# Business Plan 2025-28

## Advocacy for Neuroacanthocytosis Patients

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# EXECUTIVE SUMMARY

**This Business Plan is set to look at the next three years starting from September 2025 to August 2028 to coincide with the financial years of the charity, which will ensure viable financial planning, reporting consistency, and goal reviewing.**

## Mission

Advocacy for Neuroacanthocytosis Patients (NA Advocacy) exists to:

1. provide support to patients, their family and carers affected by neuroacanthocytosis (NA) syndromes
2. shorten the interval to correct diagnosis by raising awareness and making diagnostic tools available
3. fund research for better understanding and treatment of NA syndromes.

## Vision

Our vision is a world where NA syndromes are correctly and timely diagnosed, well understood, effectively treated and ultimately cured.

## Objectives

To continue to achieve our focused mission and long-term vision, we are looking to the following main objectives:

- secure and increase sustainable funding for the charity
- enhance the awareness and support to all our communities (patients/families/carers and scientific)
- fund research.

## Activities

Our key activities currently revolve around:

- support to potential, newly diagnosed or existing patients, their families and carers (communications by email, virtually or even in person where possible)
- advocacy efforts such as engaging with clinicians, raising awareness through Rare Disease Day and media channels collaborations, and participating in wider rare disease networks
- fundraising campaigns

- building collaborative relationships and partnerships (e.g. Multidisciplinary teams at the National Hospital for Neurology)

## Key planned programs:

- Symposium 2025 & 2027
- Patient registry
- Educational programs / materials
- Research funding.

This plan sets what we need to do in the next three years and beyond to ensure we carry on the great work of the founders and all those involved throughout the years. To support this, we also set out a Fundraising Strategy and a Marketing and Outreach Strategy, which should be considered together with this Business Plan.

# ORGANISATION

**While we are small in size, we aim high, and we pride in our tenacity to follow our mission and turn our vision into reality.**

## Background & structure

Glenn and Ginger Irvine co-founded the charity in 2002, following the diagnosis of their daughter, Alex Irvine with VPS13A (then called chorea-acanthocytosis). Alex's first symptoms manifested in 1995, and it wasn't until 1999, after medical exams both in USA and UK that the diagnosis was reached. The lack of information (on and off-line) about the condition drove Alex's parents to initiate the charitable work in raising awareness and find out more about where in the world progress was being made in this medical area, and also if there were other diagnosed individuals they could reach out to.

In 2002 the first International Symposium on NA Syndromes was held in Germany, and it was made possible by the collaboration between the charity and the scientific community. This led to NA Advocacy funding important research projects globally to help with the better understanding of the mechanisms of the NA syndromes.

In 2009 NA Advocacy became a registered charity based in the UK providing support to worldwide audiences and communities, including further research funding and fundraising.

The international symposia were regularly held every two years up until the 10th Symposium which was delayed to 2021 due to Covid. Although organised in Barcelona, Spain, the attendance was for the first time entirely virtual. The 11th Symposium took place in person in September 2023 in Homburg, Germany. Work for organising the 12th Symposium in Switzerland is in progress.

Inspired by the wide international attendance in 2021 a new regular virtual meeting, the VPS13 Forum, was initiated to facilitate the continued conversations between clinicians, researchers and patients, their families and carers and we're currently at its 21st edition (mid-2025).

In 2019 our sister organisation, NA Advocacy USA was incorporated as non-profit to facilitate the fundraising activities across USA and with the same mission and vision as us, to provide support, enhance awareness and fund research. They successfully funded three research projects based in USA. We now work together and share the main communication channels - such as NA News, our regular newsletter and social media channels - with all our audiences.

## Core values

**Compassion** – we commit to understanding everyone in our community and share the best information available

**Collaboration** – we work internationally uniting all our communities and accelerating progress toward our common goals

**Integrity** – we are respectful and honest

**Innovation** – we encourage visionary approaches to improving advances in care and research.

## Present

NA Advocacy and NA Advocacy USA were mainly operated based on volunteer commitments until the appointment of a full-time permanent Charity Manager (CM) for NA Advocacy in May 2023. The financial administration is kindly provided voluntarily by Jennifer Nanton. We also benefit from Orcadia's support with the annual accounts and some governance compliance. NA Advocacy USA is operated on voluntary basis only.

With Board's support, the CM covers all other core activities (governance, strategy, all aspects of communications, IT and systems) and provides some similar support to NA Advocacy USA when possible. There is a need for more support and improvement on the fundraising programs which will be detailed in this plan and in the subsequent fundraising strategy to be drafted.

# WHERE ARE WE NOW?

NA Advocacy and NA Advocacy USA have made significant strides since their inception, driven by the dedication of founders and the wider NA community. We have established ourselves as the primary resource for information and support related to NA syndromes, fostering a fairly strong international network of patients, families, clinicians, and researchers. Our key achievements include:

- Providing ongoing support and resources to NA patients, families, and carers worldwide
- Facilitating critical research into NA syndromes through grant funding and the Glenn Irvine Prize
- Raising awareness of NA syndromes among healthcare professionals and the general public
- Creating platforms for collaboration and knowledge sharing, such as the International Symposia and the VPS13 Forum.

However, we also face challenges that need to be addressed to ensure our continued growth and impact. These include limited financial resources, a reliance on volunteer support, and the need to enhance our fundraising and outreach efforts.

| Strengths | Weaknesses |
|---|---|
| Established reputation and established UK and US based organisations<br>Good network (international network of patients, families, clinicians, researchers, and supporters)<br>Existing programs (Forums, Symposia) | Limited financial resources<br>Struggle to find volunteers<br>Need for enhanced fundraising<br>Lack of impact measurement<br>Limited marketing and outreach |
| **Opportunities** | **Threats** |
| Growing awareness of rare diseases<br>Potential corporate partnerships<br>Expansion of digital channels<br>Collaboration with other organisations | Extremely high competition for funding<br>Economic downturn<br>Healthcare landscape (uncertainty, disjointed systems)<br>Lack of public awareness |

This analysis highlights the need to diversify funding, expand outreach, and formalise our internal systems. It provides a framework for prioritising our actions over the next three years. We will focus on leveraging our strengths, addressing our weaknesses, capitalising on opportunities, and mitigating threats to achieve our strategic objectives. This analysis supports the development of our fundraising strategy, marketing plan, and program development efforts.

## Our audiences

Our messages are intended for four main audiences as identified and segmented in the Marketing and Outreach Strategy. We are considering what we think they need from us and practical ways to reach them. For our detailed marketing channels, content plan, and communications KPIs, see the standalone strategy.

## Rare diseases environment

The rare disease charities landscape is a crowded one. The organisations are small and often operate on limited / restricted resources. However, there are bigger umbrella organisations to support our efforts and make us collectively stronger. In the UK, Beacon for Rare Diseases and Genetic Alliance UK offer free training and networking resources which we use and benefit from.

The fundraising and philanthropic landscape in general, are not in a great place due to local and international limitations and current economic climate. Searching and finding funding for our niche medical area is challenging and quite competitive.

However we are in a unique position of being the only two organisations in the world to provide the interlink between the world of NA patients, potential patients, their families and carers, and the scientific community (clinicians and researchers).

# WHAT WE DO – CURRENT PROGRAMS

**Support services**

Emotional support and informational resources for potential and existing patients, their families and carers

**Research funding**

Grants for scientific research

Glenn Irvine Prize – to support new / young scientists in the fields relevant to us

**Awareness & advocacy activities**

VPS13 Forum – the periodical online forum which facilitates continuous conversations between clinicians, researchers and patients, their families and carers.

Engagement with health providers through 1:1 rapport built through existing patients.

# PLANNED PROGRAMS

| Programs at a glance | Planned launch |
|---|---|
| 12th & 13th International Symposium on NA Syndromes | 2025 & 2027 |
| Monthly donor program | 2026 |
| International patient registry | 2026-27 |
| Events and educational webinars | 2025 |
| Impact measuring system | 2026 |

Each program has a description of its purpose, the audience aimed at, proposed key activities and desired outcomes. Timelines, budget implications and KPIs are detailed in the following sections.

### 12th & 13th International Symposium on NA Syndromes

**Purpose:** To bring together leading researchers, clinicians, patients, families, and carers from around the world to share the latest research findings, discuss best practices in care, and foster collaboration.

**Audience:** Researchers, clinicians, patients, families, carers, and other stakeholders interested in NA syndromes. However, our focus would be on the patients, families and carers, so all key activities below are oriented towards them. The rest is handled by the organising scientific committee.

**Key activities**:

- Developing the patient-oriented section of the agenda with presentations, workshops, and networking opportunities.
- Recruiting speakers and presenters.
- Promoting the symposium to the target audience through various channels (website, social media, email).
- Managing registrations and logistics
- Securing sponsorship / funding for the patient-oriented sections.
- Evaluating the symposium's impact through surveys and feedback.

**Desired outcomes**:

- Increased knowledge and understanding of NA syndromes, shared cared practices for NA patients
- New collaborations and conversations between patients, families and carers worldwide

### Monthly donor program

**Purpose:** To establish a sustainable source of recurring revenue to support our programs and operations. To strengthen the connection with our supporters and create a community of regular givers.

**Audience:** Individuals who are passionate about supporting us, NA research and patient care. This will be formed of existing donors, and we need to identify and attract new donors, too.

**Key activities:**

- Developing a compelling case for support for the monthly giving program
- Analysing the current data in the database
- Creating different giving levels with associated benefits
- Adapting our existing online platform, GoodHub which supports regular giving; consider alternative ways for those who donate only offline
- Promoting the program through various channels (website, social media, email, mail)
- Developing a stewardship plan to cultivate relationships with the regular donors

- Tracking donations and providing regular updates to donors on the impact of their contributions.

**Desired outcomes:**

- Increased and predictable revenue stream
- Expanded base of engaged supporters
- Enhanced financial sustainability for us.

### International patient registry

**Purpose:** To collect data on / from individuals with NA syndromes to support the advancement of research and improve understanding of the conditions. To facilitate the recruitment of participants for research studies and eventually for clinical trials. The estimated start for 2026 is due to preliminary work that needs to be carried out for finding funding as well as platform scoping.

**Audience:** Individuals with a confirmed diagnosis of either VPS13A disease or XK disease, and also their families and carers where they are in no position of participating themselves.

**Key activities:**

- Selecting a secure and user-friendly platform for data collection
- Defining the data points to be collected
- Developing a recruitment strategy to reach eligible patients
- Obtaining ethical approvals for the registry
- Ensuring data privacy and security
- Analysing the data to identify trends and insights
- Making the data available to researchers (while maintaining patient confidentiality)

**Desired outcomes:**

- Increased understanding of the natural history of NA syndromes
- Identification of potential targets for drug development
- Facilitated recruitment for research studies / clinical trials
- Improved care and treatment for the patients.

### Events and educational webinars

**Purpose:** To provide educational resources and support to the NA community. To raise awareness of NA syndromes among the general public and healthcare professionals. To create opportunities for connection and networking.

**Audience:** Patients, families, carers, healthcare professionals, researchers, and the general public.

**Key activities:**

- Identifying topics of interest to the target audience
- Recruiting speakers and presenters with relevant expertise
- Developing educational materials and presentations
- Promoting events and webinars through various channels
- Managing logistics and registrations
- Evaluating the effectiveness of events and webinars through feedback surveys.

**Desired outcomes:**

- Increased knowledge and understanding of NA syndromes
- Improved access to information and resources
- Enhanced support for the NA community
- Greater awareness of NA syndromes among the general public and healthcare professionals.

## Impact measuring system

**Purpose:** To track and measure the impact of the charity's programs and activities. To demonstrate the effectiveness of our work to funders and other stakeholders. To identify areas for improvement and inform future strategic planning.

**Audience:** Funders, trustees, staff, and other stakeholders

**Key activities:**

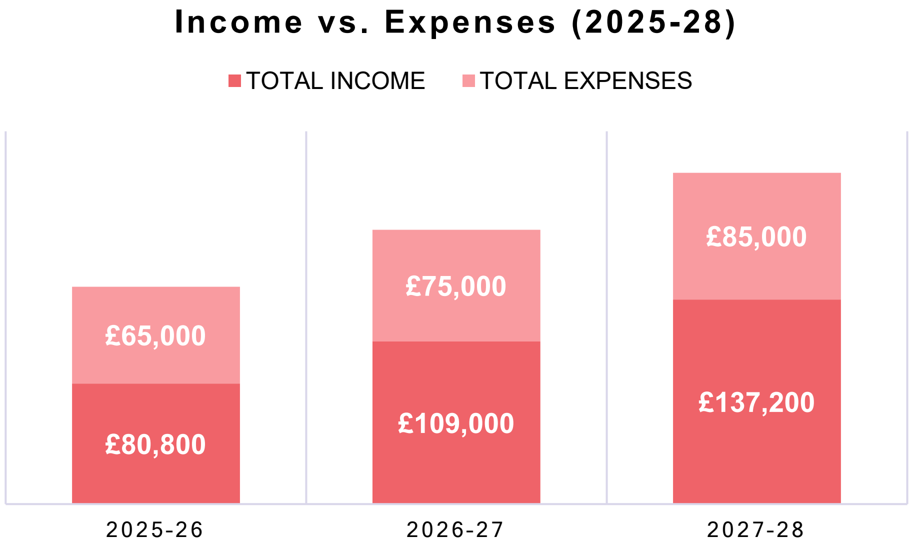
- Identifying key performance indicators (KPIs) for each program and activity
- Selecting a suitable platform or system for data collection and analysis (potentially use the existing database and create a suitable section within it)
- Developing data collection tools / routines for regular collection and analysis
- Reporting on the impact of the charity's work

**Desired outcomes:**

- Improved understanding of the charity's impact and what works (and what doesn't) for us
- Enhanced accountability and transparency
- Stronger case for support from funders

# BUDGET AND PROJECTIONS

| Category | 2025–26 | 2026–27 | 2027–28 | Total (3 yrs) |
|---|---|---|---|---|
| **INCOME** | | | | |
| Individual Donations | £10,700 | £11,800 | £12,900 | £35,400 |
| Major Donations | £40,000 | £50,000 | £60,000 | £150,000 |
| Monthly Giving | £2,100 | £4,200 | £6,300 | £12,600 |
| Partnerships | £5,000 | £10,000 | £15,000 | £30,000 |
| Grants | £20,000 | £30,000 | £40,000 | £90,000 |
| Other Income | £3,000 | £3,000 | £3,000 | £9,000 |
| **TOTAL INCOME** | **£80,800** | **£109,000** | **£137,200** | **£327,000** |
| | | | | |
| **EXPENSES** | | | | |
| Program Delivery | £20,000 | £25,000 | £30,000 | £75,000 |
| Staffing | £35,000 | £37,000 | £39,000 | £111,000 |
| Marketing & Comms | £2,000 | £3,000 | £4,000 | £9,000 |
| Tech & Ops | £2,000 | £3,000 | £4,000 | £9,000 |
| Fundraising Costs | £5,000 | £6,000 | £7,000 | £18,000 |
| Governance/Admin | £1,000 | £1,000 | £1,000 | £1,000 |
| **TOTAL EXPENSES** | **£65,000** | **£75,000** | **£85,000** | **£223,000** |
| | | | | |
| **Net Surplus / Deficit** | **£15,800** | **£34,000** | **£52,200** | **£102,000** |



## Budget assumptions / narrative

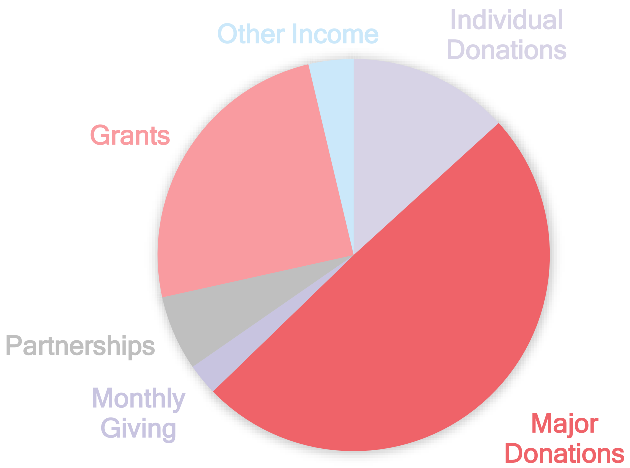
The budget for 2025–2028 reflects our strategic priorities and a realistic growth trajectory in both income and expenditure. Financial planning has been closely aligned with our program goals and operational development, and underpins our long-term vision for sustainability.

For full income projections and donor development plans, see accompanying Fundraising Strategy where the approach to diversifying income is detailed in full.

### Income Assumptions

- **Individual and Major Donations** will continue to provide a core foundation of support. We anticipate modest annual growth by strengthening stewardship and donor communication. This includes the donations made to NA USA
- The **Monthly Donor Programme** is expected to launch in Year 1 and scale gradually. It will provide a more predictable revenue stream by Year 3.
- **Corporate and Strategic Partnerships** will be cultivated beginning in Year 1, with new income forecast from Year 2 onwards. These may fund general operations, specific programs, or event sponsorship.
- **Grants** will be sought for core programs and new initiatives, including symposium support and patient registry development. We expect a small number of grant opportunities annually (Jeans for Genes and other organisations we'll research).
- **Other Income** includes passive fundraising (e.g. Give as you Live, interest) and is expected to remain modest but stable.

Income sources - first year (2025-26)



### Expenditure Assumptions

- **Program Costs** increase steadily as key programs (Symposia, Registry, Webinars) are launched or scaled. Symposium costs are expected to peak every other year.
- **Research Funding** continues as a strategic priority and is expected to be maintained or grow subject to major donor and grant income.
- **Operational Costs** grow gradually to accommodate rising needs in marketing, IT, compliance, and fundraising. However, costs will be managed carefully, with pro bono and volunteer contributions sought where feasible.
- **Staffing** remains lean, with one FTE and some volunteer support. A second staff member is not budgeted but may be considered pending income growth.

### Annual Focus

- **Year 1 (2025–26):** Investment in foundational systems (CRM, website), launch of Monthly Giving, planning for the 2025 Symposium and Registry. Income goal: £80,800.
- **Year 2 (2026–27):** First full-year delivery of new programs, refinement of fundraising strategy, pursuit of corporate and major donor partnerships. Income goal: £109,000.
- **Year 3 (2027–28):** Consolidation of learning, expansion of successful programs, and planning for the next strategic period. Income goal: £137,200.

A conservative inflation rate has been applied to key operational lines.

## Cost management

Effective cost management is critical to ensuring we can deliver our mission sustainably while maximising impact for every pound raised. We are committed to responsible stewardship of funds, transparency with our supporters, and ongoing review of how resources are allocated.

### Key Cost Principles

- **Prioritise program delivery**: The majority of our expenditure will remain focused on direct program costs—patient support, awareness activities, research funding, and education.
- **Limit administrative overhead**: Operational costs will be carefully managed to ensure value for money while still maintaining the systems and governance needed for a compliant and well-functioning organisation.

- **Use in-kind support where possible**: We will endeavour to make strategic use of voluntary support and pro bono services (e.g. accounting, expert speakers, and translations) to keep the costs down.
- **Forecast with flexibility**: Budgets will be reviewed annually to reflect evolving priorities, inflation, and any shifts in fundraising performance or program needs.
- **Align spend with funding streams**: Where appropriate, restricted funding will be matched with specific program areas (e.g. Symposium costs covered by a grant or sponsor) to ensure clarity and accountability.

### Monitoring & Review

- Budgets and actuals will be monitored monthly by the Charity Manager, with quarterly oversight by the Board of Trustees.
- Variances of over 10% on major budget lines will be flagged and investigated.
- Suppliers and software contracts will be reviewed annually to ensure cost efficiency.

### Efficiency Commitments

- Use free or discounted tools for non-profits (e.g. Microsoft, Google Workspace, Canva, Zoom) wherever feasible.
- Track time allocations for core staff to monitor cost-per-program-delivery.
- Benchmark costs (e.g. Symposium-related costs, website hosting) against sector averages where possible.

# KEY PERFORMANCE INDICATORS (KPIS)

Please see below a summary for all the areas covered. Further details on KPI definitions, collection tools, and evaluation processes are outlined in the Fundraising and Marketing & Outreach Strategies.

| Area | Key Metrics | Frequency of Review | Source / Tool |
|---|---|---|---|
| **Fundraising – Total Income** | Total income vs. annual targets (per stream) | Quarterly | Financial reports |
| **Individual Giving** | No. of individual donors, avg. donation size, donor retention rate | Biannually | Donor database / GoodHub |
| **Major Donors** | No. of major gifts secured, avg. gift size, cultivation pipeline | Quarterly | CRM / manual tracking |
| **Monthly Giving** | No. of monthly donors, avg. gift, retention rate, churn rate | Quarterly | GoodHub reports / spreadsheet |
| **Partnerships** | No. of partnerships, value secured, proposals sent vs. converted | Biannually | Partnership tracker (manual) |
| **Grants** | No. of grants applied for, success rate, total income from grants | Annually | Grant application records |
| **Website** | Unique visitors, page views, bounce rate, SEO (search engine optimisation) rankings | Quarterly | Google Analytics / SEO tools |
| **Social Media** | Reach, engagement rate (likes, shares, comments), follower growth | Monthly | Platform analytics |
| **NA News** | Open rate, click-through rate, subscription growth | After each edition | Mailchimp reports (future) |
| **Events & Webinars** | No. of attendees, feedback scores, post-event engagement | After each event | Event tools / surveys |
| **Impact & Program Delivery** | No. of patients supported, feedback collected, survey completion rate | Annually | Support logs / feedback forms |

# OPERATIONS PLAN

NA Advocacy operates as a small but focused charity with a lean operational structure. Our goal is to deliver high-impact work through strategic use of paid staff, skilled volunteers, and collaborations with partner organisations.

## Staff / volunteers

### Charity Manager (1 FTE)

Responsible for day-to-day operations, program delivery, fundraising, marketing, governance, and liaison with NA Advocacy USA. The CM also supports IT, systems management, and limited communications for the US organisation when capacity allows.

### Volunteers

We will seek to recruit 1–2 volunteers by 2026 to support specific functions (e.g. marketing and data support, grant research). Volunteer roles will be clearly scoped and supervised by the CM.

## Governance

Our Board of Trustees provides oversight, strategic input, and governance approvals.

We will continue to submit annual accounts and reports to:

- Charity Commission (Annual Return, Financial Accounts)
- Companies House.

Financial administration is provided on a pro bono basis by Jennifer Nanton, with support from Orcadia.

## Internal Processes

The Charity Manager maintains oversight of program planning, budgeting, and day-to-day operations.

Orcadia assists with accounts preparation, compliance filings, and advice on financial governance.

Key processes (e.g. grant approvals, event planning, donor stewardship) will be documented by 2026 to support continuity and future staff onboarding.

## Technology

Technology plays a vital role in enabling NA Advocacy to operate efficiently, communicate effectively with our audiences, and support delivery of our mission. As a small charity, our approach is to maximise impact through low-cost, reliable, and scalable digital tools.

**Current Use**

- Communications: Zoom / MSTeams for virtual events and forums; Poppulo (soon Mailchimp) for newsletters; social media platforms (Facebook, LinkedIn, Instagram, YouTube, BlueSky, X)
- Data management: Monday.com
- Fundraising: GoodHub platform for online giving; Give as you Live for passive donations.
- Web & SEO (search engine optimisation): We are in the process of building a new website (2025) with improved accessibility and SEO capability.

**Plans for 2025–2028**

- Invest in digital infrastructure: Formalise Monday.com to better manage donor data, mailing lists, and event registrations.
- Improve donor journey: Optimise donation processes, add automation to thank-you emails, and integrate giving into the new website.
- Enable impact tracking: Expand existing tools (or add new ones) to support program evaluation, survey distribution, and data visualisation.
- Data protection & compliance: Implement clear data privacy procedures and staff/volunteer training to ensure GDPR compliance.
- Leverage non-profit discounts: Apply for or continue using discounted tech offerings (e.g. Microsoft 365, Google Workspace, Zoom, Mailchimp).

## Impact measurement and evaluation

Evaluating the impact of our work is essential to ensuring we stay accountable to our supporters, funders, and beneficiaries. It also helps us to learn, improve, and better understand what works in the community we serve.

**Purpose**

- Demonstrate outcomes and value to funders, trustees, and donors
- Identify what’s working and what needs improving
- Track progress toward strategic goals and KPIs
- Strengthen our case for support and inform future planning

### Approach

- Each core program or initiative will have 3–5 outcome-focused KPIs (see Summary KPI Table).
- We will use a combination of quantitative and qualitative data, including:
  - Donor engagement and retention data
  - Web and social media analytics
  - Event attendance and satisfaction scores
  - Participant feedback from patients, researchers, and families
  - Internal reflection and activity reviews
- Impact will be reviewed annually and summarised in our annual report and end-of-strategy review.

### Tools

- Simple tracking spreadsheets and analytics dashboards (e.g. Google Analytics, Mailchimp reports, Zoom / MSTeams event data)
- Survey tools for feedback with potential integration into Monday.com CRM.

# RISK ASSESSMENT AND MITIGATION

As a small charity operating in a competitive and resource-limited environment, NA Advocacy faces several strategic and operational risks. This section outlines key risks and how we plan to mitigate them.

**Key Risks & Mitigation Strategies**

| Risk | Impact | Mitigation Strategy | Status at (date) |
|---|---|---|---|
| Funding shortfall | Medium–High | Diversify income; strengthen donor retention; increase regular giving; apply for multi-year grants. | |
| Staff capacity | Medium | Monitor workload; prioritise core activities; recruit targeted volunteers; plan for role succession. | |
| Technology failure or data loss | Medium | Back up critical data; we are on secure cloud storage; implement data protection policy. | |
| GDPR/data breach | High | Use secure platforms; train staff and volunteers; update privacy policies; review data regularly. | |
| Reputational risk | Medium | Maintain transparency; communicate proactively; have clear safeguarding and complaints policies. | |
| Economic downturn | Medium–High | Build reserves where possible; develop flexible program budgeting; nurture core donor relationships. | |
| Program delivery disruption (e.g. pandemic) | Medium | Maintain virtual event capability; develop hybrid formats; plan contingencies for major activities. | |

We will review our risk register annually as part of trustee meetings and make updates based on changes in the external landscape or internal capacity.

# SUPPORTING DOCUMENTS

The following documents accompany this Business Plan and provide additional detail, working plans, and operational frameworks for the 2025–2028 strategy period. They should be read in conjunction with this plan for a full picture of our goals, methods, and metrics.

- **Fundraising Strategy 2025–2028** *(attached)*
  Outlines income targets, donor development strategies, new income streams, projections by revenue type, and associated KPIs.
- **Marketing & Outreach Strategy 2025–2028** *(attached)*
  Details our audience segmentation, communications channels, engagement goals, content strategy, and digital performance indicators.
- **Budget Spreadsheet (2025–2028)** *(included)* Provides detailed income and expenditure forecasts across all programmatic and operational areas.
- **Risk Register & Mitigation Plan** *(included)*
  Identifies major risks across fundraising, governance, and operations, with proposed mitigation strategies.
- **Governance & Compliance Calendar** *(to be created)*
  Tracks key submission deadlines and reporting responsibilities (e.g. Charity Commission, Companies House, annual accounts).
- **Program Timelines & Deliverables Tracker** *(to be created)*
  Supports implementation by setting out key milestones for each core activity or initiative.