

Maximizing Your Strategic Plan

Arkansas Community Action Agencies Association Annual Conference



Presented by:

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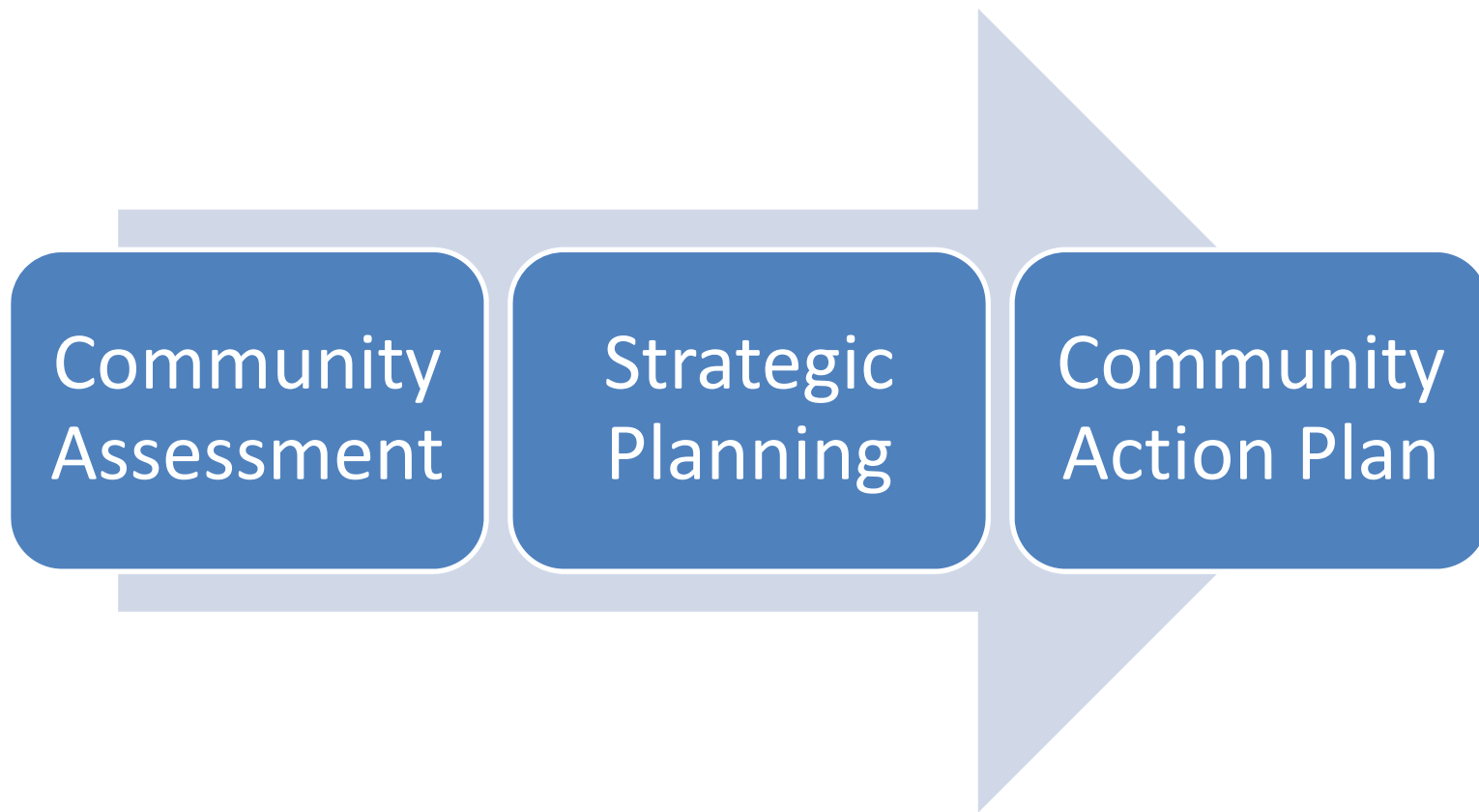
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*“Leadership is the capacity
to translate vision into reality.”*

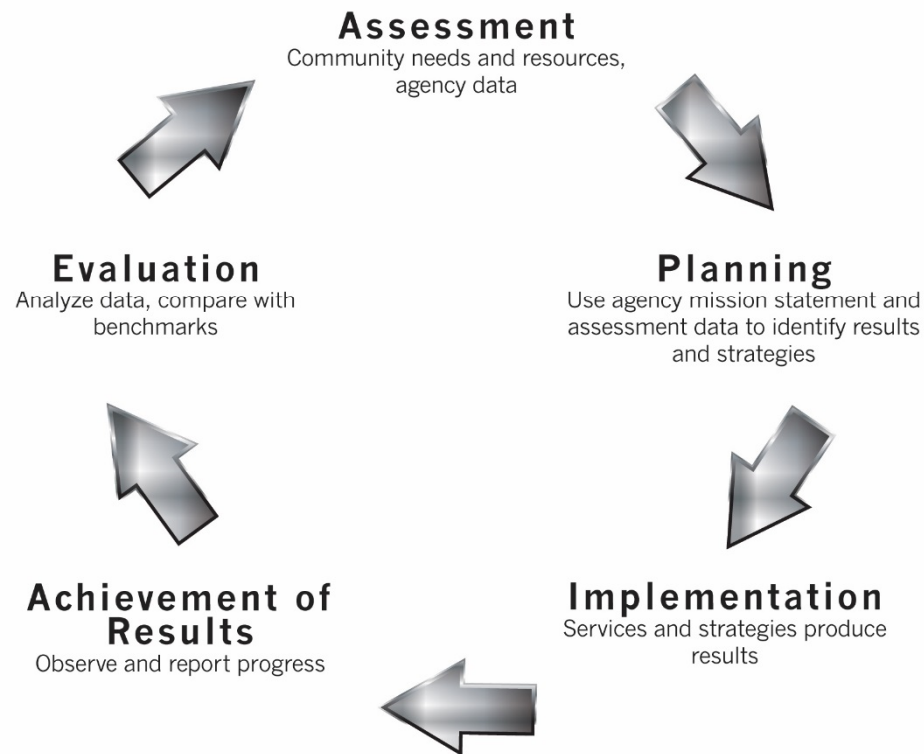
— Warren Bennis

Strategic Planning in Context



ROMA Planning Cycle

The Results Oriented Management and Accountability Cycle



CAA Boards (IM 82)

Sections 676B of the Community Services Block Grant Reauthorization Act of 1998 requires that, as a condition of designation, private nonprofit entities and public organizations administer their CSBG program through tripartite boards that ***“fully participate in the development, planning, implementation, and evaluation of the program to serve low-income communities.”***

Strategic Planning

- Agency-wide
- Board-led, staff engaged
- Uses a wide variety of data collected, including data collected as part of the *Community Assessment* process and analysis of prior plan's accomplishments/misses
- Core component of the ROMA Cycle
- No one right way to do strategic planning

Importance of Strategic Planning

- Anticipate and head off challenges
- Unify people and strategies
- Mobilize and/or focus resources
- Support decision-making
- Identify and support new leadership
- Strengthen existing leadership
- Set context for accountability
- Generate energy and confidence

Planning Cannot....

- Fill a leadership void
- Fix bad staff or board behavior
- Make money appear
- Mobilize or empower people who are not included
- Build on unacknowledged strengths
- Improve unacknowledged areas of weakness

Tools of the Trade

- Board-led, Staff engaged
- Board-led committee
- Consultants
- Retreats
- Surveys
- Key Informant Interviews



So, You Have a Strategic Plan...

- Now what?
- What do you do with it?
- How does it impact board and staff?
- Can't we let it sit on a shelf and gather dust like the last one?

Plan the work...work the plan

Don't Let the Strategic Planning Process End

- Board Responsibility
- Executive Director Responsibility
- Leadership Team Responsibility

Tools

- Committee
- Performance Appraisal

Big Three

- Mission
- Vision
- Values

Mission/Vision/Values

- Embed them in your CAA
- Post them in visible locations (wall, websites, business cards, letterhead, etc.)
- Connect everyone's job

Key Issue Areas

- Programs and Services
- Financial
- Human Resources
- Leadership
- Governance
- Operations
- Information Technology
- Communications and Marketing
- Fund Development
- Facilities
- Partnerships

Operationalize Your Plan

- Goals/Strategic Direction
- Objectives
- Activities
- Timeline

Governance

Goal: The board of directors will be engaged, active, and fulfill its governance role.

Objective 1: Board meetings will be well run and last no longer than 2 hours

	Who	By When
Action 1: Board Members will receive their board packet 5 days in advance	Executive Director	Q1
Action 2: Use/value of a consent agenda will assessed/implemented if agreed to by the board	Board Development Committee	Q2

Objective 2: Board Members will understand their roles and responsibilities

Action 1: Two board trainings will be held this year	Board Development Committee	Q2, Q4
Action 2: Board member and officer job descriptions will be developed and approved by the board.	Board Development Committee	Q3

Human Resources

Goal: The agency's staff will be well trained and prepared to do their jobs.

Objective 1: Leadership staff will obtain their CCAP within the next two years

	Who	By When
Action 1: Applications will be processed	HR Director	Q1
Action 2: CCAP Study Group will form and meet monthly January-June	Executive Director	Q2

Objective 2: Three Certified ROMA Trainers/Implementers will be on staff within one year

Action 1: Staff will be surveyed for interest	Deputy Director	Q1, Q3
Action 2: Application and training for interested staff will be provided	HR Director	Q2, Q4

Communicate the Plan

- Staff
- Funders
- Donors
- Public
- Website
- Executive Summary
- Social Media/Infographics

Update the Board Quarterly

- Board Strategic Planning Committee
- CEO/ED Reports
- Other Board Committees

Evaluate Progress Annually

- What did happen
- What did not happen and why
- Changes inside and outside of control
- Board meeting
- Annual Board retreat
- Staff retreat

Update Operational Plan Annually

- Update work plan each year
- CEO/ED present to the board
- Board approves

Embed in Performance Appraisals

- CEO/ED
- Leadership Team
- Staff

Other Tools

- Community Assessment
- Customer Satisfaction Data

Organizational Standards

- **Standard 6.1 • private**

The Organization has an agency-wide Strategic Plan in place that has been **approved by the governing board** within the **past 5 years**.

- **Standard 6.2 • private**

The approved Strategic Plan **addresses** reduction of poverty, revitalization of low-income communities, and/or empowerment of people with low incomes to become more self-sufficient.

Organizational Standards

- **Standard 6.3 • private**

The approved Strategic Plan contains Family, Agency, **and/or** Community goals.

- **Standard 6.4 • private**

Customer satisfaction data and **customer input**, collected as part of the Community Assessment, is included in the strategic planning process.

Organizational Standards

- **Standard 6.5 • private**

The governing board has received an **update(s)** on meeting the goals of the Strategic Plan within the **past 12 months**.

- **Standard 4.1 • private**

The governing board **has reviewed the Organization's mission statement within the past 5 years** and assured that:

1. The mission addresses poverty; and
2. The Organization's programs and services are in alignment with the mission.

Related Organizational Standards

- **Standard 4.3 • private**

The Organization's Community Action Plan and Strategic Plan document the continuous use of the full ROMA cycle or comparable system (assessment, planning, implementation, achievement of results, and evaluation). In addition, the Organization documents having used the services of a ROMA-certified trainer (or equivalent) to assist in implementation.

- **Standard 9.3 • private**

The organization has presented to the governing board for review or action, at least within the past 12 months, **an analysis of the agency's outcomes and any operational or strategic program adjustments and improvements identified as necessary.**

Potential Challenges

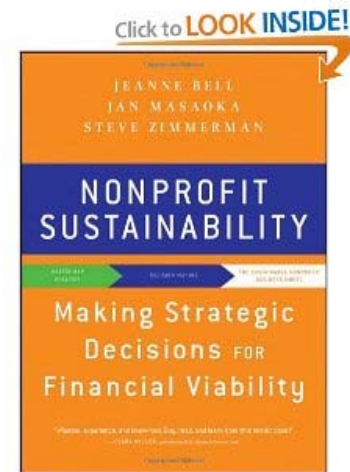
- Unclear or unassigned leadership roles
- Disengaged board
- Inconsistent follow-through
- Decision-avoidance
- Lack of a willingness to change
- Budget decisions get delayed, and delayed, and delayed....
- Unclear expectations of staff and board members
- Time frame keeps extending...the never ending strategic plan....
- It gets done and sits on a shelf gathering dust

Other Resources

- *Nonprofit Sustainability: Making Strategic Decisions for Financial Viability*
 - Jeanne Bell, Jan Masaoka, Steve Zimmerman
- *The Sustainability Mindset*
 - Jeanne Bell, Steve Zimmerman



– www.josseybass.com

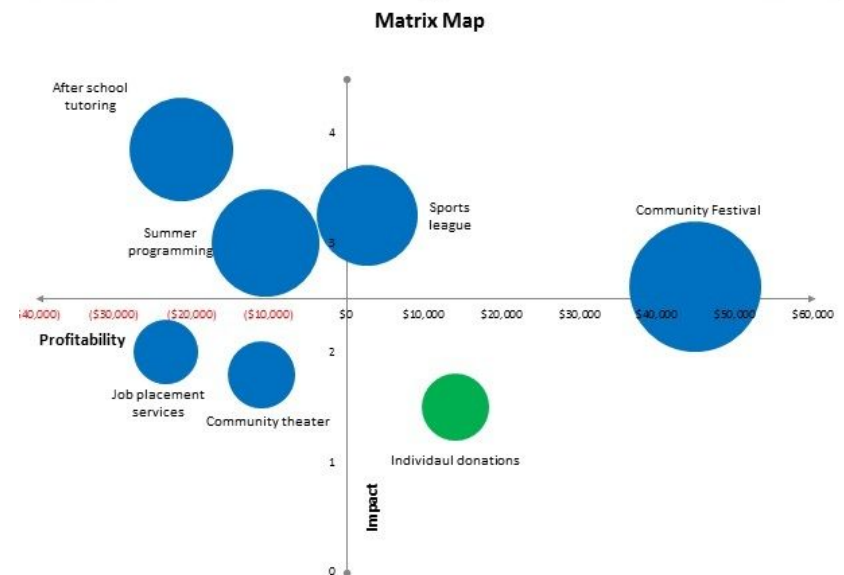
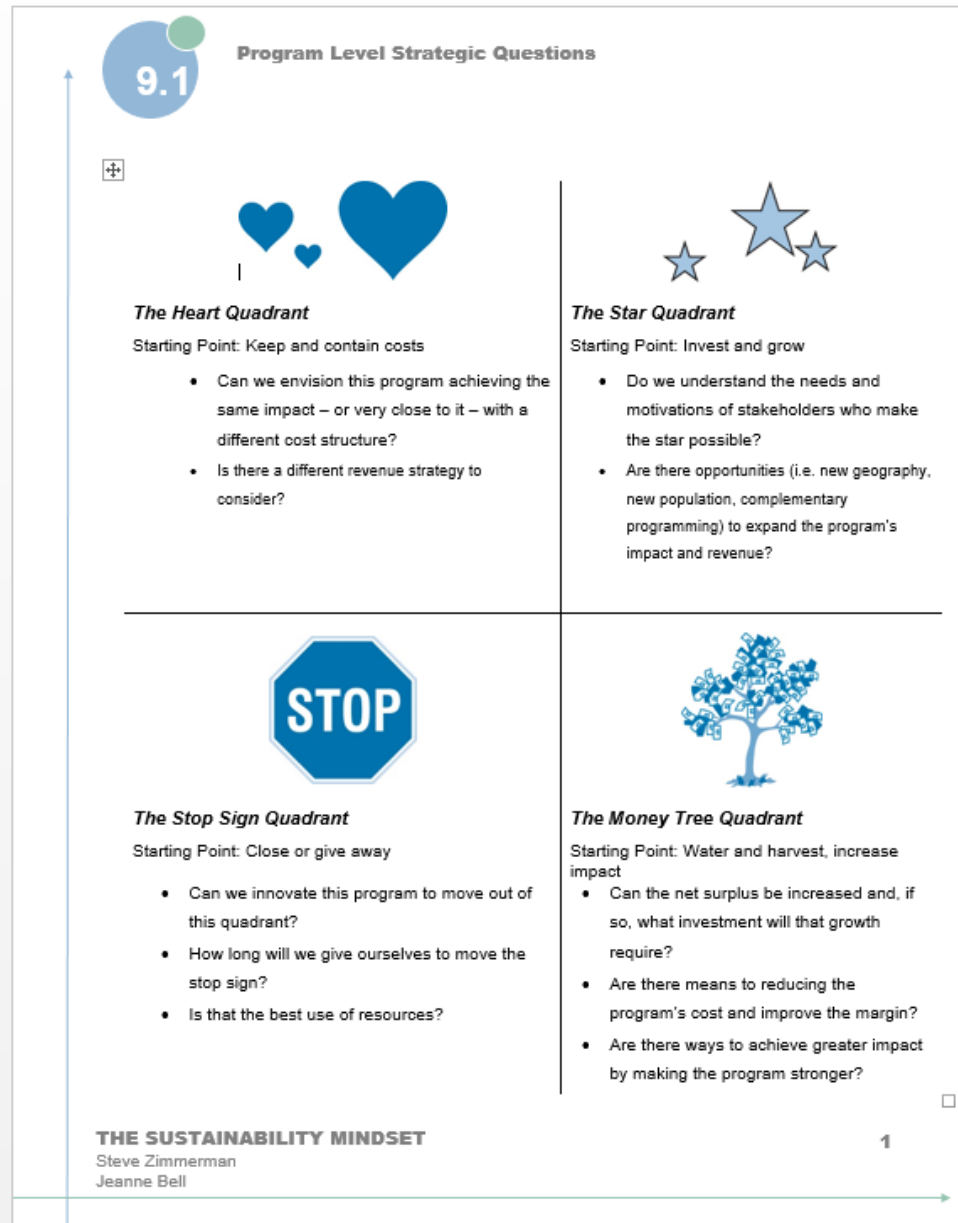


A Duel Bottom Line: Mission Impact and Financial Return



From: Nonprofit Sustainability: Making Strategic Decisions for Financial Viability (2010)

The Sustainability Mindset



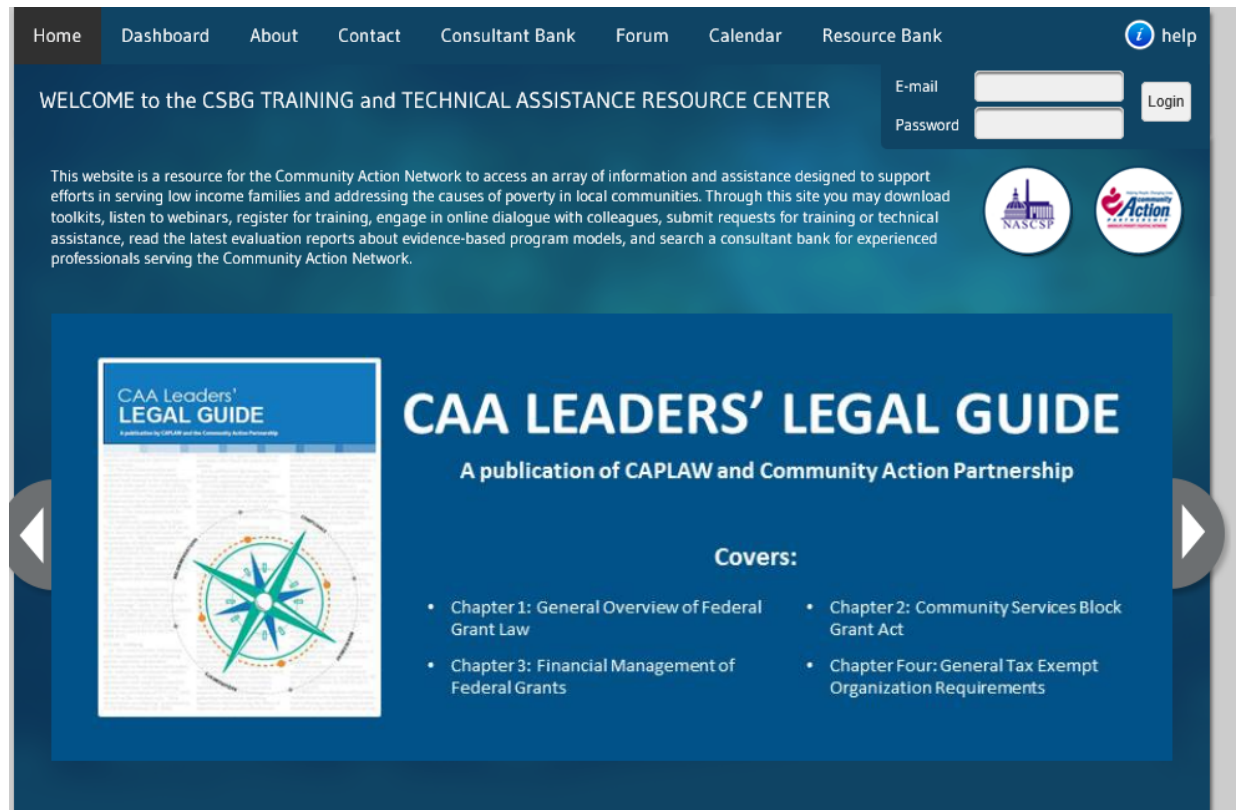
From: *Nonprofit Sustainability: Making Strategic Decisions for Financial Viability* (2010)



National Training
Center

CSBG T/TA Resource Center

- www.csbgtta.org
- *Many more toolkits, webinars, and print resources*
- Consultant Bank
- Training Calendar
- Discussion Forum
- Shared Calendar



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quicklinks

- Partnership Membership Form
- Updates on CSBG Organizational Standards and ROMA Next Generation
- Annual Convention
- Certified Community Action Professional (CCAP)
- Subscribe to the eNews
- Community Action Code of Ethics
- New Reality Initiative
- Community Economic Development Website
- Managing My Money Financial Literacy Website
- 2015 Community Action Partnership Fact Sheet

The Partnership has moved!
Our new address is 1020 19th Street, NW, Washington, DC 20036.
We ask your patience as we transition to the new space.
Our email and phones may be impacted as we get settled. Thank you!

National Community Action Month 2016 Toolkit is Here!

Community Action Month

• May 2016 •
#BeCommunityAction

[Click here](#) to download the toolkit
[Click here](#) for complete information.

NATIONAL TRAINING CENTER

RESOURCES

LEARNING COMMUNITIES RESOURCE CENTER

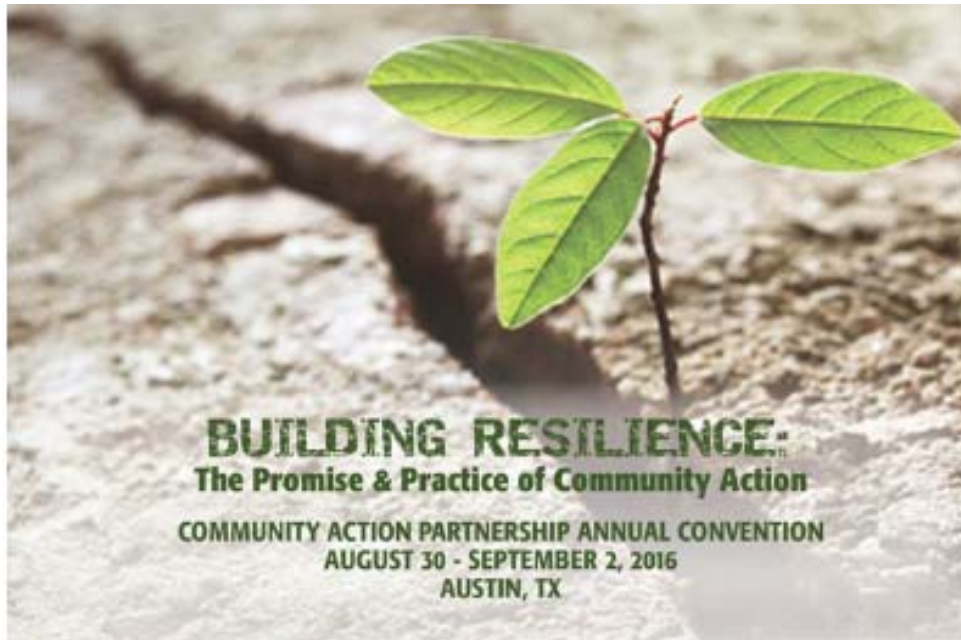
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Community Action changes people's lives, embodies the spirit of hope, improves communities, and makes America a better place to live. We care about the entire community, and we are dedicated to helping people help themselves and each other.

Helping People. Changing Lives.

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AMERICA'S POVERTY FIGHTING NETWORK

2016 Annual Convention



SAVE THE DATE!

Austin, TX
August 30-September 2, 2016
JW Marriott
#Promise2016



Thursday Keynoter
Vu Le, Executive Director
Rainier Valley Corps,
Seattle, WA

Contact Information



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Many of the publications , training, and webinars mentioned were created by the National Association of Community Action Agencies – Community Action Partnership, in the performance of the U.S. Department of Health and Human Services, Administration for Children and Families, Office of Community Services Grant Number 90ET0428, 90EQ0231, 90ET0434, 90ET0436, 90ET0437, and 90ET0445. Others were created by the Community Action Program Legal Services, Inc. (CAPLAW), in the performance of the U.S. Department of Health and Human Services, Administration for Children and Families, Office of Community Services Grant Number 90ET0429 and 90SQ0047. Any opinion, findings, and conclusions, or recommendations expressed in this material are those of the author(s) and do not necessarily reflect the views of the U.S. Department of Health and Human Services, Administration for Children and Families.