Developing a Strategic Plan Scorecard

Presented by:
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Community Action Partnership
Agenda

• Developing your action plan
• Creating the implementation structure and process
• Developing the strategic plan scorecard
A Community Action Model for Strategic Planning

COMMUNITY ACTION STRATEGIC PLANNING PROCESS

**PREPARATION**
- Define process parameters
- Establish planning committee
- Orient committee to process
- Develop timeline & work plan

**ASSESSMENT**
- Conduct an assessment
- Review assessment with committee
- (Re)define mission, values & vision

**PLANNING**
- Determine priorities
- Define goals/outcomes
- Develop indicators/objectives
- Draft plan document

**IMPLEMENTATION**
- Evaluate resources
- Prioritize plan objectives
- Create annual operating plan
- Develop monitoring & reporting plan

**ACHIEVEMENT**
- Execute operating plan
- Monitor & measure progress
- Report progress to board

**EVALUATION**
- Reconvene annually to review progress
- Update plan as necessary
- Revisit last 3 phases annually for plan duration
Challenges to Implementing a Strategic Plan

• Gaps in the agency’s governance structure
• Lack of a persistent implementation structure
• Absence of clearly defined roles and responsibilities
• Low levels of shared accountability
• No scorecard to track progress
This week on the nonprofit channel...

Nonprofit Antiques Roadshow

...so I was cleaning out an old bookshelf in our office, and I found this complete set of strategic plans, dating all the way back to the 70's!

And these are in mint condition! It's obvious that they've never been read, or implemented.

Because unimplemented plans are commonplace, your set is worth nothing, though it is a good source of recycled paper.

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WWW.PLANET50103.ORG
4. Implementation

- Decide on implementation process
- Develop action plans
Options and Responsibilities for the Implementation Process

Process
- Single committee
- “Handoff” to leadership team
- Task groups organized by strategic plan goals
- Integrate into program or department work plans

Responsibilities
- Develop action plans
- Develop strategic planning score card
- Review budget and resource needs
- Regular meetings to review progress (at least quarterly)
- Report to leadership team and board
- Identify and address implementation challenges
Goals, Objectives, Actions Ex. 1

**Goal**

Increase the availability of high quality child care slots by 50% in three years

**Objective**

- Provide child care quality training to 25 unlicensed providers
- Develop a coalition to advocate for increased reimbursement

**Action**

- Partner with local community college
- Provide direct TTA to providers
- Convene a stakeholder collaborative
Goals, Objectives, Actions Ex. 2

Goal
- Increase the agency budget by 30% in three years

Objective
- Develop fee for service programs
- Increase charitable donations

Action
- Offer FFS in child care center
- Market food service program
- Hold annual fundraiser
Developing Action Plans

• Each Objective will typically have its own Action Plan

• Action plans are developed by the staff responsible for implementing the plan

• Action plans should include:
  - List of action steps
  - Resources required
  - Staff responsible
  - Timeline
  - Outcomes
  - Method of tracking
# Action Plan: Expand Fee for Service Child Care Slots

<table>
<thead>
<tr>
<th>Step</th>
<th>Resources</th>
<th>Staff</th>
<th>Timeline</th>
<th>Outcomes</th>
<th>Tracking</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Develop a business plan</td>
<td>10 days of one FTE</td>
<td>Jane S.</td>
<td>One month</td>
<td>Completed business plan</td>
<td>Weekly progress report</td>
</tr>
<tr>
<td>2. Market service to parents</td>
<td>-10 days of FTE -$100 printing</td>
<td>Bill W.</td>
<td>Two months</td>
<td>-Marketing materials -10 FFS customers</td>
<td>-Weekly progress report -Enrollment count</td>
</tr>
</tbody>
</table>
Integrating the Strategic Plan into Management and Operations

- Quarterly or Annual report to the board
- Monthly or quarterly updates to the leadership team
- Monthly meetings by the implementation team to oversee progress on individual goals
- Creation of task committees to manage individual goals
- Integration into or development of an agency-wide or balanced scorecard to track progress
- Make strategic plan goals part of formal job descriptions
- Updates on strategic plan progress at staff meetings
5. Results

- Develop score card or other monitoring tool
- Track results of strategic plan goals
- Conduct updates to strategic plan goals and work plans as necessary
## Elements of a Strategic Plan Scorecard

<table>
<thead>
<tr>
<th>Objective</th>
<th>Measure</th>
<th>Target</th>
<th>Frequency</th>
<th>Source</th>
<th>Year to Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provide FFS child care</td>
<td>-Number of children enrolled</td>
<td>-10 FFS customers/month</td>
<td>Monthly to child care team</td>
<td>Enrollment data</td>
<td>-Average 8.5 FFS customers</td>
</tr>
<tr>
<td></td>
<td>-Monthly revenue</td>
<td>-$2,000 monthly revenue</td>
<td>Quarterly to strategic planning committee</td>
<td></td>
<td>-$1,600 in April revenues</td>
</tr>
<tr>
<td></td>
<td>--YTD revenue</td>
<td>-$24,000 annual revenue</td>
<td></td>
<td></td>
<td>-$7,200</td>
</tr>
<tr>
<td>Market food service program</td>
<td>-</td>
<td>-</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Monitoring the Strategic Plan

- Convene six month or annual review of strategic plan goals
- Continue monthly or quarterly reporting of plan outcomes through a strategic plan scorecard, the implementation committee, or similar structure and process
- Provide time for board discussion and feedback
Top Ten Tenets to Create a Balanced Scorecard

1. Gain top leadership support; it helps if there is a 'burning platform' for change.
2. Measure the right things - things that customers, stakeholders, and employees find value in -- not everything.
3. Create a governance process that engages key stakeholders.
4. Design the system to follow the actual work of the organization.
5. Start development of measures at both the top and bottom of the organization and cascade them in both directions.
6. Create a communications campaign that explains how a Scorecard both reflects and drives a focus on mission.
7. Align systems: tie them to the organization's planning, measurement, and budget cycles.
8. Insure the credibility of the process and honesty in reporting.
9. Create transparency of information that is as real-time as possible; this is key to its credibility and usefulness to both senior and frontline managers.
10. Align incentives: link rewards to performance through effective evaluation and performance appraisals.
Balanced Scorecard Toolkit

Mayberry Community Action Agency (MCAA)

**Mission:** Helping people, changing lives by offering opportunities through Education, Wealth Building, Advocacy & Community organizing that empower low income residents to achieve self-sufficiency.

**Vision:** A thriving, self-sufficient Mayberry, powered by a community alliance delivering cost-effective, high impact services to citizens in need.

**Strategic Themes:**

- Operational Excellence
- Strengthening Partnerships
- High Impact Services
- Capacity Building

<table>
<thead>
<tr>
<th>Strategy Map</th>
<th>Objectives</th>
<th>Indicators</th>
<th>Targets</th>
<th>Initiatives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improve Advocacy</td>
<td>Improve Community Outcomes</td>
<td>Client outcome index, including indicators of training, employment, and income</td>
<td>90% (2011 level=84%)</td>
<td>Revised job training program, Advocacy Program</td>
</tr>
<tr>
<td>Improve Community Outcomes</td>
<td>Improve Family Outcomes</td>
<td>Unrestricted funds, %</td>
<td>&gt;20%</td>
<td>Funder Cultivation</td>
</tr>
<tr>
<td>Improve Family Outcomes</td>
<td>Improve Advocacy</td>
<td>Program Benefit/Cost Ratio</td>
<td>&gt;20%</td>
<td>Online Access Program, Partner Outreach</td>
</tr>
<tr>
<td>Improve Advocacy</td>
<td>Improve Diversity Funding</td>
<td>Client Access Score, Family Development Score, Community Scaling T2 Index</td>
<td>85% (+7% projected)</td>
<td>Career Development, Balanced Scorecard Initiatives, SmartCIP Program</td>
</tr>
<tr>
<td>Improve Service Quality</td>
<td>Improve Program Development</td>
<td>Employee skills assessment score, Cultural survey score, Paper usage</td>
<td>8 out of 10, 60% Percentile, Reduce 15% from last year</td>
<td></td>
</tr>
</tbody>
</table>

**Figure 16: Strategic Plan and Scorecard Graphic**

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Assess the Impact

Evaluation

• Evaluate outcomes

• Update strategic plan and operational plans

• Connect strategic plan outcomes to upcoming community assessment
Managing the Evaluation Process

• Clarity and accountability for the monitoring process are critical
• Use a dual accountability system – staff checks in monthly or quarterly with leadership, leadership checks in quarterly or semi-annually with the board
• Maintain a board strategic planning committee to monitor progress
• Focus on outcomes – not just implementation progress
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
Community Action Examples

2009 Strategic Plan

It is the mission of Community Action Duluth to use innovative strategies that mobilize low-income people and the broader community to build assets that prevent poverty, create equality, and strengthen our social fabric.

Vision Statement
Community Action Duluth envisions a community where individuals and families can means to flourish with access to quality education, affordable housing and healthful employment, and meaningful involvement in civic life. Through community coordinated and partnerships, people with low incomes will find support, resources, and relationships that help them overcome economic racial, and cultural barriers to establishing and maintaining self-sufficient and connected lives in the community.

Organizational Values
Community Action Duluth will reflect the following values in its organization and programs:
Respect
Community Action Duluth values the strengths and assets of all people and the organizations with whom we partner.
Integrity
Community Action Duluth believes in a listening honestly, processing information accurately, and following through on its commitments.
Cultural Competence
Community Action Duluth values meaningful relationships between people of diverse cultural, racial, and socioeconomic backgrounds.
Optimism
Community Action Duluth believes it is possible for Duluth residents and organizations to improve the quality of life for everyone.

Heartland’s Strategic Plan


Heartland Community Action’s Strategic Plan impacts the future and focuses on Family, Community, and Agency where:
- Education is a top priority for children, parents, and community leaders.
- Community leaders and members are engaged in advocating community well-being.
- Basic needs are transformed into opportunities that enhance quality of life.

Family: Heartland provides services to households that range from emergency/crisis prevention, education, family development, and asset building. Heartland Community Action strives to help at-risk populations, such as the elderly and children.

Community: Heartland organizes and facilitates partnerships so its communities can be responsive to the needs of its poorest residents. Heartland Community Action partners with multiple sectors of the community to ensure its families’ needs are addressed.

Agency: Just as Heartland Community Action is responsible as an agency to strategically able to assist its families and communities to become empowered to help themselves.

National ROMA Peer-To-Peer Training Program

FY 2004 - FY 2008

PLANNING FOR RESULTS

Facilitator Manual
VERSION 1.2
February 2007

Julie Jekopic
Barbara Mooney

Curriculum developed with funding from the US Department of Health and Human Services – Office of Community Services, under the supervision of the Minnesota Department of Health and the Community Action Agency of the Minnesota Department of Health.
Community Action Examples

Community Action Partnership
of Riverside County

Strategic Plan
2013 - 2015

If we do nothing
people will continue to live in poverty

Community Action Partnership
of San Bernardino County

Strategic Plan
2011-2021


CAPCO

About Us
Staff
Board of Directors
Policy Council
Strategic Plan
Employment Opportunities
Privacy Policy
Contact Us

About CAPCO

Our Mission
CAPCO is dedicated to providing and advocating for community-wide actions and programs that increase individuals’ dignity, self-reliance and improve community conditions engaging all sectors of the community in Cortland County’s fight against poverty.

We Value
• The stories and experiences of the people we serve, and their full participation in our community.
• Commitment for ourselves and all those we come in contact with in our work.
• Accountability for our resources and results to our participants and our community.
• Cooperation and partnership within CAPCO and with the individuals and organizations that support our mission.
• A commitment to understanding our own and others’ strengths, and using these strengths to support our program, management and governance activities.

Strategic Priorities

• Individuals and Families
CAPCO will provide access to services and supports for people in Cortland County who want to increase their self-reliance, improve their economic circumstances and strengthen their connections to family and community.
• Community
CAPCO’s programs, advocacy and leadership role in the community will result in improved conditions and greater influence for individuals and families in community-wide initiatives to change the public’s response to poverty in Cortland County.
• Agency
CAPCO will increase its capacity to manage its human and financial resources and strategic partnerships as an effective leader in Cortland County’s efforts to break the cycle of poverty.

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Energy Services | Stock Market | Women, Infants and Children | Consumer Directed Personal Assistance Program | Family Enrichment Program

Web site design by Sue Reynolds of Sue Reynolds Communications

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HR1655 Language is Released

The National Community Action Foundation (NCAF) has been working to get HR1655, Community Action’s authorizing legislation, through Congress. The text has been released. Click here for a one-page summary of the bill and here for the full text. You can go to NCAF.org for information.

National Community Action Month 2015 Toolkit is Here!

Click here to download the toolkit.

Click here for more information on National Community Action Month
CSBG T/TA Resource Center

- www.csbgtta.org
- Many more toolkits, webinars, and print resources
- Consultant Bank
- Training Calendar
- Discussion Forum
- Shared Calendar
- Individual registrations for Board and Staff
Questions?

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jcrocker@communityactionpartnership.com

Thank you!