Putting the Strategy in Your Strategic Plan

Management and Leadership Training Conference
January 18, 2019

Jarle Crocker, PhD, NCRT, CCAP
Director of TTA, NCAP
“Leadership is the capacity to translate vision into reality.”

— Warren Bennis
Agenda

• Welcome and Introductions
• Questions and Take-Aways
  ➢ What is the top challenge you’ve seen with strategic planning?
  ➢ What is your main learning objectives for this training?
• Strategic Planning Overview
• Designing the strategy of your strategic plan
Partnership Resources

- **Fighting Poverty**
  The US Census Bureau estimates that 16% of the population lives in poverty. We work to end poverty across the country.

- **Community Action Network**
  We have over a thousand agencies in local communities, as well as state associations and national partners.

- **Tools and Resources**
  Find all of our Training and Technical Assistance webinars, toolkits, useful information and other resources.
Strategic Planning Guide

www.CommunityActionPartnership.com
Tools and Resources
Organizational Standards and Training and Technical Assistance
Strategic Planning Webinar Series

Strategic Planning: Implementing the Strategic Plan

How do you implement and ensure follow-through on the strategic plan? This final webinar of the Strategic Planning Webinar Series discusses how to develop a structure and process that ensures effective implementation of the strategic plan. The webinar includes examples various accountability measures, processes, and tools, such as dashboards and scorecards, that can be adapted by agencies to help ensure follow-through on the strategic plan.

Strategic Planning: Developing an Outcomes Based Strategic Plan

How do you develop an outcomes-driven strategic plan? The third webinar in the Strategic Planning Webinar Series helps agencies understand how to define clear outcomes that link to the agency’s mission, develop strategies that drive change, and create action plans that guide implementation.

Can’t Find What You’re Looking For?

Please feel free to contact us...!

Our resource team can provide support with accessing resources from our new resource library.

For assistance with Management & Operations resources, please contact Liza Porlis.

For assistance with Innovative Practices resources, please contact Hyacinth McKinley.
Why do Nonprofits Engage in Strategic Planning?
Importance of Strategic Planning

• **Agency Direction**
  – Unify people and strategies
  – Mobilize and/or focus resources
  – Anticipate and head off challenges

• **Capacity Building**
  – Identify and support new leadership
  – Generate energy and confidence

• **Performance Management**
  – Set context for accountability

• **Leadership**
  – Support decision-making
  – Strengthen existing leadership
Characteristics of Strategic Planning

• Board-driven, staff engaged
• Driven by data
• Sets long-term goals
  – targeted
  – specific
  – achievable
• Forces choice based on
  – strategic needs
  – competing resources
  – and time
• Increases internal integration & efficiency
• Promotes change and innovation
  – To improve outcomes
• Builds on and leverages relationships
The Strategic Foundation: Your CNA

- The **Strategic Plan** should always begin with a review of the data and conclusions from the **Community Needs Assessment**
- The **Strategic Plan** should inform the **Community Action Plan** of how the agency will deliver programs and services
Working Smarter – Utilizing the CNA

- Assessment of Partners and Assets
- Potential Causes Influencing Need
- Prioritized Needs
- Recommendations from CNA Team

Agency Strategy
Using the ROMA Framework to Connect the CNA and Strategic Plan

• Utilize Family, Agency, & Community Level needs from CNA.
  – Ask: “Who’s need is it?” to plan accordingly

• Consider the outcomes to be achieved at the Family, Agency, and Community Level.

• Identify strategies to achieve the outcomes and address the needs.
From Assessment of Needs to Strategic Plan

- Catalogued the needs in service area
  - Are we targeting the right needs?
- Identified the level of needs
  - Do our strategies address multiple levels of needs?
- Discussed potential causes behind needs
  - Do our strategies address the root causes of needs?
- Assessed partners and available resources
  - Have we engaged the right partners?
  - Are we leveraging all available resources?
Incorporating the National Community Action Theory of Change

The National Community Action Network Theory of Change

**Community Action Goals**

**Goal 1:** Individuals and families with low incomes are stable and achieve economic security.

**Goal 2:** Communities where people with low incomes live are healthy and offer economic opportunity.

**Goal 3:** People with low incomes are engaged and active in building opportunities in communities.

**Services and Strategies**

- Employment
- Education & Cognitive Development
- Income, Infrastructure & Asset Building
- Health/Social Behavioral Development
- Housing
- Civic Engagement & Community Involvement

**Core Principles**

- Recognize the complexity of the issues of poverty
- Build local solutions specific to local needs
- Support family stability as a foundation for economic security
- Advocate for systemic change
- Pursue positive individual, family, and community level change
- Maximize involvement of people with low incomes
- Engage local community partners and citizens in solutions
- Leverage state, federal, and community resources

**Performance Management**

- How well does the network operate?
- What difference does the network make?

- Local Organizational Standards
- State and Federal Accountability Measures
- Results Oriented Management and Accountability System
- Individual and Family National Performance Indicators
- Community National Performance Indicators

[Image of the National Community Action Network Theory of Change]
Incorporating a Local Theory of Change

Guides the strategic planning process by:

• stimulating important conversations about agency’s assumptions and roles

• communicating clearly what you are working towards

• defining population

• connecting strategies and services to long term outcomes
A Community Action Model for Strategic Planning
ROMA and Strategic Planning

The Results Oriented Management and Accountability Cycle

**Assessment**
Community needs and resources, agency data

**Planning**
Use agency mission statement and assessment data to identify results and strategies

**Evaluation**
Analyze data, compare with benchmarks

**Implementation**
Services and strategies produce results

**Achievement of Results**
Observe and report progress
Organizational Standards 6.1

• **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 6.1 • public**
  The Department has a Strategic Plan, or comparable planning document, in place that has been reviewed and accepted by the tripartite board/advisory body within the past 5 years. If the Department does not have a plan, the tripartite board/advisory body will develop the plan.
Organizational Standards 6.2

- **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.

- **Standard 6.2 • public**
  The approved Strategic Plan, or comparable planning document, addresses reduction of poverty, revitalization of low-income communities, and/or empowerment of people with low incomes to become more self-sufficient.
Organizational Standards 6.3

- **Standard 6.3 • private**
  The approved Strategic Plan contains Family, Agency, and/or Community goals.

- **Standard 6.3 • public**
  The approved Strategic Plan, or comparable planning document, contains Family, Agency, and/or Community goals.
Organizational Standards 6.4

- Standard 6.4 • private
  Customer satisfaction data and customer input, collected as part of the Community Assessment, is included in the strategic planning process.

- Standard 6.4 • public
  Customer satisfaction data and customer input, collected as part of the Community Assessment, is included in the strategic planning process, or comparable planning process.
Organizational Standards 6.5

- **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 6.5 • public**
  The tripartite board/advisory body has received an update(s) on meeting the goals of the Strategic Plan/Comparable Planning Document within the past 12 months.
Organizational Standard 4.3

• Standard 4.3 • private/public

The organization’s/department’s Community Action Plan and strategic plan document continuous use of the full Results Oriented Management and Accountability (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.
Strategic Planning
A Six Stage Model for Community Action Agencies
3. Planning

- Design plan development process
- Develop the plan
- Finalize the plan
Process Design Options

• Committee and task groups
• “Open space” large group meeting
• Team-based negotiation
• Retreat with small group
Word Scramble Exercise

- Measure
- Outcome
- Goal
- Indicator
- Milestone
- Output
- Target
- Action
- Strategy

- What word describes what you are trying to ultimately achieve with your strategic plan?
- What word describes what you do to get there?
- What word describes how you know you are making progress?
Identify, Discuss, and Prioritize Strategic Issues

1. Review the summary of your needs assessment
2. Review the prioritized list of your strengths, weaknesses, opportunities, and threats
3. Review the discussion of your vision, mission, and values
4. Review any additional key data – budget, program outcomes, reports
5. Identify, discuss, and prioritize the key strategic issues that face the organization
6. Begin identification of goals
Thinking About the Whole Agency

Internal Functional Units
- Human Resources
- Finance and Budget
- Information Technology
- Advocacy/Communications
- Facilities

Programs and Services
- Workforce Development
- Education
- Housing
- Transportation
- Nutrition
Structuring Your Strategic Plan

- **Goals** are the highest “level” of the strategic plan and describe what your agency is trying to achieve. They are typically organized around an agency’s key performance areas. Ideally, they connect with needs from the community assessment.

- **Strategies** are how the agency achieves its goals. They describe how programs, services, and other activities work to produce results. Ideally, they take into account individual/family, community, and agency needs.

- **Indicators** describe *outputs* and *outcomes* that measure progress towards meeting goals.
Translating Key Performance Areas into Goals

• Programs and services “roll up” into key performance areas and those “roll up” into goals

Housing
Goal

- Homeless Shelter
- Subsidized Housing
- Financial Literacy
Deciding on Goals

• Start with your key performance areas. A strategic plan will have both internal (agency) and external (programs and services) goals.
  – Tip: “Roll up” programs and services into a smaller number of goals (e.g. housing services are under a “housing goal”)
• Examples of goals might include:
  – Provide safe and affordable housing to low-income residents of our service area
  – Develop a budget with diverse sources of funding to ensure adequate resources and long-term financial sustainability
• Check your goals against the needs assessment and mission
Deciding on Strategies

• Strategies should include what you already do plus what you want to do (continuous improvement)
• Strategies should push you to describe how:
  – Functional units support programs and services
  – Programs and services achieve overall goals
• Strategies can focus within a goal and across goals. For example:
  – Provide subsidized housing through direct services and referral agreements with two partner agencies.
  – Integrate agency databases to support delivery of wraparound services.
Diagnostic Questions for Strategies

• What can we do to improve outcomes within our key performance areas?
• What can we do to improve performance across key performance areas?
• What can we do to improve our referral networks and partnerships?
• How can we coordinate strategies across multiple levels of needs?
• What innovative service delivery strategies and evidence-based programs can we add?
Deciding on Indicators

- Indicators track progress towards achieving agency goals. They include both outputs and outcomes:
  - Number of customers completing job training certification program
  - Number of customers employed in living wage jobs after 6 months
- Include target and actual numbers if possible
- Try to use indicators you already collect data for
- Don’t go overboard – aim for no more than 10 indicators per goal (if that) and choose the most important ones
- Ideally, the agency will develop a “scorecard” or similar performance management tool to track indicators across all strategic plan goals
Organizational Standards Peer-to-Peer Series: Strategic Planning and Performance Management

During this webinar, staff from the United Planning Organization, the newest Award for Excellence winner, discuss their performance management system that has been recognized as a best practice by a senior team of Pathways to Excellence Peer Reviewers. They discuss how they use their strategic plan to set agency-wide outcome goals and how their performance management team uses program data to help staff improve results. They also provide a detailed presentation on how they track progress across the agency.
Example of Agency Scorecard

### FY 2017 PERFORMANCE MEASUREMENT REPORT

**April-17**

**WORKFORCE INSTITUTE DIVISION**

<table>
<thead>
<tr>
<th>PERFORMANCE INDICATOR</th>
<th>CASA</th>
<th>FY 2017</th>
<th>YTD</th>
<th>YTD</th>
<th>YTD</th>
<th>% YTD</th>
<th>% ANNUAL ACHIEVED</th>
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<tr>
<td># Indiv Initiate Case Management</td>
<td>8104</td>
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<td>35</td>
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<td>Indiv Moved from &quot;In Crisis&quot; to &quot;At Risk&quot;</td>
<td>8002</td>
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<td>47</td>
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<td>8004</td>
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<td>14</td>
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<td>32.14%</td>
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<td># Indiv Demonstrate Job Readiness</td>
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<td>Indiv Obtain Employment With Benefits</td>
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<td>67%</td>
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<tr>
<td>Indiv Complete Vocat/Train Enrollment</td>
<td>1620</td>
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<td>85</td>
<td>114</td>
<td>134%</td>
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<td>0</td>
<td>0%</td>
<td>0.00%</td>
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Using Action Plans

• Some strategies will be new activities for the agency (e.g. implementing a new program or service delivery strategy). Any significant new activity should have an action plan that details the steps required for implementation.

• Action plans are typically developed after the strategic plan is finished by the individual or group responsible for implementation.
Incorporating the National Goals

• Standard 6.2 requires that strategic plans address one or more goals that seek: reduction of poverty, revitalization of low-income communities, and/or empowerment of people with low incomes to become more self-sufficient

• Some CAAs use the Six (now three) National Goals as their broad strategic goals

• To meet the Organizational Standards, either:
  – Include how the strategic plan addresses the goals in the summary
  – Include which national goals are addressed by your strategic plan goals
Incorporating ROMA Goals

• Standard 6.3 requires that strategic plans include one or more of:
  – Family goals
  – Agency goals
  – Community goals

• To meet the Organizational Standards, include which goal(s) each strategy addresses
Organizing the Plan’s Structure

I. Executive Summary
II. Introduction: Purpose, Process, and Stakeholders
III. Summary of strategic issues
   a. SWOT analysis findings
   b. Mission, vision, values findings
IV. Goals, strategies, indicators
V. Next Steps
Finalizing the Plan

• Strategic plans should be exactly as long as they need to be – and no longer
• Include goals and strategies, but let staff develop action plans in the next phase
• Circulate the draft plan to key stakeholders
• Final draft is completed and submitted to board for approval
• Make sure to include next steps for implementation
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
Developing Action Plans

- Each new strategy 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
Integrating the Strategic Plan into Management and Operations

• Provide a quarterly report to the board
• Provide monthly or quarterly updates to the leadership team
• Create a clear structure and process for implementation
• Make strategic plan goals part of formal job descriptions
• Shift staff responsibilities if necessary
• Provide updates on strategic plan progress at staff meetings
5. Results

- Implement score card or other monitoring tool
- Track results of strategic plan actions
- Conduct updates to strategic plan outcomes and action plans as necessary
Monitoring the Strategic Plan

• Convene six month or annual review of strategic plan goals, strategies, and indicators
• Continue quarterly reporting of plan indicators 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**

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<thead>
<tr>
<th>High Impact Services</th>
<th>Capacity Building</th>
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<tr>
<td>Strategy Map</td>
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<tr>
<td>Improve Advocacy</td>
<td>• Improve Client Outcomes</td>
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<td>Improve Community Outcomes</td>
<td>• Advocacy Activity Score (MONAI 2.3)</td>
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<td>Improve Family Outcomes</td>
<td>• Diversify Funding</td>
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<td>Improve Advocacy</td>
<td>• Improve Cost Effectiveness</td>
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<td>Improve Cost Effectiveness</td>
<td>• Improve Community Quality</td>
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<td>Improve Partnership</td>
<td>• Improve Service Quality</td>
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<td>Improve Program Development</td>
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<td>Improve Discovery</td>
<td>• Improve Knowledge, Skills, and Abilities</td>
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<td>Improve Employee Motivations</td>
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<td>• Improve Employee Motivations</td>
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**Figure 16: Strategic Plan and Scorecard Graphic**

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6. 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 prosper with access to quality education, affordable housing and meaningful employment, and meaningful involvement in civic life. Through community coordinated 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 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:

Family: Heartland provides services to households (families) that range from emergency/crisis prevention, education, family development, and asset building. Heartland Community Action strives to help all 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 families’ needs are addressed.

Agency: Just as Heartland Community Action’s leadership and its services are dynamic and evolving, so is Heartland Community Action’s strategic plan. The plan supports Heartland’s vision of the difference between poverty now and poverty in the future.

National ROMA Peer-To-Peer Training Program

FY 2004 - FY 2008

PLANNING FOR RESULTS

Facilitator Manual
VERSION 1.2
February 2007

Julie Jaksic
Barbara Mooney

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Resources

• **A Comprehensive Guide to Community Action Strategic Planning** – Community Action Partnership

• **Developing a Strategic Plan** – Community Toolbox, Ch. 8

• **Strategic and Operational Planning Toolkit** – Tasmanian Government

• **Creating a Local Theory of Change** – ANCRT/CAP ROMA NG Training Series
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
Pathways to Excellence: The Network’s Premier Capacity Building Initiative

- Getting Started at Getting Better – the process starts where you are today
- Diagnostic process using 35 National CAA Standards in a guided Self-Study Process
- Feedback reports identify Strengths and Opportunities for Improvement
The Pathways Process

- 2 day Self-Study training for your Pathways team
- 9 months to complete the Self-Study, with Partnership Technical Assistance monthly by Web Meeting
- 3 months for the expert peer review and Feedback Report process
Contacts at the Partnership

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