Putting the Strategy into your Strategic Plan

2019 CAP Convention

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Learning Objectives

• Clarify the importance of agency-wide strategic planning for meeting the agency’s mission
• Understand how strategic planning fits into ROMA and Organizational Standards
• Know the connections between the strategic plan, the agency’s community needs assessment, and other program plans
• Consider steps and roles for a successful planning process
• Identify successful implementation and monitoring techniques
Why plan?

• The act of “planning” provides an opportunity for an agency or a community to step away from day to day operations and consider a vision of the future.

• It allows you to consider how your agency will address its anti-poverty mission.

• A well thought out plan will help to unify agency staff (from all programs) and board members around a common vision and common goals.
ROMA and Planning

The Results Oriented Management and Accountability Cycle

Assessment
Community needs and resources, agency data

Evaluation
Analyze data, compare with benchmarks

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

Achievement of Results
Observe and report progress

Implementation
Services and strategies produce results
Planning is Required

CSBG Legislation:
• The Community Services Block Grant (CSBG) Act (42 USC Sec. 9901 et seq.) requires all community action agencies, private nonprofit organizations, and public organizations that receive CSBG allocations to submit a community action plan for their CSBG service area.

Organizational Standards
• (6.1) The organization has an agency-wide strategic plan in place that has been approved by the governing board within the past 5 years.
Understanding the Requirements

The Community Action Organizational Standards identify a series of items that must be included in the required agency-wide Strategic Plan. The Plan must

• Address:
  – reduction of poverty,
  – revitalization of low-income communities, and/or
  – empowerment of people with low incomes to become more self-sufficient. (6.2)

• Have Family, Agency and/or Community Goals (6.3)

• Include Customer Satisfaction and Consumer Input data (6.4)

• Reflect full ROMA Cycle - with ROMA Trainer/Implementer involved (4.3)

• Be approved by governing board within last 5 years (6.1)
Different Kinds of Plans

• Agency-wide Strategic Plan - Results from the Board’s comprehensive planning process that identifies the agency direction and its goals.
  – It includes outcomes, actions, and the means of measuring the achievement of (or progress towards) the goals.

• Community Action Plan
  – detailed plan of how CSBG funds will be utilized to support or leverage other funding to support specific programs and services that lead to anti-poverty outcomes

• Program Plans – aka funding proposals
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

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

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?

- Local Organizational Standards
- State and Federal Accountability Measures
- Results Oriented Management and Accountability System

What difference does the network make?

- Individual and Family National Performance Indicators
- Community National Performance Indicators

A national network of over 1,000 high performing Community Action Agencies, State Associations, State offices, and Federal partners supported by the Community Services Block Grant (CSBG) to mobilize communities to fight poverty.

This publication was created by NASCAP in the performance of the U.S. Department of Health and Human Services, Administration for Children and Families, Office of Community Services, Grant Number 90ET8666.
Local Theory of Change

• What does your agency believe it should be doing to address issues related to poverty in your community?
• The answer to this question will guide the selection of outcomes and actions that will accomplish those outcomes.

The Local Theory of Change can be a great guiding exercise for Strategic Planning OR help to bring it all together after Strategic Planning
Economic Security Corporation Local Theory of Change

**BROAD AGENCY GOALS:**
- Children are ready for school
- Families are ready to engage
- The agency is ready to support
- The community is ready to invest

**OUTCOMES:**

**FAMILY**
- Increased engagement
- Increased engagement in community
- Sufficient income to support needs
- Insured and equipped with medical payment options

**AGENCY**
- Increased knowledge of agency programs internally and externally
- Higher employee wages
- Increased flexible wages
- Established communication strategy

**COMMUNITY**
- Increased reliable transportation options
- Increased affordable/quality childcare options
- More living wage employment opportunities
- Additional safe, healthy, affordable, energy-efficient housing units

**SERVICES/STRATEGIES:**
- Early Head Start
- Head Start
- Asset Development
- Rental Assistance
- Housing Assistance
- Employment Assistance
- Case Management
- Utility Assistance
- Agency Capacity Building
- Resource Development
- Communication Strategy
- Poverty Simulations
- Weatherization
- Home Repair
- Housing Development
- Job Creation
- Leadership Training

**COMMUNITY ACTION CORE PRINCIPLES**

**PERFORMANCE MANAGEMENT**

**VISION:** A thriving community of neighbors that is free from poverty

**MISSION:** To provide comprehensive services that instill hope and share opportunities to eliminate the conditions of poverty and help neighbors achieve self-sufficiency
• Utilize **needs** from CNA process (at all three levels).
  – Ask: “Who’s need is it?” to plan accordingly
• Consider the **outcomes** to be achieved at the Family, Agency, and Community Level.
• Identify the **services and strategies** to achieve the outcomes and address the needs.
# Examples of Different Levels

<table>
<thead>
<tr>
<th>Need Statement (family level)</th>
<th>Outcome Statement (family level)</th>
<th>Service (family level)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parents are not involved in their children’s school activities</td>
<td>Parents increase their involvement with children’s school activities</td>
<td>Parents will participate in monthly parent support group meetings during the school year</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Need Statement (community level)</th>
<th>Outcome Statement (community level)</th>
<th>Strategy (community level)</th>
</tr>
</thead>
<tbody>
<tr>
<td>The fire department reports that the low income neighborhood has fires that are more severe than other neighborhoods.</td>
<td>The severity of fires in low income neighborhood is reduced.</td>
<td>A community campaign (of several partners) will establish fire safety classes and make smoke detectors available to low income residents.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Need Statement (agency level)</th>
<th>Outcome Statement (agency level)</th>
<th>Strategy (agency level)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Our agency does not have staff who understand the “whole family approach”</td>
<td>Our agency case managers are able to apply the “whole family approach”</td>
<td>Agency case managers will participate in training for direct service and supervisory staff will be trained in providing support to them.</td>
</tr>
</tbody>
</table>
On What Level Will You Work?

- Direct services to individuals and families to produce changes in knowledge, skills, attitudes, behaviors.
- Strategies that include community initiatives to promote changes in infrastructure, access, policy or specific conditions.
- Strategies that support agency capacity such as staff, facilities, resources or practices.
5 Steps to Strategic Planning

1. Prepare to Plan
2. Gather Information Needed
3. Design and Create the Plan
4. Communicate the Plan
5. Monitor the Plan
• Get Buy-in
• Assess readiness
• Clarify roles of the ED, board, and staff
• Create the planning committee
• Establish a time table
Getting Buy In

1. Leadership team agrees on the process, demonstrates commitment, and communicates vision
   - *Sometimes utilizing an outside facilitator can help*

2. Establish resources for the planning process (budget, facilities, staff time, etc)

3. Answer: Why are we engaging in the strategic planning process? What are its benefits?
   - Foster understanding of how the strategic planning process will address the major issues facing the organization
# Strategic Planning Roles

<table>
<thead>
<tr>
<th>Board</th>
<th>Executive Director</th>
<th>Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Provide input on agency’s strategic direction</td>
<td>• Initiate discussion on purpose and timing</td>
<td>• Participate in the Planning Committee</td>
</tr>
<tr>
<td>• Assist with process design and research</td>
<td>• Ensure adequate resources</td>
<td>• Assist in gathering information</td>
</tr>
<tr>
<td>• Identify resources to support process</td>
<td>• Oversee process design and research</td>
<td>• Assist in development of the Plan</td>
</tr>
<tr>
<td></td>
<td>• Engage key internal and external stakeholders</td>
<td>• Assist in management of communications and</td>
</tr>
<tr>
<td></td>
<td></td>
<td>logistics</td>
</tr>
</tbody>
</table>

Planning Committee
Size and Structure

Planning Committee

Board
- Board members
- Executive Director
- Leadership team
- ROMA Trainer/Implementer
- Program managers

Stakeholders

Staff
- Administrative support
- Direct Service staff
- Customers
- Key partners
- Consultant, if desired
Gather Information

- Collect existing information
- Review vision, mission, and values
- Gather any additional information needed:
  - Conduct SWOT analysis
Collect Existing Information

- Previous strategic plan, Community Action Plan and any other plans available
- Agency-wide budget
- Summary data from the needs assessment
  - Output and outcome data from programs and services
- Customer satisfaction data
- Key studies and reports related to priority topics
“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.”
Do you have sufficient information about:

- Where do low-income individuals and families live in the agency’s service area?
- Where are the areas of highest need in the agency’s service area?
- Where are there gaps in resources?
- Are there barriers to access in specific areas of the community?
- What is the demographic breakdown of population in poverty by age?
- Are there gaps in services for specific populations (e.g. child care/early education, seniors?)
- Did our agency data showing that we served the population in need? Serve the population you thought you’d serve Not serving a population, despite data telling us there is a high need?

If not, now is the time to find this information before proceeding
# The SWOT Analysis

<table>
<thead>
<tr>
<th></th>
<th>Helpful</th>
<th>Harmful</th>
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<tbody>
<tr>
<td><strong>Internal</strong></td>
<td>Strengths</td>
<td>Weaknesses</td>
</tr>
<tr>
<td><strong>External</strong></td>
<td>Opportunities</td>
<td>Threats</td>
</tr>
</tbody>
</table>
• Establish a Plan format and design
• Draft the Plan
  – Identifying Outcomes, Services and Strategies, Indicators and Measurement processes
• Consider implementation processes
• Finalize the Plan
• Develop action steps
Process Design Options

- Committee and task groups
- “Open space” large group meeting
- Team-based negotiation
- Retreat with small group
Get Clear on the Language

Target
Objective
Output
Indicator
Outcome
Action
Strategy
Goal
Measure
Milestone
Definitions

• Goals – Broad, overarching goals or core business areas
• Outcomes – The change you want to see based on the needs and the goals.
• Indicator – How much change? What will you measure?
• Services and Strategies – Identification of how the initiative will reach the outcome.
• Action Steps – The details of making it happen (who, what, by when, where, resources)
Tips for Writing the Strategic Plan

• Shorter is better
• Leave the writing for after the meeting – the focus should be on articulating outcomes, strategies, and actions
• Don’t get too detailed on the actions – these will be developed in the action plans
• Leave time for comments and revisions
The Plan’s Structure

I. Executive Summary
II. Introduction: Purpose, Process, Stakeholders
III. Organize the content so requirements are clearly found: Organizational Standards, ROMA
IV. Assessment Summary
   a. High Priority Needs (CNA)
   b. SWOT
   c. Mission, vision, values
V. Agency Goals and Outcomes
VI. Services, Indicators, Strategies, Actions
VII. Recommendations
Options and Responsibilities for the Implementation Process

Process
• Single committee
• “Handoff” to leadership team
• Task groups organized by strategic plan outcomes
• 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 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
What happens with the final Plan?

• Who needs to know?
• What do they need to know?
• How is it shared with
  – Staff
  – Partners
  – Community
Why Share Your Agency-wide Strategic Plan?

- Educate others about your agency
- Tell a local chapter of the Community Action Story
- Advocate for increased knowledge about the issues your agency plans to address related to people with low income and the communities in which they live.
- Strengthen Partnerships by sharing what you plan to do and what you plan to accomplish
What you share...

*depends on the audience & purpose or goal*

- Create an Executive Summary with high level overview of what you plan
- Create a Graphic to show agency-wide connections between goals, outcomes and services/strategies
- Develop logic models to show program essentials and outcomes
How do you communicate?

- Post to website
- Use Social Media
- Hold public forum
- Participate in Community/Advocacy Meetings
With *Whom* do you Communicate?

- Partners and other Service Providers
- Business owners and operators
- Community Members
- Elected Officials
- News Media
- Current and Potential Funders
• Develop score card or other monitoring tool

• Track results of strategic plan actions

• Conduct updates to strategic plan outcomes and action plans as necessary
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 strategies and action plans
- Creation of task committees to manage individual action plans
- Integration into or development of an agency-wide or balanced scorecard to track progress
- Make strategic plan outcomes part of formal job descriptions
- Updates on strategic plan progress at staff meetings
### Elements of a Strategic Plan Scorecard

<table>
<thead>
<tr>
<th>Strategic Priority:</th>
<th>Outcome</th>
<th>Indicator</th>
<th>Strategy</th>
<th>Measurement of Success</th>
<th>Year to Date</th>
<th>Progress R/Y/G</th>
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</table>
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, and community organizing to empower low-income residents to achieve self-sufficiency.

**Vision:** A thriving, self-sufficient, trabecular, 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

**Objectives**

**Indicators**

**Targets**

**Initiatives**

- Improve Community Outcomes
- Improve Family Outcomes
- Improve Healthy Communities
- Improve Academic Outcomes
- Improve Adult Literacy
- Improve Early Childhood Education
- Improve Poverty Reduction
- Improve Housing Stability
- Improve Health and Wellness
- Improve Economic Development

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

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This publication was 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. 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. The publication is provided free of charge to CSBG grantees and is part of the National T/TA Strategy for Promoting Exemplary Practices and Risk Mitigation for the CSBG program. To download the report, please visit www.communityactionpartnership.com.
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
For More Details

www.CommunityActionPartnership.com
Resource Library
Strategic Planning
STRATEGIC PLANNING

Community Action Partnership of North Alabama
ROMA and Planning

The Results Oriented Management and Accountability Cycle

Assessment
Community needs and resources, agency data

Evaluation
Analyze data, compare with benchmarks

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

Achievement of Results
Observe and report progress

Implementation
Services and strategies produce results

Financial Integrity | Operational Excellence
Exceptional Customer Service | Leader of Change
Timeline

CNA  SP  TOC
Strategic Planning Process

- ROMA Scaling by Business Unit
- SWOT Analyses
  - Business units
  - Agency-wide
- Updated VMV
- Linked to CNA
- Action Plans
<table>
<thead>
<tr>
<th>Business Unit: Children’s Services</th>
<th>Program Scale</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Outcome Level</strong></td>
<td><strong>Benchmarks</strong></td>
</tr>
<tr>
<td><strong>Program Scale</strong></td>
<td><strong>Outcomes</strong></td>
</tr>
<tr>
<td>Thriving</td>
<td>81-100</td>
</tr>
<tr>
<td>Safe ---</td>
<td>72</td>
</tr>
<tr>
<td>Stable</td>
<td>41-60</td>
</tr>
<tr>
<td>Vulnerable</td>
<td>21-40</td>
</tr>
<tr>
<td>In-Crisis</td>
<td>0-20</td>
</tr>
</tbody>
</table>
SWOT: BUSINESS UNIT

BUSINESS UNIT: CHILDREN’S SERVICES

Internal Factors Summary
The program has a strong infrastructure and is well rooted in the local community. Over its 48 year history, the program has demonstrated resilience and adaptability that has allowed it to establish a strong reputation among its peer and the local community. While performance was determined to be high, program efficiency and effectiveness could be improved through data integration and improved onboarding/training processes.

External Factors Summary
Although the organization survived a re-competition process, some instability is currently being experienced due to timeliness associated with restoring the original funding cycles. New pre-k programs operated by school systems, high numbers of opioid addiction and a negative climate against immigrants in the community have all recently been identified as potential threats. Additional funding and potential partnerships are hoped to be able to counter these over the next several years.

SWOT:
- Strengths
  - Compliance issues
  - Awareness of state of need
  - Meeting program goals
  - Strong program
  - Technology (state of the art)
  - Qualified staff
  - Experiences (48+ years)
  - Strong advocacy
  - Mission
  - Adaptable

- Opportunities
  - Consistent partners in all areas
  - Identifying services after transition into school
  - Skilled personnel support
  - Grant funding
  - Technical development grants

- Threats
  - Financial instability due to reduced funding
  - Pre-K phased by school system
  - Climate against immigrant services
  - Grant addition

- Weaknesses
  - Trending program in state
  - Lacks of quantitative data
  - Performance-related measures
  - PALS/ProChild Plus integration
  - Onboarding/Training processes
  - MIFinance data integration
  - Managent lack of access to KIndlink data
  - Lack of community centers
Financial Integrity | Operational Excellence
Exceptional Customer Service | Leader of Change

COMMUNITY ACTION PARTNERSHIP OF NORTH ALABAMA

STRENGTHS
- Strong leadership
- Strong partnerships
- Respected in the industry
- High customer satisfaction
- Highly experienced (16+ years)
- State of the art tech infrastructure
- Well-located and respected in community
- No complex debt issues
- Legal advisory contact
- Board officer's succession
- Engaged active board
- Strong fiscal processes
- Strong accountability
- Close ties and staff
- Low administrative costs
- Rastered-related

ORGANIZATION

WEAKNESSES
- Organizational integration
- Understaffed IT departmnet
- Lack of funding diversify
- Mgt. access to financial data
- Financial continuation to the Board of Directors
- Succession plan need to be reviewed
- Organizational issues communicated a gap-wide
- Aging buildings

OPPORTUNITIES
- Explore other types of RCO beyond tax aid and social welfare
- Additional community partnerships
- Worldwide network of volunteers
- Strengthen CDM Montgomery community engagement

Page 20

SWOT: AGENCY

Financial Integrity | Operational Excellence
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Community Needs Assessment
Key Areas of Need

CHILDREN
Infants, Toddlers & Preschoolers

FOOD
Soup Kitchens, Food Pantries & Food Programs

HEALTHCARE
Dental, Physical, Prescription Assistance

HOUSING
Safe & Affordable Rental, Home Repair, Weatherization, Homeownership

JOBS
Youth, Older Adults, Formerly Incarcerated

UTILITIES
Electric, Propane, Natural Gas

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AGENCY RECOMMENDATIONS

Based on the findings of the 2017 CNRA, the following are recommendations to guide Community Action Partnership of North Alabama in decisions relating to services, service delivery strategies, prioritization of resources allocated to services and create opportunities to leverage current assets to address the top key needs of families and the community.

Childcare: Infants, Toddlers & Preschoolers. The Partnership is justified in its continuation of Head Start, Early Head Start and other Childcare programs. It is recommended that The Partnership work with the community to

• explore avenues to reduce the cost of childcare for low-income families
• expand childcare hours of operation to meet the need for childcare that is the most conducive to parental work schedules.
• The organization is compliant and has established an accountability framework to deliver quality services with a high level of efficiency and effectiveness.
• Individuals and families with low incomes are stable and achieve economic security.
• People with low incomes are engaged and active in building opportunities in communities.
• Communities where people with low incomes live are healthy and offer economic opportunity.
SETTING STRATEGIC PRIORITIES

THE ORGANIZATION IS COMPLIANT AND HAS ESTABLISHED AN ACCOUNTABILITY FRAMEWORK TO DELIVER QUALITY SERVICES WITH A HIGH LEVEL OF EFFICIENCY AND EFFECTIVENESS

OUTCOMES

• Agency childcare center hours are conducive with the schedules of low-income workers.
• The agency decreases financial risks due to funding diversification.
• The organization increases coordination of services among programs.
• The agency has effective onboarding and training process.
• The agency has formalized succession plans for all leadership positions.
• The agency has fully functional and engaged advisory councils.
• The agency has established a formal internal and external communication plan.
• The agency has established a streamlined volunteer recruitment and placement process for all qualified volunteers.

Financial Integrity | Operational Excellence
Exceptional Customer Service | Leader of Change
Financial Integrity | Operational Excellence
Exceptional Customer Service | Leader of Change

INDIVIDUALS AND FAMILIES WITH LOW INCOMES ARE STABLE AND ACHIEVE ECONOMIC SECURITY

OUTCOMES
• Financial burdens do not prevent families from being stable and achieving economic security.
• Individuals and families obtain affordable childcare options for children birth to 4 years.
• Utility bills are lower for families because homes are energy efficient.
• Healthcare costs are affordable for families and individuals.
• Family personal barriers do not prevent job attainment/retention.
• Low-income individuals/families obtain assistance with home repairs.
PEOPLE WITH LOW INCOMES ARE ENGAGED AND ACTIVE IN BUILDING OPPORTUNITIES IN COMMUNITIES

OUTCOMES
• People with low incomes are engaged in the implementation of strategies to address conditions of poverty.

COMMUNITIES WHERE PEOPLE WITH LOW INCOMES LIVE ARE HEALTHY AND OFFER ECONOMIC OPPORTUNITY

OUTCOMES
• Community food providers increase variety and nutrition for families.
• Communities increase safe/affordable housing options for families.
**Business Unit:** Housing

**Family/Agency/Community Need:** Community

**Outcome Statement:** Communities obtain safe/affordable housing options for families

**Strategy/Service:** Affordable Housing Development

**Performance Measure Indicator(s):** Appropriate support documentation and SP Action Plan

<table>
<thead>
<tr>
<th>Action Steps</th>
<th>Resources/Cost</th>
<th>GAP</th>
<th>Staff Responsible</th>
<th>Target Date of Completion</th>
<th>% Complete</th>
<th>Status Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submit 2 LIHTC (tax credit deal) applications - 2019</td>
<td>LIHTC application, email, phone calls, support documentation for application, committee meetings</td>
<td>Dave Truitt, Aron Boldog, Tammie Clark, &amp; Venessa Leffers</td>
<td>1st quarter 2019</td>
<td>100%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Submit 3 LIHTC (tax credit deal) applications - 2020</td>
<td>LIHTC application, email, phone calls, support documentation for application, additional funding/staff</td>
<td>Dave Truitt, Aron Boldog, Tammie Clark, &amp; Venessa Leffers</td>
<td>1st quarter 2020</td>
<td>100%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Housing Committee to determine number of 2021 LIHTC (tax credit deal) applications</td>
<td>email, phone calls, face to face meetings</td>
<td>Housing Committee, Dave Truitt, Aron Boldog, Venessa Leffers, Lorrie Mauro, &amp; Tammie Clark</td>
<td>12/30/2020</td>
<td>100%</td>
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<tr>
<td>Submit ___ number of LIHTC (tax credit deals) for 2021</td>
<td>LIHTC application, email, phone calls, support documentation for application, committee meetings</td>
<td>Dave Truitt, Aron Boldog, Tammie Clark, &amp; Venessa Leffers</td>
<td>1st quarter 2021</td>
<td>100%</td>
<td></td>
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<tr>
<td>Annual CHDO update</td>
<td>appropriate paperwork, email, phone calls</td>
<td>Dave Truitt, Aron Boldog, Tammie Clark</td>
<td>1/31/2019</td>
<td>100%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Submit HOME funded projects with City of Montgomery biannually, 2019, 2020, &amp; 2021</td>
<td>funding application, email, phone calls, committee meetings</td>
<td>Dave Truitt, Aron Boldog, Tammie Clark, &amp; Venessa Leffers</td>
<td>varies</td>
<td>100%</td>
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Contact Us

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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
Please Complete Your Evaluation!

We appreciate your attention and feedback!

Safe Travels Home!
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