

STRATEGIC **P**LANNING **F**UNDAMENTALS

Dr. Jennifer R. Madden

THE RESEARCH SUGGESTS



- 1. *Nonprofit Management Fundamentals (7/18)*
- 2. *Fund Development Strategies (7/25)*
- 3. *Grant Writing Fundamentals (8/8)*
- 4. *Management & Leadership Fundamentals (8/22)*
- 5. *Design Thinking /Human-Centered Design Fundamentals (9/19)*
- 6. *Design Thinking Techniques (10/17)*

**Strategic
Planning
FUNdamentals
(TODAY!)**

next steps on the
JOURNEY



next steps on the

ELEVATE YOUTH CAPACITY BUILDING JOURNEY...



Toolbox Examples

- *Infographic*
- *Logic Model Information*
- *Definitions*
- *Example: Strategic Plan*
- *Example: Strategic Plan + Implementation Plan Connection*



Strategic Planning FUNDamentals

- *Identify the fundamental practices of a strategic planning process*
- *Learn the key indicators of a successful strategic planning process*
- *Define the foundations of a strong strategic plan using workbook tools*

AGENDA: STRATEGIC PLANNING FUNDAMENTALS

1. Why develop a Strategic Plan
2. Five (5) steps of the Strategic Plan (with a helpful toolbox)
 - ▶ Get Organized
 - ▶ Take Stock
 - ▶ Develop a Strategy
 - ▶ Draft & Refine Plan
 - ▶ Implement & Monitor Performance
3. Toolbox Examples:
 - ▶ What Makes a Great Strategic Plan
 - ▶ Logic Model Information
 - ▶ Definitions (Vision, Mission, Values, Goals)
 - ▶ Example: Strategic Plan
 - ▶ Example: Strategic Plan + Implementation Plan Connection



*Core Concept &
Toolbox Icon*

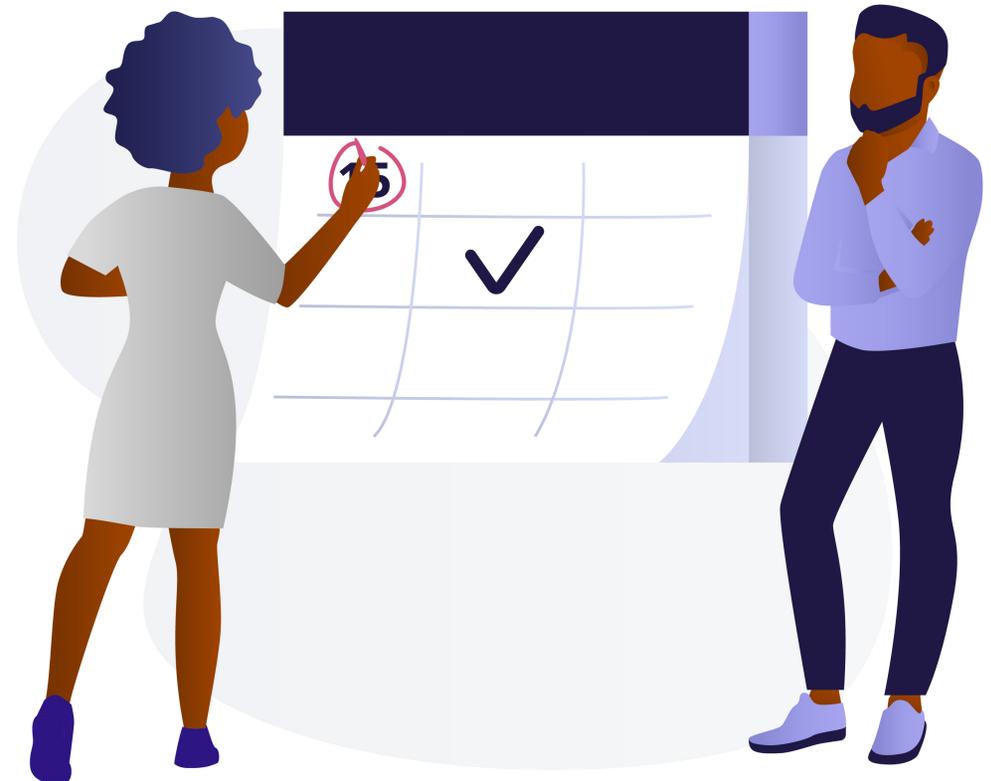


Chat Storm



LEARNING OBJECTIVES

- ▶ Identify the fundamentals of strategic planning.
- ▶ Understand the keys to a successful strategic planning process.
- ▶ Understand how to have a stronger plan utilizing several Strategic Planning Tools:
 - ▶ What Makes a Great Strategic Plan Summary (for better insight)
 - ▶ Logic Model Information (for better implementation)
 - ▶ Definitions (Vision, Mission, Values, Goals) (for better understanding)
 - ▶ Examples Provided



1 Why Develop a STRATEGIC PLAN?



Does your organization have a current strategic plan?



“Strategic planning
builds power and
connections with the
community served
and strengthens
organizational
credibility and
effectiveness.”

Chupp, Madden, Yankey & Coombs, 2022



STRATEGIC PLANNING

- Helps an organization
 - Fulfill their mission
 - Meet requirements
 - Satisfy constituents
 - Create value
- A time to
 - Set priorities
 - Build consensus
 - Revisit/review mission



If you have a Strategic Plan or not, why might you need a strategic plan?

STRATEGIC PLANNING



- ▶ Focuses on the near future (3 to 5 years)
- ▶ Ties to an implementations plan
 - ▶ Outlines goals and SMART objectives
 - ▶ Tighter timeframes (monthly, quarterly)
 - ▶ Can identify responsible persons or departments
- ▶ Builds consensus

SIX (6) BENEFITS OF STRATEGIC PLANNING

1. Promotion of strategic thinking, acting, and learning through forward-looking conversations among key actors
2. Improved organizational decision-making
3. Enhanced organizational effectiveness linking resource allocations to outputs and outcomes.

SIX (6) BENEFITS OF STRATEGIC PLANNING

4. Directly benefits the people involved by producing needed results (for example programs or services)
5. Greater awareness of unmet needs and unresolved issues
6. Benefits the people involved in the process, both those internal to the organization and external stakeholders. Those involved can experience improved morale, increased expertise and greater teamwork and collaboration with others through their participation.

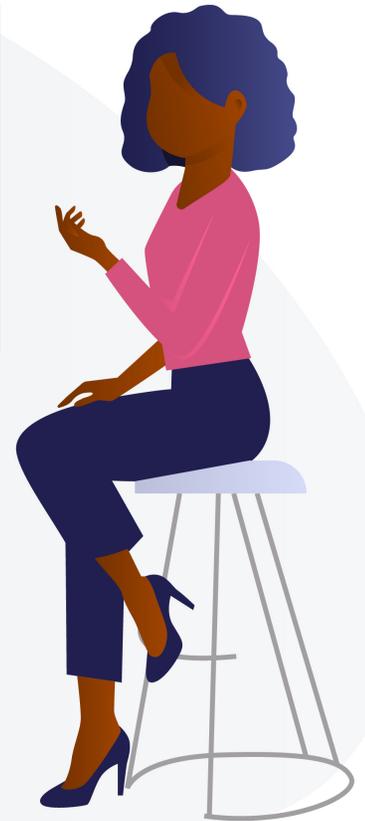
SUMMARY: WHY DEVELOP A STRATEGIC PLAN?



- To improve performance
- To stimulate forward thinking and clarify future direction
- To solve major organizational problems
- To survive—even flourish—with less
- To build teamwork and expertise
- To influence rather than be influenced
- To meet the requirements of others

toolbox

**WHAT MAKES A
GREAT STRATEGIC
PLAN?**





Use of Data

- Opinions and perceptions only
- Ad-hoc data, raw lists/charts
- Meaningful, compelling data synthesized

Internal / External Focus

- Externally-focused
- Internally-focused
- Strategic blend of internal and external focus

Flexibility

- Static, snapshot planning
- Prepared to react to change
- Dynamic realities embraced & anticipated

Problem Orientation

- Reactive
- Preventative
- Promotion and proactive

Resources

- Unclear, more hope than reality
- Clear fundraising plan
- More strategic use of existing resources, plus creative search

Defining Focus

- Narrow, single focus
- Multi-focus, but categorical
- Comprehensive, integrated; synergy strategy

Priorities / Starting Points

- Priorities unclear
- Arbitrary or overly-opportunistic priorities
- Strategic points of entry

Use of Previous Plans

- Ignore
- Tweak and update
- Review, evaluate, start fresh

Goal Clarity

- Vague
- Over/Under-reaching
- Clear, feasibly ambitious

Results Focus

- Non-existent
- Vague
- Clear, SMART results and outcomes

Strategy

- Needs/Deficit-focused
- Assets-focused only
- Build on assets, realistic on needs

Timelines

- Non-existent
- Unrealistic
- Detailed and realistic

Green light insight for Strategic Planning

Red: Proceed with caution

Green: Go



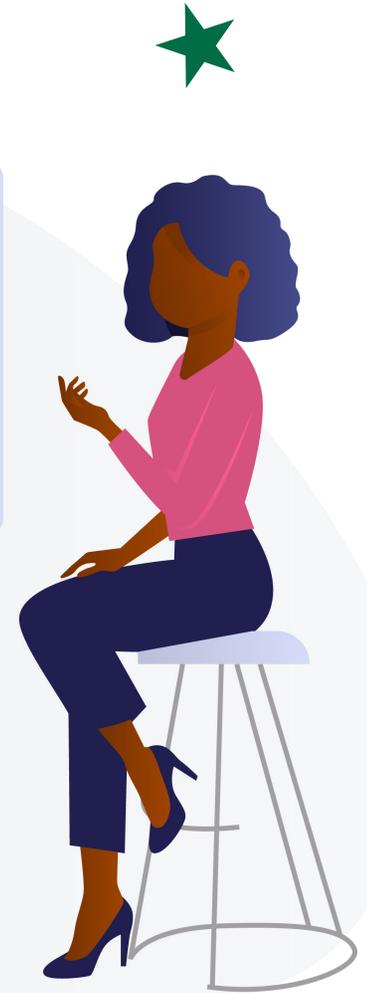
QUESTIONS?



2

STRATEGIC PLANNING PROCESS

5 Steps





STEP 1: GET ORGANIZED

STEP 1: GET ORGANIZED

- Review previous strategic plans and work
- Strategic Planning Committee for approval of: approach, **critical research**, **stakeholders**, and timeline
- Decision on community meeting/convening; **electronic survey development and deployment; individual interviews.**
- Finalize approach, survey development, individual interviews

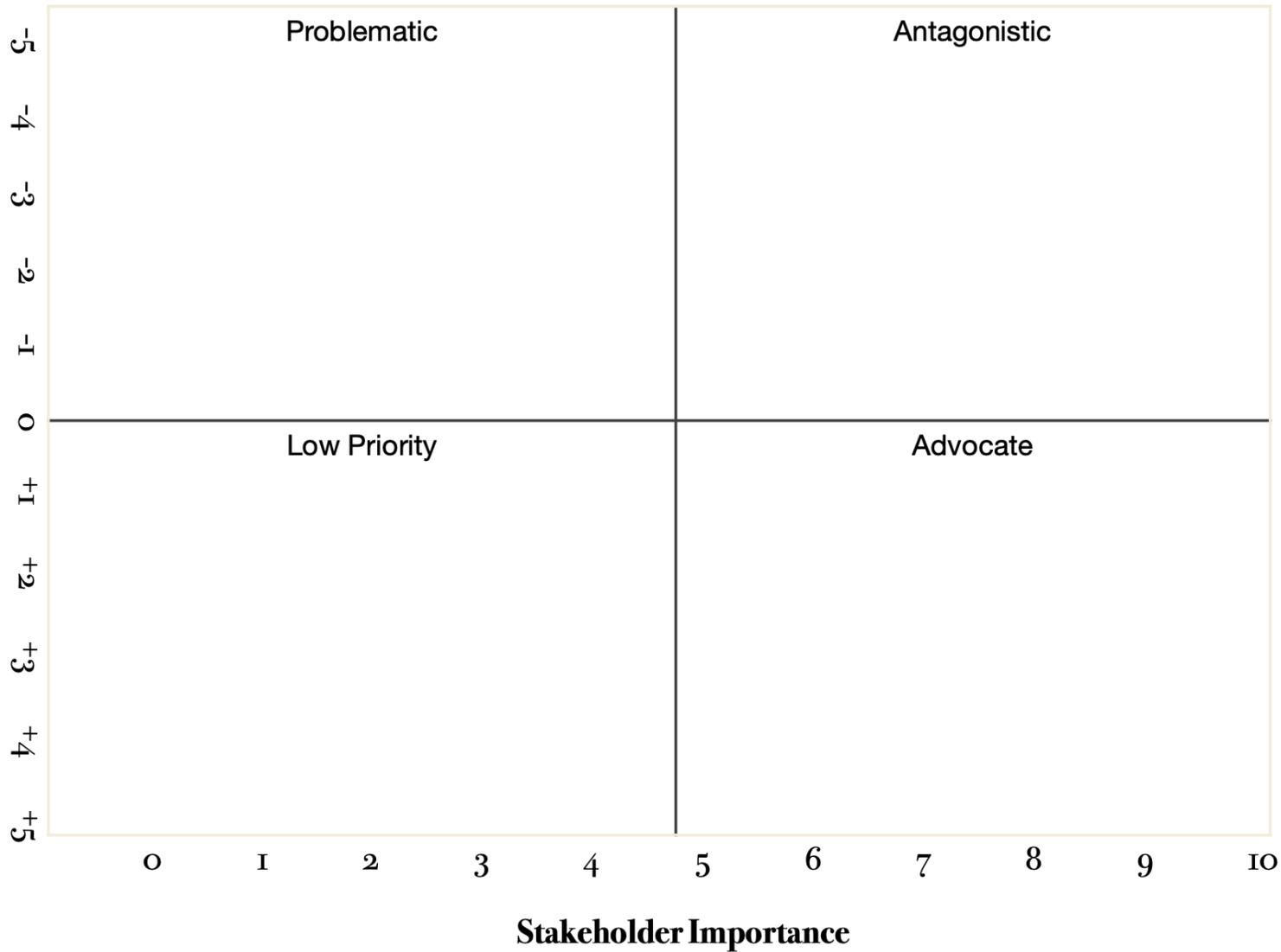
STAKEHOLDER RESOURCES: IDENTIFICATION & ANALYSIS

- A stakeholder is a person, group, or organization that can place a claim on the organization's resources, attention, or output or is affected by that output
- It is important to determine how stakeholders evaluate and influence the organization, what the organization needs from them, and how important they are
- This analysis will also provide information about the political situation facing the organization

- https://docs.google.com/spreadsheets/d/1eLtc0Oj5NB0oa-FbAkN25528DrC9d_1X711ZJNUkrps/edit?usp=sharing

toolbox

Stakeholder position on the issue



STAKEHOLDER RESOURCES: POSITIONING & IMPORTANCE

SURVEY RESOURCES

- ▶ Survey Monkey — <https://www.surveymonkey.com/>
- ▶ Google Forms — <https://www.google.com/forms/about/>
- ▶ Jotform — <https://www.jotform.com/>
- ▶ More secure option:
 - ▶ Typeform — <https://www.typeform.com/>

toolbox

SURVEY QUESTIONS EXAMPLE

- ▶ Example 1: Service Provider Survey
 - ▶ What is the greatest barrier for getting your population housed
 - ▶ How can we amplify your voice?
 - ▶ How can we help share the success of your organization?

toolbox

SURVEY QUESTIONS EXAMPLE

► Example 2

- It's March, 2026 (three years from now). If we have exceeded your expectations, what have we achieved?
- What three critical issues must we make a priority in order to [CORE MISSION OF ORGANIZATION] in our County?
- What deliverables or measures (up to three) should we be accountable for that demonstrates added value in reducing or sustaining [KEY GOAL] in our [TARGET GEOGRAPHY]?

toolbox

INDIVIDUAL INTERVIEW QUESTIONS EXAMPLE

- Interview Questions
 - From your perspective, what do you think are the key strengths of [organization]?
 - From your perspective, what do you think are the real opportunities for [organization]?
 - In what ways might you see strong collaboration between your organization and [organization]?
 - How do you see our organizations continuing to work together or do you see new ways to collaborate?
 - Why?
- Probe/Tips:
 - Say more about that...
 - Can you think of a time when... (storytelling)
 - Feel free to ask for confirmation/validation

toolbox



STEP 2: TAKE STOCK

A: SWOT ANALYSIS (FULL)

B: RESEARCH

C: ENVIRONMENTAL SCAN

D: ORGANIZATIONAL ASSESSMENT

STEP 2A: TAKE STOCK

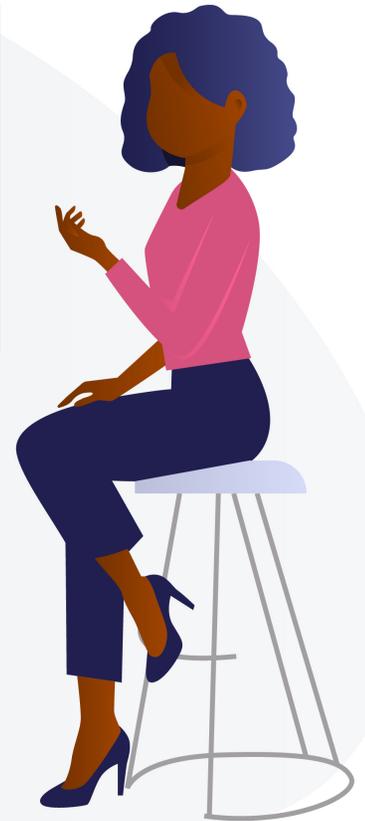


- Visioning
- **Mission** (i.e., what Organization was created to do); **Mandates** (i.e., what Organization is required to do); and **Stakeholders** (i.e., who Organization is expected to do for)
- **Situational (SWOT) Analysis**
 - Strengths & Weaknesses (Internal Assessment)
 - Opportunities & Threats (External Assessment)
- Steps

toolbox SWOT ANALYSIS

*Have you used a SWOT
analysis in your org?*

*If yes, have they been useful
or not useful?*



Start with Vision

**DR. MARTIN LUTHER KING, JR.
DID NOT SAY, "I HAVE A
STRATEGIC PLAN."**

★ SWOT ANALYSIS

- Vision
- History & Present Situation (Situational Analysis)
 - Strengths & Weaknesses
 - Opportunities & Threats
- Steps

Sample Prompts for Vision:

- *If we received an unrestricted grant, what would we do with the resources?*
- *If time or resources were both available what would you envision for the organization?*



If you were trying to get your team to dream big, what prompt would you use?

toolbox

SWOT TECHNIQUES

Facilitator Tools

Strengths

Influence/Reach

PULSE ON WHAT IS GOING ON IN COMMUNITIES - CRIME

ACCESS TO MULTIPLE ECONOMIC INFLUENCERS

ABILITY TO MOBILE PEOPLE IN NEIGHBORHOODS - ACTIVATE A IN THE COMMUNITY

State of the Neigh Address -

Videos - Documentary Film - Doc

Space - C4 & C3

MEN & WOMEN IN PROGRAMMING

CREATING LASTING FAMILIES MODE

CASE MGMT

MENTORING

PLACE OF REFUGE / SAFESPACE



- Round Robin
- Scribe
- Multiple Colors
- Post-It Notes
- Affinity Clustering

In-Person Techniques

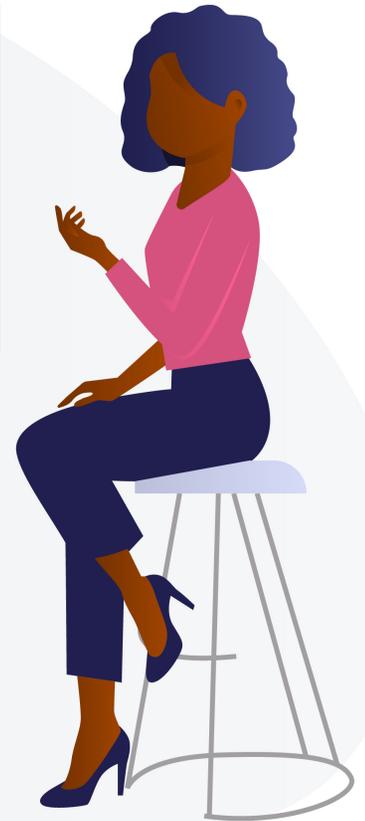


COWS

- Challenges
- Opportunities
- Weaknesses
- Strengths

Recall:
toolbox
**ROSE,
THORN, BUD**

*A technique for identifying
things as positive, negative,
or having potential*



ONLINE TECHNIQUES

- Rose, Thorn, Bud
 - Rose = Positive / Strength
 - Thorn = Negative / Weakness
 - Bud = Opportunity



ROSE, THORN, BUD

➤ Part One: Ideation

- One idea per post-it
- As many ideas as you can think of categorized by post-it color

➤ Part Two: Affinity Clustering

- Look across all the post-its
- What ideas are connected
- Name the connection

Staff Strengths

Leadership

Office Rapport

Productivity

Aminah: Amazing leadership	Aminah: Sketching our personal lives	Amyssa: There is always more to learn and an opportunity	Aminah: Amazing leadership	Clay: Good job of maintaining morale	Aminah: No EEMH hugs	Aminah: No community snack area	Clay: Efficiency opportunities	Clay: 4 day work week = greater productivity	Amyssa: Virtual office delivery opportunities
Clay: We have adjusted!	Clay: Staff buy in	Finding innovative ways to stay connected	Clay: resilience of East End Management	Clay: Change helps create other perspectives on the work we do	Aminah: Seeing how much we truly value each other	Clay: UBUNTU	Amyssa: More like-minded collaborations	Aminah: Rest	Aminah: People are seeing how vital our work is
Clay: We miss the social aspect	Aminah: Not laying eyes on clients	Clay: Good job of maintaining morale	Amyssa: Virtual office delivery opportunities	Aminah: People are seeing how vital our work is	Amyssa: We are staying open!	Amyssa: Opportunity to grow trust within the agency	Opportunity to be less expensive and increase involvement in other areas team contact	Not being able to learn hands on/F2F	Clay: The uncertainty of it all
Clay: New strengths. Sketching.	Opportunity to be interactive and innovative Sketching is better when team connect	Amyssa: Opportunity to grow trust within the agency						Amyssa: ZOOM. Would rather be connecting F2F	Amyssa: We don't know when this is going to end

toolbox

SWOT TECHNIQUES

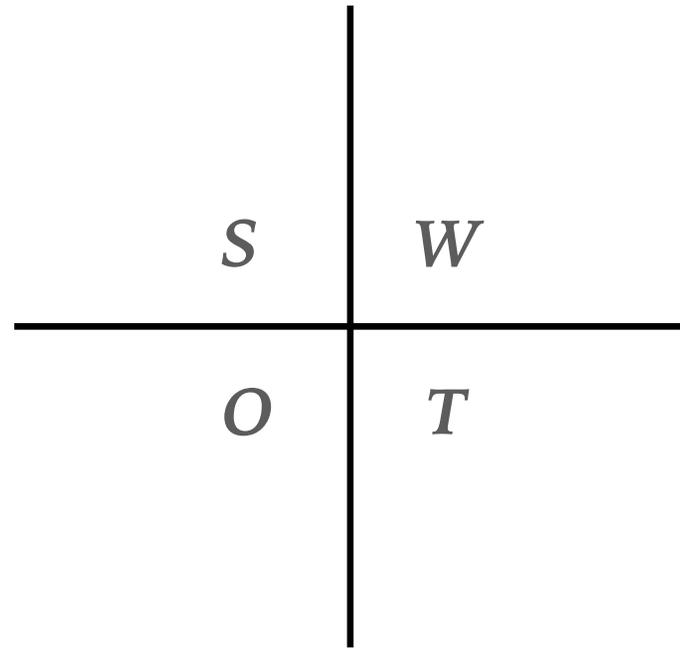
Facilitator Tips

SWOT ANALYSIS WORKSHEET

Organization:				
	<i>Current</i>		<i>Future</i>	
	Strengths	Weaknesses	Opportunities	Threats
External				
Internal				

SWOT ANALYSIS

- ▶ Strengths
- ▶ Weaknesses
- ▶ Opportunities
- ▶ Threats (or Challenges)



STEPS

- Prompt: "What's one thing we can do to get us from where we are (SWOT/Situational Analysis) to our Vision?"

STEPS

1. Reach back and sponsor/mentor; help navigate; personal challenge to help those different than you. **FORMALIZE** → a commitment → obligation
2. People Management - **TOOLBOX**
↳ How to Manage
↳ How to be Managed / "ASK" - proactive manage of own careers
3. Champion initiatives passionate about @ work. **EDUCATE OTHERS/AWARENESS**
4. Peer Support that **BUILDS/LIFTS** storytelling, Real connections; mental health protocols - regular visits w/ therapists
NO STIGMA around the therapy
5. **BUILD CULTURAL SENSITIVITY INTO TRAINING PROGRAMS - MUST BE MEASURED & EVALUATED**. Gender/AGE/GENERATION/CULTURE/COMPANY/CULTURE/CLASS/GEODGRAPHY
6. Identify the overlap of work/passions. Find opportunities to use skills have to give back. Authentic way to build brand.

~ FINANCE ~

- LEADER IN PRE-K EDUCATION
- FUNDRAISING STRATEGY FOR CHILDREN UNDER AGE 5 (5)
- HIRE A DEVELOPMENT PERSON/STAFF & BUILD A DEVELOPMENT STRATEGY (4)
- ADDITIONAL FUNDRAISING
- ENDOWMENT
- SCHOLARSHIP FUND (FOR HIGH SCHOOL) (PARTNERSHIP W/ H.S.)
- FRIENDS OF STONEBROOK MONTESSORI
- DEVELOPMENT OF A SUSTAINABLE BUDGET (1)

~ Performance ~

- RECRUIT KNOWLEDGEABLE PERSON FOR COMMITTEE (3)
 - ↳ REPORTING / REQUIREMENTS
 - ↳ PRE SCHOOL
 - ↳ CHARTER SCHOOL
- 1-YEAR STRATEGY FOR BUILDING COMPETENCY (A)
 - Reading List
 - Conference Attendance
 - KEY MEETINGS
- WRAP-AROUND SERVICES MODEL (b)
- CHALLENGE SPONSOR FRAMEWORK (1)
 - ↳ CREATE A REASONABLE FRAMEWORK
 - ↳ CONVERSATIONS W/ CMSD
 - ↳ BUILD INTO "BEST PRACTICES"
 - ↳ RATIONALE / EVIDENCE
- ANNUAL REVIEW / SUPPORT OF PRINCIPAL PROFESSIONAL DEVELOPMENT - BUILD (3)
- AFTER CARE / AFTER SCHOOL PROGRAMMING (2)
- SUMMER PROGRAMMING

~ COMMUNITY OUTREACH ~

- Spreadsheet - IDENTIFY POSSIBLE PARTNERS. Understand connections for Multiple Categories; Asset Map; Hospital System (Infant Program & other programs on the Books) Health (Needs for children under 3)
- (2)
- Parent Engagement Strategy - BUILD A PARENT ORGANIZATION - BUILD A COMPETENT ORGANIZATION; FUN (Multiple Entry Points; Parent Defined engagement & Participation)
- MICHAEL R. WHITE - BUILD CONNECTION, THE WAY FORWARD
- COMMUNITY OUTREACH & ENGAGEMENT
- SEEK OUT CHAMPIONS
- MUTUAL BENEFIT - EXPLORE
- Community SPACE - USE POLICY (3)
- MARKETING - PLAN, STRATEGY → KNOW ABOUT S.M. / COMMUNICATIONS PLAN (4)
- STONEBROOK MONTESSORI - RESOURCE FOR PARENTS (3)

- Prioritize using the Nominal Group Technique (NGT)
 - "dot-mocracy"
 - Can also use a Poll or Survey

- Expand collaboratives for other communities, Latinx, Asian publishers
- Collabs in every area/region/state working together
- Embrace and develop the overlap relationships with other media associations
- Establish a "prospect" program for college graduates, to help encourage people to work in the media business

Consulting Services

- Shared sales resources/CRO as consultants or sales teams
- More glass house projects for other problems in the industry not just around technology
- Staff consulting specialists dedicated to media types and pillars
- On demand business analysis and consulting resources for LS
- More focus on local B2B publishers
- Expand leadership training programs for women and BIPOC
- Leadership / Exec Coaching as On Demand Service
- User acquisition competency training/ consulting
- Offer fundraising or grant writing consulting to news orgs
- Startup Hub

Diversity

- Improved diversity in the media tech space
- Bringing YOUNGER people into the business.
- A mentorship program with POC that helps create more POC Executives
- Paid intern program partnerships with HBCU Journalism programs

Funding

- More funding and support for LGBTQ+ publishers
- Experiential learning opportunities like Innovation Missions
- Funding to create research platform/incubator leveraging member subscriber data
- Scaling the Lab for Journalism Funding to many more companies
- Blank check for emerging journalist development programs
- \$25 million local journalism fund for reporting projects
- Innovation endowments
- Technology grants for more media companies
- Funding for investigative reporting centers in every area
- Free resources for all local media

Innovation

- Fund Digital-First News Incubator
- Playbooks for new business models
- Innovation funds direct from the LM org
- Restart innovation missions

Leadership

- Media operations company for the industry

- Help journalists be better people managers/leaders
- Expansion of women leadership programs in the industry to include executive/business management track
- Ongoing Leadership Training & support for our managers
- How do we create the next generation of leaders supporting local media?
- Leadership development

Marketing

- Need market level and deeper communication with media outlets
- Redefine "legacy" as a good thing/advantage for publishers.
- Bringing in/listening to voices of publishers underserved by our industry.
- Aggressive marketing of our purpose, mission and pillars
- Be first org local media think of for growing revenue and sophistication
- Benchmarking for the industry, by publisher type/size

Outreach / Engagement

- More work with/outreach to journalism schools, communications schools, etc.
- Increased/ engaged radio media company membership.
- Determine roles & engagement opportunities for "the next leadership" within local media companies.
- Develop a vision for where the audience is going/will be in the next 3-5-10 years.

Programming / Programming Growth

- Structure and opportunities that support intrapreneurs (within "legacy" organizations) — especially the innovators who aren't in executive positions
- Climate reporters in all 260 markets
- Fighting media disinformation
- Bring back Innovation Missions
- Ability to support more collabs
- Continued focus on and development of BCP.
- Scalable video resources for newspapers
- Strategic Planning Support
- Intensive revenue model building for members
- More support services offeror for members like what we are doing with BloomLab
- Advisors for core and new business models
- Yes: Revive Innovation Missions
- Create Innovation Mission 2.0 (but only 1 per year)
- Solve the data challenges all media organizations face
- Media Matchmaker Platform
- Advertisers & Media Sources
- More broadcast specific programs like a Producer Training effort
- LMA would facilitate using media as a teaching tool
- Alt-weekly
- inclusion

- Create more opportunities for TV/radio members
- If we're still about ALL local media, we need more programs that resonate with radio groups or any legacy selling digital.
- A program like RFA but for the business side of the industry
- Fund programs to study the future of advertising across the board
- Host Table Stakes Cohort (KF Funded)
- Run an even bigger reader revenue Accelerator
- Ethnic Media Resource Center

BloomLab

- Innovative support for collaborations (More of Bloom Lab)
- More labs like BloomLab - Hispanic, independent
- BLOOM x 1000

Journalism

- Climate reporter in all 260 markets
- Fund for journalism projects (we become the funder)
- Diverse Journalist Fellowships
- Journalism literacy and quality for local media

Shared Resources

- Content licensing/ sharing models across media companies & mediums
- More opportunities to share content across media companies
- More embedded resources working with more local media companies
- Infrastructure overhaul for small local media outlets
- Talent acquisition tools for all publishers
- Leverage multiple members for better terms from R&D partners
- Legal support for members when they have questions

Staffing / Build Staff

- Support staff to help grantees implement...
- Staff culture-building retreats
- Expand programs to allow more companies to participate
- Funding to pay for the staff long term
- More tools to tell the LMA story, what we offer
- Increase Staff
- Core content and marketing resources -- more messaging and better engagement.
- Full time HR person
- More staffing for LMA
- Double down on all four pillars. They're well aimed but need more resources.
- Staff and structure according to fully support the pillars indepdently.
- More consulting type hires (like BloomLab team) - more handholding
- Add Development Officer - dedicated to FUNdraise
- Be the leading hub for recruitment and retention of employees to the industry

- Online Technique
- Heat Map

LEGEND

- Fire Idea... lets Advance this work
- Caution... lets hold off on this idea (out of scope)
- Partnership Opportunity

SOAR ANALYSIS

- **Strengths**—What makes us proud?
- **Opportunities**—How do we make sense of the opportunities in our environment?
- **Aspirations**—What do we care deeply about?
- **Results**—How do we know we are succeeding?

toolbox

- SOAR Is about...
 - Action
 - Strength based
 - Be the best (good to great)
 - Innovation
 - Engagement
 - Planning-implementation
 - Results
 - Plants seeds vs. pulling weeds
 - Achieving the good vs. avoiding error

STEP 2B: TAKE STOCK

➤ Research

- To be effective in their work, nonprofit organizations must demonstrate impact both qualitatively (through stories) and quantitatively (through numbers).
- Nonprofit organizations often secure and retain funding and support using anecdotal stories and images, but this qualitative information must also be grounded quantitatively.
- The research component of the strategic planning process is critical because it identifies evidence-based solutions that will enable the organization to thrive.

Oakland city, California

People and Population

Race and Ethnicity

Health

Education

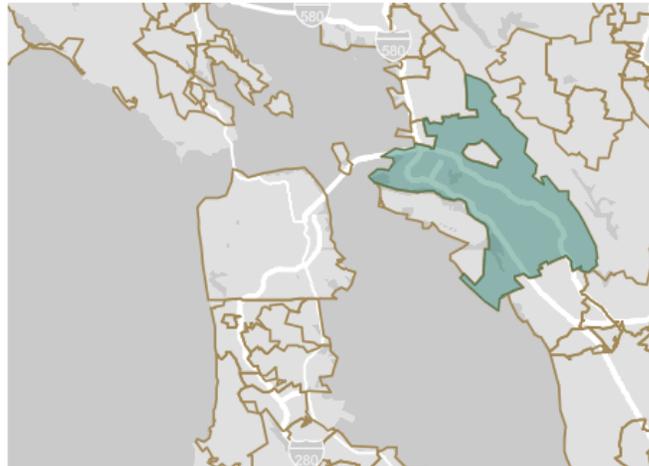
Business and Economy

Employment

Income and Poverty

Oakland city, California

Place in California



Oakland city, California is a city, town, place equivalent (CDP), or township located in California. Oakland city, California has a total area of 55.9 square miles.



POPULATION
421,042



MEDIAN HOUSEHOLD INCOME
\$68,442



POVERTY RATE
17.6%



EMPLOYMENT RATE
63.8%

Recall...
toolbox

RESEARCH RESOURCES

Recall... *toolbox*

► Federal Resources

- Census data — data.census.gov
- Bureau of Labor Statistics — <https://www.bls.gov>

► Think Tanks & Forums

- Aspen Institute — <https://www.aspeninstitute.org>
 - Entrepreneurship — <https://www.aspeninstitute.org/tag/entrepreneurship/>
 - Micro-enterprises — <https://www.aspeninstitute.org/programs/field/>
- Policy Link — <http://www.policylink.org>
- Brookings — <http://www.brookings.edu>
- Urban Institute — <http://www.urban.org>
- MDRC — <http://www.mdrc.org>
- Bridgespan — <https://www.bridgespan.org/>
- Milken Institute — <http://www.milkeninstitute.org>
- Policy Bridge — <http://www.policy-bridge.org>

► Foundation Sponsored

- Annie E. Casey Foundation — <http://www.aecf.org>
- Rockefeller Foundation — <http://www.rockefellerfoundation.org>
- Robert Wood Johnson — <http://rwjf.org>
- Kauffman Foundation — <http://www.kauffman.org>

► University Sponsored

- Harvard University — <http://www.jchs.harvard.edu/research/publications>
- University of Michigan — <http://www.npc.umich.edu>
- University of Michigan — <https://www.icpsr.umich.edu/icpsrweb/ICPSR/access/subject.jsp>

► Management Consulting Firms

- McKinsey & Company — <https://www.mckinsey.com/>
- IBM — <https://www.research.ibm.com/>
- A.T. Kearney — <https://www. Kearney.com/>
- KPMG — <https://www.kpmg.us/insights.html>

MANAGEMENT CONSULTING RESEARCH

- ▶ McKinsey & Company — <https://www.mckinsey.com/>
- ▶ IBM — <https://www.research.ibm.com/>
- ▶ A.T. Kearney — <https://www.kearney.com/>
- ▶ KPMG — <https://www.kpmg.us/insights.html>
- ▶ esri — <https://www.esri.com/en-us/arcgis/products/tapestry-segmentation/overview>

toolbox

STEP 2C: TAKE STOCK

- Market Assessment (Environmental Scan)
 - Identify and assess changes in the needs and perceptions of the organization's market and constituents:
 - Who are the organization constituents/stakeholders?
 - What are the needs, perceptions and service expectations of the constituents/stakeholders?
 - What are the emerging market trends?
 - What are the implications?
 - How to effectively respond to changes and discover opportunities?
- **PEST analysis**—Political, economic, social, and technological

POLITICAL

ECONOMIC

SOCIAL

TECHNOLOGICAL

PEST ANALYSIS

- Political Factors (e.g., political stability, support)
- Economic Factors (e.g., economic issues, unemployment)
- Social Factors (e.g., demographics, culture, education)
- Technological Factors (e.g., access to technology)

toolbox

STEP 2D: TAKE STOCK

- Organizational Assessment
 - Operations
 - Staff Development & Volunteer Management
 - Program Planning
 - Marketing, Messaging & Communications
 - Outreach & Engagement
 - Financial Management & Budgeting
 - Resource Development & Fund Raising



*Where is your internal
pain point?*



STEP 3: DEVELOP A STRATEGY

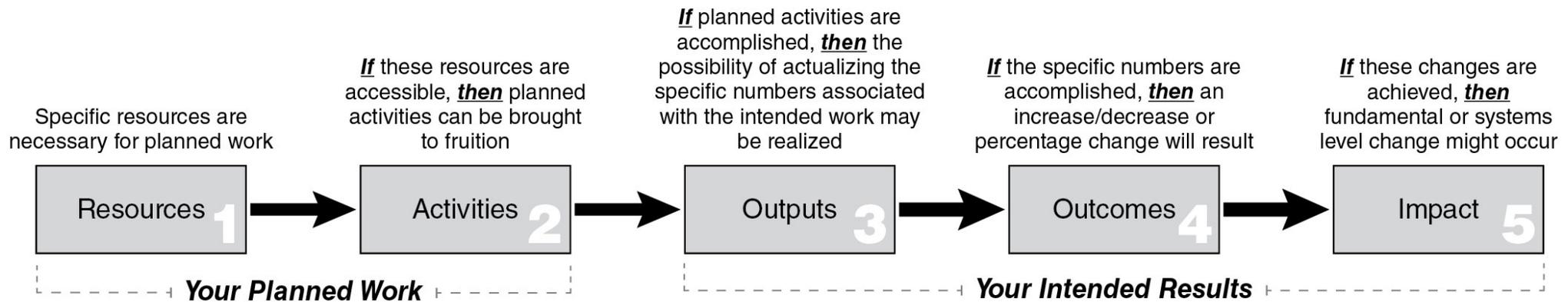
STEP 3: DEVELOP STRATEGY

- ▶ Information gathered (e.g., research, SWOT analysis, focus group meetings, assessments) will be utilized to develop the logic model or work plan
 - ▶ With the logic model in place, designing a sustainable system is possible
 - ▶ Organization can identify what resources and support are needed, and the **logic model** can serve as a guide for prioritizing and organizing investment, and for promoting comprehensive, integrated, and collaborative strategic implementation to align stakeholders on objectives and impact
 - ▶ Organizations can also decide if a **work plan** is more useful for implementation

toolbox
LOGIC
MODELS



LOGIC MODEL



WHAT IS A LOGIC MODEL?

- A visual representation of a pathway
- A diagram that specifies the steps from having a vision to long-term outcomes
- A model that links the building blocks of a process from start to finish
- An action tool to support program design, implementation and evaluation

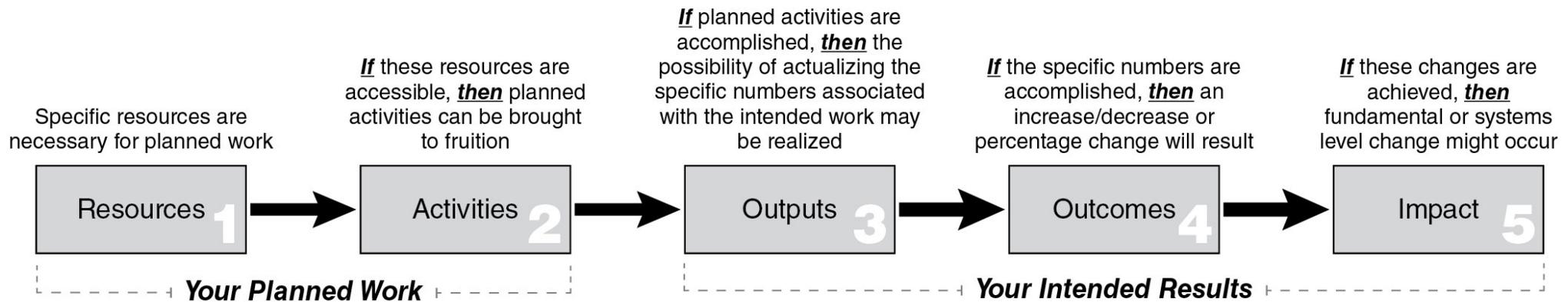
WHY USE A LOGIC MODEL?

- To think through and communicate the objectives and strategies
- To consider the sequence and logic of a process
- To clarify assumptions
- To consider needed resources
- To align vision and objectives to reality

LOGIC MODELS ALIGN WITH STRATEGIC PLANNING

- Prioritizes and organizes strategic investments
- Avoids strategic mistakes
- Promotes comprehensive, integrated, collaborative strategic implementation
- Gets stakeholders on the same page about objectives, strategy and priorities
- Creates a guide for ongoing course correction

LOGIC MODEL



Resources	Activities	Outputs	Outcomes	Impact
<p>Residents</p> <p>Community Organizer</p> <p>Volunteers</p> <p>Supplies</p> <p>Community Center / Zoom Account</p>	<p>Organize block clubs</p> <p>Community meetings</p>	<p>6 block clubs created</p> <p>12 community meetings</p>	<p>Increase civic engagement</p> <p>Increase awareness about activities in the community</p> <p>Build neighborhood connections</p> <p>Increase awareness and engagement of citywide activities and resources</p>	<p>Thriving community residents engaged in community building</p>

OUTPUTS | OUTCOMES | IMPACT

- Outputs
 - the direct products of your activities
 - “units” of activity
- Outcomes
 - the changes observed in your targets
 - what is different due to the activity?
 - can be measured in % change
- Impact
 - fundamental results

SPECIFIC USES



- ▶ for planning
- ▶ to maximize resource use
- ▶ to engage community/stakeholder input
- ▶ for external communication
- ▶ for evaluation
- ▶ to raise funds

RESOURCES

Carol Boddy
Myron Bennett
Councilman
Residents
CHI Resident
Leadership
Neighborhood
Leadership Institute
Fundors
Advisory Council
Members
Churches
Businesses
Block Clubs
Community Based
Organizations
Consultants

ACTIVITIES

Develop communication ideas that emerged from the community meeting

Gain input and support from key stakeholders around sustainable marketing strategies

Review and revise current logo, marketing materials

Align marketing material with future direction of the CHI initiative

Identify communication consultant and resident to partner

OUTPUTS

3 stakeholder meetings to develop logo, and marketing materials appeal to the broader community in particular, persons under 40

Develop short and long-term messages that provide CHI and resident leadership clear consistent messaging to improve community relations

Develop communication, branding and marketing committee targeting young adults and youth

OUTCOMES

Variety of marketing materials developed that appeals to the different age demographics in the community and reflects CHI, inclusive of H.E.A.L.

Residents understand importance of the CHI

Develop consistent messaging to improve engagement from broader community

Increase youth voice and engagement with opportunities that promotes H.E.A.L. and other

IMPACT

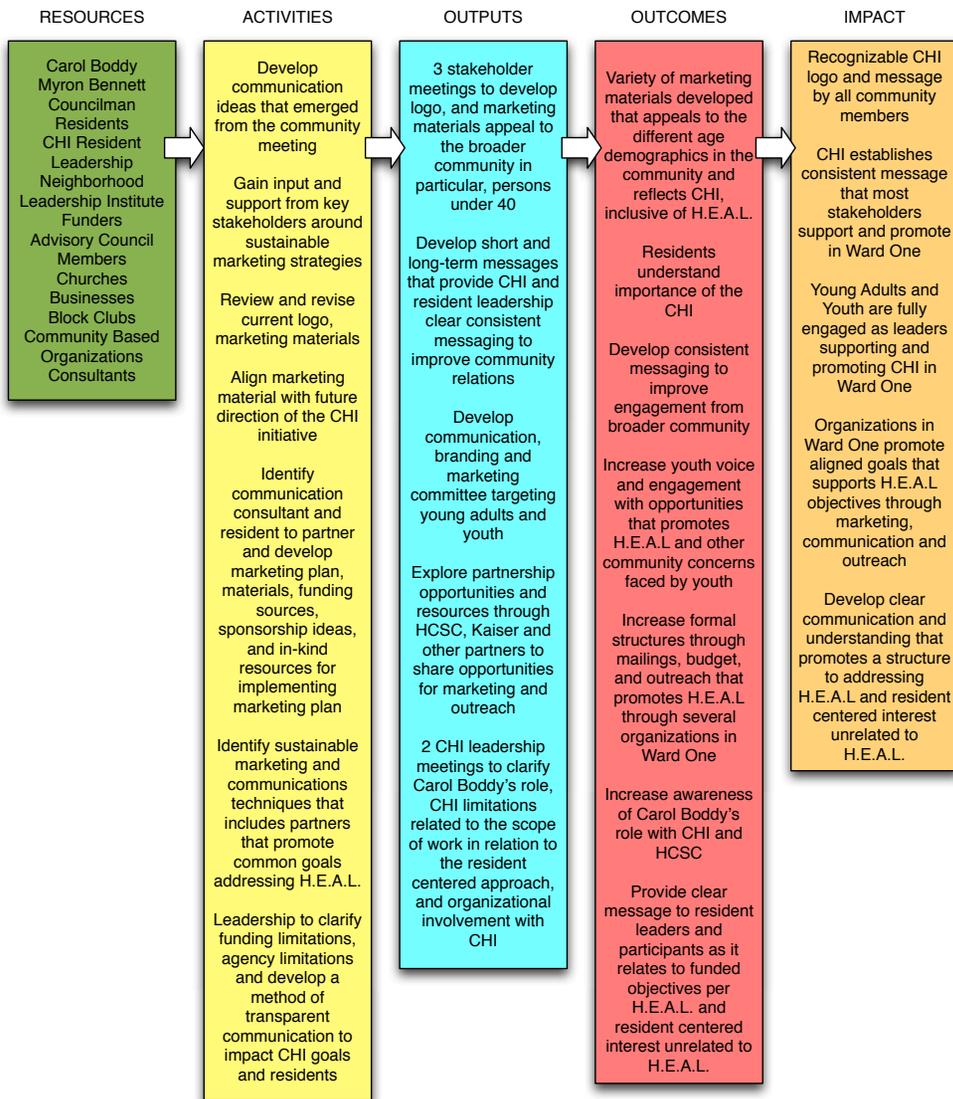
Recognizable CHI logo and message by all community members

CHI establishes consistent message that most stakeholders support and promote in Ward One

Young Adults and Youth are fully engaged as leaders supporting and promoting CHI in Ward One

Organizations in Ward One promote aligned goals that supports H.E.A.L objectives through marketing, communication, and

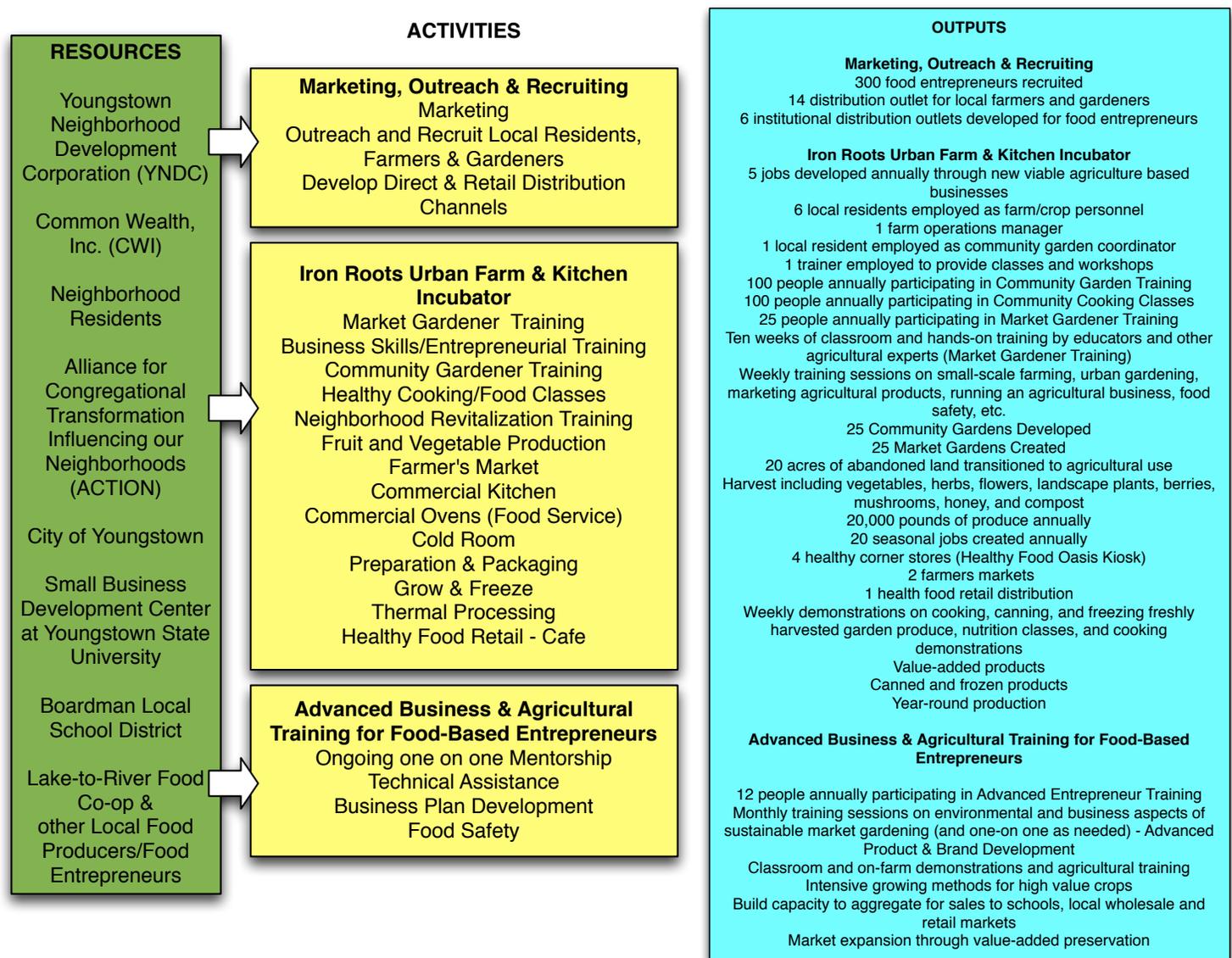
*Community
Health
Initiative
(CHI)*



Develop a Communication and Marketing Plan

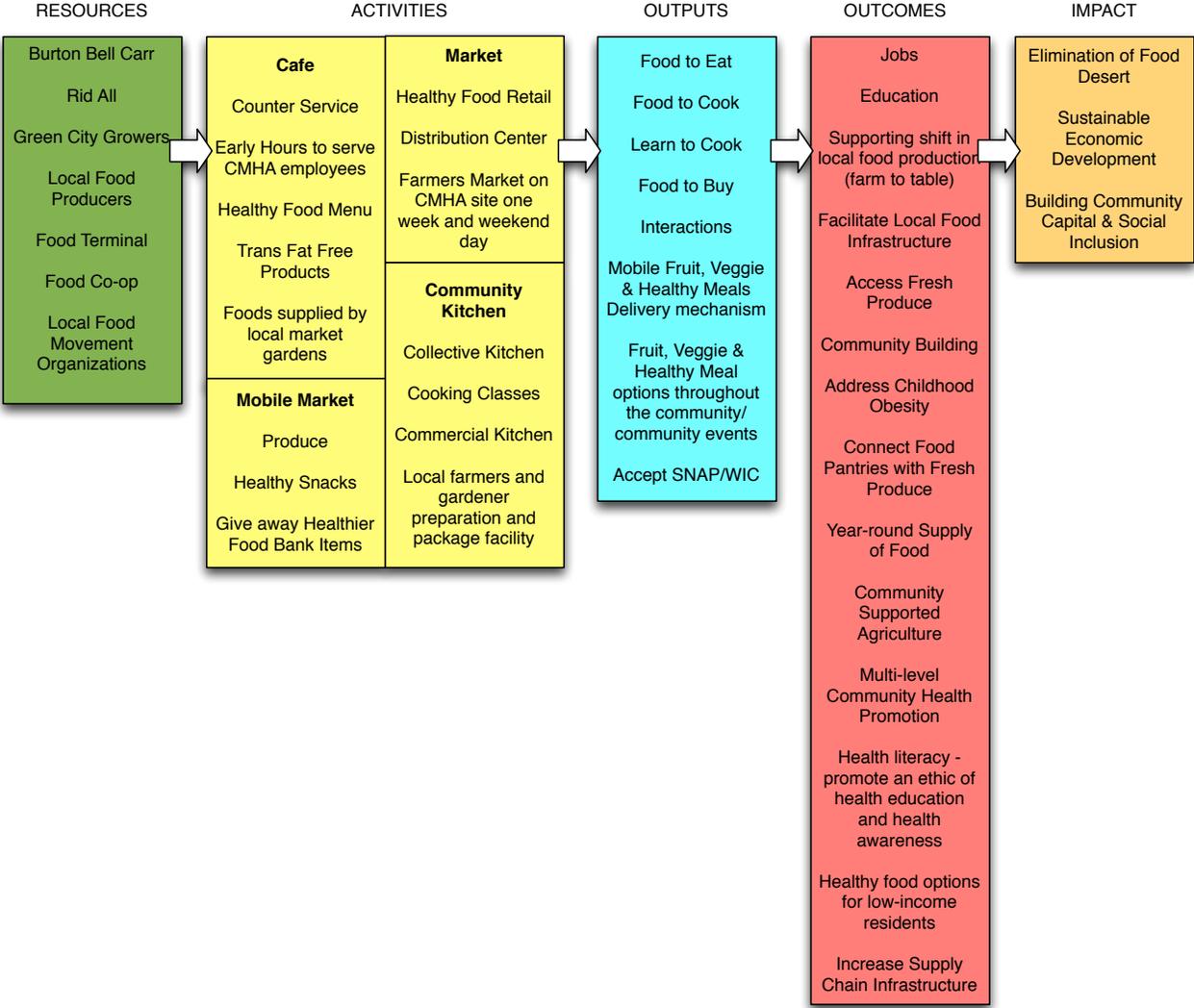
Marketing & Communications Plan	Timing	Start	End
Develop communication ideas that emerged from the community meetings	1 to 3 months	April 2011	Ongoing
Gain input and support from key stakeholders around sustainable marketing strategies.	3 months	April 2011	July 2011
Review and revise current logo, marketing materials	3 months	May 2011	August 2011
Align marketing material with future direction of CHI	3 months	May 2011	August 2011
Identify communication consultant and resident to partner and develop marketing plan, materials, funding sources, sponsorship ideas, and in-kind resources for implementing marketing plan	9 months	March 2011	January 2012
Identify sustainable marketing and communications techniques that includes partners that promote common goals addressing H.E.A.L.	3 months	April 2011	Ongoing
Leadership to clarify funding limitations, agency limitations and develop a method of transparent communication to impact CHI goals and residents.	3 months	March 2011	June 2011

Urban Farm & Kitchen Incubator



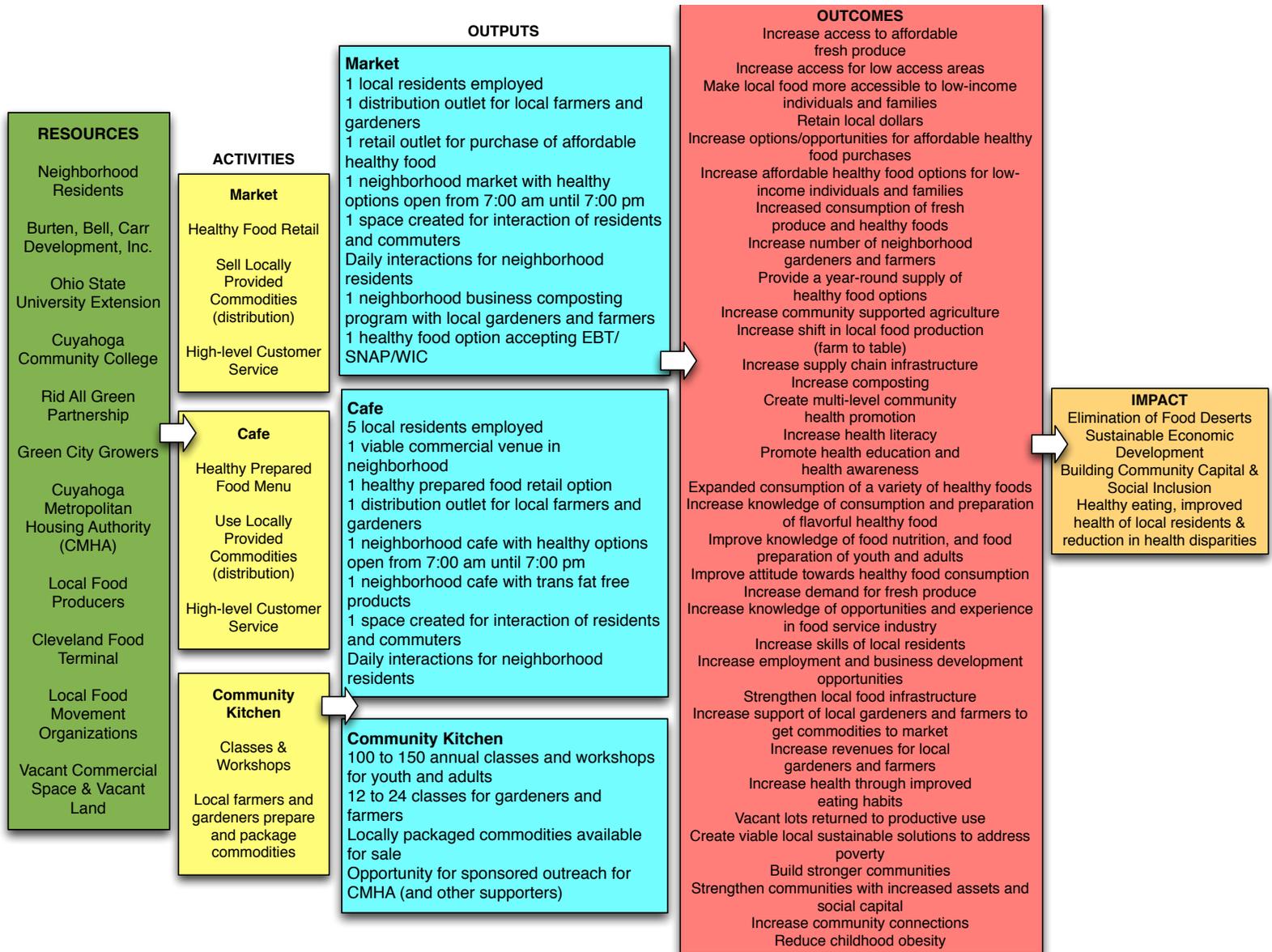
Bridgeport MC2 (Market, Cafe & Community Kitchen)

More than Access: A Comprehensive Intervention Designed to Create Sustainable Employment and Business Opportunities, Improve Access to Healthy Affordable Foods, and Promote Education to Eliminate Local Food Deserts, Build Food Security, and Develop Vibrant Communities of Opportunity



Urban Cafe & Community Kitchen

Urban Cafe & Community Kitchen



FRESH FOOD
& NUTRITION
EDUCATION
are cropping up in the
KINSMAN
NEIGHBORHOOD

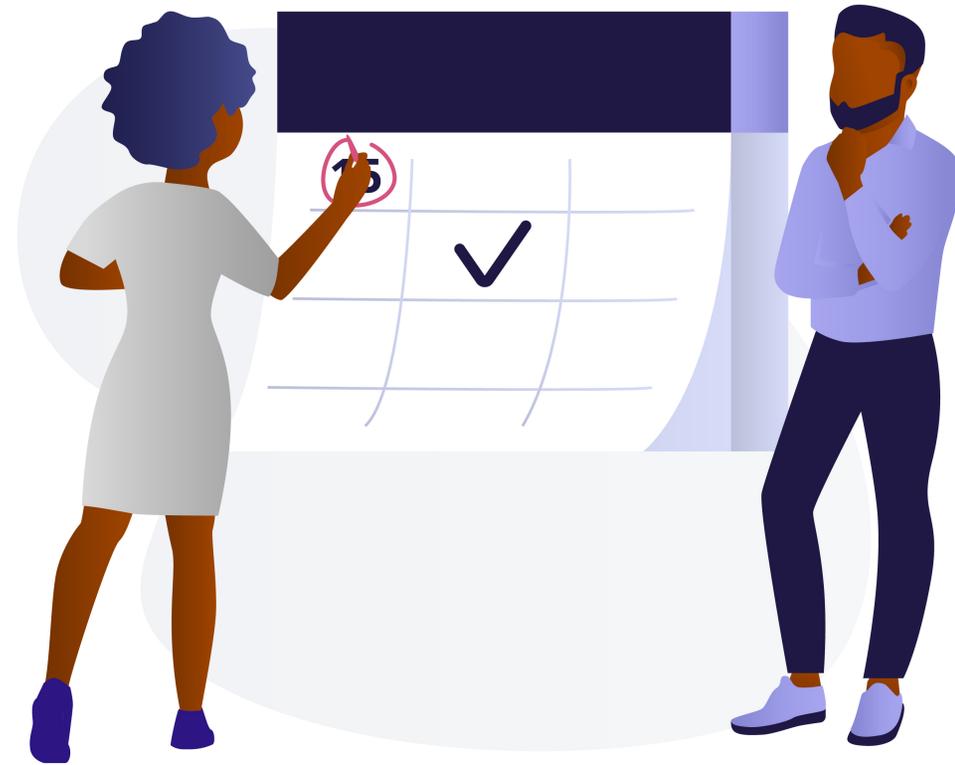


Urban Café &
Community Kitchen
Awarded: \$760,000



QUICK CHECK

https://www.surveymonkey.com/r/Logic_Model





STEP 4: DRAFT & REFINED STRATEGIC PLAN

STEP 4: DRAFT & REFINE STRATEGIC PLAN

- ▶ Iterative Process



STEP 5: IMPLEMENT THE STRATEGIC PLAN & MONITOR PERFORMANCE

STEP 5: IMPLEMENT THE STRATEGIC PLAN & MONITOR PERFORMANCE

- ▶ Strategic Plan will include implementation plan outlining action steps (tasks linked to individuals with specific dates and deliverables)
- ▶ SMART Goals / Objectives are key

EXAMPLE: STRATEGIC PLAN

toolbox



2011 Strategic Plan



WARD 1 Community Health Initiative

February 2011

"Make resources accessible and available in the community to educate ourselves, because when we know better we do better."

Ward 1 Resident, Community Meeting



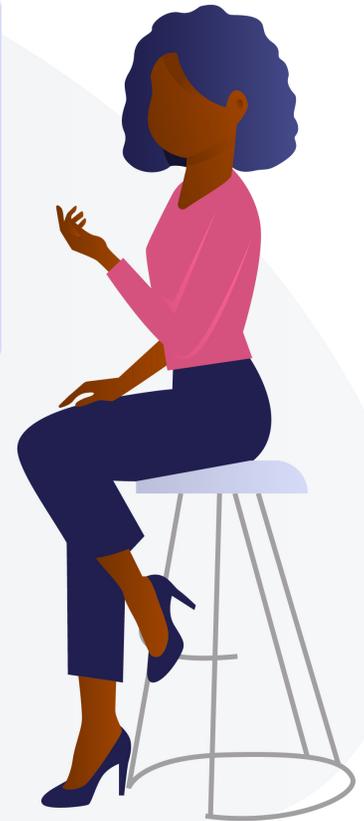
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EXAMPLE

toolbox

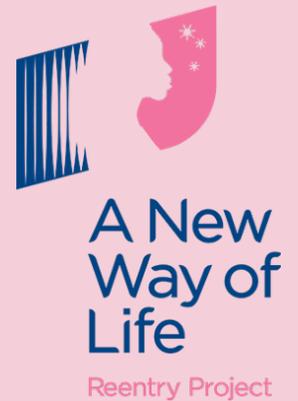
**EXAMPLE:
STRATEGIC PLAN
+
IMPLEMENTATION
PLAN**



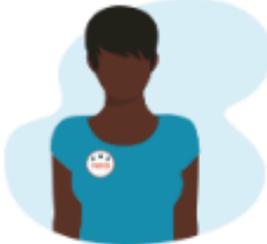
2022 - 2025 STRATEGY MAP

Vision	We envision a world where everyone is valued and systems of oppression are eliminated.			
Mission	Empower communities with opportunity where justice impacted women heal, excel, and lead while disrupting systems of oppression and harm.			
Themes				
	Reintegration Housing and supportive services for community reentry, family reunification, and individual healing.	Civil Rights & Dignity Dignity, civil rights, and human rights defended and restored.	Social Change & Transformation Empowered, organized, and mobilized as advocates for social change and personal transformation.	Job Placement, Training & Entrepreneurship Champion education, training, and entrepreneurship.
Primary ANWOL Department Support	Housing & Stability	Legal	Advocacy	Workforce
	Board of Directors Executive Leadership Communications Development & Fundraising Administration Human Resources Finance			
Internal Goal Summary	Board Leadership Mission Ambassadors Fundraising National Presence Executive Leadership Organizational Capacity Fundraising Real Estate Portfolio Entrepreneurship National Recognition: SAFE Housing Network	Development & Fundraising Annual Growth of Fundraising Sustained Growth Fiscal Health Special Initiatives Funding National Funders Endowment Build Development Department Fundraising Technology (scheduling, tracking, donors, development goals) Policies & Procedures	Communications Media Plan Tell Stories (storytelling, blogs, photo, and video) Communications submission infrastructure Photo Library Living Library Organizational Communications Structure Professional Development Internal Communications Plan	Administration Internal Systems CRM Platform
	Housing & Stability Housing & Support for Residents Case Management Immersive Support Intake Assessments Workforce Development Training	Legal Walk-in clinics at DOORS CRDF in-jail clinic Child welfare tip emergency response phone line Partnership with research / statistics entity (e.g., Pritzker, Center on Strengthening Families) Serve DCFS with public records request Lectures, training, workshops, and awareness raising events	Advocacy Active Listening & Safe Spaces Issue Identification, Education & Training Organizing Advocacy & Action Internal Development	Workforce Special Projects: Entrepreneurship Series & Bus Operator Training Business Development & Partnerships: Temp Agencies Delivery Services Large Employers & Employment Areas Clothing Providers College/University Direct Services
Values	Building Community, Motivating & Centering ALL Women			
				
	Valuing Every person has inherent value and hold the power of possibility and transformation within them	Investing Public resources are better invested in opportunities for transformation than on prisons and punishment	Leading Formerly incarcerated people must be at the forefront in creating solutions to the incarceration crisis	Healing Incarceration of a family member affects the entire family and the healing process must involve the entire family

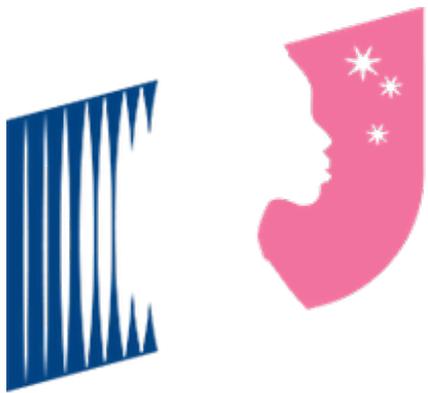
Strategy Map



2022 - 2025 STRATEGY MAP

Vision	We envision a world where everyone is valued and systems of oppression are eliminated.			
Mission	Empower communities with opportunity where justice impacted women heal, excel, and lead while disrupting systems of oppression and harm.			
Themes	 <p align="center">Reintegration</p>	 <p align="center">Civil Rights & Dignity</p>	 <p align="center">Social Change & Transformation</p>	 <p align="center">Job Placement, Training & Entrepreneurship</p>
	Housing and supportive services for community reentry, family reunification, and individual healing.	Dignity, civil rights, and human rights defended and restored.	Empowered, organized, and mobilized as advocates for social change and personal transformation.	Champion education, training, and entrepreneurship.
Primary ANWOL Department Support	Housing & Stability	Legal	Advocacy	Workforce
	Board of Directors Executive Leadership Communications Development & Fundraising Administration Human Resources Finance			
Internal Goal Summary	Board Leadership Mission Ambassadors Fundraising National Presence Executive Leadership Organizational Capacity Fundraising Real Estate Portfolio Entrepreneurship National Recognition: SAFE Housing Network	Development & Fundraising Annual Growth of Fundraising Sustained Growth Fiscal Health Special Initiatives Funding National Funders Endowment Build Development Department Fundraising Technology (scheduling, tracking, donors, development goals) Policies & Procedures	Communications Media Plan Tell Stories (storytelling, blogs, photo, and video) Communications submission infrastructure Photo Library Living Library Organizational Communications Structure Professional Development Internal Communications Plan	Administration Internal Systems CRM Platform

Internal Goal Summary	<p>Board Leadership Mission Ambassadors Fundraising National Presence</p> <p>Executive Leadership Organizational Capacity Fundraising Real Estate Portfolio Entrepreneurship National Recognition: SAFE Housing Network</p>	<p>Development & Fundraising Annual Growth of Fundraising Sustained Growth Fiscal Health Special Initiatives Funding National Funders Endowment Build Development Department Fundraising Technology (scheduling, tracking, donors, development goals) Policies & Procedures</p>	<p>Communications Media Plan Tell Stories (storytelling, blogs, photo, and video) Communications submission infrastructure Photo Library Living Library Organizational Communications Structure Professional Development Internal Communications Plan</p>	<p>Administration Internal Systems CRM Platform</p>
	<p>Housing & Stability Housing & Support for Residents Case Management Immersive Support Intake Assessments Workforce Development Training</p>	<p>Legal Walk-in clinics at DOORS CRDF in-jail clinic Child welfare tip emergency response phone line Partnership with research / statistics entity (e.g., Pritzker, Center on Strengthening Families) Serve DCFS with public records request Lectures, training, workshops, and awareness raising events</p>	<p>Advocacy Active Listening & Safe Spaces Issue Identification, Education & Training Organizing Advocacy & Action Internal Development</p>	<p>Workforce Special Projects: Entrepreneurship Series & Bus Operator Training Business Development & Partnerships: Temp Agencies Delivery Services Large Employers & Employment Areas Clothing Providers College/University Direct Services</p>
Values	Building Community, Motivating & Centering ALL Women			
	 <p style="text-align: center;">Valuing</p>	 <p style="text-align: center;">Investing</p>	 <p style="text-align: center;">Leading</p>	 <p style="text-align: center;">Healing</p>
	Every person has inherent value and hold the power of possibility and transformation within them	Public resources are better invested in opportunities for transformation than on prisons and punishment	Formerly incarcerated people must be at the forefront in creating solutions to the incarceration crisis	Incarceration of a family member affects the entire family and the healing process must involve the entire family



A New
Way of
Life

Reentry Project

Implementation Plan

	A	B	C	D	E	F	G	
1	2022 - 2025 STRATEGY MAP							
2	Vision	We envision a world where everyone is valued and systems of oppression are eliminated.						
3	Mission	Empower communities with opportunity where justice impacted women heal, excel, and lead while disrupting systems of oppression and harm.						
4	Themes							
5		Reintegration	Civil Rights & Dignity	Social Change & Transformation	Job Placement, Training & Entrepreneurship			
		Housing and supportive services for community reentry, family reunification, and individual healing.	Dignity, civil rights, and human rights defended and restored.	Empowered, organized, and mobilized as advocates for social change and personal transformation.	Champion education, training, and entrepreneurship.			
6	Primary ANWOL Department Support	Housing & Stability	Legal	Advocacy	Workforce			
7		Board of Directors Executive Leadership Communications Development & Fundraising Administration Human Resources Finance						
8	Internal Goal Summary	Board Leadership Mission Ambassadors Fundraising National Presence Executive Leadership Organizational Capacity Fundraising Real Estate Portfolio Entrepreneurship National Recognition: SAFE Housing Network	Development & Fundraising Annual Growth of Fundraising Sustained Growth Fiscal Health Special Initiatives Funding National Funders Endowment Build Development Department Fundraising Technology (scheduling, tracking, donors, development goals) Policies & Procedures	Communications Media Plan Tell Stories (storytelling, blogs, photo, and video) Communications submission infrastructure Photo Library Living Library Organizational Communications Structure Professional Development Internal Communications Plan	Administration Internal Systems CRM Platform			

Active Strategy Document

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	YEAR 1: 2022			Who	When	Status	Notes							
2	A. Special Projects													
3		1	Continue CDRF			In progress	Project has been project to contunue for another year							
4		2	Entrepreneurship Classes Curriculum Development (6-course series)			In progress	Found a course that was offered via monica motivates - Nike partnership							
5		3	Continue with relationship Metro (Bus Operator Training)				Working toward starting a conversation for the new year - delayed due to staffing on Metros end							
6		4	Develop financial literacy course			In progress	developing with pacific premier bank							
7	B. Business Development													
8		1	Build Partnerships with 1-2 Temporary Agencies			50%	Contacts were made and one relationship was developed with Chrysalis							
9		2	Build Partnerships with 1 -2 Delivery Services for Supplementary Income			In progress	working with pepsi co to devleop partnership and training similar to metro program							
10		3	Build Partnership with 1-2 Large Employers			In progress	working with pepsi co to devleop partnership and trainign similar to metro program							
11		4	Build Partnership with Metro to access 1-2 additional employment areas for FIP placement											
12		5	Build Partnerships with 1 -2 clothing providers/retail (Macy's, Goodwill...)			Need	reached out to st vincent goodwill for employment - need to make a touch point for clothign purposes							
13														
14	C. Direct Work													
15		1	Job Readiness Workshops (4 to 6)				Need to revisit this idea based on need							
16		2	Business Clothing (gender-affirming) for community and women (100 served)			Need								
17		3	Resume building (for residents and non-residents) 100			In progress					75%			
18		4	Job Search support (for residents and non-residents) 100				Continuted supp an ongoing duty							
19		5	Case Management (for residents and non-residents) 100				Continuted supp an ongoing duty							
20		6	Education-based support (for residents and non-residents) 50				Continuted supp an ongoing duty							
21		7	4 to 5 Partnerships with community-based organizations			In progress					75%			
22														
23	E. Needs													
24		1	Additional Staff (in progress) to achieve Business Development Goals			Complete	hired new staff (Natasha)							
25		2	Funding/Staff/Consultant for Entrepreneurship Curriculum			Complete	Monica Motivates							

**Example:
Workforce**

toolbox
**SMART &
SMARTIE
OBJECTIVES**



DEFINING SMART OBJECTIVES

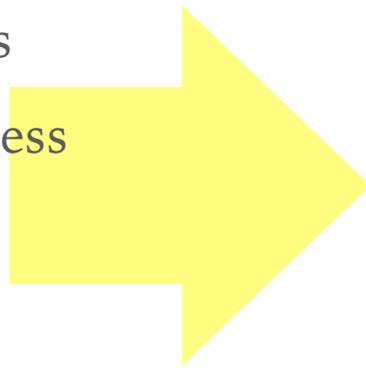
- Specific
- Measurable
- Achievable (though ambitious, and agreed upon)
- Relevant
- Time-bound

SMART AND NOT-SO-SMART OBJECTIVES



➤ Poorly-Written Objective

- To eliminate highway deaths
- To improve healthy food access
- To provide faster service
- Housing for senior citizens



➤ SMART Objectives

- To reduce by 5% the highway accident rate in FY24
- To develop 12 community gardens by Summer 2024
- To reduce waiting time by 15% in one year
- To build 25 units of affordable rental housing for senior citizens in FY24.



DEVELOP A SMART OBJECTIVE

GOALS SHOULD SPECIFY CLEAR, PURPOSEFUL OUTCOMES



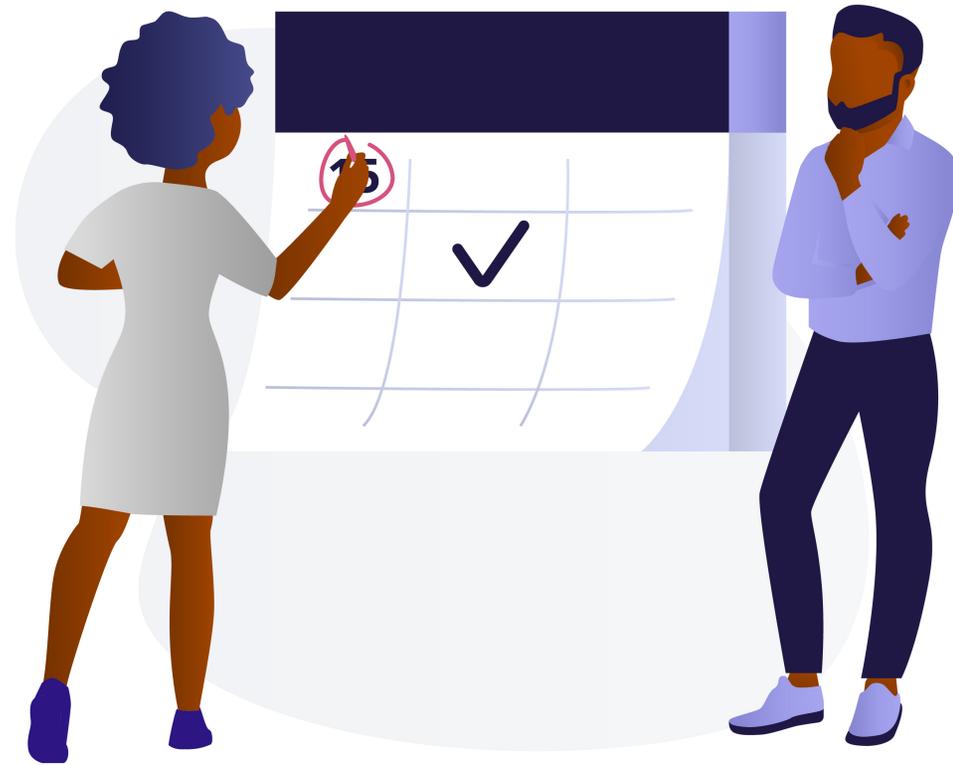
DEFINING SMARTIE OBJECTIVES

- Specific
- Measurable
- Achievable (though ambitious, and agreed upon)
- Relevant
- Time-bound
- **Inclusion**
- **Equity**

From SMART...	... to SMARTIE
Build a volunteer team of 100 door-to-door canvassers by May...	...with at least 10 people of color recruited as volunteer leaders first, so that they can help shape the way we run the canvasses.
Run a successful annual conference with 20% more attendance...	...and people of color making up at least 50% of the panelists.
Expand youth mentorship program into three new counties by the end of June...	...with volunteer task forces that are representative of the community (by age, gender, race, and other characteristics) advising the expansion.
Redesign community grant program by the end of June...	...to prioritize organizations that center inclusion and equity in their work.

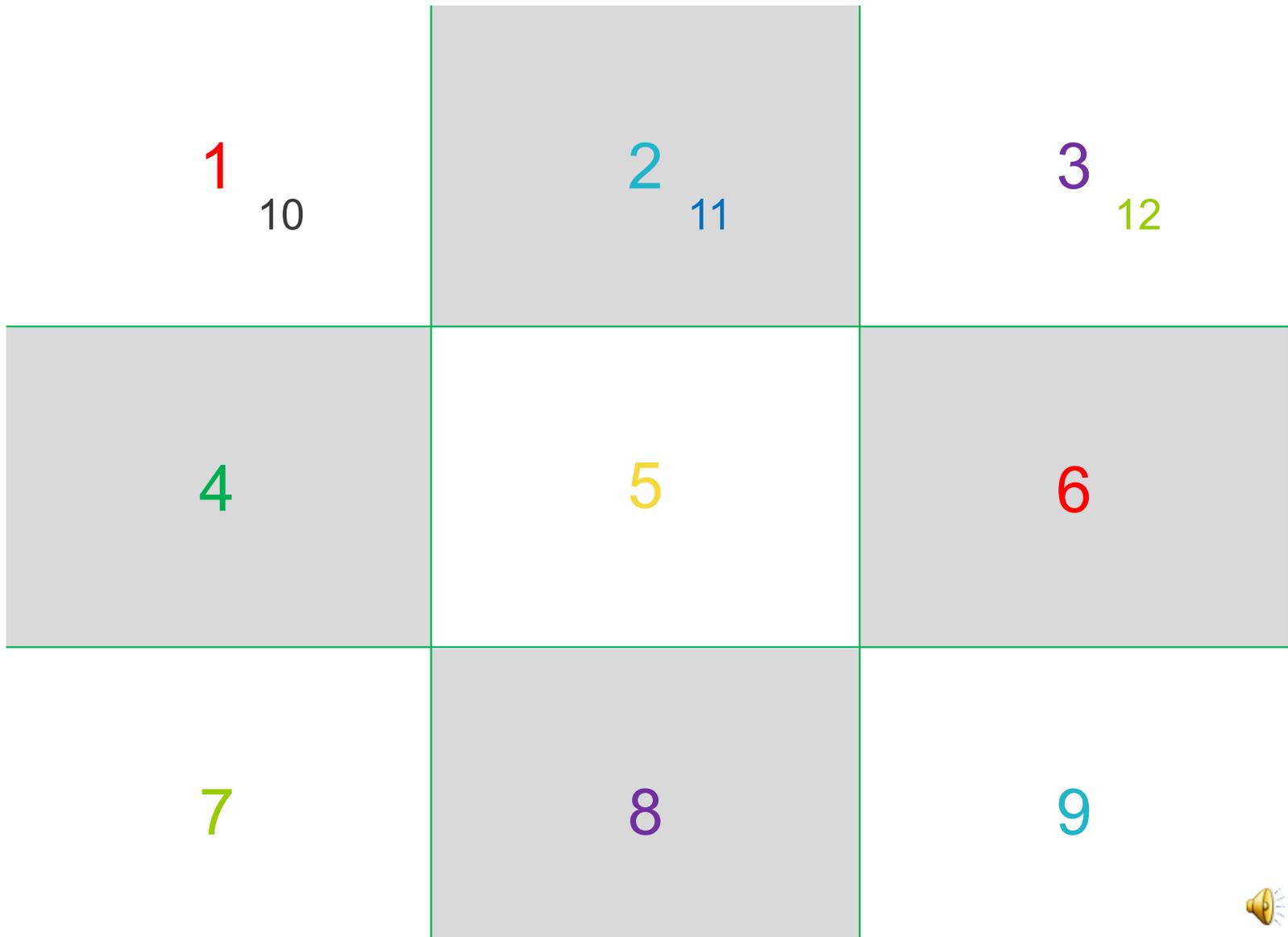
<https://www.idealists.org/en/careers/better-than-smart-smartie-goals>

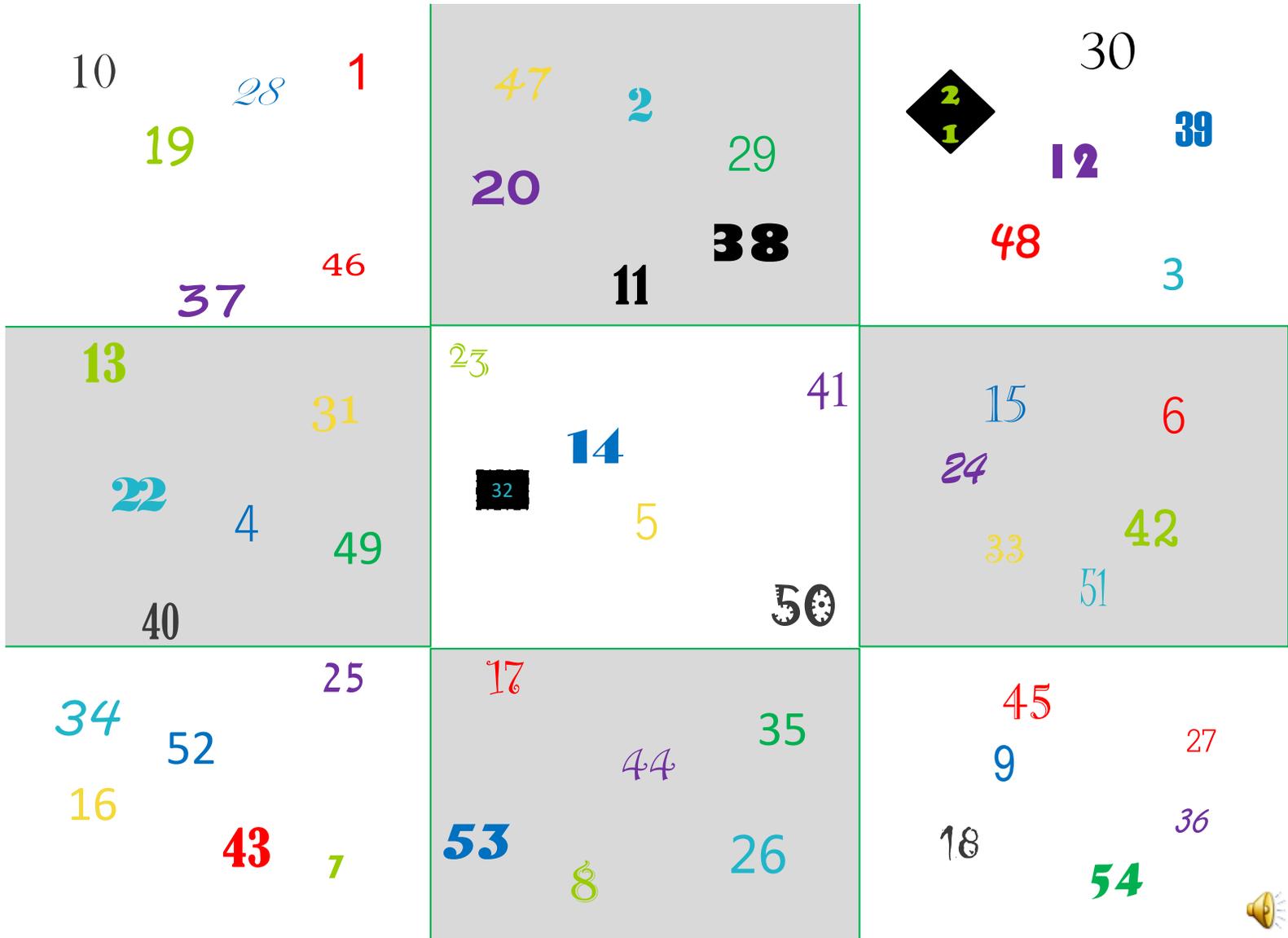
QUESTIONS?



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19 20 29 21 39
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40 50
34 25 17 35 45 27
52 44 9 36
16 43 7 53 26 18 54
8







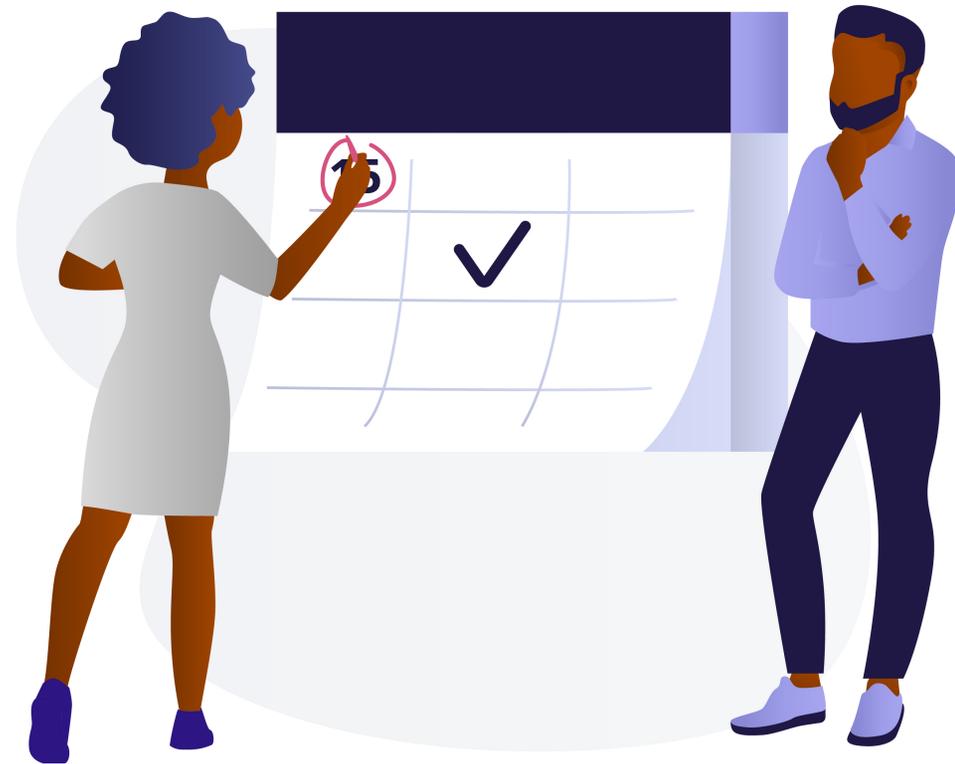


ACTION STEPS:

TO DO NEXT 3 DAYS

TO DO NEXT 3 WEEKS

TO DO NEXT 3 MONTHS





Thank You!



Dr. Jennifer R. Madden
jmadden@Lpointdevelopment.com

www.LeveragePointDevelopment.com
twitter: @ideas2fruition
#BuildBetterCollaborations



Dean, School of Business
& Professor of Management
Linfield University