



4



STRATEGIC PLANNING TOOLKIT

Dr. Jennifer R. Madden

THE RESEARCH SUGGESTS



1. Grant Writing FUNdamentals (7/24/24)

2. Grant Writing Toolkit (7/30/24)

3. Strategic Planning FUNdamentals (10/24/24)

next steps on the
JOURNEY

5. Organizational Goal Setting (2/6/25)

6. Planning your Work, Working your Plan (2/20/25)



*Strategic
Planning Toolkit
(TODAY!)*

AGENDA: STRATEGIC PLANNING TOOLKIT

- A. SWOT Analysis
- B. Mural Board
- C. SMART Objectives & SMARTIE Objectives
 - ▶ Specific
 - ▶ Measurable
 - ▶ Achievable
 - ▶ Relevant
 - ▶ Time-bound
 - ▶ Inclusion
 - ▶ Equity
- D. PEST Analysis
- E. “To-Go” Toolbox
 - ▶ Strategy Map
 - ▶ Implementation Plan
 - ▶ SOAR Analysis

*Core Concept &
Toolbox Icon*



Chat Storm





A SWOT ANALYSIS

Fundamental Building Block

“You can only be distinctive in your areas of strength.”

~ Dr. Madden



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

*How 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 were to receive an investment from the Sierra Health Foundation, 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?



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 Hazle

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

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

Aminah: Amazing leadership	Aminah: Sketching our personal lives	Amyesa: There are lots more resources & learning opportunities available
Clay: We have adjusted!	Clay: Staff buy in	Finding innovative ways to stay connected
Clay: We miss the social aspect	Aminah: Not laying eyes on clients	Clay: Good job of maintaining morale
Clay: New strengths. Sketching.	Opportunity to be introspective and innovative. Sketching is what we've been trained	Amyesa: Opportunity to grow trust within the agency

Leadership

Aminah: Amazing leadership	Clay: Good job of maintaining morale
Clay: resilience of East End Management	Clay: Change helps create other perspectives on the work we do
Amyesa: There are lots more operational opportunities	Aminah: People are seeing how vital our work is

Office Rapport

Aminah: No EEMH hugs	Aminah: No community snack area
Aminah: Seeing how much we truly value each other	Clay: UBUNTU
Amyesa: We are staying open!	Amyesa: Opportunity to grow trust within the agency

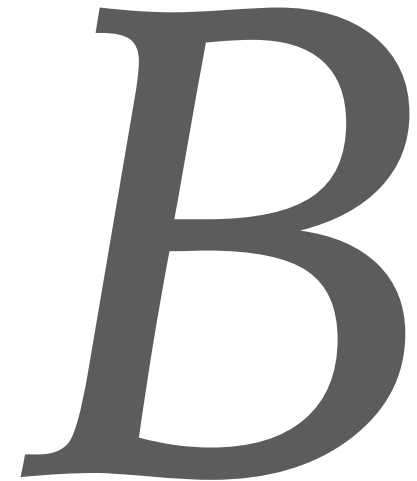
Productivity

Clay: Efficiency opportunities	Clay: 4 day work week = greater productivity	Amyesa: There are lots more operational opportunities
Amyesa: More like-minded collaborations	Aminah: Rest	Aminah: People are seeing how vital our work is
Opportunity to be introspective and innovative. Sketching is what we've been trained	Not being able to learn hands on/F2F	Clay: The uncertainty of it all
	Amyesa: ZOOM. Would rather be connecting F2F	Amyesa: We don't know when this is going to end

MURAL



- Practice Board
- <https://app.mural.co/t/sass4098407/m/sass4098407/1729813548958/6847e0920317c33c33f962469dee894864c3efb5?sender=ubc39c30ef00bed36831b3485>
- Mural — <https://www.mural.co/>
- Digital White Board
- Collaborative work space
- Mural YouTube Tutorials — <https://www.youtube.com/channel/UCUcf9nFefdwgOoKMQ6qiHeA>



ONLINE TECHNIQUES

- Rose, Thorn, Bud
 - Rose = Positive / Strength
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Practice — Complete Vision & RTB
“EYC Training & Coaching”

<https://app.mural.co/t/sass4098407/m/sass4098407/1729813906121/142bc6b0c221785465dfa4aae88f88516aed243b?sender=ubc39c30ef00bed36831b3485>





SWOT TECHNIQUES

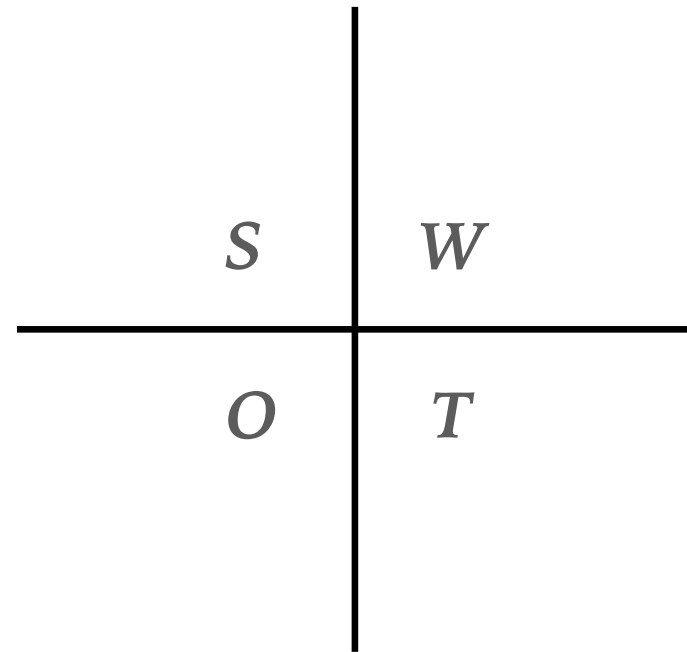
Facilitator Tips

SWOT ANALYSIS WORKSHEET

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

SWOT ANALYSIS

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



★ SWOT ANALYSIS

✓ Vision

✓ History & Present Situation
(Situational Analysis)

➤ Strengths & Weaknesses

➤ Opportunities & Threats

➤ Steps

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/GEOGRAPHY
 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 (4)
 - Reading List
 - Conference Attendance
 - KEY MEETINGS
- WRAP-AROUND SERVICES MODEL (6)
- CHALLENGE SPONSOR FRAMEWORK
 - ↳ CREATE A REASONABLE FRAMEWORK
 - ↳ CONVERSATIONS W/ CMSD (1)
 - ↳ BUILD INTO "BEST PRACTICES"
 - ↳ RATIONALE / EVIDENCE (3)
- ANNUAL REVIEW / SUPPORT OF PRINCIPAL PROFESSIONAL DEVELOPMENT - BUILD (STAFF) (3)
- AFTER CARE / AFTER SCHOOL PROGRAMMING (2)
- SUMMER PROGRAMMING (2)

~ 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 - PARENT ORGANIZATION - BUILD A COMPETENT ORGANIZATION; FUN (Multiple Entry Points; Parent Defined engagement & Participation) (6)
- 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 on this Idea... lets hold off on this idea (out of scope)
- Partnership Opportunity



QUESTIONS?



C

SMART & SMARTIE OBJECTIVES

DEFINING SMART OBJECTIVES

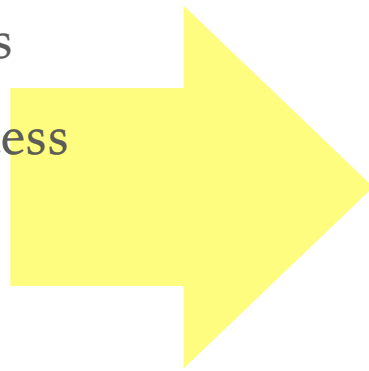
- Specific
- Measurable
- Achievable (though ambitious, and agreed upon)
- Relevant
- Time-bound

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 FY25
- To develop 12 community gardens by Summer 2025
- To reduce waiting time by 15% in one year
- To build 25 units of affordable rental housing for senior citizens in FY25



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>



D PEST ANALYSIS

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)



Also...

PESTEL ANALYSIS

★ *Complete a PESTLE
Analysis on EYC work*

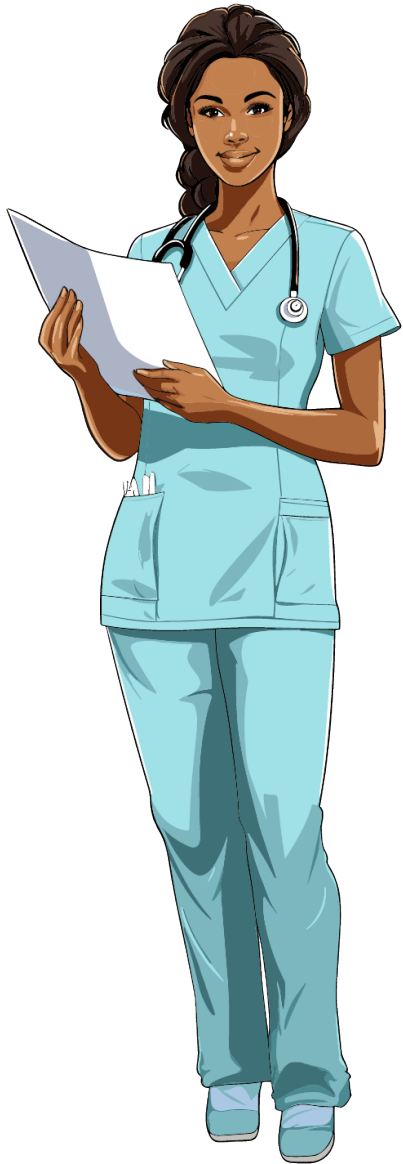
Includes Environmental & Legal Factors

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sass4098407/1729814524280/30adae4b324e175417c087659b
71546453112f23?sender=ubc39c30ef00bed36831b3485](https://app.mural.co/t/sass4098407/m/sass4098407/1729814524280/30adae4b324e175417c087659b71546453112f23?sender=ubc39c30ef00bed36831b3485)

toolkit



QUESTIONS?



ACTION STEPS:
TO DO NEXT 3 DAYS
TO DO NEXT 3 WEEKS
TO DO NEXT 3 MONTHS

E toolbox *to-go*









RESOURCE BUNDLE

- Strategy Map
- Implementation Plan
- SOAR Analysis

EXAMPLE: STRATEGY MAP + 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	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.
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	Investing	Leading	Healing
	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

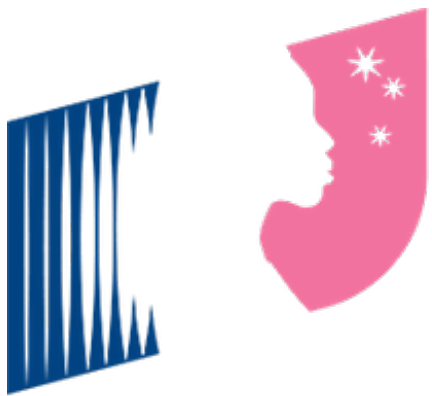
Strategy Map



2022 - 2025 STRATEGY MAP

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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>
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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>
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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.			
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Active Strategy Document

	A	B	C	D	E	F	G	H
1	YEAR 1: 2022				Who	When	Status	Notes
2	A. Active Listening & Safe Spaces							
3	1	WOJO Cohort 20 to 25 participants			Stephanie		Ongoing	Team will assist with application process and outreach under the direction of Susan, Michael, and Pamela
4		Ways to outreach						
5		1.1	Email and Social Media		Team	January -March	Ongoing	Outreach times subject to change
6		1.2	Listserve		Team	January -March	Ongoing	Outreach times subject to change
7		1.3	Women and Children Recovery Homes		Team	January -March	Ongoing	Outreach times sunbject to change
8		1.4	Houses and Events		Team	January -March	Ongoing	Outreach times subject to change
9	2	All of Us or None (Monthly)			Stephanie	Monthly	Ongoing	
10		Ways we can recruit			Team	Monthly	Ongoing	
11		2.1	Recruit 5-7 people every month		Team	Monthly	Ongoing	
12		2.2	Reach out to organizations with impacted individuals		Team			
13	3	Surveys (quarterly)						
14		3.1	Membership Surveys to collect data on members info and needs		Team/Comms	Quarterly	Ongoing	
15		3.2	Family Reunification, Housing, Reentry support		Team/Comms	Quarterly	Ongoing	
16								
17	B. Issue Identification, Education & Training							
18	1	Identify one (1) campaign to advance						
19		1.1	Family Reunification		Team/Legal	2022-2023	Ongoing	Advocay will team with the legal and potential partners under advisement of Susan, Michael, and Pamela
20		1.2	Stop The Clock Campaign		Team/Legal	2022-2023	Ongoing	
21	2	Create 3 to 4 training and educational modules to deliver at different organizations/agencies (Advocacy, Knowing your Rights (family reunification), Re-entry, History)			Team/Communications			
22		2.1	Quarterly Training Support Group for impacted families.		Team	2022-2023	Ongoing	Outreach and create partnerships that are resourceful to the parents. Parenting classes, therapy, social biography
23		2.2	Know Your Right- housing, family reunification and voting		Team	2022-2023	Ongoing	Trainings for members and community to be educated
24			Training and educational module presentations at five (5)					

**Example:
Advocacy**

	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**

SOAR ANALYSIS



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?

- 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



Next in the Capacity Building Training Series

10:00 AM to 11:30 AM

Thursday, February 6, 2025 — Organizational Goal Setting

Thursday, February 20, 2025 — Planning your Work, Working your Plan



Thank You!
Dr. Jennifer R. Madden

