

# Northeast Iowa Community Action Corporation

Strategic Plan Overview

# PERSPECTIVE



**CHANGES EVERYTHING.**

**WIPFLI**

## Executive Summary

Wipfli LLP (“Wipfli”) was engaged to assist Northeast Iowa Community Action Corporation (NEICAC) in designing and delivering an inclusive strategic planning process, resulting in a Strategic Plan (“the Plan”), to help direct Board, leadership, and staff activities. In the initial phases of the process, Wipfli worked with NEICAC’s leadership to identify stakeholders to involve in the process and to plan for a successful process overall. The identification of stakeholders led to the completion of an environmental scan, which was used to inform the design of the Strategic Plan.

An Assessment Summary was circulated to Strategic Planning Committee members in advance of the strategic planning sessions. This document included analysis of stakeholder interview and staff/board and stakeholder survey results that would be integrated into the perspectives of those in attendance of the sessions.

During the Strategic Planning sessions, Wipfli assisted NEICAC Strategic Planning Workshop participants in exploring the ongoing relevance of their Mission and Vision statements, assessing Strengths, Weaknesses, Opportunities and Threats (SWOT) of NEICAC and discussing underlying contradictions that may hinder the achievement of goals. These collaborative exercises resulted in the identification of innovative, substantial actions that can help move NEICAC toward achieving its vision for the future.

Strategic Priorities and actionable goal statements were developed, and Priority Teams will work together throughout the duration of the strategic plan to achieve these goals. Leadership will regularly report to stakeholders on the progress and impact of these goals. The final versions of the Strategic Priorities can be found below.

### **Strategic Priorities**

**Branding**

**Partnerships**

**Funding**

**Service Delivery**

**Technology**

**Culture**

## Process

Strategic planning is not merely an event — rather it is a process. The process engaged NEICAC’s team in an exploration of questions about the competitive position of the organization and the organization’s vision for the future. Wipfli’s approach to partnering with NEICAC in strategic planning involved five steps, with homework between the steps to get additional feedback and perspective from stakeholders. The steps and timeline were:

STEP	DESCRIPTION	TIMELINE
<b>Step 1</b>	Readiness & Planning	September-October 2021
<b>Step 2</b>	Insight Gathering & Stakeholder Engagement	October-November 2021
<b>Step 3</b>	Workshop Planning & Facilitation	November 2021
<b>Step 4</b>	Strategic Action Planning	November 2021-April 2022
<b>Step 5</b>	Implementation & Accountability	April 2022 +

## **Assessment**

### **Data Review**

Wipfli conducted a review of the current landscape, known as an environmental scan, assesses the organization from several perspectives. Wipfli consultants reviewed the following data sources including:

- 48 desirable stakeholder surveys
- 74 board and staff surveys
- 9 critical stakeholder interviews/focus groups
- 37 NEICAC provided data documents including strategic plan, performance indicators, program assessments, monitoring reports, needs survey data, and organizational documents

### **Agency Changes Identified**

Inconsistent funding; increasing changes to programs; leadership and staff changes; wider scope of needs; challenging the status quo; pandemic response; better promotion of the agency

### **Future Trends**

Increasing reliance on technology; continual changes to the workforce; need for unrestricted funding; continuing impacts from Covid-19 on health and program delivery; value of time

**Underlying  
Blockers to  
Continued  
Success**

**Internal/External Communications, Marketing and  
Branding**

**Client, Societal, and Cultural Influences**

**Staffing**

**Program Data, Accountability, and ROMA**

**Service and Program Delivery**

**Restrictive Nature of Programming**

**Limitations of Technology**

## **Strategic Priorities**

Establishing priorities and goals can look very different depending on a multitude of factors including culture, values, and definitions of success. Because of this complexity, setting goals is one of the more challenging tasks that leaders face. There are short- and long-term goals, plus overall organizational business objectives to keep in mind. Goals must be relevant and timely to motivate employees and best serve the interests of the clients served. Generally, goals need to be specific, measurable, achievable, relevant, and timely or S.M.A.R.T.

The NEICAC team considered the question of what innovative and substantial actions would move the organization forward toward fulfillment of a meaningful and effective strategic plan. In small teams, brainstorming ideas that could reduce or eliminate the underlying issues included previously.

The following chart exhibits the culmination of individual think time, small group discussion and, ultimately, the collaboration of the Cabinet and Action Planning Teams to create a roadmap for success. These ideas and strategic thinking led to the development of newly crafted strategic priorities, actionable goals, and aligned initiatives, which are represented on the following page.

Priority Area	Actionable Goal Statement	Sample Initiatives Identified by Action Planning Teams (to be finalized by Leadership)
Branding	Tell our story, educate, and demonstrate agency community impact so employees, clients, and communities better understand NEICAC’s mission and services.	<ul style="list-style-type: none"> <li>• Create employee advocate training program for all NEICAC programs</li> <li>• Improve processes for internal and external agency communications</li> <li>• Develop a coordinated marketing, communications, and branding strategy</li> <li>• Enhance outreach and engagement programs for external stakeholders</li> </ul>
Partnerships	Collaborate with internal and external partner to identify, cultivate, and expand partnerships strengthening the impact of services on individuals and families in the community.	<ul style="list-style-type: none"> <li>• Strengthen interdepartmental communication and collaboration</li> <li>• Establish stronger relationships with partners by improving frequency and content of communications</li> <li>• Be more present in the community by increasing the number of events NEICAC attends</li> </ul>
Funding	Secure \$1,000,000 in unrestricted funding over the next five years.	<ul style="list-style-type: none"> <li>• Develop a donor identification and cultivation program</li> <li>• Cultivate NEICAC relationships with current and prospective donors</li> <li>• Create a comprehensive stewardship program for all volunteers and donors</li> <li>• Build a strategic development program to solicit unrestricted funds</li> </ul>
Service Delivery	Improving Service approach to enhance client experience.	<ul style="list-style-type: none"> <li>• Building a collaborative internal and external referral process</li> <li>• Streamline internal processes to create a quicker and smoother client experience</li> <li>• Use data to understand long-term impact &amp; outcomes to improve service delivery for Clients</li> <li>• Develop organization culture that puts clients first.</li> <li>• Create customer focused approach to accessing services</li> </ul>
Technology	Modernizing Technology to Support Strategic Direction	<ul style="list-style-type: none"> <li>• Create greater staff efficiencies through modernizing technology</li> <li>• Implement dynamic referral tracking system</li> <li>• Reduce reliance on paper for internal operations and service delivery</li> <li>• Improve client experience through modernizing technology</li> </ul>
Organizational Culture	Improve the organizational culture to attract, inspire and retain staff.	<ul style="list-style-type: none"> <li>• Increase job satisfaction &amp; engagement of NEICAC employees</li> <li>• Enhance Staff Training &amp; Professional Development</li> <li>• Establish Mentoring Program for New Employees</li> <li>• Implement Recruitment Plan to Attract Qualified Candidates</li> <li>• Create New Methods of Staff Recognition</li> </ul>

## **NEICAC's Strategic Plan Alignment to ROMA and CSBG Standards**

### **ROMA Alignment**

Our process took NEICAC's leadership team(s) through a 5-step process that aligns to the six activities that are critical to the ROMA cycle: **Assessment; Planning; Implementation; Achievement of Results; and Evaluation.**

### **Alignment to Community Action's Three National Goals**

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

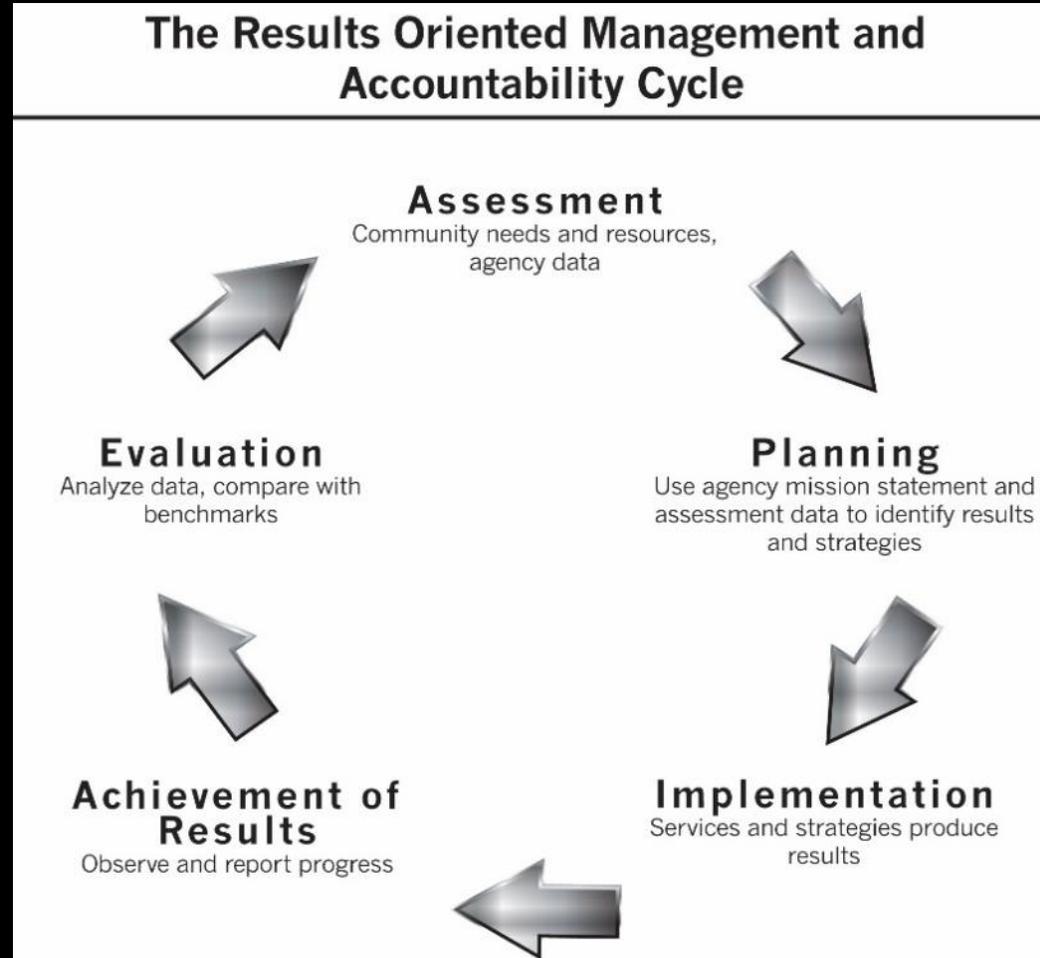
**Goal 2:** Communities where people with low incomes live are healthy and offer economic opportunity.

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

### **Alignment to CSBG Organizational Standards**

NEICAC operations, governance, and programs align broadly to many if not all the standards for which it is governed by, and Wipfli has identified plan alignment to the specific CSBG Organizational Standards pertaining specifically to strategic planning.

## ROMA Defined



## **NEICAC's Strategic Plan is aligned to all of the CSBG Organizational Standards Pertaining to Strategic Planning**

**Standard 4.3 • private** The Organization's Community Action Plan and Strategic Plan document the continuous use of the full ROMA cycle or comparable system (assessment, planning, implementation, achievement of results, and evaluation). In addition, the Organization documents having used the services of a ROMA-certified trainer (or equivalent) to assist in implementation.

**Standard 6.1 • private** The department has a strategic plan, or comparable planning document, in place that has been reviewed and accepted by the tripartite board/advisory body within the past 5 years. If the department does not have a plan, the tripartite board/advisory body will develop the plan.

**Standard 6.2 • private** The approved strategic plan, or comparable planning document, addresses reduction of poverty, revitalization of low-income communities, and/or empowerment of people with low incomes to become more self-sufficient.

**Standard 6.3 • private** The approved strategic plan, or comparable planning document, contains family, agency, and/or community goals.

**Standard 6.4 • private** Customer satisfaction data and customer input, collected as part of the community assessment, is included in the strategic planning process, or comparable planning process.

**Standard 6.5 • private** The tripartite board/advisory body has received an update(s) on progress meeting the goals of the strategic plan/comparable planning document within the past 12 months.



**ONE TEAM,**  
**ONE FOCUS.** **YOU.**