Strategic Planning Narrative Report

Northeast Iowa Community Action Corporation (NEICAC)

April 2022

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WIPFLI

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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.

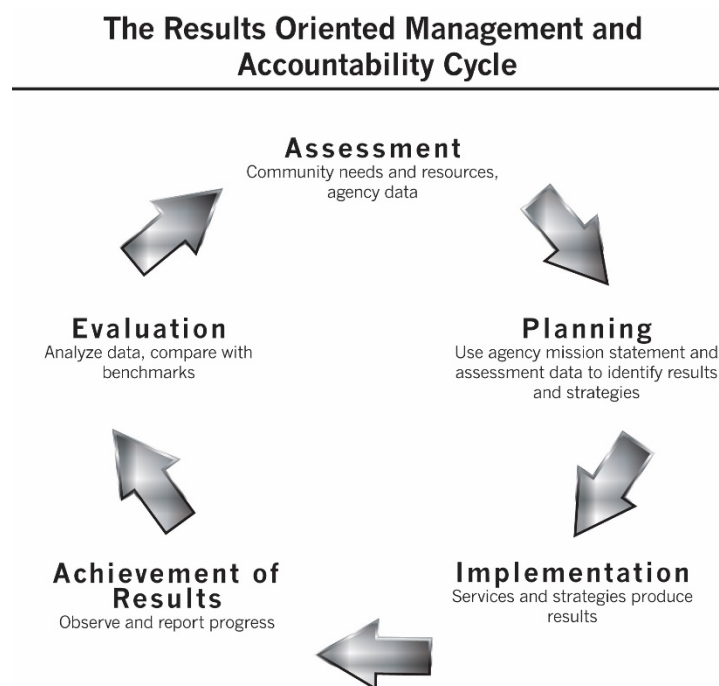## Strategic Priorities with Actionable Goal Statements

1. **Branding:** Tell our story, educate, and demonstrate agency community impact so employees, clients, and communities better understand NEICAC's mission and services.
2. **Partnerships:** Collaborate with internal and external partners to identify, cultivate and expand partnerships, strengthening the impact of services on individuals and families in the community.
3. **Funding:** Secure $1,000,000 in unrestricted funding over the next five years.
4. **Service Delivery:** Improve service delivery approach to enhance client experience.
5. **Technology:** Modernize technology to support strategic direction.
6. **Culture:** Improve the organizational culture to attract, inspire, and retain staff.
7. **Education:** Educate the staff and community on systemic poverty (to be addressed in years 2-3)

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
Step 1	Readiness & Planning	September–October 2021
Step 2	Insight Gathering & Stakeholder Engagement	October–November 2021
Step 3	Workshop Planning & Facilitation	November 2021
Step 4	Strategic Action Planning	November 2021–April 2022
Step 5	Implementation & Accountability	April 2022 +

In following our established process, Community Action Agencies across the country use the *Results Oriented Management and Accountability* (ROMA) framework to assure their work aligns with national program goals and priorities.

The Results Oriented Management and Accountability Cycle

Assessment
Community needs and resources, agency data

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

Implementation
Services and strategies produce results

Achievement of Results
Observe and report progress

Evaluation
Analyze data, compare with benchmarks

Source: National ROMA Peer-to-Peer Certification Program

Engagement

Critical to the success of this engagement has been the hard work of NEICAC's leadership team, board, and staff and the expert work of Wipfli's consulting team. Those scheduled to participate were:

Board | Staff | Community Partner

Anna Wilkes	Marcia Hesse	Chrishelle Stravers
Dan Byrnes	Martin Stanbrough	Courtney Adam
Janel Langreck	Nick Winter	Karen Henry
Jenny Cole	Nina Brickman	Karli Schmelzer
John Beard	Richard Holthaus	Lori Egan
Joseph Pisney	Sara Noack	Scott Fischer
Julie Wurtzel	Shannon Michael	Sharon Burke
Les Askelson	Steve Doeppke	Trisha Wilkins
Linda Voshell	Suellen Kolbet	Martin Ahrndt
Malissa Kappes	Tim Neil	Jada Bahls-Kargalskiy
Rachelle Howe	Wendy Shea	Shannon Nagel

Facilitators:
Jeffrey Prottas, MBA, CFRE –Engagement Manager & Workshop Facilitator
Devin Dukes, Prosci CCP – Project Manager
Courtney Kohler, MPA, CCAP, NCRT – Project Analyst

Current Landscape

When determining whether or not an organization needs a new or updated strategic plan, whether mandated by funders or not, questions arise of what the current environment is, what has changed since the last strategic plan was crafted, and whether or not an organization is prepared for the strategic planning process. A review of the current landscape, known as an environmental scan, reviews the organization from several perspectives.

For the purposes of this strategic plan, Wipfli consultants reviewed primary data sources including:

- 48 desirable stakeholder surveys
- 74 board and staff surveys
- 9 critical stakeholder interviews/focus groups

In addition, Wipfli consultants reviewed secondary data sources including:

1. NEICAC 2020 Year-End Report
2. NEICAC 2020 Agency Resources Report
3. PY 21 Various Program Customer Satisfaction Report
4. FY20 FaDSS Survey Results for Board
5. Client Satisfaction All Summary Data (11-2020 – 2-2021)
6. EHS PIR Report
7. PY20 All County Services
8. 2020-2021 Head Start PIR Performance Indicators
9. NEICAC Client Satisfaction Survey 2020-2021
10. NEICAC Story
11. Services Presentation Handout (all areas PY19)
12. COVID Programs NCAP Template
13. Head Start 2021 Program Assessment
14. Head Start Focus Area 1 Review
15. FaDSS Program Monitoring
16. WAP Field Monitoring
17. WAP Admin Monitoring
18. Northeast Iowa Community Action Corporation Short-form report 1.31.2021
19. CSBG Monitoring Report
20. 2018 NEICAC Annual Report
21. 2020 NEICAC Annual Report
22. Annual Head Start Report to the Public 2021
23. 2021 – 2022 Policy Council Roster
24. Board and Staff Directory 8-2021
25. Organizational Chart 8-2021
26. 2020-2021 Program Goals Q4
27. Strategic Plan & Programs Report
28. 2020-2021 Working Strategic Plan Goals Q4
29. 2020-2021 Strategic Plan Q4
30. Mission & Vision Statements
31. Client Needs Survey Data (2019-2020)
32. NEICAC Client Needs Assessment Survey Results Website (2019-2020)
33. ES & Recommendations – 2021 Head Start Community Assessment
34. 2021 National Community Action Partnership Assessment Report
35. 2021 CNA Executive Summary
36. NEICAC 2021 HS EHS Community Assessment Report – June 24 2021
37. NEICAC Stakeholder Identification Map

As previously communicated, Wipfli consultants reviewed, independently and as a group, the data, research, and documents in detail, summarized the key information and concepts around the strengths, weaknesses, opportunities and threats to the organization, and vertical alignment of mission, vision, and values.

In addition, the NEICAC team, participated in group discussion and informed the process beyond the submission of the surveys and interviews. The following brainstorming questions and data review points provided the workshop participants additional context with which to construct strategic priorities that were meaningful to them.

Group Discussion – Changes:
How has NEICAC changed in the last 3-4 years?

- Increases and decreases in funding
- Adding and changing programs
- Leadership transitions
- Staff changes
- Wider scope of needs
- Becoming more progressive, challenging the status quo
- Changes in the way of doing business due to the Pandemic
- Better promotion of the agency in the community

NEICAC workshop attendees, as well as community partners during the interviews, expressed that the agency has conducted outstanding work in the past few years and adapted to COVID well to serve the community. Knowledge and new norms were adopted to continue to deliver services. NEICAC sustained and there is a desire to capitalize on this and move forward.

Group Discussion – Future Trends:
Over the next 1-3 years, what trends do you see moving NEICAC in the future and how will it affect how you work or participate?

- **Technology:** Future may be a hybrid
- **Workforce:** Staff retention and workforce development - harder to hire; competitive wages; impact of COVID - vaccinations; daycare shortages;
  - o Staff leaving for mental health reasons or just to leave
  - o Will have to think differently about the employer/employee relationship
    - How do we as an employer evolve to create an attractive workplace for those seeking employment?
- **Funding:** Think outside the box for future funding
  - o New streams and new sources
  - o Unrestricted
  - o Do more with less
  - o Impact of reverting to pre-COVID levels
- **Long-term Impact of COVID**
  - o Health
  - o Mentality shift

o Getting used to support - creating impacts in other areas
▪ **Value of time:** Changing mentality

Data review

Workshop attendees participated in a cooperative study of data, which included the compiled Assessment Summary provided by Wipfli, as well as the previous Strategic Plan & Q4 report (2020-2021), the 2021 Community Needs Assessment Executive Summary, the Head Start Community Assessment, and recent Customer Satisfaction data. Recommendations from the review of these documents included:

▪ Increase resource awareness for providing better referrals
  o Resource guide for agency-wide use
▪ Add additional education and training components to see impact with mental health
▪ Better utilize partnerships
  o Media partnership
  o Coordinate partnerships for mental health and housing programs/services
  o Relationships and partnerships with school districts to enhance Head Start program
▪ Increase brand awareness
▪ Agency involvement in community events and fundraising
▪ Continue to focus on Outreach Coordinator work within the agency
▪ Develop two-way communication process at all staff levels
▪ Provide more creative ways to enhance employee satisfaction that aren't always tied to pay

SWOT Analysis

A comprehensive analysis of NEICAC's Strengths, Weaknesses, Opportunities and Threats (SWOT) elicited insights that helped workshop attendees celebrate their strengths as well as evaluate current challenges.

Answers for each area of focus were reported and are reflected on the following pages. This also includes input gathered from key stakeholders prior to the workshop.

	Strengths	Weaknesses
INTERNAL	1. Dedicated, caring staff 2. Multiple field locations 3. Variety of services and funding 4. Strong leadership team 5. Reliable 6. COVID-19 response 7. Adaptive 8. Customer-focused 9. Desire/ability to help 10. Teamwork 11. Long-standing partnerships 12. Knowledgeable 13. Community Action Network 14. Supportive Board 15. Ability to envision the future – proactive 16. Growth mindset	1. Limited staff in the field 2. Staff retention/turnover 3. Not enough staff training/orientation 4. Underpaid staff 5. Limited/restricted funding 6. Eligibility requirements/bureaucracy 7. Program/county silos 8. Not enough staff recognition 9. Staff capacity and burnout 10. Spread too thin over too many programs to make a deep impact on poverty
	Opportunities	**Threats**
EXTERNAL	1. Visibility in the community 2. Innovative in programs/partnerships 3. Marketing/advertising (committee) 4. Increased involvement/leadership in the community 5. Break down silos – internally and externally 6. Publication of results and stories 7. Use of social media 8. Increased mental health resources 9. Use of technology advances 10. Stronger, warm referrals 11. Focus on diversity & equity 12. Competitive wages 13. Family education for budgeting 14. Local funding sources 15. Appeal to upcoming workforce	1. COVID-19 pandemic 2. Stigma of asking for help 3. Reliance on government funding 4. Employee shortage 5. Staff capacity 6. Economy 7. Governmental changes 8. Vaccination requirements 9. Mental health stigmas 10. Political divisiveness 11. Shifting generations in the workforce/retirements 12. Eventual loss of COVID funds 13. Lack of discretionary funds 14. Reporting Burden/new regulations

Mission Review

Answers to the questions posed in the previous section helped set the table for more in-depth conversations regarding mission and vision, which were paired with the results of the data review and environmental scan to produce updated statements and the development of actionable goal statements.

What is our mission?

At its best, a nonprofit's mission statement is a succinct expression of an organization's essential reason for existence or its core purpose. The mission provides long-term direction and goals that guide daily operations. In essence, the mission provides a foundation for an organization's culture, and its programs, services, and communications.

The Agency's current mission statement is:

Through dynamic partnerships, quality family services, advocacy, and education, NEICAC advances community development and improves social and economic conditions for individuals and families with limited resources.

An environmental scan, performed prior to the strategic planning workshop, used several data sources to specifically gather insight on the Agency's mission statement. Data from these sources was compiled to show what resonates with the stakeholder groups, and that data is represented in the word cloud below.

Vision Review

What is our vision?

The vision statement of a nonprofit is a supplement to the mission statement. An effective vision presents a description of the world as it would exist if the organization were to succeed in achieving its grandest aspirations.

The Agency's current vision is:

Create inclusive communities with equitable access to resources and opportunities where all individuals and families thrive.

Data from the environmental scan was compiled to show what resonates with the stakeholder groups, and that data is represented in the word cloud below.

Shared Values

An organization's values are the principles within which we behave; it's how we treat our clients and each other, and how we do business.

Data from compiled to show what resonates with the stakeholder groups, and that data is represented in the word cloud below.

During the planning workshop, participants worked through an exercise to identify core value characteristics and how they apply to NEICAC. The following were identified:

Driven | Loyal | Competent | Follow-through | Trustworthy | Client-centered | Empathy | Integrity | Caring | Reliable | Adaptive | Organized | Respect | Compassionate | Dependable | Empathetic | Strong | Thorough | Confidentiality | Dedicated | Resolute | Determined | Supportive | Self-Awareness

It is also worth noting that NEICAC aligns with a Promise Statement branded by the National Community Partnership, which speaks to the organizational values and should be considered:

Community Action changes people's lives, embodies the spirit of hope, improves communities, and makes America a better place to live. We care about the entire community, and we are dedicated to helping people help themselves and each other.

Underlying Contradictions

When divided into small groups, team members were asked to visualize and brainstorm what the future impact NEICAC would have in the community. Coming together in a large group, the team discussed potential barriers in moving toward a new vision. Underlying issues *potentially blocking forward movement* were grouped into large categories:

- Internal/External Communication and Marketing/Branding
- Client, Society, and Cultural Influences
- Staffing
- Program Data, Accountability, and ROMA
- Service and Program Delivery
- Funding
- Technology

A visual representation of the categories and specific issues identified for each category are included on the following page.

Issues that are blocking us from moving towards our vision…

Internal/External Communication/ Marketing/Branding	Client/Society/ Cultural Influences	Staffing		Program Data/ Accountability And ROMA	Service/ Program Delivery	Funding
Communication within our agency/program	Stigma of asking for help	High staff turnover	Unbalanced workloads - staff/supervisory	Reporting outcomes	Insufficient Partnerships	Restrictions of funding source
Program & Depart. Silos	Misunderstanding of equity vs. equality	new employees do not know what they need to know	Staff has too much to do and can't make TIME for other needed priorities	Inadequate outcome tracking systems–creating siloed systems	Program/Svc Litmus Testing	Economy
	Change in Generational Values	Poorly Structured Training and Accountability Agency Services	Silo Mindset – focus on my own job	Bureaucracy - restrictions	Unaware of Trauma Informed Care	Limited Unrestricted Funding
Inconsistent Messaging of whole agency expectations	Better understanding cultural diversity	Time/Resources for adequate training	Change Adversity	Data Collecting from unintegrated systems	Poor Client Mental Health	Availability of resources
Insufficient Public Awareness Program	Complex Political issues	Inflexible work schedules	Employee Morale	Outdated reporting software	Restrictive Mandates in Providing Service	Administrative Reporting Red Tape
No process for regular Stakeholder communication	Client Stigma	Childcare shortage	Qualified applicant pool	Inability to Track Client Success	Siloed Systems impact Coordinated Service	Government restriction
Infrequent 2-way staff communication	Deficient client education	Competitive wages	Vacant staff positions	Clarity/direction for reporting	Separate/Disproportionate Regulations	Unidentified: Technology; Building; Equipment

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 regarding:

- Internal/External Communication and Marketing/Branding
- Client, Society, and Cultural Influences
- Staffing
- Program Data, Accountability, and ROMA
- Service and Program Delivery
- Funding
- Technology

The following chart exhibits the culmination of individual think time, small group discussion and, ultimately, the collaboration of all attendees to create a roadmap for success. The ideas that led the development of the newly crafted goals are represented on the following page.

Priority Area	Actionable Goal Statement	Sample Initiatives Identified by Action Planning Teams
Branding	Tell our story, educate, and demonstrate agency community impact so employees, clients, and communities better understand NEICAC's mission and services.	• Create employee advocate training program for all NEICAC programs • Improve processes for internal and external agency communications • Develop a coordinated marketing, communications, and branding strategy • Enhance outreach and engagement programs for external stakeholders
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.	• Strengthen interdepartmental communication and collaboration • Establish stronger relationships with partners by improving frequency and content of communications • Be more present in the community by increasing the number of events NEICAC attends
Funding	Secure $1,000,000 in unrestricted funding over the next five years.	• Develop a donor identification and cultivation program • Cultivate NEICAC relationships with current and prospective donors • Create a comprehensive stewardship program for all volunteers and donors • Build a strategic development program to solicit unrestricted funds
Service Delivery	Improving Service approach to enhance client experience.	• Building a collaborative internal and external referral process • Streamline internal processes to create a quicker and smoother client experience • Use data to understand long-term impact & outcomes to improve service delivery for Clients • Develop organization culture that puts clients first. • Create customer focused approach to accessing services
Technology	Modernizing Technology to Support Strategic Direction	• Create greater staff efficiencies through modernizing technology • Implement dynamic referral tracking system • Reduce reliance on paper for internal operations and service delivery • Improve client experience through modernizing technology
Organizational Culture	Improve the organizational culture to attract, inspire and retain staff.	• Increase job satisfaction & engagement of NEICAC employees • Enhance Staff Training & Professional Development • Establish Mentoring Program for New Employees • Implement Recruitment Plan to Attract Qualified Candidates • Create New Methods of Staff Recognition

Upon the completion of the readiness and planning stage, engaging stakeholders in information gathering, and completing an in-depth workshop, NEICAC's strategic planning team developed seven Strategic Priorities. They are:

1. **Branding:** Tell our story, educate, and demonstrate agency community impact so employees, clients, and communities better understand NEICAC's mission and services.
2. **Partnerships:** Collaborate with internal and external partners to identify, cultivate and expand partnerships, strengthening the impact of services on individuals and families in the community.
3. **Funding:** Secure $1,000,000 in unrestricted funding over the next five years.
4. **Service Delivery:** Improve service delivery approach to enhance client experience.
5. **Technology:** Modernize technology to support strategic direction.
6. **Culture:** Improve the organizational culture to attract, inspire, and retain staff.
7. **Education:** Educate the staff and community on systemic poverty (to be addressed in years 2-3)

Creating accountability measures, as well as future reporting and adherence to the plan, will be aided using the action plans in the appendices with each Priority Team's actionable goal statement, strategic objectives, initiatives, activities, and success indicators.

The first set of accountability measures is comprised of a multi-year timeline that identifies timelines, deadlines, and accomplishments by Priority Team and by quarter. This timeline allows Executive Leadership and Priority Team Leaders the ability to review the entire timeline and determine whether the goals individually or as a collective are achievable. This allows then for modifications to be made, resources allocated, and consensus built for ultimate success. The second set of measures is tracked and evaluated through comprehensive implementation plans for each of the seven Strategic Priorities. Each implementation plan will identify similar timelines and success indicators. In addition, the strategic steps to successful implementation are identified, leadership assigned, initial deadlines, and resources determined, and a performance management framework agreed upon. Ultimately, this becomes the organization's implementation playbook, which if followed, ensures successful achievement of the goals.

Results Oriented Management and Accountability (ROMA)

In 1998, the CSBG Reauthorization Act made ROMA implementation a requirement for receiving federal CSBG funds and required reporting on performance-based management principles. ROMA helps develop and implement processes to identify, measure, and record improvements in the condition of people who earn a low-income and the communities in which they live. ROMA helps create an informed process that uses information to develop, implement, and evaluate organizational effectiveness, inform short- and long-range planning, and promote funding and partnership activities. It is a complete management and

accountability process that is focused on the results achieved as a result of the agency's activities.

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**.

Wipfli led NEICAC's leadership through an information gathering process that engaged key stakeholders around current processes and strategies, in hopes of better informing the development of new strategies (Assessment). After a thorough review of primary and secondary data sources, NEICAC's leadership team(s) and Wipfli consultants engaged in a deep-dive planning workshop resulting in a comprehensive, shared set of strategies. Finally, NEICAC's Priority Team Leaders were trained using best practices to develop seven long-range strategic goals related to the priorities and were provided a framework for the development of action plans and key performance indicators. All of this was done with intentionality, careful thought, and consideration of the ROMA framework and Community Action's 3 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.

CSBG Organizational Standards

The CSBG Organizational Standards are a comprehensive set of standards developed with input from the entire CSBG Network. The Organizational Standards are organized in three thematic groups comprising nine categories and totals of 58 standards for private, nonprofit entities and 50 for public entities. The purpose of the organizational standards is to ensure that all agencies have appropriate organizational capacity, in both critical financial and administrative areas, as well as areas of unique importance to the mission of the Community Action network. The three thematic categories include: Maximum Feasible Participation; Vision and Direction; and Operations and Accountability. Each has three supporting standards making a total of nine categories.

These standards work together to characterize effective and healthy organizations. Alignment to these standards is critical to securing ongoing funding. While NEICAC operations, governance, and programs align broadly to many if not all the standards for which it is governed by, Wifpli has identified the specific CSBG Organizational Standards pertaining specifically to strategic planning. They include:

Standard 4.3 • 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.

Documented above, Wipfli consultants took NEICAC's leadership team(s) through a 5-step process that aligns to the five activities that are critical to the ROMA cycle: **Assessment; Planning; Implementation; Achievement of Results; and Evaluation**. Each of the five stages of Wipfli's strategic planning process embed the ROMA framework in all aspects of the strategic planning process and documentation. At each critical juncture, Wipfli and NEICAC leadership codified the process creating documented plans, established goals and timelines, results-oriented accountability measures, and evaluation methods.

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

NEICAC has been working under a board approved strategic plan through 2021. Upon receipt and approval of this strategic plan, it will augment and/or replace that plan in part or in whole.

Standard 6.2 • 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.

Each of the strategic priorities strive to empower people who earn a low-income to become more self-sufficient, attempts to reduce poverty, and revitalize low-income communities. The following table identifies which goal aligns with one or more of the categories identified in Standard 6.2.

Strategic Plan Priority		Standard 6.2
Branding	Tell our story, educate, and demonstrate agency community impact so employees, clients, and communities better	Indirectly, a positive image and greater awareness of NEICAC in the community will enhance the ability the agency has to address the

	understand NEICAC's mission and services.	3 components of the CSBG Act.
Partnerships	Collaborate with internal and external partners to identify, cultivate and expand partnerships, strengthening the impact of services on individuals and families in the community.	Addresses the reduction of poverty, revitalization of low-income communities, and empowerment of people with low incomes to become more self-sufficient by bringing partners and resources together to better meet needs and reduce poverty.
Funding	Secure $1,000,000 in unrestricted funding over the next five years.	Indirectly, additional and diversified funding will enhance the ability the agency has to address the 3 components of the CSBG Act.
Service Delivery	Improve service delivery approach to enhance client experience.	Empowerment of people with low-incomes to become more self-sufficient by increased access and ease of navigation for client experience.
Technology	Modernize technology to support strategic direction.	Indirectly, modernizing technology will support the overall strategic direction and ability that the agency has to address the 3 components of the CSBG Act.
Culture	Improve the organizational culture to attract, inspire, and retain staff.	Indirectly, improving the organizational culture will attract and retain quality staff to better address the 3 components of the CSBG Act.
Education *(to be addressed in years 2-3)*	Educate the staff and community on systemic poverty.	Revitalization of low-income communities and empowerment of people with low-incomes to become more self-

		sufficient by increasing awareness of poverty and how NEICAC can support families and communities.

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

Through extensive discussion and debate, NEICAC's strategic planning team identified seven strategic priorities to help support the agency, families being served, and the broader community. The following outlines which goal aligns with one or more of the categories (family, agency, community) identified in Standard 6.3. Some goals can also align to more than one category.

Family
- **Service Delivery:** Improve service delivery approach to enhance client experience.

Agency
- **Branding:** Tell our story, educate, and demonstrate agency community impact so employees, clients, and communities better understand NEICAC's mission and services.
- **Funding:** Secure $1,000,000 in unrestricted funding over the next five years.
- **Technology:** Modernize technology to support strategic direction.
- **Culture:** Improve the organizational culture to attract, inspire, and retain staff.

Community
- **Partnerships:** Collaborate with internal and external partners to identify, cultivate and expand partnerships, strengthening the impact of services on individuals and families in the community.
- **Education:** Educate the staff and community on systemic poverty (to be addressed in years 2-3)

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

As part of the comprehensive five-step strategic planning process, a comprehensive environmental scan was conducted. This process reviewed 37 data sets and engaged various stakeholder groups. All

tools (including satisfaction surveys and the CNA) were reviewed and coordinated by Wipfli and NEICAC's strategic planning committee. Primary data was collected from 48 desirable stakeholder surveys, 74 board and staff surveys, and 9 critical stakeholder interviews/focus groups. In addition, the previous Strategic Plan & Q4 report (2020-2021), the 2021 Community Needs Assessment Executive Summary, the Head Start Community Assessment, and recent Customer Satisfaction data were reviewed during the planning workshops.

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

The Leadership Team will be providing the Board with future updates on progress toward meeting the actionable goals in the strategic plan. The Leadership Team intends to provide the Board with reports, utilizing the OnStrategy tool, including progress toward goals and outcomes, at least every 12 months (at minimum), or more frequent as identified.

Next Steps

After all the time, resources, and effort NEICAC has invested in building the updated strategic plan, getting the most out of it is critical in achieving both short- and long-term goals and pursuing identified initiatives. The plan is an organic document that evolves over time as it is informed by choices made by the organization in the coming years. Not just a management tool, this plan and the goals it hopes to achieve can enhance public support and drive impact in the community. At this stage, there are several follow-up steps that NEICAC needs to take to maximize impact and effectiveness. They include:

- NEICAC leadership will communicate the plan to key internal and external stakeholders, taking care to communicate to those that participated in the planning process. Key pieces to communicate are the mission, vision, long range goals and where the organization is going next.
- Priority Team Leaders and Leadership to meet and discuss the following:
    - Will these implementation steps achieve what we want to accomplish?
    - Where is any overlap?
    - Where are any gaps?
    - Do we have the budget?
    - Where is anything that can be combined?
- Priority Teams will make updates to the Action Plans based on decisions from above questions.
- Priority Teams to reconvene on a quarterly basis (Jan, April, July, October) to review their Action Plans and record and report on progress and accomplishments.
- Progress report from Priority Team Leaders to take place at board meetings.