



Strategic Planning Consultant Bidders Conference

May 4, 2016

Mission / Vision

The Mission and Vision are the foundation for long term success. A vision and mission that is recognized by all stakeholders and guides hiring, strategic decisions and communication will unleash the agency;

the effects can be magic.

Vision

- As an entrepreneurial agency, we bridge the gap to self-sufficiency by providing opportunities and resources, as we initiate and partner in shared community efforts to improve the quality of life.
- To empower individuals who thrive as healthy, self-sufficient and contributing members of our communities. And
- To create healthy communities with equal access to social justice, jobs, education and resources.



Economic Opportunity Act (EOA) of 1964:

“It is therefore the policy of the United States to eliminate the paradox of poverty in the midst of plenty in this nation by opening, to everyone,

- the opportunity for education and training,
- the opportunity to work and
- the opportunity to live in decency and dignity.”

50+ years later these remain the core concepts of the Fresno Economic Opportunities Commission.



The Promise of Community Action:

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.



Strategic Planning

- ▶ Strategic planning is a management tool, period. It is used for one primary purpose only: to help the Agency do a better job focusing our energy to ensure that all are working toward the same goals.
- ▶ Strategic planning is a systematic process to assess the ever changing environments allowing for an appropriate resetting of the agency's direction.
- ▶ Strategic planning establishes the framework for actions that shape and guide what Fresno EOC is, what Fresno EOC does, how Fresno EOC does it and what more Fresno EOC should do or do better, while always focused on the emerging needs of our communities.



Strategic Planning Stages

- Agency Profile
- Community Demographics
- Community Needs Assessment
 - Stakeholder Interviews
 - Focus Groups
 - Public Hearings
 - Surveys, Client, Community, Partners
 - Focused discussions with partners
- Five Year Strategic Plan adopted by the Board
 - Sub-presentation: An agency growth strategy
 - Sub-presentation: Program responses



Agency Profile and Self Assessment

- Agency Profile:

- Directory of services
- Identify all funding partners
- Organizational Standards Self Assessment
- Facilities / Real Estate Assessment
- Technology Assessment
- Assessment of financial position
- Assessment of other resources
- Assessment of community support



Community Demographics

- ▶ Community demographic information will, as identified in the RFQ, be drawn from many sources.
- ▶ It will provide a data driven picture of poverty in Fresno County. This picture will need to identify pockets of poverty and differentiate between urban and rural poverty



Community Needs Assessment

A way of gauging opinions, trends, assumptions, needs, key issues, gaps and/or assets within Fresno County.

Partner strategic plans and community assessments will be sought.



Needs Assessment Purpose

- Focuses community needs, concerns and issues
- Improve outreach
- Increased public relations and marketing
- Determine if needs have changed
- Identifies emerging or under addressed issues
- Advances collaborative action around needs
- Collect communities' hopes/dreams/desires



“Community”

A body of persons having a common history, ethnicity, culture, geography, or interests.

- ▶ **Communities of Place:** Defined by a distinct boundary or bound by a common political, economic and social system.
- ▶ **Communities of likeness:** A group of individuals that share common characteristics, such as race, gender, language, ethnicity, economic status, or age.
- ▶ **Communities of Interest:** A group of individuals that *share* common interests, goals, or knowledge about something, health, faith, business, etc.



The Information Gathering Process

- ▶ Stakeholder Interviews
- ▶ Focus Groups
- ▶ Public Hearings
- ▶ Client, Community and partners surveys
- ▶ Focused discussions with partners
- ▶ Conversations within community partnerships



Stakeholder Interviews

A structured conversation designed to gather information about assumptions and perceptions of the agency, as it is now and what it might be in the future. They are a powerful tool in building support for the agency.

Advantages

- detailed information
- allows for clarification/ follow up on questions
- personal contact builds rapport
- Public Relations and marketing benefits
- Begins the buy in process

Disadvantages

- Time-consuming
- requires significant Board involvement, time and training
- Variety makes it difficult to bring together
- Information is hard to summarize
- Little quantitative value



Focus Groups

A way to gather the opinions/ ideas from targeted communities. Focus groups often builds synergy of thoughts and ideas concerning issues and the agency as much as they identify issues or make projections.

Advantages

- easy to conduct
- provides detailed info
- allows for issue probing
- stimulates thinking and discussion

Disadvantages

- ideas generated not necessarily prevalent
- small sample for effort
- difficult to analyze
- quiet folks suppressed
- requires participation



Public Hearings

A way to give the entire community an opportunity to express their opinions/ ideas. Public Hearings often allow for new ideas, opportunities or issues to be introduced.

Advantages

- easy to conduct
- opens the process to all
- allows for introduction of new or emerging or hidden issues
- Increases agency awareness and outreach
- Engages potential new partners, volunteers and supporters

Disadvantages

- potential to turn into “bitch” session
- can be off issues
- can focus on an individual’s issue
- easily taken over by a special interest



Client, Community and Partners Survey

Help to gather information and attitudes regarding issues, agency perceptions and opportunities. Surveys may be open ended or multiple choice.

Advantages

- wide distribution
- good for data analysis
- strong sample of the population

Disadvantages

- expensive
- requires skill/time
- suffers low return rate
- poor qualitative tool



Focused discussions with partners

Ensures that like missioned organizations, especially community groups, are reached out to and specifically engaged in the process

Advantages

- engages long standing and newly emerging partners
- information is received from activist and those most involved in issues of concern
- strong statement of partnership

Disadvantages

- requires partners to provide time on their usually busy agendas
- we must accommodate others meeting dates and time
- groups are often to target focused



Conversations within Community Partnerships

Engages those we collaborate with, encourages discussions on common issues, shares information. A good way to gather information on how the agency is perceived and, especially, how our agency partners feel we could be a better partner in the community. This process should provide greater insight into emerging trends in particular interest area. The process will put EOC at the center of community discussions and emerging solutions

Advantages

- Builds relationships
- Focuses on specific communities or issues
- Accesses community leaders
- Spreads information about the agency and gathers a higher level of understanding of potential partners

Disadvantages

- Info is skewed by interest
- Possible defensiveness
- Time consuming
- Possible negative affect on current relationships



The Strategic Plan

- ▶ Strategic planning is an organization's process of defining its direction with aligned strategy. The Strategic Plan should lead to more focus and better decision making on allocating its resources, including capital, and people in pursuit of our goals.
- ▶ Strategic planning is the formal consideration and setting of an organization's future course.
- ▶ All strategic planning deals with four key questions:
 - "What do we do?"
 - "Why do we do it?"
 - "For whom do we do it?"
 - "How can we innovate and excel?"



Overview of Expectations

1. The SPC will be expected to be prepared to do the following at the 2017 Fresno EOC Board Retreat:
 - Present the Needs Assessment data
 - Facilitate the identification and adoption of 3-7 strategic goals
 - Work with staff to prepare draft Strategic Initiatives for review and comment
 - Facilitate discussion leading to the adoption of 2-4 strategic initiatives within each strategic goal
2. The SPC will be expected to review, comment and approve the surveys, questionnaires, focus group questions and all other instruments used in the data collection process.
3. The SPC is expected to be available for consult during the Needs Assessment Process



Specific Tasks

- Advise in the needs assessment process that includes stakeholder interviews, focus groups, staff input, client surveys, partner surveys, community surveys and partnership discussions.
- Advise the agency in developing the tools to be utilized in the surveys, focus group, stakeholder interview and partnership discussions.
- Assist with setting the agenda and possibly assist with facilitating a staff retreat focused on reviewing possible strategic goals and strategic initiatives.



Specific Tasks

- Prepare and deliver a clear, complete and concise presentation to the Board of Commissioners at the 2017 Annual Retreat which includes demographic and other relevant information, along with information obtained from stakeholder interviews, focus groups, input from staff, client surveys, partner agency surveys and the partnership conversations.
- Present for the 2017 Annual Board a set of draft Strategic Goals.
- Lead the facilitation of the Board retreat (2.5 days) for the purpose of setting 4-6 Strategic Goals, each with 2-4 draft strategic initiatives.



Specific Tasks

- Using demographic data either collected and provided by the Agency, or identified within other's strategic plans, or researched from public sources to create a clear, concise and complete written report, with a brief summary. Data may include, but is not be limited to:
 - Basic demographic data, and trends
 - Unemployment and unemployment trends
 - Industry trends, and opportunities
 - High school graduation/dropout data and trends
 - County schools performance, by standard measurements
 - Post secondary enrollment, including vocational training, and enrollment trends
 - Transportation needs for low-income residents, seniors, and disabled persons
 - Current and emerging health and nutrition trends
 - Substance abuse data and trends, by age and use
 - Housing affordability, foreclosure data, and homeownership percentages and trends
 - Crime statistics, including a brief survey of types of crimes, ages of individuals committing crimes, neighborhoods most affected, and emerging trends
 - Refugees, needs, data and trends
 - Veterans in poverty, needs, data and trends
 - Teen pregnancy data and trends
 - Child care service needs, including waiting lists, by regions
 - Percentage of homes headed by a single parent, male and female
 - Disabled population data, by age, and identification of any service gaps and trends
 - Homelessness, and homeless trends, by age and gender
 - Number of individuals returning to the area following incarceration, including trends
 - Financial and banking data among the poor
 - Other poverty data as may be available

Specific Tasks

- Offer recommendations concerning an ongoing strategic growth process including the potential for diversification of funding
- In some cases, where appropriate and/or requested, some data may be provided for the city, balance of county and/or specific communities of high poverty.
- Produce a final product, the Fresno EOC Strategic Plan, that includes the vision, mission and 4-6 strategic goals each inclusive of 2-4 draft strategic initiatives which will guide the organization for the next three to five years.
- Include as an addendum to the Strategic Plan a suggested growth strategy or strategies for the agency.



Dr. Seuss:

*“Sometimes the questions are complicated
but the answers are simple”*

