

STRATEGIC PLANNING AT WCCAO

I. 1987-1996 Strategic Planning Process

Background

During 1987-88, WCCAO contracted with The Planning Group to complete a community needs assessment and facilitate a strategic planning process for WCCAO. The needs assessment was based on surveys completed by low income families, social service agencies, key informants, Board and staff, along with relevant data gathered from a variety of sources. It became the foundation piece for WCCAO's planning.

The planning process actively involved members of the Board and staff, along with some community representation. The process resulted in a revised mission statement, a statement of organization values and a set of long range goals and objectives. In an effort to have the plan be a "living document", we annually dropped the past year and added a new fifth year. As a result, the annual planning process became very cumbersome and somewhat negated the achievement of a long term vision and the comprehensive, highly participatory process that was used. Instead, the original goals and objectives are now reviewed annually and revised if needed and our annual planning focuses on incrementally reaching our strategic vision. The original vision has remained relevant through the annual adjustments and has kept WCCAO focused on a set of priorities.

Impact

Strategic planning established a long range vision for WCCAO. It created, for the first time, a framework of priorities which put WCCAO's annual plan into context and linked all program activities to a set of common goals and objectives. A paradigm shift was required of WCCAO managers to move from specific grant and program management, organized very separately and distinctly, to a highly integrated system of services, support and development. The enormity of this change and all of its implications were never fully anticipated or appreciated. Needless to say, we have been learning as we evolve, and frequently from our mistakes. The implementation of the major changes in how we do business and the financial forecasting were the weakest areas of our first strategic planning experience. That was more true, however, in the first three years of the plan's implementation.

Results

Attached are copies of our:

1. Mission Statement
2. Statement of Values
3. Strategic Goals & Objectives
4. Chart of Organizational Changes

Our values, goals and objectives have been revised and refined over the past six years from the original documents. The Mission Statement remains unaltered.

In order to achieve our vision, a major review and overhaul of WCCAO's organizational structure and client services system occurred. These changes were driven by:

How can we serve families more comprehensively and be more holistic in our approach?

How can we become more effective and efficient by centralizing certain support functions, combining like functions and collaborating across program lines?

How can we create organizational capacity to grow in our priority areas?

II. 1995-2000 Strategic Planning Process

During the Spring of 1995 WCCAO will conduct a comprehensive needs assessment process through a contract with Marc Smiley, Organizational Development Consultant. This will result in a document that will provide WCCAO with the information needed to develop a long range plan based on priority needs of the low income community in Washington County. This document will also be used for community education and fundraising.

The Board will determine if an internal audit of the organization is needed as part of the strategic planning process. If so, the audit would occur prior to the Fall of 1995.

During the Fall of 1995 a planning process will occur to identify the priority goals that will guide the organization's resources and efforts into the new millennium. This process will involve WCCAO stakeholders in a meaningful way and will be based upon the prioritized needs of the low income community. The plan will be implemented in 1996-97.