



Strategic Plan 2014-2016

Introduction

On April 26, 2014, the board and leadership staff of Community Catalysts of California (Community Catalysts) engaged in a planning process to identify the organization's strategic direction and enhance the impact of the organization over the next three years and beyond. The session was preceded by extensive planning and research. This included the development of a feedback report, which featured input from a variety of stakeholder groups and which provided information to help board members make their strategic decisions at the retreat. The organization contracted with Momentum LLC to coordinate and create the feedback report, and to facilitate the retreat itself.

The board retreat began with a presentation from *CEO* Jim Jenkins, who provided a summarized set of information about the organization's history and current impact. This was followed by a summarized presentation of the feedback report, a SWOT analysis, a dialogue specific to the challenges/opportunities of the veterans program, and a series of discussions to determine a set of goals and objectives. The board then discussed its own development and growth, which would enable members to provide optimal support to the organization in achieving the goals and objectives. The final discussion determined next steps to ensure effective execution and monitoring of the strategic plan. An agenda for the session can be found as *Attachment A* at the end of this document.

The following pages provide detailed information on the primary discussions and decisions made at the board retreat.

Retreat Objective

The objective of session was identified as the following:

Using feedback from a variety of stakeholders, create a meaningful strategic plan that sets the path for the next three years and beyond.

CEO Presentation/Feedback Report Summary/SWOT Analysis/Veterans Services Discussion

The first portion of the day featured a variety of information and discussions to assist the board in making its strategic decisions at the retreat. It began with a presentation from CEO Jim Jenkins, who provided information on the history and current impact of Community Catalysts. This was followed by a summarized presentation of the feedback report, which included input from five sets of stakeholders: community partners, staff members, consumers of developmental disabilities services, participants in the Veterans Services program, and the board of directors.

The final discussions in this part of the day was a SWOT analysis (which included an exploration of the organization's current strengths, weaknesses, opportunities and threats) and a dialogue specific to the Veterans Services program and its future in the organization. The SWOT analysis and Veterans Services discussion details can be found as *Attachment B* at the end of this document.

Strategic Goals

Based on the information and analysis from the earlier portions of the day, and through a full-group facilitated discussion, the board found consensus on the following three-year strategic goals:

1. Strategically evolve the Veterans Services Division
2. Increase diversification of revenue
3. Develop board and staff personnel

Objectives

Once the goals were determined, the board then engaged in break-out and full-group discussions, finding consensus on the following three-year objectives for each goal (note: some objectives also include one or more tactics):

Strategic Goal	Objectives
<i>Goal #1:</i> Strategically evolve the Veterans Services Division	<ol style="list-style-type: none"><li data-bbox="810 415 1976 488">1. Analyze the structure and financial strength of the division and adapt the program accordingly<li data-bbox="810 529 1999 675">2. If determined to be feasible, expand the division by identifying future VA funding opportunities (tactics: investigate prospective pilot programs to potentially “sell” to the VA; create symbiotic partnerships; develop new messaging that focuses on core competencies rather than popularity)<li data-bbox="810 716 1745 748">3. Identify and strategically address political and funding challenges
<i>Goal #2:</i> Increase diversification of revenue	<ol style="list-style-type: none"><li data-bbox="810 870 1986 935">1. Explore the creation of a fundraising program and establish one if determined to be feasible (tactic: identify potential board members with fundraising experience)<li data-bbox="810 976 1923 1008">2. Strategically identify and pursue grants that match the organization’s expertise<li data-bbox="810 1049 1999 1114">3. Pursue partnerships and acquisitions, and integrate newly developed strategies into the staff culture
<i>Goal #3:</i> Develop board and staff personnel	<ol style="list-style-type: none"><li data-bbox="810 1203 1881 1235">1. Build the board constituency to provide optimal support to the organization<li data-bbox="810 1276 1923 1308">2. Increase the capacity of staff leadership to achieve strategic business objectives<li data-bbox="810 1349 1430 1382">3. Develop an executive level succession plan

