

Strategic Plan Report

Western Dairyland Community Action Agency

October 18, 2017

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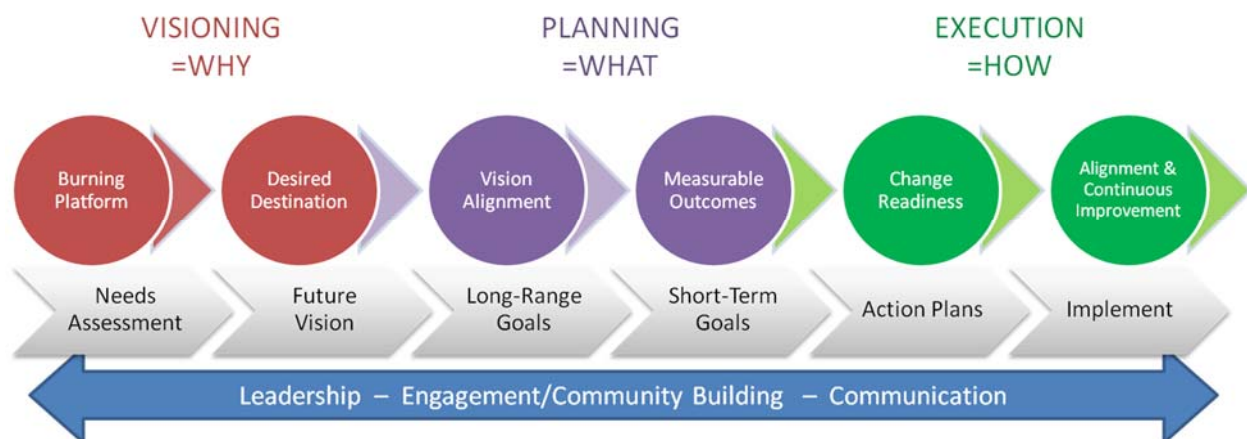
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Section I. Introduction and Background

Western Dairyland CAA (the “Agency” or “Western Dairyland”) engaged Wipfli to facilitate a strategic planning process. The objective of this project and process was to create a Strategic Plan that enhanced the alignment between the agency and community.

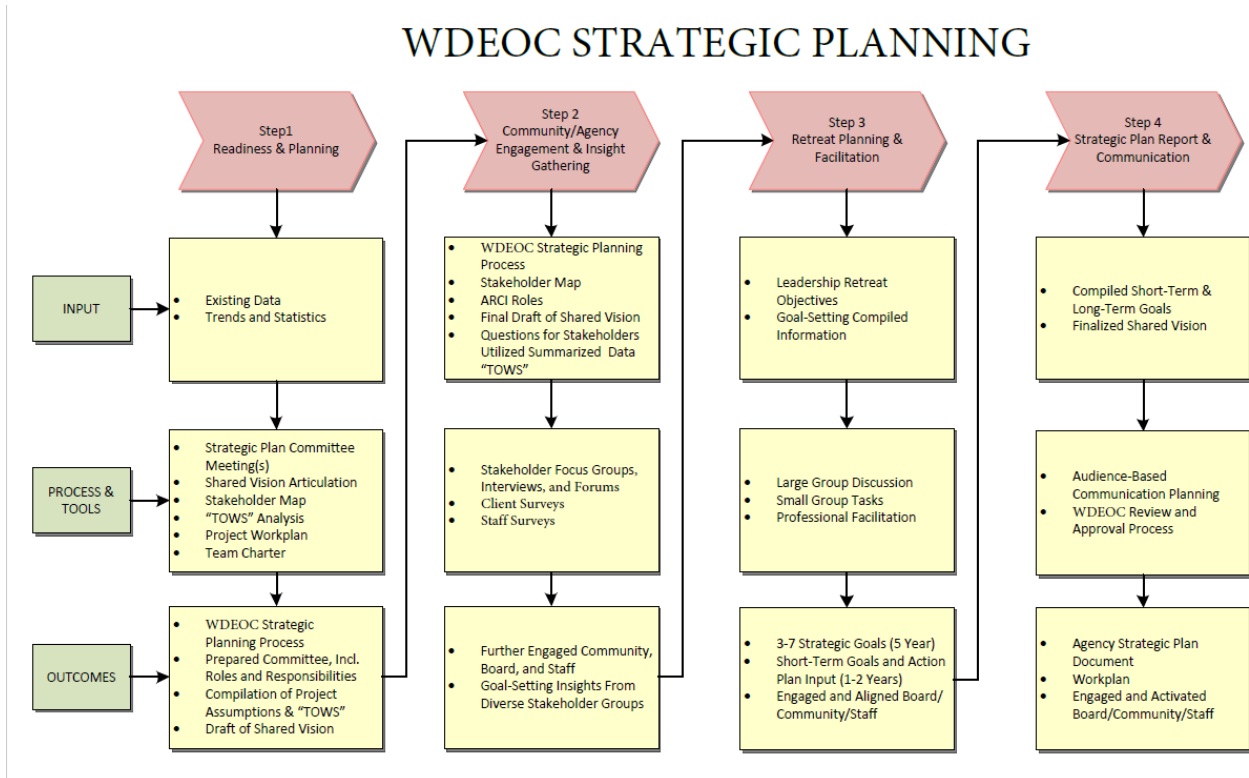
The specific goals of the process were to:

1. Convene a Strategic Planning Task Force with Board and Staff representation.
2. Articulate a community and agency Shared Vision that puts forth a compelling long-term future for Western Dairyland and its communities.
3. Research and document the current threats, opportunities, weakness and strengths (TOWS) of Western Dairyland and its program divisions.
4. Establish and prioritize Western Dairyland community and agency stakeholders that are critical to the Project’s success.
5. Engage and gather stakeholder input through interviews, focus groups, forums, and surveys.
6. Re-evaluate the Shared Vision and TOWS based on stakeholder feedback.
7. Develop long-range goals for implementation of strategic objectives over the next five years (to 2022).
8. Communicate the Strategic Plan Report to the agency and community.



Section II. Approach

Wipfli worked with Western Dairyland to design a customized process to develop a new strategic plan. This process integrated key stakeholder and client/community input to drive decision making. Our approach is overviewed below (graphic) with the approach spelled out thereafter.



Step One – Readiness & Planning

Objectives: Prepare the convened Strategic Planning Task Force at Western Dairyland for its strategic planning process; create a plan for the strategic plan; and support the gathering of internal and external strategic goal input by providing Western Dairyland with best practices, tools and consultation.

Timing:

January, 2017

Tasks and deliverables:

1. Produce a request for background and strategic planning supporting documents (Wipfli)
2. Complete as much of the request for documents as possible before the week of January 16, 2017 (Western Dairyland)
3. Prepare an agenda, questions and discussion guides for on-site meetings, January 17 – 19, 2017 (Wipfli)
4. Convene strategic planning “Task Force” (Western Dairyland* See Below)
5. Hold planning and initial input meetings with you, the Task Force, and Western Dairyland’ management/staff to achieve the following outcomes (All):
 - a. Shared vision and values articulation
 - b. Initial change readiness assessment (stakeholder identification/map)
 - c. Preliminary Threats-Opportunities-Weaknesses-Strengths (TOWS) analysis
6. Document a project workplan, including timeline, major milestones, roles, responsibilities and immediate next steps (Wipfli)
7. Create a Shared Vision Subcommittee to further develop/vet the vision
8. Setup biweekly check-in calls to discuss questions/concerns/needs/progress.

*Senior leadership identified and nominated a total of 13 people to join the Task Force (TF or Strategic Planning Task Force). These members comprised a cross-section of the organization. The TF members include:

1. Troy Bjorgo, Program Leader – Weatherization/Rehab
2. Karman Briggs, Program Leader – Women’s Business Center
3. Anna Cardarella, Executive Director
4. Thanh Bui-Duquette, Program Leader – Head Start/Early Head Start
5. Peter Jones, Planning and Development
6. Dale Karls, Communications
7. Paul Savides, Board
8. Jeanne Semb, Program Leader – Housing Services
9. Meghan Solberg, Program Leader – Child Care Partnership
10. Sherri VanVuren, Program Leader – Head Start/Healthy Communities

Step Two – Community/Agency Engagement & Insight Gathering

Objectives: Engage program and community stakeholders in envisioning Western Dairyland's future and long-term goals; prepare the TF to gather and coordinate diverse stakeholder feedback for planning input.

Timing:

January – March, 2017

Tasks and deliverables:

1. Create an interview guide, focus group guide and survey instruments to enable Western Dairyland to gather key insights along common themes and data needs (Wipfli)
2. Advise Western Dairyland's TF on the detailed plans for interviews, focus groups and in-person surveys (Wipfli)
3. Conduct the planned interviews and focus groups (Western Dairyland)
4. Conduct select phone or in-person interviews, where an arms-length relationship is necessary for valid feedback (Wipfli)
5. Collect, analyze and summarize existing documents and research (Wipfli)
6. Gather, organize and summarize new Western Dairyland data (Wipfli)
7. Identify trends, major insights, and other relevant input to strategic planning (Wipfli)

Step Three – Retreat Planning & Facilitation

Objectives: Plan an agenda and tailored group processes to facilitate the development, evaluation and selection of long- and short-term goals for Western Dairyland; successfully facilitate a strategic planning retreat in or near Eau Claire.

Timing:

March 6 – 7, 2017

Tasks and deliverables:

1. Assist Western Dairyland with an invitation list, space planning and other retreat logistics (Wipfli)
2. Arrange for space and provide retreat-related supplies and food/beverages (Western Dairyland)
3. Create the retreat agenda, including group process to fit the culture and achieve desired outcomes (Wipfli, with close Western Dairyland coordination)
4. Produce retreat pre-read documents, consisting of summarized data/insights and relevant third-party materials (trends, research, etc.) (Wipfli)
5. Send invitations, confirm attendance, provide pre-reads in a timely manner, and help to ensure attendees are prepared for the planning retreat (Western Dairyland)

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6. Facilitate the Western Dairyland planning retreat (Wipfli)
 7. Document the updated Shared Vision, the 5-year strategic goals or goal input; any short-term goals and/or action steps identified; and other relevant process outcomes (Wipfli)
 8. Confirm, validate and/or approve retreat outcomes (Western Dairyland)

Step Four – Strategic Plan Report & Communication

Objectives: Document the Western Dairyland strategic plan; provide guidance on the development of a communication plan to achieve stakeholder awareness, approval or ownership of the long-range goals.

Timing:

Summer, 2017

Tasks and deliverables:

1. Review, refine and incorporate retreat outcomes into previous insights; incorporate relevant process and stakeholder involvement information.
2. Identify and document updates to TOWS analysis, Readiness Assessment, Stakeholder Map, and other tools used in Step 1.
3. Design stakeholder (client and employee) surveys in electronic format (Wipfli)
4. Conduct family, individual client, and staff member surveys (Western Dairyland)
5. Gather, organize and summarize new Western Dairyland survey data (Wipfli)
6. Create the Strategic Plan Report, a p of the Strategic Plan for public communication, and any supporting documents.
7. Present the final Report and documents to Western Dairyland.

Section III. Results

The Task Force utilized all the input summarized below and in the Appendices as part of the Strategic Planning process and Board Retreat process, resulting in the confirmation of the Mission, Vision, and new 2018-2022 Long-Range Goals. An “at-a-glance” summary for strategic plan communication is also included below.

Mission Statement

The TF agreed consistently that the historic mission of the agency has not changed. It correlates with what Western Dairyland does and is supposed to do as an organization. After testing this with various other stakeholders, Western Dairyland approved this statement:

Mission:

Alleviate poverty-related conditions and provide opportunities which enable people to advance economically and socially.

Vision Statements

Reviewing substantial input for future community and client needs and aspirations, and then “market testing” with every stakeholder group, the TF put forth a refined shared vision for both the communities served and the Agency:

Community Vision:

All people in western Wisconsin are embraced by and empowered to participate in a thriving, safe, and healthy community.

Agency Vision:

We are a progressive, action oriented team that supports people of all backgrounds in moving from situational or generational poverty and isolation to self-sufficiency.

Long-Range Goals

The TF and Board Retreat attendees utilized all input gathered throughout the process to create six (6) long-range goals for the organization. Long range goals are organizing principles to help clarify the vision and make future decisions about strategies, actions, innovation, budgets, and resources.

Long-Range Goals:

1. Inform the community about the impacts of poverty and the collective benefits of addressing it together.
2. Lead collaboration within our communities to secure funding and develop services that meet current needs.
3. Assist vulnerable populations to achieve financial security.
4. Advance the coordinated effort to ensure permanent, safe, and affordable housing.
5. Ensure access to employment and community resources through safe, affordable, and reliable transportation.
6. Expand community capacity to provide high quality child care and comprehensive early childhood services for all children and families.

Strategic Plan “At-a-Glance”



Stakeholder Involvement

Our collaborative process of community and low-income stakeholder engagement and involvement resulted in the following:

- 40 rural and urban community and partner interviews
- 10 governance, leadership, and staff interviews or focus group meetings
- 97 staff strategic plan survey responses
- 280 client strategic plan survey responses, representing every program area and location served

Note that stakeholders interviewed are included in Appendix A

Note that interview guides and surveys used in the strategic planning process are included in Appendices B and C.

TOWS (Threats, Opportunities, Weaknesses and Strengths)

The summarizing of stakeholder feedback also provided for a detailed TOWS analysis. To restate, the analysis is comprised of the following:

- Threat: an external-to-the-agency trend, issue, occurrence, or decision that may *negatively* impact its current or future direction and success
- Opportunity: an external-to-the-agency trend, issue, occurrence, or decision that may *positively* impact its current or future direction and success
- Weakness: an internal-to-the-agency factor (system, policy, behavior, etc.) that *negatively* impacts its ability to deliver on its mission or program goals and outcomes
- Strength: an internal-to-the-agency factor (system, policy, behavior, etc.) that *positively* impacts its ability to deliver on its mission or program goals and outcomes

Summarized results, as used in the Board Retreat and long-range goal decision making:

Western Dairyland Community Action Agency



TOWS MATRIX

EXTERNAL FACTORS	
THREATS (-)	OPPORTUNITIES (+)
<ul style="list-style-type: none"> Diminishing resources for families living in rural communities Decreasing program enrollments (e.g. early childhood) Funding constraints – limited funding sources with restricted requirements, increased competition National political and economic climate for human and social services (lack of empathy; blame the individual) Negative media influence Not enough community/client involvement in solutions 	<ul style="list-style-type: none"> Strong collaborations and relationships with other local agencies Growing climate of collaboration in Eau Claire Underserved lower counties can mean “room for growth” Early childhood grant expansion trends Positive media influence Changing demographics (greater empathy/tolerance) Growing Latino population Increased awareness of some programming and support services (e.g. mental health, energy conservation) Social movements aligned to mission and programs New funding development (e.g. philanthropy)
INTERNAL FACTORS	
WEAKNESSES (-)	STRENGTHS (+)
<ul style="list-style-type: none"> Lack of public awareness or misinformation <ul style="list-style-type: none"> Confusing brand name Broad, non-specific mission and array of services Lack of internal awareness of opportunities in other programs/communities Programs and services are grant-driven, not needs- or “people-driven” <ul style="list-style-type: none"> Agency delivers services, not solutions Not connected well enough to the right people/organizations for solutions Missing social needs in current programming (having to refer clients elsewhere) Services to community governed by strict eligibility rules Capacity of individual programs, agency and staff spread too thin Lack of staff diversity Lack of full Board involvement (i.e. development, outreach, fundraising) Lack of succession plans for tenured staff (e.g. CFO) Access to clients and outreach (finding clients who cannot find WDCAA) Lack of diversified funding Lack of fundraising resources (development staff, history/experience) 	<ul style="list-style-type: none"> Staff is competent, experienced, qualified, devoted and dedicated Strong passion and commitment among some Board members Client engagement and participation in policy making Existing programs have built strong reputations within the community Direct connections with low income families Many programs and services housed in one space; “one stop shop” Many strong local/regional collaborations and relationships One of very few agencies with regional reach Great success stories to help educate and advocate for support/change 50+ years of experience and public service Agency is seen as having initiative, innovative Good relationships with legislators Successful transition of executive leadership to Anna

Strategic Need Areas Prioritized

To complete Planning Process Step 2 and prepare for the Board Retreat, Wipfli helped summarize all new and existing input and data into “strategic need areas.” The TF and Board representatives used both the summary and detailed data to selecting areas for consideration in setting long-range goals for the agency. The inputs consisted in general of the following:

- Existing documents and research around the causes and conditions of poverty in communities served by Western Dairyland, such as the 2016 CSBG Needs Assessment, the 2016 Community Action Plan, and the most recent Head Start Needs Assessment.
- New primary data gathered through client, community, and staff interviews, forums, surveys, and governance meetings.
- Identification of trends, major insights, and other relevant input to Western Dairyland client and community needs and conditions.

Summarized results, as used in the Board Retreat and long-range goal decision making:

STRATEGIC NEEDS

STRATEGIC NEED AREAS		
PERVASIVE	STRONG	IMPORTANT
<p><i>Causes & Conditions of Poverty</i></p> <ol style="list-style-type: none"> 1. Economic development <ul style="list-style-type: none"> o Job creation o Living wage employment o Underemployment o Income disparity 2. Rural services 3. Transportation 4. Housing/homelessness 5. Employment skills and talent retention 6. Mental health 7. Child care <p><i>Needs from the Agency</i></p> <ol style="list-style-type: none"> 8. Community planning/Collective impact 9. Communication about WDCAA 10. Education about poverty 	<p><i>Causes & Conditions of Poverty</i></p> <ol style="list-style-type: none"> 11. Diversity and inclusion 12. Drug abuse and addiction 13. Food insecurity 14. Healthcare 15. Resources for the working poor 16. Preventing ACEs 17. Seniors/aging poor <p><i>Needs from the Agency</i></p> <ol style="list-style-type: none"> 18. Outreach and case management 	<p><i>Causes & Conditions of Poverty</i></p> <ol style="list-style-type: none"> 19. Higher education opportunities 20. Single mothers (wrap-around) 21. Small business survival 22. Infrastructure (roads) 23. Hidden poor in rural areas 24. Re-entry/incarcerated (wrap-around)

Section IV. Next Steps and Summary

Next Steps

With the completed components of the Western Dairyland Strategic Plan, members of the Task Force are advised to identify one (1) accountable senior leadership champion for each of the Agency's Long-Range Goals. This approach will ensure that the Goals can be further researched, clarified, extended to others for collaboration and planning, etc. as the situation for each warrants. Leadership champions are not necessarily the subject matter experts or responsible parties for the future strategies under each goal. Rather they are representatives of the TF and the process undertaken, as well as people of influence in the Agency and community, to ensure momentum is carried forward and that a communication and action plan is fully developed.

Additional Next Steps:

1. **Communication** Wipfli recommends creating an audience-based communication plan to ensure the following outcomes are met:
 - a. Follow up with those involved in the Strategic Planning process
 - b. Awareness of all staff of the new Strategic Plan components
 - c. Awareness of all staff of intended next steps for Strategic Planning
 - d. Awareness of other key community stakeholders of the new Strategic Plan components
 - e. Targeted communication to media, partners, coalitions, donors, prospective donors, prospective funders, and current funders regarding Strategic Plan updates
 - f. Momentum and progress for TF members and Board members, through to the next phase of Planning (in 2018)
2. **Change Readiness** For those areas identified as high likelihood for change (process, system, personnel, etc.), Wipfli recommends a change plan inclusive of leadership communication, training/development needs, and any other support unique and appropriate to the expected change. Wipfli can provide tools and technical assistance in this area.
3. **Rural County/Community Outreach** Through the Strategic Planning process, we collected feedback and heard abundant input about Western Dairyland's desired presence and service needs in its more rural counties and communities. Wipfli recommends creating a sub-committee/taskforce coordinated through the Executive Director to help focus all the long-range goals to best meet the specialized needs.
4. **Strategic Planning Task Force** We recommend re-convening your Strategic Planning Group, with a key first action step to review and integrate Client Survey results and Staff Volunteers into ongoing short-term action steps, communication planning, etc. Also, at six month increments (Spring and Fall), we recommend formal strategy check-in's on progress and barriers.

Summary

Wipfli appreciates this opportunity to work with Western Dairyland's leadership team, Board members, staff, and community stakeholders through this important process. In our meetings with the TF, we found each member was dedicated to and passionate about finding the clear connection between what the Agency does and what the Community needs and expects of it.

Our assessment of the results of the Committee and Board's work is that the Strategic Plan components delivered are impactful, motivational, visionary and most importantly reflective of the diverse array of individuals and organizations involved in the process.

It is our hope that, through the involvement of so many engaged stakeholders, the Executive Committee and the full Board will approve and endorse the work contained herein.

Appendix A

Key Inputs to TOWS and Strategic Needs

2017 Stakeholder Interviews (Task Force)

1. Amy, Bob, Becky, Cheri and Scott, Eau Claire Chamber of Commerce
2. Ann Rupnow, Western Dairyland Women's Business Center Advisory Board
3. Anne Hlavacka, UW La Crosse Small Business Development Center
4. Annie Lisowski, 4-H and Youth Development, Buffalo County UW Extension
5. Ashley Kosharek, AMK Cleaning Services (WBC Client)
6. Barb Brower, Communications Director, Black River Memorial Hospital
7. Bernie Brunkow, Western Dairyland Director
8. Bob Jones, Executive Director, WISCAP
9. Chris Hardie, Executive Director, Black River Area Chamber of Commerce
10. Collin Hawkins, Chippewa Valley Technical College
11. Debbie Gough, Eau Claire Housing Coalition
12. Debra Suchla, Trempealeau County Human Services
13. Dian Moen-Ross, Black River Falls Boys & Girls Club
14. Elizabeth Giese, Healthy Communities, City/County Health Department
15. Emily Moore, Executive Director, Feed My People Food Bank
16. Gene Tremblay, Division of Vocational Rehabilitation (Eau Claire Office)
17. Greg Corning, Superintendent, Mondovi Schools
18. Gregg Moore, County Board Chair, Eau Claire County Board
19. Jeff Eide, Superintendent, Blair-Taylor School District
20. Julian Emerson, Leader-Telegram
21. Keith Jonathan, City of Eau Claire Housing Authority
22. Kelly Christianson, Eau Claire Housing Coalition
23. Ken Adler, Eau Claire Housing Coalition
24. Kerry Kincaid, President, Eau Claire City Council
25. Kyle Deno, Jackson County Clerk
26. Laurie Boettcher, Chippewa Valley Technical College
27. Luke Hansen, Eau Claire Economic Development Corporation
28. Luke Kempen, UW Eau Claire Small Business Development Center
29. Mary Wood, Family Living Coordinator, Buffalo County UW Extension
30. Mike Huggins, Clear Vision Eau Claire
31. Ned Noel, Associate City Planner, City of Eau Claire
32. Pam Taylor, Workforce Connections, Inc.
33. Sandra McKinney, JONAH
34. Sarah Steffen, Community Connections Program Assistance, Marshfield Clinic
35. Sarah Stokes, Stokes+HERZOG
36. Sheila Wall, Western Dairyland Women's Business Center Board
37. Staci Heidtke, UW Eau Claire
38. Steve Meyer, Community Member/Retired from Jackson Electric
39. Tom Hiebert, Superintendent, Cochrane-Fountain City (CFC) School District
40. Tom Wirth, Assistant Director, Eau Claire County Human Services

Western Dairyland Community Action Agency



2017 Staff and Governance Interviews (Wipfli)

1. Thanh Bui-Duquette & Sherri VanVuren (Director and ERSEA Manager, Head Start)
2. Karman Briggs (Director of Jobs & Business Development/Women's Business Center)
3. Anna Cardarella (Executive Director)
4. Jacque Hogan (Program Director, Project Employment)
5. Dotty Lillo (Director, Child Care Partnership)
6. Cheryl Padula (Program Director, RSVP)
7. Cindy Schaller (Finance Director)
8. Board of Directors' Executive Committee
9. Head Start Policy Council
10. Strategic Planning Task Force

Additional Sources

1. 2016 Western Dairyland Agency Needs Assessment
2. 2016 Head Start Community Health Needs Assessment
3. Community Action Plan 2016
4. 2015-2016 Head Start Program Year Self-Assessment Report
5. 2015-2016 PIR Performance Indicator Report –Head Start
6. 2015 Western Dairyland Annual Report
7. 2015 Western Dairyland Consolidated Financial Statements
8. 2014 Western Dairyland Annual Report
9. 2010 Western Dairyland Strategic Plan

Appendix B

Western Dairyland Community Action Agency

Strategic Planning Interview

Name: _____

Date: _____

Program/Dept: _____

1. What couple of words come to mind when you think of Western Dairyland, as it is today?
[Click here to enter text.](#)

2. What is your best or most memorable experience with Western Dairyland? OR What is the greatest strength(s) of Western Dairyland?
[Click here to enter text.](#)
How does that inform your overall opinion of the agency?
[Click here to enter text.](#)

3. What is a not so memorable experience or memory with Western Dairyland? OR What is the biggest limitation(s) of Western Dairyland?
[Click here to enter text.](#)
What do you contribute the issue to?
[Click here to enter text.](#)

4. Why are Western Dairyland's programs vital to the community?
[Click here to enter text.](#)

5. What are the greatest strengths of your program?
[Click here to enter text.](#)

6. What are the limitations or barriers your program faces?
[Click here to enter text.](#)

7. Describe some of the (additional) ways you see Western Dairyland achieving its mission.
[Click here to enter text.](#)

8. What is the greatest priority of unmet need in your community?
[Click here to enter text.](#)

9. What is the 1 best way for Western Dairyland to be a better (provider, partner, employer, agency), to better serve the community?
[Click here to enter text.](#)

10. Are there ideas that we have not discussed that you think we should have?
[Click here to enter text.](#)

Appendix C

Western Dairyland Staff - Strategic Planning Input

Welcome!

Please take a few minutes to complete this staff survey. Your voice is so extremely valuable to our work and the future of Western Dairyland Community Action Agency's programs and services.

All responses are anonymous. Our partners at Wipfli CPAs & Consultants are managing the survey process and results, so you can feel comfortable answering honestly and confidentially.

Thank you so much for your time and feedback,

Anna Cardarella, Executive Director

Western Dairyland Staff - Strategic Planning Input

About You

1. Please indicate your department or program area:

- Admin/Finance
- Head Start
- JBD (Jobs and Business Development)
- Child Care Partnership
- RSVP (Retired Senior Volunteer Program)
- Weatherization/Energy
- Project Employment

2. Please indicate your organizational level:

- Program Staff (Non-manager)
- Administrative Staff (Non-manager)
- Manager/Supervisor
- Director or Executive

Western Dairyland Staff - Strategic Planning Input

Vision

The Strategic Planning Task Force has drafted two vision statements for your consideration in the following question:

COMMUNITY VISION: All people in western Wisconsin are embraced by and empowered to participate in a thriving, safe and healthy community.

AGENCY VISION: A progressive, action oriented and cohesive team that helps people of all backgrounds move from situational or generational poverty to independence and beyond.

3. What are two ways you see us achieving each of these visions?

Community Vision

Agency Vision

Western Dairyland Staff - Strategic Planning Input

Long-Range Goals

The Board and Strategic Planning Task Force established the following long-range goals for 2018-2022. Please use these goals to respond to the following set of questions.

- 1. Inform the community about the impacts of poverty and the collective benefits of addressing it together.**
- 2. Lead collaboration within our communities to secure funding and develop services that meet current needs.**
- 3. Assist vulnerable populations to achieve financial security.**
- 4. Advance the coordinated effort to ensure permanent, safe, and affordable housing.**
- 5. Ensure access to employment and community resources through safe, affordable, and reliable transportation.**
- 6. Expand community capacity to provide high quality child care and comprehensive early childhood services for all children and families.**

4. Which of the 6 goals does your role most closely align to? Choose as many as apply.

- 1
- 2
- 3
- 4
- 5
- 6
- None

5. How do you see your role contributing to the goal(s) you selected?

6. What ideas do you have for accomplishing any of these goals?

7. How can the agency do things differently to better achieve these goals?

8. Would you be interested in working on a team to identify short-term goals and action plans?

Yes

No

Western Dairyland Staff - Strategic Planning Input

Team Sign-Up

Please provide your name and email address to be a part of the team. The rest of your responses will be kept confidential and separate from your identifiable information.

* 9. First and Last Name:

* 10. E-mail Address:

Western Dairyland Staff - Strategic Planning Input

Thank You!

Thank you for your participation and input. Your feedback is invaluable.

Welcome!

Please take a few minutes to complete this client survey to help us in our strategic planning and goal-setting efforts. Your voice is so extremely valuable to our work and the future of Western Dairyland Community Action Agency's programs and services.

All responses are anonymous. Our partners at Wipfli CPAs & Consultants are managing the survey process and results, so you can feel comfortable answering honestly and confidentially.

Thank you so much for your time and feedback,

Anna Cardarella, Executive Director

About You

1. Please choose which program(s) or service(s) you are a part of:

- Head Start
- Women's Business Center
- Child and Adult Care Food Program (CACFP)
- YoungStar Technical Assistance
- Childcare Resource and Referral
- Homeless Shelters/Housing First
- Fresh Start
- Work & Wheels
- Paratransit Certification
- Rapid Rehousing
- RSVP Volunteer Program: Weekend Foods 4 Kids
- RSVP Volunteer Program: Birthday Box project
- RSVP Volunteer Program: Volunteer Caregivers
- Weatherization
- Housing Rehab
- Energy Assistance
- Skills Enhancement

Long-Range Goals

* 2. The following are our organization's 2018-2022 long-range goals.

Please rank the goals by how much they meet the needs of your family or your community
(1=Meets the Most, 6=Meets the Least)

<input type="text"/>	Inform the community about the impacts of poverty and the collective benefits of addressing it together.
<input type="text"/>	Lead collaboration within our communities to secure funding and develop services that meet current needs.
<input type="text"/>	Assist vulnerable populations to achieve financial security.
<input type="text"/>	Advance the coordinated effort to ensure permanent, safe, and affordable housing.
<input type="text"/>	Ensure access to employment and community resources through safe, affordable, and reliable transportation.
<input type="text"/>	Expand community capacity to provide high quality child care and comprehensive early childhood services for all children and families.

* 3. To achieve the goal you ranked as #1 in the previous question, should the agency/program...

- Keep providing the same or even more of the same services
- Provide new services in addition to those currently offered
- Provide completely new and different services

If you chose option 2 or 3, please provide examples of the new services the agency should provide:

Thank You!

Thank you for your participation and input. Your feedback is invaluable.

Appendix D

Western Dairyland Community Action Agency



Strategic Planning Retreat Agenda

Eau Claire March 6 – 7, 2017

Wipfli: Seth Fine and Shelly Schwane

WDCAA: Attending Board Members

Strategic Planning Task Force:

(Troy Bjorgo, Karman Briggs, Thanh Bui-Duquette, Anna Cardarella, Peter Jones, Dale Karls, Paul Savides, Jeanne Semb, Meghan Solberg, Sherri VanVuren)

Day 1 – Monday, March 6

8:30-9:00	Reception/Social
9:00-9:15	Welcome, Communicate desired outcomes (Anna)
9:15-9:45	Warm Up and Process Introduction
9:45-10:30	Shared Vision Activity
10:30-10:45	Break
10:45-11:15	Community Needs & TOWS Review
11:15-12:00	History and Destination Activity
12:00-1:00	Lunch
1:00-2:30	Long-range Planning & Goal Setting
2:30-2:45	Break
2:45-3:45	Goal Setting Continued
3:45-4:00	Recap of Day 1/Prep for Day 2

Intended Outcomes for Day 1: Shared vision input; draft of long-range goals; engaged and informed Board and Task Force

Day 2 – Tuesday, March 7

8:30-9:00	Reception/Social
9:00-9:15	Welcome back, confirm process and outcomes
9:15-10:30	Propose and discuss drafted long-range goals
10:30-10:45	Break
10:45-11:30	Modify and finalize goals
11:30-12:00	Group discussion – Change readiness and impact
12:00-1:00	Lunch
1:00-1:45	Change and communication planning
1:45-2:00	Appreciations and Wrap Up

Intended Outcomes for Day 2: Final long-range goals for full Board approval; change management and communication plan outlined; engaged and activated Board and Task Force