



Strategic Plan Narrative Report

Western South Dakota Community Action

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Executive Summary

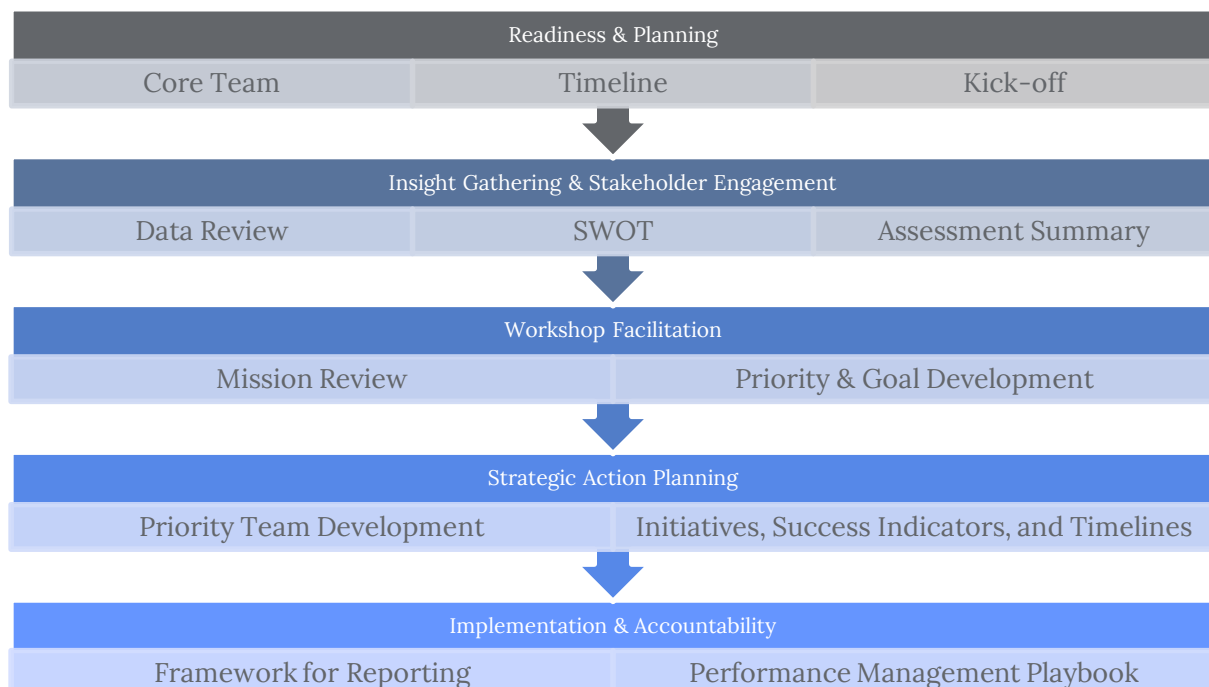
Wipfli LLP was engaged to assist Western South Dakota Community Action (WSDCA) in designing and delivering an inclusive strategic planning process for the organization. This is resulting in a Strategic Plan, to help direct Board, leadership, and staff activities with implementation beginning in 2025.

Through a data informed process and consensus-based facilitation, five strategic priorities were developed that WSDCA believes will move them toward their mission over the next 3 to 5 years. These are listed to the right. Each area now has an actionable goal statement, initiatives, and action items for implementation.

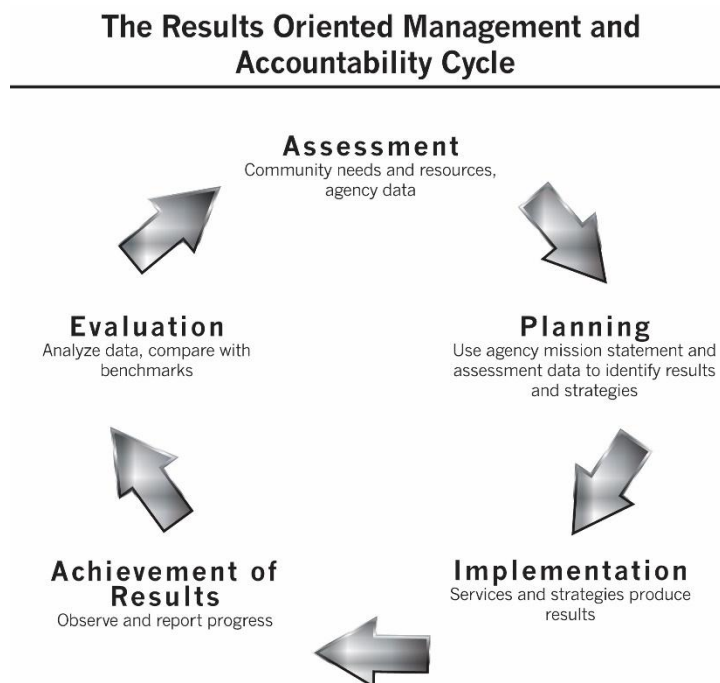


Process Overview

Wipfli worked with WSDCA's leadership to plan, identify stakeholders to involve, and structure the workshop for success. Prior to the workshop, data on community needs, customer satisfaction, and agency capacity was collected and analyzed to provide a foundation of emerging themes to plan with. The result is a well-balanced plan, alignment with the ROMA framework, and with goals at the family, agency, and community level. Additional details on the process are depicted below.



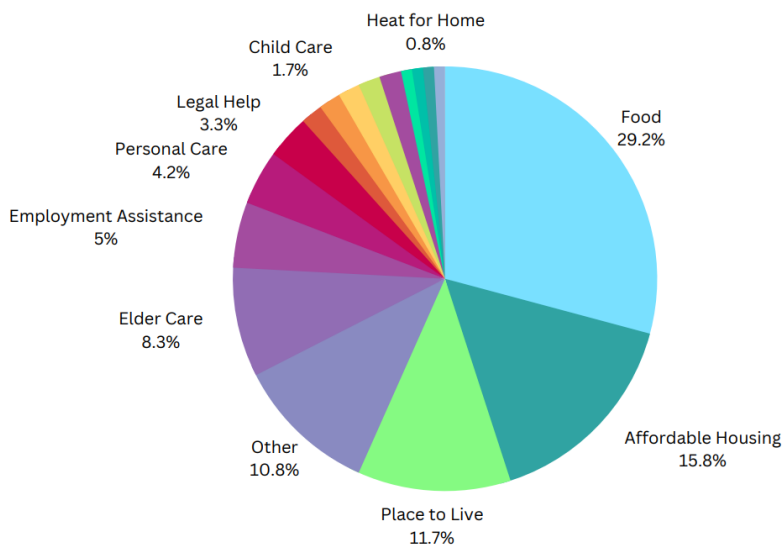
In following our established process, Community Action Agencies across the country use the *Results Oriented Management and Accountability* (ROMA) framework to assure their work aligns with national program goals and priorities.



Source: National ROMA Peer-to-Peer Certification Program

Community and Family Data

When the agency conducted its last Community Needs Assessment in 2023, respondents were asked about the top needs in the community for those who live in poverty. The results are depicted below, with food and affordable housing being top needs.



SWOT Analysis

A SWOT analysis is the basis for strategic decision making. It is pivotal in telling us who we are and what could be in our organization's future. It helps inform of our capabilities, where we should invest, where we should divest, what we should capitalize on, and what we should avoid. Specific definitions are presented below:

- **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
- **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
- **Opportunity:** An external-to-the-agency trend, issue, occurrence, or decision that may positively impact its current or future direction and success
- **Threat:** An external-to-the-agency trend, issue, occurrence, or decision that may negatively impact its current or future direction and success

The environmental scan used all primary and secondary data available to us to make a comprehensive SWOT analysis. The summary of these SWOT items identified prior to and during the Strategic Planning Workshop are listed below.

INTERNAL	Strengths	Weaknesses
	1. Dedicated and knowledgeable staff 2. Strong sense of community and empathetic nature 3. Staff diversity and experience 4. Quality of work and helpfulness of programs 5. Passionate and collaborative employees 6. Commitment to the mission and community 7. Availability of services like housing and energy assistance 8. Office culture and environment	1. Limited visibility in the community 2. Struggles with modern technology 3. Challenges related to funding and staff retention 4. Communication issues 5. Low wages and decreasing benefits 6. Limited availability of assistance in rural areas 7. Lack of public awareness and volunteers 8. Dependence on federal funding
EXTERNAL	Opportunities	Threats
	1. Expanding to outer counties 2. Raising awareness in the community 3. Private donor fundraising and collaboration with other nonprofits 4. Improving marketing and fundraising opportunities 5. Increased professional development 6. Becoming a presence for good in the area 7. Developing a fund development program 8. Strengthening energy efficiency and environmental resilience programs	1. Political shifts affecting funding 2. Economic instability and rising costs of living 3. Funding cuts and uncertainty about federal grants 4. Retaining staff 5. Aversion to public assistance 6. Gaps in authority and support from leadership 7. Dependence on state and federal funding 8. Instability in federal funds

Mission & Vision Review

Prior to and during the onsite workshop, the mission of WSDCA was reviewed and affirmed. Participants in the process were asked what resonated with them about the mission, as well as what they thought was missing. During the workshop, participants reviewed the mission statement against two key criteria:

1. Does the mission address poverty for Western South Dakota?
2. How do programs and services at WSDCA align with the mission?

Help low-income and vulnerable populations achieve stability in their communities.

The mission was affirmed to meet the criteria. Discussion led to confirmation that, while it addresses poverty and aligns with programs and services at WSDCA. Some feedback during the workshop centered around potential word alternatives that may be considered in the case of a future revision. The overall meaning for the agency is aligned with the work.

In addition, when survey respondents were asked how effectively they think the organization is achieving its mission, on a scale of 1-5 (with 5 being most effective), the average rating was 3.37. This suggests that respondents believe the organization is moderately effective in achieving its mission.

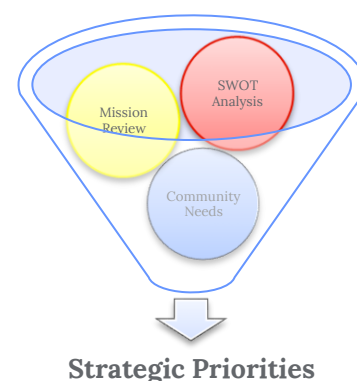
An organization's shared vision is our hope for the preferred future, our desired destination as individuals and as a community. It's why we struggle. The organization's current vision is:

WSDCA provides services that reduce poverty in Western South Dakota one person at a time.

Strategic Priorities

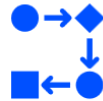
The WSDCA leadership and board considered the question of what innovative and substantial actions would move the organization forward toward fulfillment of a meaningful and effective strategic plan. Small teams brainstormed ideas that would work toward the mission, while leveraging strengths, overcoming weaknesses, taking on opportunities, and mitigating risks.

The following pages exhibit the culmination of individual think time, small group discussion and, ultimately, the collaboration of all attendees to create a roadmap for success. These ideas and strategic thinking led to the development of the newly crafted strategic priorities, actionable goals, aligned initiatives, and indicators of success.





WSDCA Strategic Priorities and Goals



Adaptive Programming

Enhance current programming and respond to gaps in services throughout our 15-county service area



Visibility & Awareness

Promote brand and programming awareness across communities and service organizations



Enhanced Collaboration

Strengthen internal collaboration and create lasting relationships within the community



Financial Sustainability

Create a fiscal plan to increase reserves and diversify funding to anticipate change



Staff & Infrastructure

Recruit, retain, and develop staff, and enhance infrastructure for a safe, secure, and quality work environment



Adaptive Programming

Enhance current programming and respond to gaps in services throughout our 15-county service area

Initiatives:

- Collaborate with community leaders and stakeholders to engage community support in programs
- Develop a plan for enhanced services in rural areas inclusive of civic partnership, digital access, and traveling staff to ensure equality in program services
- Conduct needs assessment and form a task force to implement an action plan

Indicators of Success:

- # of program partnerships established
- # of remote access points established in priority locations within 1 year
- Community Assessment form and delivery methods adapted
- # of programs enhanced or created to address unmet needs each year



Visibility & Awareness

Promote brand and programming awareness across communities and service organizations

Initiatives:

- Increase board involvement and training to promote the agency footprint in the outer communities
- Enhance brand awareness
- Encourage staff knowledge of all WSDCA programs to promote information through public events
- Create a closer philanthropic relationship with our for-profit partners and vendors

Indicators of Success:

- Board and staff onboarding program created
- Increased media presence
 - Social media: # of posts and interactions
 - Traditional media: # of interactions
- Increased internal staff knowledge of all programs and services
 - # of interdepartmental cross-training activities



Enhanced Collaboration

Strengthen internal collaboration and create lasting relationships within the community

Initiatives:

- Meet with other organizations to share information and community needs on a quarterly basis
- Develop a plan for volunteerism for the agency
- Explore opportunities for collaboration with other Community Action and Tribal organizations

Indicators of Success:

- # of partner collaboration meetings per year
- Volunteerism plan created
 - # of new volunteer relationship developed each month
- Increased engagement with SD Community Action, Tribal, and Region 8
 - # of collaborative activities



Financial Sustainability

Create a fiscal plan to increase reserves and diversify funding to anticipate change

Initiatives:

- Increase board understanding, involvement, fundraising, and training
- Establish and enhance internal processes for fiscal management
- Create resource development and outreach plan

Indicators of Success:

- % of Board members trained on fiscal responsibility each year
- # policies and procedures enhanced for proactive tracking or oversight
- # of new funding partners each year
- 3-6 months of reserves established within 3 years



Staff & Infrastructure

Recruit, retain, and develop staff, and enhance infrastructure for a safe, secure, and quality work environment

Initiatives:

- Create an Employee Relations Committee to promote staff advocacy, recognition, and development
- Develop a staff recruitment and retention plan
- Formalize the building renovation and expansion plan
- Complete software development and integrate data storage, access and security, with robust reporting capacity.

Indicators of Success:

- Employee Relations Committee established within one year
- Staff recruitment and retention plan completed within one year
 - Employee evaluation process enhanced
 - % of staff reporting job satisfaction
- Building and renovation plan completed within one year
 - Capital campaign for remodel completed within two years
- All relevant staff trained on use of any new/enhanced systems or tools within 3 months

Implementation and Accountability

In 1998, the CSBG Reauthorization Act made Results Oriented Management & Accountability (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.

Our process took WSDCA's team 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**. 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. These standards work together to characterize effective and healthy organizations. Alignment to these standards is critical to securing ongoing funding. The following standards are achieved in full or in part through this strategic planning process.

- Standard 4.1 • The governing board has reviewed the organization’s mission statement within the past 5 years and assured that:**
- The mission addresses poverty; and
 - The organization’s programs and services are in alignment with the mission.

Wipfli consultants took the WSDCA team through a mission statement review during the onsite Strategic Planning workshop. Review questions such as, “how does our mission address poverty?” and “how does our mission encompass our programs and the business we are in?” were asked of workshop attendees. Overall, the mission was affirmed, with agreement that the mission addresses poverty and aligns with the agency’s programs and services.

- 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.**

Wipfli consultants, which includes a Nationally Certified ROMA Advocate, took the WSDCA team through a planning process that aligns to the ROMA framework, connecting the assessment and implementation aspects of the ROMA cycle, and setting the organization up for achieving results and evaluating progress. During the strategic planning process, Wipfli and WSDCA created 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.**

Upon receipt and approval of this strategic plan, it will meet this 5-year requirement through 2028, with the final year built in for evaluation and preparation for the next plan.

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 & Goal		Standard 6.2
Adaptive Programming	<i>Enhance current programming and respond to gaps in services throughout our 15-county service area</i>	Enhancing current programming and responding to gaps in services directly helps to empower people with low incomes to become more self-sufficient, as well as reduce poverty.
Visibility & Awareness	<i>Promote brand and programming awareness across communities and service organizations</i>	Promoting brand and program awareness indirectly supports all three components of the CSBG Act.
Enhanced Collaboration	<i>Strengthen internal collaboration and create lasting relationships within the community</i>	Strengthening internal collaboration and community relationships supports the agency's ability to revitalize low-income communities.
Financial Sustainability	<i>Create a fiscal plan to increase reserves and diversify funding to anticipate change</i>	Increasing and diversifying funding supports all three components of the CSBG Act.
Staff & Infrastructure	<i>Recruit, retain, and develop staff, and enhance infrastructure for a safe, secure, and quality work environment</i>	Developing staff and enhancing infrastructure indirectly supports all three components of the CSBG Act.

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

The following outlines which goal aligns with one or more of the categories (family, agency, community) identified in Standard 6.3. Some goals align to more than one category. The initiatives within the priority areas further demonstrate alignment to the three levels.

Family

- **Adaptive Programming:** Enhance current programming and respond to gaps in services throughout our 15-county service area
- **Enhanced Collaboration:** Strengthen internal collaboration and create lasting relationships within the community

Agency

- **Financial Sustainability:** Create a fiscal plan to increase reserves and diversify funding to anticipate change
- **Staff & Infrastructure:** Recruit, retain, and develop staff, and enhance infrastructure for a safe, secure, and quality work environment

Community

- **Visibility & Awareness:** Promote brand and programming awareness across communities and service organizations
- **Enhanced Collaboration:** Strengthen internal collaboration and create lasting relationships within the community

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 strategic planning process, a comprehensive environmental scan was conducted. This process reviewed more than 22 documents and data sets and engaged various stakeholder groups. All were reviewed by Wipfli, and important components were summarized for workshop attendees. Primary data was collected from desirable stakeholder surveys, board and staff surveys, and critical stakeholder interviews/focus groups. In addition, community needs and recent customer data and input were reviewed during the planning process.

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 program directors will be providing the Board with future updates on a regular basis. Then, WSDCA will continue to provide the Board with reports, including progress toward goals and outcomes, every 12 months at minimum.

Conclusion

After all the time, resources, and effort WSDCA has invested in building their strategic plan, getting the most out of it is critical in achieving 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. Next steps for communication and implementation of the plan, beginning in 2025, include:

- **Communication:** WSDCA leadership will communicate the plan to key internal and external stakeholders, taking care to communicate to those that participated in the planning process, as well as those affected by outcomes. Key pieces to communicate are the mission, vision, strategic priorities, and the broad actionable goals.
- **Implementation & Accountability:** Leadership will briefly check-in on the strategic plan monthly, as well as convene on a quarterly basis to review their Action Plans and record and report on progress and accomplishments.
 - Progress report from Leadership to take place at board meetings on a regular basis, and at minimum annually. An annual refresh of the plan will occur to guide details of the plan in each upcoming year in the 5-year timeline.