

TO: Community Action  
FROM: Holly Pruett 503.287.3571, [hpruett@aol.com](mailto:hpruett@aol.com)  
RE: Summary of All-Staff Strategic Planning Session  
DATE: December 3, 2003

Part  
I

"We received positive feedback from our direct service staff regarding the strategic planning process. One staff person shared that she had never participated in an agency strategic planning process and she had really appreciated the opportunity. Staff felt heard!"

### Overview

On October 24, 2003 Community Action convened an all-staff retreat to consider a series of questions intended to inform the strategic planning process. Staff sat in table clusters of their own choosing and responded both individually and as table groups. Responses were tabulated for over 150 individuals.

As facilitator, I was impressed throughout the day by the degree of engagement among participants. The sequence of planning questions was complex and the risk of confusion or wandering attention was great. Instead, the room was filled with thoughtful reflection and dialogue. The culture of Community Action appears to support a high degree of respect for group participation.

The exercises in the planning day had value in the moment. They focused the group on key questions about Community Action and the people you serve, fostering collective reflection and analysis. The greater value, however, will come in the application of the data. It will be important for staff to see how their input is reflected in the emerging strategic plan. More immediately, data collected about staff experience within their work group can be used to explore improvements to the functioning of particular work areas.

The raw data for each major question is available for further study and action. This report summarizes key findings.

### Trends in Washington County

#### 1. Staff were asked to describe the people served by Community Action.

Responses revealed a wide diversity of demographic characteristics across lines of income, employment status, age, ethnicity, family configuration, etc. (See summary, next page.) Some respondents focused on the aspirations of people served by Community Action: wanting to improve their lives, wanting education/ a better life for their children, trying to get out of the system, asking for help. Some focused on assets and strengths, describing clients as: "bright, smart resourceful people facing economic & social problems;" also: nice, proud, resilient, persistent, hard working. Others painted a more somber picture: tired, frustrated, lacking information on resources, have given up, depressed, low self-esteem, feel they don't

belong, unstable, survival mode functioning, "work and try hard but have nothing." Finally, some offered a harsher view of people seeking services who are fraudulent, taking advantage of the system, loiterers, with a "sense of entitlement."

Several participants commented that those seeking services are "just like you and me." One noted, "They are us" – reflecting the fact that some of the people seeking services are the same as those working for Community Action. Demographic traits span a broad range:

Income

- Survival level
- Low income
- Mid to high income

Age

- Children
- Teens/ Students
- Adults
- Seniors/ elderly

Ethnicity & Culture

- Hispanic
- Multicultural
- Immigrants & refugees
- Undocumented
- English learners

Employment & Education

- Working multiple jobs
- Agricultural/ farm workers
- Seasonal workers
- Minimum wage workers
- Underemployed
- Professionals hit by bad economy
- Educated families
- Undereducated

Other Characteristics

- Uninsured
- Homeless
- With disabilities
- Criminal history

Family Configurations

- Multi family households
- Foster parents & children
- Young & teen parents
- Single parent families
- Grandparent households
- Large families with young children
- Pregnant women
- Incarcerated families
- Significant others in parent roles
- 2 parent working poor families

2. Staff were then asked to describe the **struggles** of the people served by Community Action.

Economic Struggles

- Basic needs
- Food & nutrition
- Money/ low wages/ work
- Unstable work history
- Education/ literacy
- Housing/ furniture/ energy
- Transportation
- Budget planning

Physical & Mental Struggles

- Mental & physical illness/ disability

Access to Services

- Needs not met by other agencies/ need our services but don't qualify
- Policies & procedures
- Disrespect from DHS
- Legal status
- Lack of information

Culture & Language

- Language & communication barriers
- Cultural difference, unfamiliarity with systems

Family Struggles

- Childcare
- Divorce & custody issues
- Domestic abuse
- Parenting skills
- Too many kids
- Dysfunctional families – multiple generations
- Poor role models

Additional Issues

- Time stress
- Multiple challenges & crises
- No support system

**Rating Community Action as a High Performing Organization**

7. As the final segment of the planning process, staff were asked to rate their experience with Community Action against 25 factors of high-performing organizations. Each person filled out a survey form individually. Responses were tabulated anonymously at each table, to provide a picture by table of the highest and lowest-rated factors. Tables were encouraged to discuss specific ideas for improving those factors with the lowest average rating.

The intent of the exercise during the all-staff day was two-fold. First, it was meant to foster awareness of internal organizational factors and processes that support or impede the work of the organization. Second, it was intended to encourage staff to see themselves as active problem-solvers with the ability to diagnose and improve work process issues.

Following the event, the responses were tabulated by department: Family and Community Resources (40 responses), Child Development (93 responses) and Administration/Resource Development (12 responses). These aggregated responses will be most useful if further analyzed and applied within departmental settings. Directors and managers are encouraged to work with their teams to continue to reinforce factors gaining high scores, and to engage staff in developing methods to improve factors with low scores. Widely divergent scores on a given factor within a department can provide a fruitful place for discovery. The survey can be repeated to measure change in ratings of particular factors. The highest use of the data is when staff can see their input being put into action, action that involves and empowers them as participants in a process of collective learning and continuous improvement.

The data also provides useful information for the strategic planning process. It adds further depth to the picture of strengths and weaknesses that emerged from earlier questions.

As a sample of trends that can be drawn from the data, staff in the Family and Community Resources (FCR) and Child Development (CH) clusters provided higher ratings than those in Administration/Resource Development (ARD).

**Number of High and Low Scores by Department**

% of ratings of...	ARD	CD	FCR
4 & 5 (high)	34	45	50
1, 2 & 3 (low – med)	63	54	40

Factors drawing the highest and lowest scores also varied by department. Note that in many cases, the scores on the factor mentioned may be spread across the spectrum, i.e., with nearly as many low scores as high scores on a given factor or vice versa. The examples below indicate the factors drawing the highest number of low or high scores.

**Factors Drawing Most High and Low Scores by Department**

	ARD	CD	FCR
Factors with most 4s & 5s (# of high scores)	<ul style="list-style-type: none"> <li>▪ #12 Job clarity (9)</li> <li>▪ #14 People have the authority to do what's expected of them (7)</li> <li>▪ #23 People are</li> </ul>	<ul style="list-style-type: none"> <li>▪ #17 Big picture perspective (68)</li> <li>▪ #9 We give to others what is needed (57)</li> <li>▪ #14 People have the</li> </ul>	<ul style="list-style-type: none"> <li>▪ #14 People have the authority to do what's expected of them (34)</li> <li>▪ #24 Reprimands are clear &amp; specific (32)</li> </ul>

	<p>appreciated for work well done (7)</p> <ul style="list-style-type: none"> <li>▪ #24 Reprimands are clear &amp; specific (7)</li> </ul>	<p>authority to do what's expected of them (56)</p> <ul style="list-style-type: none"> <li>▪ #24 Reprimands are clear &amp; specific (56)</li> </ul>	<ul style="list-style-type: none"> <li>▪ #1 Supervisory support (32)</li> <li>▪ #12 Job clarity (31)</li> </ul>
<p>Factors with most 1s &amp; 2s (# of low scores)</p>	<ul style="list-style-type: none"> <li>▪ #15 Resource availability (7)</li> <li>▪ #5 Decisions are made expediently (6)</li> <li>▪ #6 Decisions are implemented in timely fashion (6)</li> <li>▪ #16 Team measurements (6)</li> </ul>	<p>Decision-related issues:</p> <ul style="list-style-type: none"> <li>▪ #5 Decisions are made expediently (34)</li> <li>▪ #4 "Managers are clear about who is deciding vs who is influencing (31)</li> </ul>	<p>Resource &amp; work flow issues:</p> <ul style="list-style-type: none"> <li>▪ #15 Resource availability (15)</li> <li>▪ #7 We get what we need from others (12)</li> <li>▪ #8 We're organized to produce quality output (10)</li> </ul>

**Conclusion**

Involving all staff in a strategic planning process is an ambitious undertaking. The results of the day reflect an abundance of knowledge and insight about the communities served by Community Action. The vision and values of the organization come alive in the commitment and compassion that are consistently voiced by the staff. Participants also offer a wealth of feedback and suggestions for improving both the experience of working for Community Action, and participating in or supporting its services and programs. This data should be very helpful in informing the next phases of the strategic planning process.

Shortages and deficits were a key theme that emerged: tighter budgets, fewer resources, and less available time for the low-income communities served and for Community Action staff and programs. These deficits take a toll on everyone, increasing the need for Community Action without increasing the organization's capacity to respond.

At the same time, the assets of the organization, like the resilience and survival skills of the communities served, emerge as an equally prominent theme. Within difficult times and with limited resources, Community Action is doing much that the staff appreciates and acknowledges as beneficial to both them and the larger community.

- Addictions to drugs, alcohol, cigarettes
- High cost of medical, dental insurance
- Discrimination, racism, community acceptance
- Stigma of receiving help
- Exploitation by employers, no power
- Immigration status
- High mobility
- Uncertainty, crisis to crisis
- Low self-esteem
- Overwhelmed, hopeless
- Loss, fear
- Legal troubles

3. Staff were asked to identify **changes** in Community Action's clients and their struggles over the past few years.

Many of the responses reiterated the issues addressed above – take the list of struggles and add the adjective “more”. This increase in need collided with a reduction in resources. Participants noted budget cuts at the state and federal levels combined with a worsened economy that placed Oregon #1 in hunger and unemployment in the nation. “Economic changes have put a lot of new people in the low income area, challenging existing services that are being stretched with limited budgets that have been cut or kept at the same level.”

Amidst these storm clouds, other participants noted rays of sunlight:

- Full day child care, better child care, more children served, more age groups served
- Teachers getting more respect & recognition, families show their appreciation more
- More parents getting an education or training, more clients in college (Sunshine Lady scholarship)
- Families taking more initiative, becoming more self-sufficient with knowledge of resources
- More collaboration with other providers & schools
- More shelter/ housing coordination
- New home buying opportunities for Latinos
- OHP has improved
- People come back to give to the agency
- All social classes have become aware of poverty issues

4. Staff were asked to **predict** how Community Action's clients and their struggles would change over the next 3 – 5 years.

Again, the majority of the responses echoed those named in the “struggles” section, with an expectation that these struggles would worsen. The link between worsening conditions for people served and lower morale of Community Action staff was noted. Examples include:

- Further funding cuts, fewer resources
- Growing demand for services
- Fewer jobs
- Higher cost of living
- Widening gap between haves & have nots
- Weakened school funding
- More immigration status difficulties
- More urbanization & traffic
- Less affordable housing
- More crime, domestic violence
- More hopelessness

Other respondents believed that future trends depended on the direction of political leadership at the federal and state level, and on the health of the economy. A few were optimistic about the economy improving.

Some predicted demographic and cultural trends: an increase in seniors needing services, an increase in the Hispanic population, an increase in other ethnicities and nationalities, and an increase in inter-generational conflict within cultural groups.

Positive trends were also predicted:

For people served/ community

- More Latino kids as citizens with better education and job prospects
- Fewer language barriers
- More educated parents
- Well-prepared Head Start parents entering public schools as advocates
- Communities becoming more aware and coming together more
- More awareness about services
- Clients better educated and better served
- Clients more successful, more self-sufficient, better leadership skills
- Improved public transit

For Community Action

- Organization growing
- More full day programs
- More highly trained staff
- Better educated child care providers who stay in business longer
- More mental health programs
- Increased collaboration
- Resources better linked

5. Staff were asked to discuss the strengths of Community Action's programs and services. Later, they were asked about its strengths as an organization. Because of the overlap in responses, the results of the two questions are summarized together.

- **Staff performance** – The largest number of responses related to the relationship between Community Action staff and the people served. Over forty responses described the staff's approach as empowering, holistic, responsive, compassionate, and 101% committed. Seven responses noted the bilingual capabilities of many staff and/ or the welcoming environment for people from many cultures.
- **Services** – The second most frequent response (29) noted the breadth and variety of services offered to meet a range of community needs. Some noted the effective integration of programs; several commented on the organization's adaptability in developing or modifying programs in response to changing needs and/or client input. Twelve respondents praised particular programs, and several noted that the programs produce good outcomes for clients.
- **Role in community** – Eighteen respondents noted Community Action's role in the community: its good reputation, the continuity it provides through stable staff, and its "strong vision for the well being of the community." Ten commented on the organization's collaborative partnerships with others. Five listed "advocacy" as a strength, one calling Community Action 'the voice of low-income people.'
- **Working conditions** – Seventeen people praised the work environment as characterized by teamwork, willingness to learn, and opportunity to grow. Several said they felt cared for and valued. Five appreciated that the organization hires parents, volunteers and

former clients. Six considered employee benefits a strength, and 3 mentioned staff training; in particular, the new employee orientation session.

- **Organization & leadership** – Four people identified particular individuals in leadership roles as a strength. Five commented on stable organization, effective planning and “good use of funds”.
6. Staff were asked to discuss the **weaknesses** of Community Action's programs and services, and – separately – its weaknesses as an organization. The combined responses are summarized here.
- **Resources** – The largest cluster of responses addressed inadequate staffing levels (13) and inadequate resources (11), including the perception that Community Action has little power over the level of funds it receives. Related to funding shortfalls were comments on lack of necessary equipment and supplies (3).
  - **Services** – Weaknesses in services included limitations on hours of operation, noted as particularly difficult for working families (3); and service locations coupled with transportation access (2). Eight people commented on the limitations to benefits available to clients (e.g. rental and energy assistance).
  - **Staff training & performance** – Nine felt that staff training is inadequate, and another 3 commented on the need for more cross-training of staff. Two commented on insufficient bilingual capabilities or proficiency in languages other than English and Spanish. Three people called for better training of managers. Five respondents commented on weaknesses in staff responsiveness, including voice mails not returned and lack of clarity about who to go to. Four felt that program coordination could be improved. One was concerned about overall program quality.
  - **Working conditions** – Regarding the experience of being on staff, 12 felt that communication flow was a weakness. Another 9 noted experiences of disrespect, inconsistency or favoritism within a hierarchy. Four noted too much paperwork and red tape. Four felt that pay rates were inadequate, and four mentioned benefits as a weakness. Several mentioned stress levels of staff and the need for more internal support. Five respondents call for a greater feeling of unity across the entire organization and a lessening of the gap between long-time and new employees.
  - **Information technology** – This area was considered a weakness by 17 respondents, including 2 who wished for a global database for clients, 5 who wanted more access to computers, 2 who mentioned phone and voice mail systems, and 5 who decried the “internet nanny.”
  - **External partners** – Relationships (especially public schools) could be improved, according to five respondents. And 13 thought the organization needed to increase awareness of its services and community support through improved marketing and promotion. One thought the organization was not friendly to volunteers.
  - **All-staff attendance** – Six respondents noted the lack of particular managers or directors at the event (“If they don't come, why should we?”) and another 5 noted that not *all* staff were invited or compensated to attend.

7. **Staff were asked to brainstorm ways that Community Action could improve, and then to prioritize their ideas by table into the one improvement that would make the biggest difference to low-income people in Washington County. Responses covered a wide range of territory, with the greatest concentration focused on increasing funding and visibility in the community (7 top choices). Other priorities for change included:**
- **Improve information technology to increase client and staff access to information on services (3).**
  - **Promote internal unity: "heal internal divisions," and "every program should emphasize they are part of Community Action" (2).**
  - **Client needs that were prioritized included: increasing health care coverage, expanding eligibility for assistance, and offering classes on civic participation/ government.**
  - **Program needs that were prioritized included: stabilizing programs before expanding further, providing access to strategic & program planning, "create programs that serve real needs," and "clarify if our programs fulfill basic rights or serve only the 'deserving poor.'"**
  - **Staff needs that were prioritized included: varying training opportunities and ensuring more cross-training**

Additional suggestions for improvement can be gleaned from the full report of responses.