

Public Policy Associates



Creating Smarter, Faster, Easier Strategic Plans and Needs Assessment

Public Policy Associates



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It's
About
You





Motivation

- Meet organizational standards
- Gain information on constituents
- Secure a direction meaningful for local context—and aligned with state or national direction
- Get genuine engagement with constituents
- Improve organizational relationships

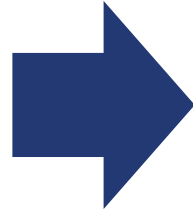


Ultimately

- PROCESS
 - Think about needs and resources comprehensively
 - Framework to create high-utility information that can drive action, performance monitoring, and course correction
- RESULT
 - Poverty solutions driven by aspiration, information, strategy, follow-through, and relationships
 - Changing lives and improving communities



Planning
Process



Community Needs Assessment

- Identifies needs and assets

Strategic Planning

- Sets priorities

Community Action Plan

- Identifies activities





Need Assessment Stages

- Define parameters
- Create a work plan
- Create a data plan and team assignments
- Implement the assessment
- Communicate the assessment and action steps





PARAMETERS: Resources for CNA

- National Community Action Partnership
 - Data hub online
- National Association for State Community Services Programs – to aid CSBG state offices
- CDBG organizational standards
- Community Toolkit (chapter 3!)
- And national and state strategic plans



PARAMETERS: Common Frameworks for CNA

Ways to think about and understand needs and assets

- Theory of Change

- CSBG service categories
- CSBG's Results Oriented Management and Accountability (ROMA) goals
- Agency-designed categories



Create a Work Plan

- Identify a team and define roles
- Deeper brainstorm on assets and needs
- Define data needs and preferred methods





Data Plan and Team

- Identify data needs and sources
- Engage cooperation from board, partners, community
- Define roles for staff and consultants
- Establish a budget and timeline
- Finalize a framework, methodology, and tools



Methods are Driven by Objectives

KEY OBJECTIVES

CNA METHODS

Identify essential indicators and means of reporting



Gather primary qualitative information to gain a deeper understanding of programming and client experiences and lift those voices in illuminating stories



Relevant and accessible analysis and reporting





Quantitative Data

KEY OBJECTIVES

Identity
essential
indicators and
means of
reporting



CNA METHODS

- Review prior reports, admin data, secondary data
 - Protocol to define uses, purpose, and logistics
 - Confirm conceptual domains and scope
 - Use a rubric or frame to distill down to essentials and affirm depth and breadth
-



Qualitative Data

KEY OBJECTIVES

Primary data to gain a deeper understanding of programming and client experiences and lift those voices



CNA METHODS

- Protocol to refine conceptual and logistical plan
 - Map topics > people > mode
 - What do you need to learn?
 - Whom do you need to hear from?
 - How intimate is the topic/how large is the setting?
 - Criteria or selection of individuals to engage
 - Equity-informed approaches
 - Only then: select a mode that fits the learning needs and audience engaged
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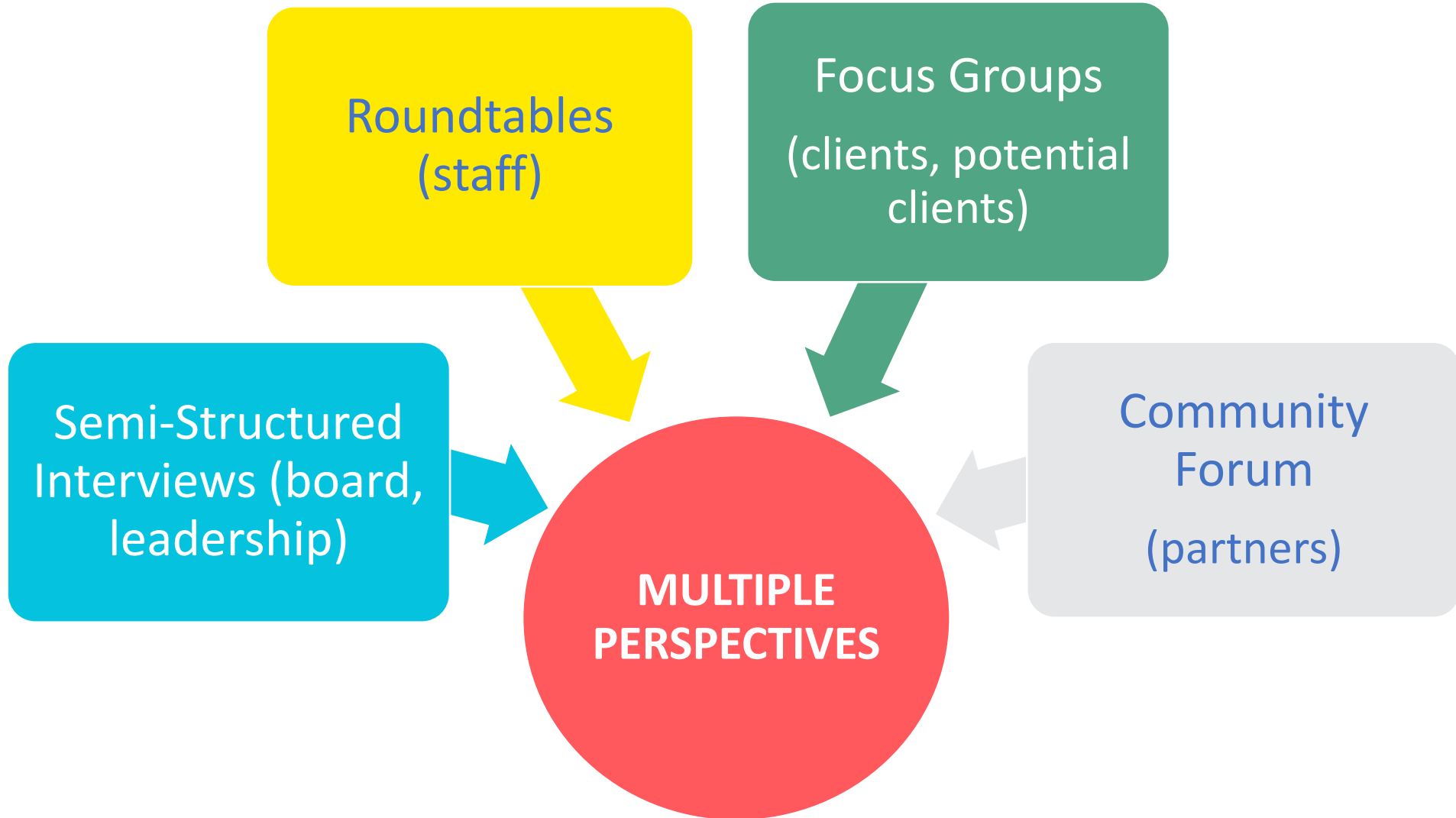
Qualitative Data Sources

KEY OBJECTIVES CNA METHODS

Primary data



- **Who:** staff, leadership team, community partners
 - **How:**
 - In-depth, facilitated conversations
 - Arts-informed data collection
 - Informal observation and conversation
-





Analysis and Reporting

KEY OBJECTIVES

CNA METHODS

Relevant and accessible analysis and reporting



- Compare service responsiveness to need
 - Identify gaps in program types and geographic reach
 - Assess reach to populations in need
 - Assess reach to specific populations, such as children, seniors, unhoused persons, undocumented persons, and veterans
-



Analysis and Reporting

KEY OBJECTIVES

CNA METHODS

Identify
implications



- Programming for clients and potential clients
- Resource for program expansions and new partnerships
- Specific expansions and new partnerships
- Capacity to pivot and adapt program delivery
- Geographic reach barriers and enablers



Data to Action



Strategic Priorities and Plan: Outcomes and indicators that align with the agency priorities and community assessment; know what results must be achieved

Tactical Action Plan: Design and develop services and activities based on the identified outcomes to be achieved, priorities, and resources



Discussion

“The end of all knowledge should surely be service to others.”

– Cesar Chavez

“There is no time for despair chaos contains information that can lead to knowledge—even wisdom.”

—Toni Morrison



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THANK YOU!

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