

**The Center of Concern**  
**Strategic ACTION Planning: July 1, 2019 – June 30, 2022**  
**Implementation and Action Grid**

<b>Goals, Outcomes, Actions</b>	<b>Complete by</b>	<b>Responsible individual/entity</b>
<b>Program and Evaluation Vision: The Center of Concern’s programs meet the needs of the community an are evaluated on an on-going basis to ensure accountability, relevance, best practices, and sustainability</b>	July 2020	ED (Board; Staff)
<b>1. Goal: COC programs realistically meet the needs of the community</b>	July 2020	ED (Staff; Board)
a. <i>Outcome:</i> COC know and understands the range of services available in the community	July 2020	ED (Board; Staff)
i. <i>Action:</i> Research and identify the range of services provided by other social service organizations in the community and by local governments	July 2020	ED (Staff; Board)
ii. <i>Action:</i> Identify overlap in programs and evaluate the impact on COC’s services	July 2020	ED (Board; Staff)
iii. <i>Action:</i> Develop and maintain strong relationships with other service providers to identify needs, resources, and opportunities for collaboration	July 2020	ED (Staff; Board)
iv. <i>Action:</i> Identify opportunities to partner with other agencies either as an outsourced service provider or to deliver services cooperatively	July 2020	ED
b. <i>Outcome:</i> COC knows and understand the needs of the community	July 2020	ED
i. <i>Action:</i> Seek and maintain accurate community demographic information	July 2020	ED (Board; Staff)
ii. <i>Action:</i> Develop methods for identifying and understanding the needs of a diverse client base, including language and cultural competency	July 2020	ED (Staff; Board)
iii. <i>Action:</i> Consult with and advocate with governmental organizations and leaders	July 2020	ED (Board; Staff)
iv. <i>Action:</i> Maintain an active dialogue with faith communities	July 2020	ED (Staff; Board)
v. <i>Action:</i> Maintain an active dialogue with local and state governments	July 2020	ED (Board; Staff)
vi. <i>Action:</i> Create a program advisory board comprised of outside professionals	July 2020	ED (Staff; Board)
<b>2. Goal: COC programs are evaluated based on the needs of the community and organizational capacity</b>	October 2020	ED (Pers/Prog Comm)
a. <i>Outcome:</i> COC has protocols for reviewing its programs vis à vis community needs and in light of the organization’s mission	October 2020	ED/ Board
i. <i>Action:</i> Develop metrics and evaluation criteria for assessing existing programs to ensure that they meet articulated needs and the mission	October 2020	ED/Staff
ii. <i>Action:</i> Monitor programs on a regular basis to ensure that expenses, funding, staff capacity, and services provided are aligned	October 2020	Treasurer
iii. <i>Action:</i> Train staff on benchmarking and evaluation methods	October 2020	
iv. <i>Action:</i> Develop decision making criteria for analyzing programs based on alignment with the	October 2020	ED (Board)

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mission, budget and staff capacity, client need, and funding		
b. <i>Outcome:</i> COC has the technology in place to track and monitor program services	October 2020	ED/Staff
i. <i>Action:</i> Evaluate current technology capacity	October 2020	ED
ii. <i>Action:</i> Research technology products that track and monitor social services	October 2020	Staff
iii. <i>Action:</i> Devise a plan to increase technology capacity (hardware, software, staff skill)	October 2020	Ed/Staff
c. <i>Outcome:</i> The Board of Directors provides oversight ensuring COC's ability to deliver services	October 2020	Board (ED)
i. <i>Action:</i> Review the Center's current business model	October 2020	ED
ii. <i>Action:</i> Explore with the Executive Director a sound and sustainable business model for COC	October 2020	Staff/Board
3. <b>Goal: COC has a robust staff of committed professionals and volunteers</b>	December 2020	ED
a. <i>Outcome:</i> COC supports staff in the implementation of best practices	December 2020	ED (Staff)
i. <i>Action:</i> Ensure open communication among and availability of all staff to each other	December 2020	
ii. <i>Action:</i> Develop staff to be independent decision makers	December 2020	ED
iii. <i>Action:</i> Provide opportunities for case-related professional consultation	December 2020	ED (Staff)
iv. <i>Action:</i> Establish a structured consultation process for COC professional staff	December 2020	ED
b. <i>Outcome:</i> COC is committed to on-going professional development for staff and volunteers	December 2020	ED
i. <i>Action:</i> Identify topics for professional development that may be addressed at internal staff meetings, develop a calendar for conducting training	December 2020	Staff
ii. <i>Action:</i> Include professional development as a budget line item	December 2020	ED
iii. <i>Action:</i> Provide compensated time and tuition/conference fee reimbursement for professional staff	December 2020	ED
iv. <i>Action:</i> Maintain and provide CEUs and other training for all staff	December 2020	ED
c. <i>Outcome:</i> COC is served by a highly trained, high functioning, diverse cadre volunteers	December 2020	ED (Senior Staff)
i. <i>Action:</i> Develop updated job descriptions and expectations for volunteers	December 2020	Staff
ii. <i>Action:</i> Provide feedback and set annual goals with volunteers and provide to ensure high quality work and a meaningful experience	On Going	Ed/Staff
iii. <i>Action:</i> identify program- and administrative-related duties that can be staffed by volunteers	December 2020	ED
iv. <i>Action:</i> Assess volunteer screening and training protocols and modify as necessary	December 2020	ED/Senior Staff

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v. <i>Action:</i> Plan and execute an effective campaign to recruit volunteers taking into account the changing interests and abilities of older adults and the Center's needs	December 2020	Staff
vi. <i>Action:</i> Plan volunteer training and peer-to-peer learning opportunities	On Going	Staff
vii. <i>Action:</i> Nurture and recognize volunteer relationships to promote long tenure and commitment	On Going	Staff
4. <b>Goal:</b> COC's internal operations support staff, programs, and evaluation efforts in a meaningful way	January 2021	ED
a. <i>Outcome:</i> COC has the appropriate technology in place to meet the organization's needs	January 2021	ED
i. <i>Action:</i> Specify information management and technology needs (hardware/software) to ensure the smooth running of the organization in all areas (including fundraising, client services, and program tracking and evaluation)	January 2021	ED/Staff
ii. <i>Action:</i> Ensure staff and volunteers have necessary technology training	January 2021	ED
iii. <i>Action:</i> Ensure that all staff and volunteers have access to computers	January 2021	ED
b. <i>Outcome:</i> COC has up-to-date information about service delivery that supports organizational decision making	December 2020	ED (Staff)
i. <i>Action:</i> Identify indicative client services related measurements for each program	December 2020	Staff
ii. <i>Action:</i> Define evaluation criteria and data to collect in order to monitor the measurable aspects of service delivery	December 2020	ED
iii. <i>Action:</i> Set benchmarks for measuring program effectiveness	December 2020	ED
iv. <i>Action:</i> Identify opportunities and efficacy of client surveys as a measurement tool	December 2020	Staff
v. <i>Action:</i> Review service related data at regular intervals	On Going	ED
<b>Goals, Outcomes, Actions</b>		<b>Responsible individual/entity</b>
<b>Finance and Resource Development Vision: The Center of Concern has a diverse revenue stream and defined financial expectations and goals.</b>	January 2020	ED
1. <b>Goal:</b> Staff and the Board of Directors have a clear understanding of the inter-relationship of programs and finances and how budget and funding impact decision making	January 2020	Finance Comm
a. <i>Outcome:</i> COC has strong financial controls and board oversight	On Going	Finance Comm
i. <i>Action:</i> Develop multi-year forecasts with recommendations regarding resource allocation	On Going	ED
ii. <i>Action:</i> Evaluate current accounting protocols	On Going	ED
iii. <i>Action:</i> Review staff assignments regarding day-to-day responsibility for finances	On Going	ED

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b. <i>Outcome:</i> Financial information is part of organizational decision making	On Going	ED
i. <i>Action:</i> Develop comprehensive financial information for all existing programs including income (fundraising or other), expenses, and cost per client served	On Going	ED
ii. <i>Action:</i> Develop a method to evaluate comprehensive financial and service projections for possible new programs	On Going	ED
iii. <i>Action:</i> Establish new procedure for board approval of program related initiatives	January 2020	Board (ED)
2. <b>Goal:</b> The Board of Directors is responsible for the long-term strategic development and the financial health of COC	On Going	Board
a. <i>Outcome:</i> COC is anchored in the community with a strong constituency of supporters	On Going	Board
i. <i>Action:</i> Engage in on-going reciprocal communication with corporations, foundations, village and municipal governments, and individuals	On Going	ED (Res Dev Comm; Board; Adv Board)
ii. <i>Action:</i> Tap into new constituencies to find new members for the Board of Directors	On Going	ED (Res Dev Comm; Board; Adv Board)
iii. <i>Action:</i> Ensure that the composition of the various Boards (of Directors, Advisory, and Auxiliary) represent a portrait of the communities COC serves	On Going	ED (Res Dev Comm; Board; Adv Board)
b. <i>Outcome:</i> COC's funding steam is clear and consistent	On Going	ED (Res Dev Comm; Board; Adv Board)
i. <i>Action:</i> Articulate the ideal/desired ratio for funding from private, foundation, and government sources	On Going	Finance Comm (ED; Board)
ii. <i>Action:</i> Assess current funding streams	On Going	ED (Res Dev Comm; Board; Adv Board)
iii. <i>Action:</i> Identify new funding sources and cultivate them	On Going	ED (Res Dev Comm; Board; Adv Board)
iv. <i>Action:</i> Develop a fundraising plan to ensure consistent support	On Going	ED (Res Dev Comm; Board; Adv Board)
v. <i>Action:</i> Maintain awareness of community politics and the effect on funding	On Going	ED (Res Dev Comm; Board; Adv Board)
vi. <i>Action:</i> Identify gaps in relationships with local governments and ways to close them	On Going	ED (Res Dev Comm; Board; Adv Board)
3. <b>Goal:</b> COC staff is responsible for securing financial support for annual operations and supports the board in its fundraising efforts	On Going	ED (Res Dev Comm; Board; Adv Board)
a. <i>Outcome:</i> COC has a fundraising plan	On Going	Ed (Res Dev Comm; Board)
i. <i>Action:</i> Maintain a comprehensive history of fundraising and grant writing activities	On Going	ED (Res Dev Comm; Board; Adv Board)
ii. <i>Action:</i> Analyze the fundraising history and develop a three-year fundraising plan	On Going	ED (Res Dev Comm; Board; Adv Board)
b. <i>Outcome:</i> Staff is able to support fundraising activities	January 2020	ED (Res Dev Comm; Board; Adv Board)
i. <i>Action:</i> Review the current distribution of fundraising duties and responsibilities and realign as appropriate; update job descriptions as required	January 2020	ED

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ii. <i>Action:</i> Determine organizational needs and staff capacity regarding grant writing	January 2020	ED/Staff
iii. <i>Action:</i> Create a team of fundraising volunteers to support staff and act as steering committee for events	January 2020	ED/Staff
iv. <i>Action:</i> Assess the need and provide fundraising training for staff and volunteers	January 2020	ED/Board
4. <b>Goal: The Auxiliary Board assists and supports COC fundraising efforts</b>	On Going	ED
a. <i>Outcome:</i> Auxiliary Board members have clearly articulated roles and expectations	January 2020	Resource Development Committee
i. <i>Action:</i> Specify Board of Directors and Auxiliary Board liaisons to the other entity to ensure strong communication and shared resource development goals	January 2020	ED
ii. <i>Action:</i> Review individual and group expectations, responsibilities, and deliverables	January 2020	ED
iii. <i>Action:</i> Develop job descriptions with members and the board as an entity	On Going	ED
b. <i>Outcome:</i> The Auxiliary Board has an articulated plan for resource development	January 2020	Resource Development Committee
i. <i>Action:</i> Identify meaningful ways for the Auxiliary Board to support COC	January 2020	ED/Staff
ii. <i>Action:</i> Set fundraising goals	On Going	ED/Staff/Board

Goals, Outcomes, Actions	Complete by	Responsible individual/entity
<b>Communication/Marketing/Public Relations Vision: The Center of Concern is well recognized as a premier social service agency.</b>	January 2022	Ed/Staff
1. <b>Goal: COC effectively communicates its mission and services to all stakeholders (clients, community partners, funders, and more)</b>	January 2022	ED
a. <i>Outcome:</i> COC has a clear, comprehensive identity statement to raise awareness and present its good work	January 2022	ED
i. <i>Action:</i> Secure a marketing consultant to develop a brand statement and platform	January 2022	
ii. <i>Action:</i> Identify all the ways the statement can be used to enhance the work of the Center – as part of outreach efforts in fundraising, recruiting staff and volunteers, and generating clients	January 2022	
b. <i>Outcome:</i> COC has a segmented marketing plan to reach all stakeholders	January 2022	
i. <i>Action:</i> Identify the different categories of stakeholders	January 2022	
ii. <i>Action:</i> Determine how best to develop a marketing plan – by staff of with the help of a consultant	January 2022	
iii. <i>Action:</i> Understand how different demographic groups and stakeholders use technology and the impact on the Center’s outreach efforts	January 2022	

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iv. <i>Action:</i> Increase staff knowledge of different marketing tools including social media	January 2022	
v. <i>Action:</i> Determine the most effective methods and tools for reaching different stakeholders	January 2022	
c. <i>Outcome:</i> COC has the staff, tools, and capacity to increase its profile in the community	January 2022	
i. <i>Action:</i> Assess the organization's communication capacity	January 2022	
ii. <i>Action:</i> Develop necessary communication tools and collateral materials to publicize COC and its programs	January 2022	Staff
iii. <i>Action:</i> Update the website	On Going	Staff
iv. <i>Action:</i> Evaluate staff competency in using on-line tools and train as necessary	January 2022	ED
v. <i>Action:</i> Determine how to use the strategic plan as an opportunity to re-introduce COC to the community	January 2022	Exec. Committee
d. <i>Outcome:</i> The Board Communications Committee works appropriately and effectively with the Center's staff	January 2022	Exec. Committee
i. <i>Action:</i> Develop a job description for a Board Communications Committee based on the model of the Resource Development Committee	January 2022	Board Development Comm.
ii. <i>Action:</i> Identify the appropriate board members for this committee	January 2022	Board Development Comm.
iii. <i>Action:</i> Support COC's marketing efforts	January 2022	New Communications Committee
2. <i>Goal:</i> The community recognizes COC as its social conscience	January 2022	
a. <i>Outcome:</i> COC is an advocate in the community	January 2022	ED (with Board oversight)
i. <i>Action:</i> Develop a protocol for deciding advocacy activity and choosing a course of action	January 2022	ED
ii. <i>Action:</i> Foster relationships with community leaders and other agencies whose missions are compatible with those of the Center	January 2022	ED Staff Board
b. <i>Outcome:</i> COC communicates its advocacy activity	January 2022	ED
i. <i>Action:</i> Identify and train staff to represent COC at appropriate events	January 2022	ED/Staff
ii. <i>Action:</i> Designate staff to serve in leadership roles for advocacy efforts	January 2022	ED

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