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Research and Coordination of Monterey County Community Action Partnership Strategic Planning Process

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Abstract

The Monterey County Community Action Partnership (MCCAP) is a publicly operated Community Action Agency supported by the Monterey County Department of Social Services (MCDSS). MCCAP primarily serves low and middle-income individuals and families. The macro-level problem is that too many people are living below the poverty level in Monterey County. The micro-level problem that will be addressed by this project is the MCCAP commissioners are lacking in their efforts to carry out their required duties and responsibilities. The purpose of this project is to provide information and assistance for the MCCAP commissioners to develop the agency's bi-annual strategic plan. The expected, short term outcome for the MCCAP strategic planning process is to increase the effectiveness and efficiency of strategic planning in a public agency. The assessment evaluates and compares the process of strategic planning. MCCAP commissioners should continue to follow the action steps developed in the strategic planning process to reach their agency goals.

Keywords: *Strategic Planning, Low Income Communities, Community Action*

Agency Information & Partnering Organizations

Mission

The Monterey County Department of Social Services (MCDSS) is a public agency that serves the residents of Monterey County. The Mission of MCDSS is “to promote the social and economic self-reliance of each individual and family we serve through the services offered” (Monterey County Department of Social Services, 2008, Our Mission, para.1). The agency, MCDSS offers a number of services to the residents of Monterey County that focus on helping individuals and families in different areas that they may need support in to become self-sufficient. Monterey County Department of Social Services' goal is community outreach, they want as many individuals in their community to benefit from the assistance that they provide, be informed and have access to resources offered.

Values

The Monterey County Department of Social Services (MCDSS) values leadership, self-sufficiency, quality services, lifelong learning and development, and internal and external client and customer satisfaction. MCDSS serves many people in Monterey County, the values and interests of the agency reflect on both the agency and the community. Therefore, MCDSS values in action are to lead by example, encourage community member participation, support the persons they serve to better meet the challenges of their lives, and to encourage personal and professional development in realizing one's potential and promoting collaboration throughout the community (Monterey County Department of Social Services, 2008). It is important that MCDSS upholds values with integrity to both internal and external participants as they are the guiding principles of the agency.

Programs and Services Provided

MCDSS is a large agency which provides over seventy programs to the community. MCDSS has served an estimated 100,000 residents of Monterey County and continues to promote the social and economic self-reliance of each individual and family. Additionally, they contract with outside community organizations to extend services. For example, the Monterey County Community Action Partnership (MCCAP). Community Action Partnership agencies are non-profit private and public agencies that are located nationwide “that serve as the focal point to coordinate and plan for the provision of community services that support, assist, and empower low-income people to improve their quality of life” (Monterey County Department of Social Services, 2008). The MCCAP is operated publicly under the MCDSS, every two years the MCCAP receives a Community Services Block Grant (CSBG). CSBG is a federally funded program that distributes funds to states, then county’s; which are used to revitalize low income communities, reduce poverty and empower low-income households. Based on the needs assessment done by MCCAP which include a community profile of Monterey County, survey results and public forum; MCCAP then accepts and approves applications of local non-profit agencies that offer top priority need services to receive funding. A few of the recurring service providers are as follows: Food Bank for Monterey County, United Way Monterey County, and Alliance on Aging.

Collaborative Partners

The Monterey County Department of Social Services (MCDSS) values collaboration. Beyond the Community Action Partnership nonprofit partners, the agency, MCDSS is willing and able to collaborate with community members and community organizations that all have the same goal of helping individuals and families become self-sufficient and self-resilient. One of

the main collaborative patterns of MCDSS is the Monterey County Coalition of Homeless Services Providers. MCDSS refers client's they cannot help by referring them to the Coalition of Homeless Services Providers where they are able to receive help from twenty plus nonprofit and public agencies whose goal is to address the complex issues of homelessness. MCDSS has been able to continue serving the community amid this global pandemic. Community meetings, and all in person activities have been changed to virtual and over the phone communication. However, despite the obstacles MCDSS continues to serve the residents of Monterey County the best they can, especially during a time like this when more than ever people need assistance.

Introduction

Monterey County Department of Social Services (MCDSS) serves many residents of Monterey County. The seventy plus services that MCDSS offers the community allows them to serve an estimated 100,000 individuals a year. The communities and population most served are middle-low income families and individuals. Monterey County Community Action Partnership (MCCAP) is an organization operated by MCDSS. MCCAP is "committed to reducing poverty in our community by funding a network of local providers who specialize in addressing specific barriers to achieving self-sufficiency" (Monterey County Community Action Partnership, 2020). Similar to MCDSS, MCCAP serves a large portion of Monterey County as they fund multiple no-profit organizations in the county that also assist residents.

Demographic Profile

The focus of the remainder of the paper will be on the Monterey County Community Action Partnership. As stated above the MCCAP receives federal funds every two years and through a community needs assessment determines which organizations to fund as service providers of MCCAP. In the 2019 needs assessment, 64.7% of the respondents were Hispanic or

Latinos. White people accounted for 16.8% which totals to over 80% of respondents. Also, 44% of respondents fell below the federal poverty line and the need for housing and shelter was ranked number one as the most in demand service/need for Monterey County residents. Although some families are not considered below the federal poverty line there are still many that are falling short of the basic level of income needed to live in Monterey County.

Community Needs

The primary issues of concern to MCCAP are to assess the needs of low-income families and individuals to improve their quality of life and promote self-sufficiency. There are many barriers for individuals and families to become self-sufficient, especially while living in Monterey County where the cost of living is extremely high. In Monterey County, the poverty rate is 14.1%, which is lower than the statewide average at 17.8% but higher than the national average of 13.1%. In Monterey County, 47% of households are cost burdened (Housing Monterey County, 2015), 42% of California households are cost burdened (Kids Data, 2020), and nationwide 31.5% (Habitat for Humanity, 2020). Cost burdened is identified as spending more than 30% of one's income on housing. When families or individuals have to spend so much of their income on housing, they have less to spend on other essentials such as food, medical care and education, resulting in other issues.

Community Assets

Monterey County Community Action Partnership (MCCAP) is a great asset of Monterey County that many community members are unaware of. MCCAP funds ten to twelve non-profit organizations every two years that specialize in issues that Monterey County residents themselves reported they need help with. Housing, health and social behavioral development,

education, and employment service organizations are only a few. Some of the nonprofit organizations funded through MCCAP in 2019 are Community Homeless Solutions, the Food Bank of Monterey County and Turning Point of California; all of these organizations help families and individuals who are facing issues of homelessness, accessing healthy food and employment. The Housing Authority of the County of Monterey is another great asset available to the community that MCDSS collaborates with; the Housing Authority program helps low-income families and individuals afford decent and safe housing by paying a portion of the rent to the landlord on behalf of the family.

Initial Capstone Project Ideas

A project idea that has been discussed with my mentor as a possible focus for my capstone project is assisting with the Monterey County Community Action Partnership (CAP) strategic planning committee and bylaw revision, which is located within the Monterey County Department of Social Services (DSS). The project will be research based and focus on strategic planning. According to Balanced Scorecard Institute (1998-2020) strategic planning is “an organizational management activity that is used to set priorities, focus energy and resources, strengthen operations, ensure that stakeholders are working toward common goals, establish agreement around intended outcome/result, as assess and adjust the organization’s direction in response to a changing environment” (Para. 1). The project will consist of the development of key strategic goals for MCCAP community action plan that will include the revision of the agency's current bylaws.

The strategic planning committee is currently being constructed and will start meeting in January. I will be assisting with organizing these meetings, as well as communicating with the commissioners to set appropriate meeting times. Once the project begins evolving, I will be

working alongside my mentor as well as the others who work in the DSS-CAP office. I hope to be involved in all aspects of the project, anywhere from putting the meetings together, communicating with the commissioners, research, drafting up documents and necessary paperwork. The projects are in the beginning stages so I will be able to see everything carried out from start to finish. The overall goal of the project is to set appropriate goals for MCCAP and develop a plan to achieve them. The other goal in revising the MCCAP bylaws is to empower the CAP board of Commissioners and ensure that they are engaged with the community, collaborative and working effectively and efficiently to better serve the community.

Title: Research for and Coordination of Monterey County Community Action Partnership Strategic Planning Process

Project Description

This project will contribute to the Monterey County Community Action Partnership's (MCCAP) Strategic Planning Process. This project is part of the agency's overall bi-annual strategic planning work to update its strategic plan in order to develop a Community Action Plan. The project components will include research on strategic planning, coordinating a strategic planning committee, holding multiple strategic planning committee meetings that will involve revisiting the previous MCCAP strategic plan, completing a SWOT analysis along with the various other steps involved in the strategic planning process and evaluating MCCAP approach to strategic planning in comparison to traditional strategic planning steps. Thereafter, the following steps will include measuring the success of the capstone project and the overall bigger effort of MCCAP staff and commissioners will involve approving and endorsing the strategic plan. Given that this project is carried out periodically, there are resources and guidance from previous work.

Project Justification

The periodic revision of the MCCAP strategic planning document is necessary to ensure that the agency and the commissioners who sit on the board are all aware of the agency's strength in operations, priorities, focus energy, resources, and ensuring that all stakeholders are working towards common goals of improving lives and strengthening communities. The shorter-term objective of this project is to get the MCCAP commissioners who sit on the board to become more empowered to carry out their required duties and responsibilities along with getting more involved with the community and advocating for the community. The long-term goal of this project is to reduce poverty for individuals and families in Monterey County. The MCDSS and MCCAP share the vision of improving lives and helping individuals and families become self-sufficient and self-resilient.

Stakeholders

The primary stakeholders who are directly affected by this project are the commissioners who sit on the board of the Community Action Partnership. The Community Action Commission is “a tripartite board of members from each district within the county. Commissioners represent one of three constituencies: public, private, and low-income sectors. The County of Monterey consists of five (5) districts; therefore, its Commission has a total fifteen (15) members” (Community Action Commission, 2020). One of the main outcomes expected from this project is to empower the MCCAP commissioners to be more involved with the community and agency decision making; as well as ensuring the agency is working towards shared goals to better serve the residents of Monterey County. The secondary stakeholders are the residents of Monterey County that receive services from any of the non-profit organizations MCCAP funds. In order

for the residents to have access to services of their most pressing needs, MCCAP commissioners must be engaged with community members in order to serve and advocate for them.

Benefits

The benefits of this project include continuing to work towards the mission of Community Action Agencies, creating more opportunities to support, assist, and empower low-income people and to improve their quality of life. Completing the bi-annual strategic plan for MCCAP and developing goals, objectives and action steps that will ensure MCCAP is aware of its direction and will allow the agency to better serve the community of Monterey County. The completion of this project, the research and coordination of MCCAP strategic planning process, will ensure that the steps that MCCAP takes in their strategic planning process are being done in an effective and proactive manner. Furthermore, after reviewing the evaluation rubric will allow for future strategic planning processes of the agency to be done in a timely manner that will ensure the agency gets the most out of the process.

Implementation Method

The Research and Coordination of Monterey County Community Action Partnership Strategic Planning Process is a research project that will involve data collection and analysis of the agency's previous bi-annual strategic planning reports to update its strategic plan for MCCAP. This project will be implemented by coordinating the commissioners who volunteered to be a part of the strategic planning committee. Completing an evaluation rubric after each strategic planning meeting to document what worked for the agency, what could have been done better and recommendations for future processes. Best practices in strategic planning for Community Action agencies throughout the United States and other government agencies will also be thoroughly researched and evaluated.

Participants

The main participants involved in this project will be myself, the agency mentor, whose title is Management Analyst II of MCCAP, Management Analyst I, CAP Director, and the Community Action Partnership commissioners. My role in this project will be assisting my mentor, in coordinating the Commissioners' meetings including setting up dates/times for the meetings, sending zoom invitations, and handling all the logistics. Along with being an active participant in the strategic planning process and completing the evaluation rubric. My mentor will be the main agency staff person who will be participating in this project. She will lead the meetings, activities, and assist with completing the final findings of the reports and assessments of the strategic plan.

Resources

The primary resources needed to implement this project is research and data collection from the CAP agency and commissioners which will include findings of the agency's goals, strengths and weaknesses, community engagement efforts and what areas within the agency should be focused on and revised to ensure that the overall goal of improving lives and strengthening communities is kept as the primary objective. Personnel time of those who will participate in the project including the agency mentor and the CAP commissioners is another resource that will be required. The time to research and analyze the agency's findings and the development of the strategic plan is a big-time commitment from myself in order to carry out this project. Prior agency reports on strategic planning for MCCAP is also a resource that will be provided by the agency.

Supplemental

As stated above, this project, The Research and Coordination of Monterey County Community Action Partnership Strategic Planning Process, is part of the agency's bi-annual work to update its strategic plan. The process of strategic planning is done every two years by the agency in order to make up the Community Action Plan that identifies what areas the agency must focus on in order to ensure that the collaborative engagement with the community stays as the number one priority. This project would greatly be benefited by community involvement, and feedback. Receiving feedback from community members that have received services from the CAP funded non-profits would contribute to research findings that would indicate the strengths and weaknesses of the agency, MCCAP.

Potential Challenges / Covid-19 Accommodations

Potential challenges that may arise during the implementation of this project would be lack of participation from the commissioners. Due to Covid-19 restrictions, this is a difficult time for everyone, and people are busy and may fall behind on work and commitments. Therefore, a potential challenge could be postponed meetings and participation in the strategic planning process. The best way to address a potential problem would be to communicate effectively with both the Commissioners and mentor. Covid-19 has disrupted many things, one being in person meetings. Feedback from the community would be beneficial to this project, however due to Covid-19, community members are not participating in MCCAP meetings, whereas before there was more involvement by attending the in-person meetings.

Scope of Work and Timeline

The scope of work and timeline is detailed below. The MCCAP Strategic Planning Process project's main activities involve researching prior strategic planning work of MCCAP,

other CAP agencies and other government agencies, coordinating the commissioners’ meetings by creating doodle polls, creating and sending remote meeting invitations, and participating in activities and meetings the commissioners will take part in to develop agency’s goals, objectives and action steps. The final activities include completing the final evaluation rubric, measuring the success of the project, completing the capstone reporting requirements, and finally, preparing and presenting the final capstone project. The capstone project is a part of the agency’s overall bigger effort, therefore presenting the final strategic plan to the full commission and endorsing the plan will unfortunately not be a part of my scope of work due to time constraints.

Scope of Work Template					
Title: Research for and Coordination of Monterey County Community Action Partnership Strategic Planning Process					
Project description: MCCAP strategic planning process is a research project that will consist of the agency’s overall bi-annual strategic plan work to update the Community Action Plan					
Goal: The goal of this project is to empower the commissioners to become more engaged with the community.					
Primary objective of the project: To empower the Monterey County Department of Social Services Board of Commissioners.					
Phases		Activities/Tasks		Deliverables	Timeline/ deadlines
1	Select capstone project	1.1	Discuss capstone project ideas with mentor and agency staff	Generate a list of capstone project ideas.	Sept 2020
		1.2	Discuss ideas with agency staff	Submit a list of potential ideas to mentor for review/approval	Oct 2020
2	Plan project	2.1	Discuss project implementation plan, purpose of the project	Submit a draft project to mentor for approval	Nov 2020
		2.2	Research MCCAP’s prior strategic plans / other agency’s strategic plans	Submit draft of take away and ideas, comparisons to mentor	Dec 2020
3	Implement project	3.1	Coordinate Commissioners	Utilize doodle poll to arrange commissioners for SP meetings.	Jan 2021

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PARTNERSHIP STRATEGIC PLANNING PROCESS

		3.2	Commissioner strategic planning meetings	Submit final meeting times for approval	Feb 2021
		3.3	Strengthsfinders training	Participate in Strengthsfinders training/discuss with staff and commissioners	Feb/March 2021
4	Assess project	4.1	Research + compare strategic plans to MCCAP approach	Complete evaluation rubric after each meeting	April 2021
		4.2	Strategic planning evaluation rubric	Review evaluation rubric with mentor during weekly check ins	April 2021
5	Report on project findings	5.1	Measure success or project	Final agency and capstone review with mentor	May 2021
		5.2	Prepare capstone presentation in selected format	Present at Dress Rehearsal for grading	May 2021
		5.3	Final preparation for Capstone Festival	Final Capstone Festival presentation!	May 2021

Problem Description & Problem Model

The project, The Research and Coordination of Monterey County Community Action Partnership Strategic Planning Process will assist the commissioners, those who sit on the board of MCCAP to help address the communities social and health problems, with the research and knowledge to revise one of the key agency goals of empowering their board. The micro-level problem is that the MCCAP board of commissioners are lacking in their efforts to carry out their required duties and responsibilities. The factors that contribute to the commissioner lack of participation are limited involvement with the community and board of supervisors, the commissioners are unsure of their roles and responsibilities and the MCCAP bylaws lacking areas that focus on community advocacy and involvement by the commissioners. The consequences of the commissioners not participating in community advocacy are a poorly developed strategic plan, the top priority needs of the community not being addressed, and limited resources being available to families and individuals.

The macro-level problem is that too many people are living below the poverty level in Monterey County. The Community Action Partnership is committed to reducing poverty in their community and helping families and individuals achieve self-sufficiency (Monterey County, 2020). The contributing factors to a high number of people living under the poverty level in Monterey County are the high cost of living, low wages, and limited access to resources and opportunities. The consequences of high poverty rates are increases in homelessness, families and individuals not being economically self-sufficient and an increase in mental and health problems.

Problem Model

Figure 1. Problem Model Template		
CONTRIBUTING FACTORS TO AGENCY PROBLEM	AGENCY-SPECIFIC “MICRO-LEVEL” PROBLEM ADDRESSED BY PROJECT	CONSEQUENCES TO AGENCY
Not enough involvement with the community/board of supervisors	MCCAP board of commissioners are lacking in their efforts to carry out their required duties and responsibilities	Strategic plan poorly developed/implemented
Commissioners are unsure of their roles/duties		Top priority needs of the community will not be addressed
The agency lacks bylaws that focus on community advocacy/commissioner engagement.		Limited resources available to the community
CONTRIBUTING FACTORS TO BROADER PROBLEM	BROADER “MACRO-LEVEL” HEALTH/SOCIAL PROBLEM	CONSEQUENCES TO SOCIETY
High cost of living		Increase in homelessness

Limited resources and opportunities	Too many people are living below the poverty level in Monterey County.	M.C residents become less self sufficient
Low pay rates		Increase in mental and health issues for residents in M.C

Micro-level Problem

The Monterey County Community Action Partnership commissioners are lacking in their efforts to carry out their required duties and responsibilities. It is important that the commissioners are fully engaged and involved with the community as they are appointed by Monterey County Board of Supervisors. The commissioners meet once a month to “support engagement in three major community action activities: contracting with nonprofits and public agencies for services, collaborating with community stakeholders and supporting educational community activities” (Monterey County Department of Social Services, 2008). The Community Action Commissioners (CAC) must feel empowered to advocate for the most vulnerable populations in Monterey County and make clear and concise decisions when needed.

Problem Description

The current state of the problem is lack of involvement from the MCCAP commissioners with both the community of Monterey County and the Board of Supervisors. A part of the responsibility when becoming a commissioner of the MCCAP is to advise the Board of Supervisors on the issues related to poverty in Monterey County. The members “represent the public, private, and low-income segments of the community, and reflect the race, economic status and gender of the community” (Community Action Commission, 2020). In order for the CAC to appropriately serve the community they must engage with individuals and learn the most pressing issues that they are experiencing and relate that information to the Board of Supervisors.

Population Affected

The populations most affected by the issue of lack of involvement and advocacy from the Community Action commissioners are low-middle income families and individuals in Monterey County. Low-middle income families rely on many of the services that MCCAP funds nonprofits to provide to live their day to day lives. According to Data USA there are an estimated 14.1% of the population that live below the poverty line in Monterey County. In order for those 14% of people to access resources and opportunities to become self-sufficient and rise from poverty they must have people in power who listen to and understand their needs and advocate for them.

Causes/Contributing Factors

The factors that contribute to this problem are limited involvement with the community and board of supervisors, without consistent engagement and efforts from the commissioners an issue of lack of information is developed. Limited information then leads to the issue of not advocating for the individuals experiencing said issues and creating and fighting for change and improvement. Lacking in their efforts to carry out their required duties and responsibilities as a commissioner is another contributing factor, becoming a commissioner for the MCCAP requires time and commitment. Commissioners must want to be involved and feel empowered to advocate for the community, as they represent one of the three constituencies: public, private and low income. The agency lacking bylaws that focus on commissioner advocacy for the community is also a contributing factor. Currently, the MCCAP bylaws do have a specific focus on commissioner and community advocacy responsibilities.

Consequences

If the micro-level problem is not addressed, it will result in a poorly developed strategic plan and furthermore a poorly developed community action plan, the top priority needs of the

community will not be addressed and there will be limited resources available to the community. A poorly developed community action plan will not consist of shared visions, and common goals of both the organization and the community. Thus, leading to the top priority needs of community members not being met. Advocating for the community and the issues that are important to them ensures that the people's voices are being heard and are reflected in the assistance that MCCAP will provide. The top priority needs not being met leads to limited resources available to the community. If the commissioners do not know what community members need, they cannot assist them to become more economically self-sufficient. Advocating for a community protects and promotes individual's rights and ensures that their views are genuinely being considered when decisions are being made about their lives (Advocacy Focus, 2020).

Macro-level Problem

The macro-level problem that the project of MCCAP strategic planning is related to but will not address is the high number of people living below the poverty line in Monterey County. As stated above, the MCCAP is committed to reducing poverty and helping individuals and families become self-sufficient. All the work that MCCAP does is aimed at reducing poverty. Currently, Monterey County's percentage of people living under the poverty line is higher at 14% than the national average of 13% which indicates the amount of people who are struggling to become self-sufficient and live a better quality of life.

Problem Description

Poverty in Monterey County continues to rise due to high cost of living. The average cost of a single-family home as of June 2020 according to MLS listings is \$660,000. While the median household income in Monterey County is \$70,000. With an average income of \$70,000 it is still

very difficult to purchase a home, for those who are low income and make \$30,000 and less a year it is nearly impossible to purchase a home. Rental prices are at an all-time high as well. Low pay rate for agriculture workers and hospitality workers, which are the two leading industries in Monterey County, leaves many individuals and families struggling to meet their basic needs.

Population Affected

Monterey County residents who are considered low, moderate and middle income are all affected by the high rate of poverty. However, according to the Community Action Partnership 2019 needs assessment the populations most affected are women-led households, children and non-white residents (CAP Needs Assessment, 2019). Also, poverty rates are higher in the Salinas and South County areas. Additionally, many residents of Monterey County are undocumented and feel unsafe to ask for assistance due to the fear of being torn apart from their families and lives as they know it. citation?

Causes/Contributing Factors

The factors that contribute to this problem are the high cost of living in Monterey County, low pay rates and limited access to resources and opportunities. As stated above, the cost of renting and buying a home in Monterey County and the average pay rate do not align. Which then causes individuals and families to become cost burdened. Limited access to resources is another contributing factor to high poverty rates. There are many people who have no access to affordable housing, healthcare, education, etc. which are all factors that can impact an individual to fall into poverty.

Consequences

The result, if this macro level problem is not addressed, is an increase in homelessness, Monterey County residents struggling to become self-sufficient, and an increase in health issues. If poverty levels continue to rise, homeless cases will follow. There is always the chance that a person can lose their jobs, become ill, live through a worldwide pandemic and if they were already cost burdened and struggling to meet their basic needs prior to these events then they can become homeless from one day to another. If poverty levels do not decrease, more and more people are moving further away from becoming economically self-sufficient, which can be difficult to get to after experiencing poverty or homelessness. Lastly, a major consequence to addressing the issue of poverty in Monterey County is an increase in both mental and physical health. There are many studies that have shown poverty having a devastating effect on one's health; by causing chronic stress, malnutrition, substance abuse, exposure to trauma and violence.

Project Assessment Plan

The Monterey County Community Action Partnership (MCCAP) Strategic Planning project consists of the coordination and development of the agency's bi-annual strategic plan. The undertaking of the strategic planning project allows the MCCAP commissioners and staff to assist with the development of the agency's goals and objectives. Strategic planning allows the agency to develop strategies and direction, while allocating its resources to pursue the goals developed. The assessment of this project will include discussions with my mentor to measure the effectiveness of the strategic planning process as well as the completion of the evaluation rubric of the steps MCCAP has taken during this process.

Expected Outcome

The expected, short term outcome for the MCCAP strategic planning process is to increase the effectiveness of the strategic planning process. Although this is a recurring project, new commissioners participate on the strategic planning committee, who have never been a part of a strategic planning process. This project is expected to improve the effectiveness and efficiency in coordinating the commissioners for future projects. The knowledge of strategic planning that the commissioners will gain from being a part of this project is expected to increase the agency's overall effectiveness in achieving their organizational goals.

Outcome Measure and Method

The most effective way to measure the expected outcome is to have a discussion with my mentor, due to this project being a part of an overall bigger effort for the agency and the strategic planning committee being rather small. The best way to measure the outcome of this project is to have a one-on-one discussion with my mentor, as she has been alongside me throughout this process. Traditionally, with this type of project it would have been great to survey the strategic

planning committee participants, however due to time constraints and not having been able to complete the final stages of strategic planning, this is the most realistic approach to measuring the success. The method that will be used to gather this information to discuss with my mentor will be the evaluation rubric that has been completed after every strategic planning committee meeting.

Intermediate and Long-term Outcome

The intermediate and long term expected outcomes will not be assessed. However, the expected intermediate outcome will be an increase in commissioner engagement. With the community, Board of Supervisors, and staff. The strategic plan will consist of primary goals that the commissioners found were evident in the agency and the strategies that will ultimately guide the MCCAP activities to achieve those goals within the next two years. Ultimately supporting the agency's mission. To assess the needs of the low-income people in Monterey County and develop, maintain, and evaluate community services that empower low-income families to improve their quality of life. The expected long-term outcome for the MCCAP strategic planning project is to reduce poverty and help families and individuals become self-sufficient.

Findings/Assessment Results

Through the discussions with my mentor, of how successful the capstone project was, we found that the strategic planning process was successful in respect to the internal and external factors we had to navigate and maneuver throughout the year. Due to the Covid-19 pandemic there were many challenges in completing the strategic planning process; the agency's focus had changed and gathering stakeholders was difficult due to everything becoming remote. An evaluation rubric was completed showing the seven traditional steps and description of strategic

planning, how MCCAP approached each step and an evaluation of how each step was completed, what worked and what did not. The appendix listed below you will find the evaluation rubric and further detail of the assessment results.

Recommendations

My recommendations to the Monterey Community Action Partnership are to include more stakeholders in the strategic planning process in the future. As well as including more commissioners to be a part of the strategic planning committee and to make realistic goals, objectives and action steps for the time frame given to complete the strategic planning process. Also, a very important recommendation is to be more thorough in each step of the strategic planning process; the Covid-19 pandemic contributed to the strategic planning process having to be done so quickly due to other emergency projects but ensuring each step is completed carefully is a recommendation to the agency.

Conclusions & Personal Reflection

As previously stated, the strategic planning process is ongoing. Unfortunately, due to time constraints the capstone project could not be completed in the time frame given. Therefore, the strategic planning process is being continued. The next steps for MCCAP strategic planning process is to conduct an execution plan, establish resource allocation, present the strategic plan to the commission to endorse and lastly, complete an execution review. Overall, this project was a great learning experience. There were times it felt difficult to complete because the project was a part of the agency's bigger effort of completing the strategic plan and community action plan. However, the scope of work that I completed was a valuable learning experience; participating in a strategic planning process contributed to my future career endeavors.

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Appendix

Strategic Planning Steps	Description	How did CAP approach this step	Evaluation
<p>Review and Develop Mission and Vision</p>	<p>Able to obtain first-hand information from various stakeholders (Shareholders, customers, employees, suppliers communities, etc)</p> <p>You may use templates to evaluate how the stakeholders think about your organization. To find out whether their action is aligned with the organization's objectives.</p> <p>To review or develop the company's Vision and Mission with the involvement of other stakeholders to ensure it is still current with the business changes and new challenges. Also, use this session as a means for communication.</p>	<p>The CAP strategic planning committee defined the committee's purpose of meeting, what the strategic planning process would consist of, time frame of completion and was able to assign roles within the committee.</p> <p>CAP strategic planning committee consisted of three commissioners, one staff member and staff intern. Although the SP committee was small and did not consist of various stakeholders such as community members, agency representatives, board supervisors, etc. Information was used to evaluate the current needs of the community through CAP needs assessment and surveys as well as feedback from service providers during monthly meetings with CAP staff.</p>	<p>No templates or documents were used in reviewing the organization's mission and vision. However, with the committee consisting of a small group of people reviewing the organization's mission and vision was accomplished through communication.</p> <p>Suggestions - remind full commission of organizations mission and vision & ask each committee member to give their interpretation of the agency's mission and vision - this explains what goals in the strategic plan should pertain to.</p> <p>Reviewing the agency's mission and vision is a very important step in any strategic planning process. However, due to the short time frame (two years) of MCCAP strategic plan this step was not as comprehensive and in depth as it typically would be.</p> <p>Also, the last strategic planning process for MCCAP was more comprehensive so the need to review the agency's mission and vision was not a vital step in the process as staff and commissioners were familiar with the information.</p>

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<p>Conduct SWOT analysis</p>	<p>One of the key considerations of strategic planning is to understand internal (own organization) Strengths and Weaknesses as well as external Threats and Opportunities. These are commonly known as the four factors of a S.W.O.T. analysis.</p> <p>Involvement from various stakeholders to provide their points of view about your organization is key. In the process, you will gain better buy-in from these implementers of strategies and policies.</p>	<p>Completing the SWOT analysis is important because it defines an organization's internal strengths and weaknesses while also defining its external opportunities and threats.</p> <p>Completion of the SWOT analysis took a total of two meetings with the SP committee. Commissioners had similar input and were in agreement with the organization's SWOT.</p> <p>With the completion of the SWOT the conversation began to merge into the development of possible goals.</p>	<p>Conducting the SWOT analysis revealed the current state of the agency and how the Covid-19 pandemic has changed their focus.</p> <p>The internal strengths of the agency showed a diverse group of commissioners who have a drive and passion to help their community. The weakness focused on lack of outreach to district members, lack of communication and difficulty for the commissioners to comprehend their roles and responsibilities. Through the SWOT analysis, commissioners and staff found opportunities to clarify roles & responsibilities, prioritize community needs, & receive input from supervisors and community members.</p> <p>Traditionally, there are many more stakeholders, such as community members, service providers funded by MCCAP, more commissioners, staff, etc. However, a smaller group was easier to maneuver, while still taking into consideration information from the community from the needs assessment, weekly meeting with the CAP staff and monthly meeting with the service providers.</p>
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<p>Develop and select strategic options</p>	<p>You may use templates to develop several key possible strategies to address the organization's objectives. More important, these possible strategies are developed based on the inputs from stakeholders (step 1) and Business and Operation analysis (step 2).</p> <p>It is often several possible strategies that are developed and every one of them is important. Since it is quite normal that an organization would have several key issues to tackle, you will be able to use proper tools to select a few from the possible strategies. You will be able to apply several prioritizing tools as introduced in this step.</p>	<p>Prior to each SP meeting there are instructions given to the commissioners and staff that make up the SP committee.</p> <p>Templates were used to complete certain steps such as the development of strategic options or goals.</p> <p>During the SP meeting staff was able to go over each person's top three goals that they entered into the shared doc.</p> <p>Majority of the goals were similar, however we found that each commissioner or staff had different objectives and priorities to reaching those goals.</p> <p>During this meeting, we were able to communicate and list those objectives.</p>	<p>Due to MCCAP being a publicly operated community action agency and supported by the MCDSS it can be difficult to develop strategies that fit into the same missions and vision that CAP agencies have and stay community based; while still having to deal with the regulations of being run under the department of social services.</p> <p>The commissioners that sit on the MCCAP board of representatives of a district in Monterey County and majority of them live or work in their district, so they are able to serve as a voice for what their community needs.</p> <p>By having these commissioners as a part of the SP committee CAP is ensuring that the strategies developed are staying community based.</p>
<p>Establish strategic objectives</p>	<p>During this step, you will be able to view the overall picture of the organization and be able to select a few strategic options objectively. The template may be used to understand various strategic options, set key measures and broad timeline to ensure the selected strategic options are achieved.</p> <p>While it is quite common that measures and timeline are given by top management, it is the intention of this step 4 that these measures and timeline are S.M.A.R.T. Which stands for, Specific (S), Measurable (M), Achievable (A), Realistic (R) and Time-bound (T). When the strategic options are SMART, it will help to ease the communication toward the lower level of the</p>	<p>A scorecard template is being used to define each goal's objective, action step, measure, target, score, progress and status. During this step, CAP had to go revisit their current strategic plan and determine if those goals were met or if parts of those goals were met. Deciding whether or not to keep similar goals, such as data management, and to develop new action steps that work towards achieving those goals had to also be evaluated. Once evaluated, CAP had to look at what the next stage for their organization was going to be.</p>	<p>We found that although many of the commissioners in the strategic planning committee were agreeing on the same goals their objectives and action steps were different. Ensuring that each commissioner gave specifics on the objectives and action steps was very important in narrowing down goals. Some of the goals/objectives are ongoing goals from the previous strategic plan such as data management. These goals are moving targets; part of the goal was achieved and now we have to develop new action steps to achieve the next part of the greater goal. Other goals/objectives are new and issues that have barely risen within the agency that are important to work on.</p>

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	organizational hierarchy for implementation.		
Strategy execution plan	Many organizations failed to realize the full potential of its strategies is due to weak implementation. In step 5, a proper deployment plan is developed to implement these strategies.	MCCAP staff is actively working on brainstorming strategies for execution of the SP plan, the next step is to draft the SP plan and present it to the full board of commissioners for approval.	Staff is currently working on brainstorming strategies to execute the strategic plan. After the board of commissioners endorse the full plan, MCCAP will be able to begin the execution process. (ongoing)
Establish Resource Allocation	Very often, the management team assigned selected strategies to key personnel and left it to the individual to carry out the task. While most organizations operate with minimum resources, it often ends up work overloaded by an individual.	There are many resources available to the MCCAP in completing the action steps of the strategic plan. Due to the Covid 19 pandemic the state of the MCCAP agency has been chaotic in the workload that has been put on the staff.	MCCAP has many resources available to them, they have CALCAPA, service providers, board of supervisors, and surrounding CAP agencies. (ongoing)
Execution Review	One of the key success factors for an effective strategy deployment is a constant review of its progress and making the decision for any deviations to plan. It is vital to decide what to review and with whom the review is done. The new decision may be required as the status of the strategies progresses.	MCCAP staff and commissioners have discussed and are looking to endorse the new SP plan for three to five years rather than the usual two years. Based on previous SP plans staff had expressed concerns in work overload and inability to have effective completion of each goal, and objective in the strategic planning process.	MCCAP staff is able to evaluate and review how the strategic planning process is happening as time goes on during their team weekly meetings. During these meeting times, staff are able to adapt their action steps if necessary; based on how the agency's strategic direction may change. (ongoing)

Source: <https://greatminds.consulting/insight/7-steps-effective-strategic-planning-process>