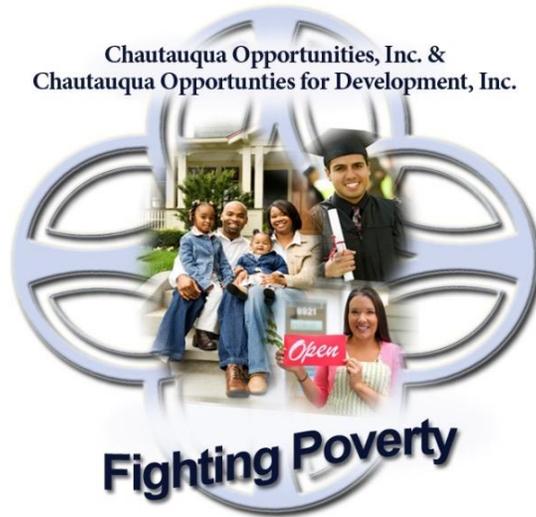


Chautauqua Opportunities, Inc. &
Chautauqua Opportunities for Development, Inc.



**CHAUTAUQUA OPPORTUNITIES, INC.
AND
CHAUTAUQUA OPPORTUNITIES FOR
DEVELOPMENT, INC.**

STRATEGIC PLAN 2016-2018

Building a Strong Future Together

*"The essence of leadership is aligning strengths, so that
weaknesses become irrelevant."*

Peter Block

INTRODUCTION

In 2015, Chautauqua Opportunities Inc. (COI) celebrated its fiftieth anniversary, a major milestone. This is also the year that the organization revised and updated its three year Strategic Plan. The *Strategic Plan 2016-2018* builds on the planning tradition of the organization. COI chose a planning process that would illuminate strengths and position itself for a future that improves the lives of its customers and the quality of its community. The approach for this planning cycle was based on inclusion and inquiry, inviting everyone connected with COI to engage in conversation that illuminated its unique positive qualities. The ideas in this plan reflect the spirit of those conversations, and we hope they stimulate continued ingenuity and positive growth for COI into its next fifty years.

The *Strategic Plan 2016-2018* has three overarching themes, each supported by specific goals and objectives. These will provide a framework for the development of actions to be implemented over the next three years. They will also provide the stimulus for other initiatives that could be developed and implemented throughout the organization.

The following pages include a description of COI's approach to planning, its Mission, Vision, Strengths, Strategic Themes, Goals, and Objectives. We invite you to read and reflect on these ideas, and most importantly, to integrate them into what we all do for COI.

HOW WE GOT HERE

When it was time to update the Strategic Plan, the COI Management Team assessed past planning cycles and identified expectations for this planning cycle. There were a number of strengths that contributed to its past successes. Planning has been inclusive, mission driven, realistic, strength-based, connected to the community, monitored and outcome based. Planning afforded COI with staff and organizational growth, forced it into new territories, developed partnerships, and increased its impact. It provided additional feedback from customers, stakeholders, partners, and staff. It was hoped that this planning cycle would help COI fulfill its Mission, strengthen its position within the community, define a vision, create buy-in at all levels, and create a sense of community. The result COI wants to achieve through the Strategic Plan is to build capacity, expand its reach, increase innovation, have a national reputation for its asset model, be more unified with its community, develop engagement at all levels of the organization, and to have Goals and Objectives that are both realistic and measurable.

COI has been disciplined in updating its Strategic Plan every three years, and using a number of different planning processes for each cycle. This year a recommendation was made to use Appreciative Inquiry, a strength based approach that meaningfully involves as many stakeholders as possible. During March 2015, Appreciative Inquiry was tested by the Management Team and with its approval, the principles and steps were used to design the planning process.

Appreciative Inquiry is an approach that has been used successfully in small and large projects with hundreds of organizations worldwide. It is based on the simple idea that organizations move in the direction of what they ask questions about. For example, when groups study high human ideals and achievements, such as peak experiences, best practices, and noble accomplishments, these phenomena tend to flourish. Appreciative Inquiry distinguishes itself from other methodologies by deliberately asking positive questions to ignite constructive dialogue and inspired action within organizations.

The underlying assumption of Appreciative Inquiry is that people and organizations are highly generative. They are always evolving, growing, and moving toward their “positive core” - its greatest assets, capacities, capabilities, resources, and strengths - to create new possibilities, action, and innovation. The steps include:

- *Discovering* the organization’s root causes for success
- *Envisioning* bold new possibilities for the future
- *Designing* the organization for excellence through dialogue
- *Co-constructing* the future

All COI stakeholders were invited to attend one of six Summits that were held in April 2015. These half day sessions were designed to discover the strengths of COI, to dream about its future, and to identify potential initiatives that could be implemented in the following eighteen months. The Summits involved over 300 members of the COI community, including board members, community leaders, managers, staff, partners, customers, and others connected with the organization. During the Summits, participants were engaged in paired interviews followed by small group activities. The information developed during these sessions became the foundation for the *Strategic Plan 2016 - 2018*.

The Summits brought together the COI community. The feelings and the spirit that emerged were positive, insightful, energizing, and hopeful. Stakeholders worked with stakeholders from other groups. They shared stories that were powerful illustrations of the strengths and the impact this organization has on their lives, their neighbors, and their community. They envisioned a future for COI, and identified potential initiatives that would move the organization forward. People were in conversation with people they didn't know. They became connected by the feelings that emerged from their interviews and their work in small groups. The result was a strong sense of community within the room and with COI.

The small group presentations at the end of each Summit provided the opportunity to share stories about the impact COI has had on individuals, organizations, and communities. A school principal described the positive impact the COI led After School Program has had on his students. It is something that his school would not be able to provide without the partnership with COI. A former customer talked about his transition from being in a state of crisis to thriving, a journey that was supported by the programs and people of COI. A customer used the presentation to deliver a testimony of gratitude for all the individual help she had received from one of the COI staff. These were just three of the powerful stories that were shared. There were a number of participants who gained new insights and a greater appreciation for the positive impact COI has on so many people in Chautauqua County.

Following the Summits the Management Team reviewed the input from the sessions, identifying the strengths of COI, and developing the Strategic Themes, Goals, and Objectives. They continued to refine these ideas, developing more specific initiatives, responsibilities, dates, measures for evaluation, and targets for success. These later elements are contained in an internal document to be used to guide and monitor the implementation of the Strategic Plan.

The ideas in *Strategic Plan 2016 - 2018* were presented to the organization during the Professional Development Day in October 2015. It will be presented to the Board of Directors for its approval in November. After approval, the Strategic Plan will be the planning foundation at COI for the next three years.

MISSION

The COI Mission Statement has been in place for many years. It was used as the cornerstone for conversations about COI's strengths, vision, and potential initiatives.

COI... Leading the fight against poverty by mobilizing resources and creating partnerships to promote empowerment, economic independence and opportunities.

VISION

Conversations about the future of COI were a central part of each of the Summits. Participants were asked to dream boldly and small groups were tasked to describe their COI of the future through a visual image and a word image. The Management Team used these images to create the COI Vision Statement:

Empowering individuals and families, while building and transforming communities, to achieve social and economic success. #virtual #regional #self-sustaining

STRENGTHS

The current strengths of COI were developed from the Root Causes of Success identified during the planning Summits. They were refined by the Management Team and describe the organization's positive core.

Mission Driven - COI is focused on its mission, with innovation, creativity, and flexibility.

Leadership - COI leadership demonstrates a mission-focused commitment to excellence through inclusive participation, fostering individual professional development.

Teamwork - Skilled and engaged staff team effectively with customers, partners and other staff to carry out the mission of the agency.

Services - COI continually strengthens services to a level of excellence.

Collaboration and Integration - We work with our community to develop services through strong collaboration and seamless integration.

Community - Through innovation, commitment, and engagement, COI responds to community need.

Customer Engagement - COI implements a strength-based, customer-focused model that promotes engagement, empathy, empowerment & mutual respect.

STRATEGIC THEMES

The three Strategic Themes were developed by the Management Team from the information developed during the Summits. The Themes were also aligned with the National Goals and Performance Indicators (NGPI).

1.0 - Growth outside Chautauqua County - COI develops and implements an evidence based anti-poverty model that coordinates services to empower and grow communities.

Words to help understand the "Growth" theme include virtual service delivery, expansion to virtual network, and regional and country expansion. The following ideas were taken directly from the Summits:

- Virtual Advocacy, awareness, and service delivery
- Regional Growth
- Service Innovation

The "Growth" theme relates to the following NGPI Goals:

1. Low income people become more self sufficient
5. Agencies increase their capacity to achieve results

Quotes from the Summits

"COI is a global leader in empowering individuals, families, and communities to achieve economic and social success."

"COI ... providing regional access to evidence based, customer driven services that promote customer and community growth."

"Increasing the capacity to help individuals and families across the region to grow and thrive ..."

"As a CAA we are part of a larger national network - opportunity for replication of services."

"Become a national model for service provision."

"Opportunity in geographical expansion."

“COI will be recognized as a regional leader in helping people through collaboration with others, to become successful, empowered, knowledgeable, and self-sufficient, so they can realize their highest potential.”

“Through advocacy and collaboration, services are expanded to encompass regional empowerment of individuals and communities to promote positive growth.

2.0 - Strengthen the Community - COI is an organization that promotes (creates, fosters) positive community growth and cohesiveness by empowering strong teams of leaders and community members.

Words to help understand the “Community” theme include real community involvement, building / strengthening community, and more customer involvement in advocacy. The following ideas were taken directly from the Summits:

- Building community and Capitals
- Customer involvement and input with service design and delivery
- Opportunities for customers to contribute and connect in a meaningful way

The “Community” theme relates to the following NGPI Goals:

2. The conditions in which low-income people live are improved
3. Low-income people own a stake in their community
4. Partnerships among supporters and providers of services to low-income people are achieved
6. Low-income people, especially vulnerable populations, achieve their potential by strengthening family and other supportive environments

Quotes from the Summits

“ Excellent customer driven service, not limited by income, geography, time or resources: resulting in an empowered community - unified toward innovation and progress.”

“Empowered to design service approach to meet needs of community.”

“Building strong community participation.”

“Empowering individuals to realize and achieve their full potential to become invested members of their community.”

Excellent customer driven service not limited by income, time, or resources, resulting in an empowered community unified toward innovation and progress.”

“Engaging individuals to come together to build communities.”

“Building stronger communities, one family at a time.”

“Community collaboration to better serve the people of Chautauqua County.”

3.0 - Sustainable Organization - COI is an organization that provides cutting edge service delivery, supportive corporate culture, and focuses on fund diversity.

Words to help understand the “Sustainable” theme include fund development. The following ideas were taken directly from the Summits:

- Human resources, staff development, culture and flexibility
- See ourselves as developers of a sustainable model
- Find other ways of getting funds
- Fund development

The “Growth” theme relates to the following NGPI Goals:

5. Agencies increase their capacity to achieve results

Quotes from the Summits

“Opportunities to bring additional national resources into the organization.”

“Need to have more diversified funding.”

“Increase unrestricted funding.”

GOALS AND OBJECTIVES

Goals are milestones to be reached before too long, and define possible desired futures that are achievable in a three year time span. They are statements of what must be achieved in order to maintain and/or upgrade performance as the organization moves toward its Vision. The Goals below are both growth and operational. The growth goals deal with new areas of endeavor, expansion, growth and innovation. Operational goals deal with current business, something COI is already doing but in a more effective way.

Objectives are measurable achievements that will move the organization toward its goals and can usually be achieved in 3 to 18 months. They are assigned Measures and Success Targets, so the results can be observed and appraised. Each objective has been assigned the responsibility of a manager, department, team, or individual. The Responsibilities, Dates, Measures, and Success Targets are included in an attached document that is only for internal COI use.

1.0 - Growth outside Chautauqua County

Goal 1.1 Create a web-based presence that provides information, service, buy-in, dialogue, and creates connection between the individual, COI, and the larger community.

1.1.1 Create a message and a brand "Helping people, changing lives, strengthening communities"

1.1.2 Create a Social media presence on Facebook, Twitter, and/or other emerging technologies

1.1.3 Create Web-based service access and options, (ie, classes, observations)

Goal 1.2 COI will systematically and incrementally expand its service area and measure impact by customer outcomes, engaged stakeholders, and social economic impact.

1.2.1 Identify criteria for Needs Assessment and prioritize our plan of addressing those indicators

1.2.2 Complete a Needs Assessment of newly identified geographic areas, with pre-defined criteria

1.2.3 Strategically identify markets and partners within pre-identified geographic locations

- 1.2.4 Define Outpost Service Model
- 1.2.5 Identify a major partner or sponsor in each location
- 1.2.6 Identify measurement indicators of stakeholder engagement
- 1.2.7 Identify measurement indicators of social economic impact

Goal 1.3 In 2018, COI will be implementing innovative evidence-based anti-poverty strategies to address core life domains.

- 1.3.1 Define an Asset focused strategy
- 1.3.2 Define an Anti-poverty strategy
- 1.3.3 Identify existing evidence based models / new delivery mechanisms - design thinking (live and virtual)
- 1.3.4 Standardize internal data collection and analysis
- 1.3.5 Develop reports / who to report to

2.0 - Strengthen the Community

Goal 2.1 COI will work within communities to increase participation of marginalized populations.

- 2.1.1 Define the "community"
- 2.1.2 Identify marginalized groups
- 2.1.3 Identify potential opportunities for participation
- 2.1.4 Engage the communities to develop solutions that increase community participation

Goal 2.2 In 2018, COI will have created new avenues for customer input and involvement in the organization regarding service design and delivery.

- 2.2.1 Identify Topics for community forums
- 2.2.2 Forums have been scheduled

2.2.3 Created volunteer opportunities, customer and community involved in service design and delivery

2.2.4 Teach "Effective Activism" to customers (coaching, mentoring – internal venues)

Goal 2.3 By 2018, customers will contribute to their communities and connect with one another across diverse mediums, resulting in more meaningful and representative participation.

2.3.1 Mentoring / Peer mentoring

2.3.2 Public education/advertising campaign (RE: community involvement, revitalization, personal ownership)

3.0 - Sustainable Organization

Goal 3.1 By 2018, we will develop, engage, and retain quality employees!

3.1.1 Implement training curriculum

3.1.2 Create a supportive culture that honors diversity.

3.1.3 Engage staff in routine design thinking forums (including virtual access, twice a year)

3.1.4 Management self-assessment and accountability linked to the CQI

Goal 3.2 By 2018, we will market our replicable model(s) nationally.

3.2.1 Develop a marketing / sales plan (What are we selling? Is there a market for it?) Develop protocol for whole process (proprietary)

3.2.2 Look at others who market a replicable model nationally (virtual CAP), and hire a professional, experienced, specialized, outside firm (experts) for a percentage / commission

3.2.3 Become a vendor at national venues (Partnership leadership conference, annual conference)

3.2.4 Add replicable model to website for sales

NEXT STEPS IN THE PLANNING PROCESS

The next steps call on COI to implement the Goals and Objectives in the Strategic Plan, as well as to develop other initiatives that will support the Mission, Strategic Themes, and Goals.

This final step “is an invitation to action inspired by the prior days of discovery, dream, and design. For some this is the day they have been waiting for, a time to finally get to work on the specifics of what will be done! At this point we seek to invite personal and group initiative and self-organizing. We seek to demonstrate the large group’s commitment to action, and support for those who choose to go forward working on behalf of the whole.” (Ludema, J., Whitney, D., et al. *The Appreciative Inquiry Summit*)

It is essential that individuals, departments, and committees be provided the opportunity, leadership, resources, and support required to succeed in implementing the Goals and Objectives described in the *Strategic Plan 2016 - 2018*. COI can also realize additional strengths that emerged during the planning process, innovation and a strong entrepreneurial spirit. It is critical to recognize that organizations are generative, always growing and moving. COI must continue to embrace innovation and entrepreneurship to insure its success for the next fifty years.

CONCLUDING THOUGHTS

When the 2016-2018 planning process began, it was hoped that it would help COI fulfill its Mission, strengthen its position within the community, define a vision, create buy-in at all levels, and create a sense of community. The Mission was referenced in conversations throughout the process, and was the cornerstone for the Goals and Objectives. Many statements from the participants, one Strategic Theme, and related Goals and Objectives focus on strengthening the community. A COI Vision statement was developed, drawn from the positive images of the future that were created by the participants in the Summits. A positive consequence of the Appreciative Inquiry approach is the connection participants develop with each other and with the organization. The sense of connection that emerged from the Summits reflects on the impact that COI has, and will have on strengthening its community.

The results COI wanted to achieve through the Strategic Planning process were to build capacity, expand its reach, increase innovation, have a national reputation for its asset model, be more unified with its community, develop engagement at all levels of the organization, and to have Goals and Objectives that were both realistic and measurable. A review of the process and this document should provide support that these expectations were met.

A very important observation was made during the Summits. The insights expressed by the participants demonstrated a culture that COI has strived to create for the past twenty years. Ironically, the Center of Association Leadership published a book that documents its research study to determine what separates exceptional associations from good ones. It is based on the question: "What does it take to turn an association from good to great, and how can excellence be sustained?" Jim Collins mentored the project and the writing of the book, *7 Measures of Success - What Remarkable Associations Do That Others Don't*. "The researchers found that truly exceptional associations - and other nonprofit organizations for that matter - share a dogged commitment to seven key factors, or measures, that define their ability to remain remarkable year after year after year. They don't so much subscribe to certain qualities as they embody these 7 Measures of Success: A Customer Service Culture, Alignment of Products and Services with Mission, Data-Driven Strategies, Dialogue and Engagement, CEO as a Broker of Ideas, Organizational Adaptability, and Alliance Building." After working with COI through this planning process, it is clear that COI embraces these measures and is an exceptional association.

The hope for the *Strategic Plan 2016 - 2018* is that it will support COI's success for the next fifty years.

**STRATEGIC THEMES, GOALS, OBJECTIVES, RESPONSIBILITIES,
DATES, MEASURES, AND SUCCESS TARGETS
(THIS DOCUMENT IS FOR INTERNAL USE ONLY)**

Theme 1.0 - Growth Outside Chautauqua County

COI develops and implements an evidence based anti-poverty model that coordinates services to empower and grow communities.

Goal 1.1 Create a web-based presence that provides information, service, buy-in, dialogue, and creates connection between the individual, COI, and the larger community.

Goal 1.2 COI will systematically and incrementally expand its service area and measure impact by customer outcomes, engaged stakeholders, and social economic impact.

Goal 1.3 In 2018, COI will be implementing innovative evidence-based anti-poverty strategies to address core life domains.

Theme 2.0 - Strengthen the Community

COI is an organization that promotes (creates, fosters) positive community growth and cohesiveness by empowering strong teams of leaders and community members.

Goal 2.1 COI will work within communities to increase participation of marginalized populations.

Goal 2.2 In 2018, COI will have created new avenues for customer input and involvement in the organization regarding service design and delivery.

Goal 2.3 By 2018, customers will contribute to their communities and connect with one another across diverse mediums, resulting in more meaningful and representative participation.

Theme 3.0 - Sustainable Organization

COI is an organization that provides cutting edge service delivery, supportive corporate culture, and focuses on fund diversity.

Goal 3.1 By 2018, we will develop, engage, and retain quality employees!

Goal 3.2 By 2018, we will market our replicable model(s) nationally.

Goal 3.3 By 2018 we will have explored service and entrepreneurial options linked to sustainability, and identified action steps to initiate progressive growth.