

*South Central  
Human Resource Agency  
Strategic Plan*



*April 2014*

# TABLE OF CONTENTS

Executive Summary .....	3
.....Background/History of Agency.....	3
..... Summary of Goals .....	4
Strategic Plan Team Members .....	5
Planning Process .....	6
.....Introduction .....	7
.....Strategic Planning Cycle .....	8
.....Exhibit A - Strategy Pyramid .....	10
Business Model .....	12
.....Vision and Mission .....	12
.....Core Values .....	13
.....Market Awareness .....	14
Competitive Advantage .....	17
Identity Statement .....	19
Strategy Screen.....	21
Big Questions.....	23
Goals/Strategies .....	24
.....Short Term.....	25
.....Long Term.....	34
Plan Monitoring.....	37
References/Consultant .....	38

## **EXECUTIVE SUMMARY**

### **Background and History**

The South Central Human Resource Agency (SCHRA) was created July 11, 1973, and chartered as a public nonprofit organization February 19, 1975, with the goal of promoting the development of human resources in South Central Tennessee. In the years that followed our charter, our programs expanded exponentially and we have emerged as a recognized leader in helping the economically disadvantaged, elderly and handicapped persons in the South Central Tennessee Development District. Today, we are guided by our Governing Board and Policy Council and continue to strive to effectively and efficiently deliver human services through our numerous programs. This strategic plan reflects our strong desire to continue our positive contribution to the community through continuous improvement, innovation, and high quality service delivery. We have established several goals.

### **Goals**

Our goals and strategies were developed as a result of our knowledge of the challenges we currently face as an agency and our unwavering desire to deliver added value and support to the communities we serve, amidst rapidly changing times. The following goals have been established:

1. Continue providing services to our customers by implementing activities that will sustain our agency for the next three years.
2. Increase community awareness, support and advocacy.
3. Become the premier provider of services and resources to individuals within our service area.
4. Gain new programs and services to meet community needs.
5. Develop an organized approach to program services that is driven by the specific needs and priorities of the community.
6. Meet the organizational standards for community action agencies.
7. Increase individual program and agency wide funding.
8. Expand our services to Veterans.

Discussion and development of these goals was completed by our agency Executive Director, administrative staff, program directors and other organizational leaders who direct and manage the SCHRA. These individuals comprise the strategic planning team.

## OUR STRATEGIC PLAN TEAM MEMBERS

TEAM MEMBER	POSITION
James Coy Anderson	Executive Director
Patsy Freeman	Executive Secretary
Scarlet Patterson	Human Resources Manager
Gale Goggin	Benefits/Personnel Specialist
Patric Bennett	Network Administrator
Jim Reynolds	Director of Fiscal Operations
Lisa Williams	Fiscal Assistant/Network Administrative Assistant
Pam Gray	Purchasing Officer
Laure Hopper	Program Director, Head Start/Early Head Start
Jessica Chambers	Assistant Director, Head Start/Early Head Start
Eric Jeffers	Information Support Coordinator, Head Start/Early Head Start
Dee Dee Sneed	Program Coordinator, Community Services Block Grant
Debbie Williams	Program Coordinator, Low Income Home Energy Assistance
Ruby Twyman	Program Coordinator, SSBG Homemaker
Donna Brazier	Program Director, Nutrition & Homemaker
Bobbie Cox	Program Director, Foster Grandparent
Judy McLeod	Program Director, Community Corrections
Pamela Morris	Program Director, SCSEP/Title V
Kenneth Parker	Maintenance Officer

---

# *Our Planning Process*

---

*If you can't describe what you are doing as a process, you do not know what you are doing.*

*-W. Edwards Deming*

## INTRODUCTION

This plan represents the initial steps of a continual process to establish strategies that will sustain us during irresolute times and help us to continue satisfying the increasing needs of our customers. Recognizing that we exist in an environment where change is abrupt and uncertainty looms, we have used the real-time planning process (La Piana, 2008) to develop a plan that allows us to respond posthaste. It is not exhaustive and compels frequent reviews of our goals and objectives for accomplishment and adaptation.

The focus of real time strategic planning is strategy. La Piana (2008) states that at the core of good nonprofit leadership is sound strategy. Strategy involves an incessant attempt to determine the right approach, the best pattern of behavior to achieve desired ends (La Piana, 2008). Strategies become action, and according to La Piana, should be amended as often as necessary to respond to significant macro and micro level occurrences. He offers that these strategies should be formulated at three levels-organizational, programmatic and operational, captured as a strategy pyramid. The strategy pyramid is the system that provided the groundwork of our strategic planning process, with key activities completed at each level. The graphic representation of the pyramid with activities is shown as exhibit A on page 10. At the

base of the pyramid is operational strategy, which includes administrative processes and management systems. The next level is programmatic which focuses on the effective and efficient implementation of the many programs we provide. This is accomplished by employing the unique capabilities of two groups of our most important assets, our staff and volunteers. At the pinnacle of the pyramid is the organizational level that takes a comprehensive look at the organization, including our vision and mission. Even though these levels are reported from base to pinnacle, it was necessary to begin with the organizational level in our planning process, as “if the organization is not aligned top to bottom, then the pyramid is not well built and the mission, which sits at its apex, is subject to collapse” (La Piana, 2008, p. 25).

### **THE STRATEGIC PLANNING CYCLE**

Real time strategic planning is cyclical and involves answering four critical questions:

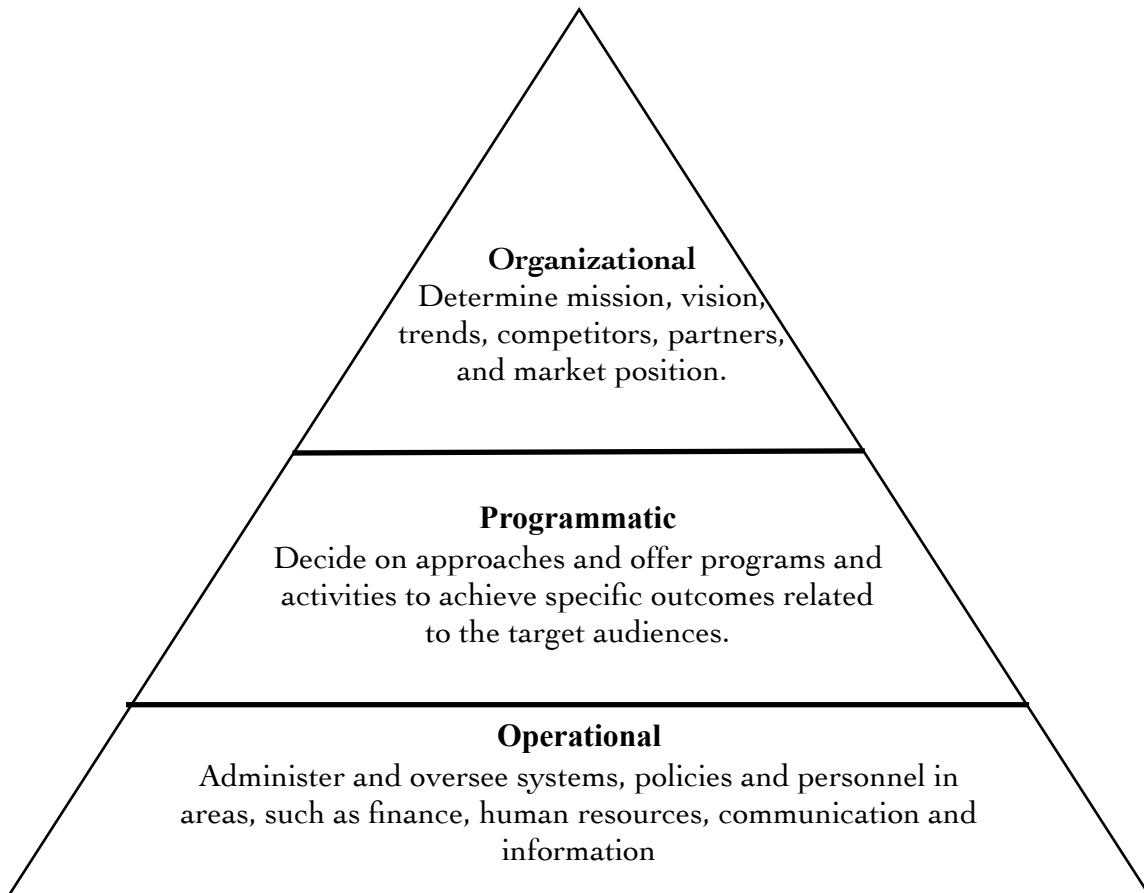
1. Who are we?
2. Where are we? How did we get here?
3. Where do we go next?
4. How do we get there?



Embodied in each of these questions was a specific set of activities completed by our planning team. These activities led to a fuller understanding of who we are as an agency, how we want to affect the community and world at large, our plans for the future, and a blueprint for achieving our desired outcomes. The exercises included establishing an organizational identity composed of a review of our business model, increase of our market awareness, and discovery of our competitive advantages. The next activity involved developing a strategy screen or criteria we will use to determine the feasibility of future strategies. This was followed by determining the big questions to ask, the opportunities or challenges we face as an organization. The final stages of the cycle included developing goals and corresponding action steps and implementation of our plan of action.

## Exhibit A

### Strategy Pyramid



La Piana (2008)

---

# *Organizational Identity*

---

*Know Thyself.*

*- Plato*

## **OUR BUSINESS MODEL**

South Central Human Resource Agency is a public nonprofit organization that promotes the development of human resources in south central Tennessee. We help the economically disadvantaged, elderly and handicapped persons in the South Central Tennessee Development District. This is accomplished through approximately twenty-one programs that are funded primarily by way of government grants. As a nonprofit that is heavily reliant upon these sources that are often dubious at best, we are taking a proactive stance to management and growth.

### **Our Vision**

Within three years, South Central Human Resource Agency will broaden our image and strengthen our internal and external collaborations in order to increase the community's awareness of our value and to deepen our impact.

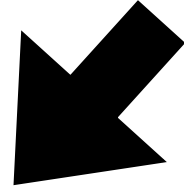
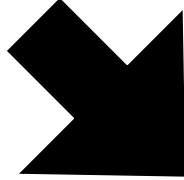
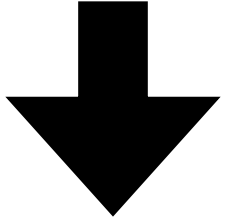
### **Our Mission**

South Central Human Resource Agency helps people in need to help themselves and each other to enrich their lives.

**Fiscal  
Responsibility**

**Ethical  
Decision  
Making**

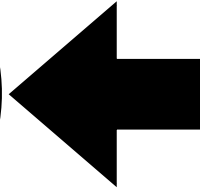
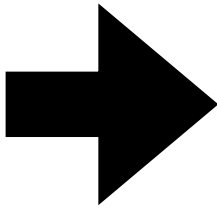
**Accountability**



**OUR  
CORE VALUES**

**Unity**

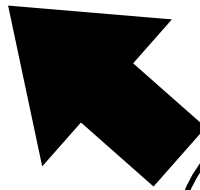
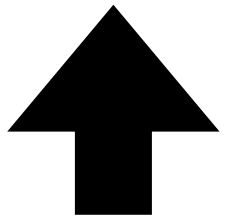
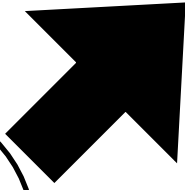
**Safe  
Environments**



**Compassion**

**Mutual  
Respect of  
Customers  
and Staff**

**Excellence**



## MARKET AWARENESS

La Piana (2008) maintains “developing and honing market awareness is the best way to support good strategic decision making” (p. 54). It is critical that even though we are a nonprofit agency, that we seek to understand our market and competitors to know where we currently stand and to know the forces that could affect our future. With this information, we can anticipate opportunities and address current challenges. This is how organizations succeed for the long term (La Piana, 2008). To develop our market awareness, we need to become and remain knowledgeable of three key areas-trends in the market, our market position and our current and potential competitors.

### Market Trends

Analysis of trends were conducted in three categories-social needs, available funding and other possible trends.

**Social Needs.** Our customer base is changing. The current economy with its increase in furloughs and permanent layoffs have created an increased demand for our services. Individuals who have in the past been able to provide for the needs of their families, are finding themselves requiring the services we provide. There are increasing needs for housing, child care, employment, food, and transportation. We

are experiencing an increase in aging workers who have very little resources to provide for their basic necessities.

**Available Funding.** ~~Stimulus money provided an increase in our funding. However, when that is exhausted the need will be even greater than the supply. While it seems that our funding has increased and in many of our programs is staying the same, the reality is that we are meeting a decrease in funding, as the government pinpoints programs in its acts of diminution.~~

**Other Trends.** There are three additional trends. The first regards the President's Affordable Care Act. Due to the provisions of this legislation and other global changes related to the provision of health insurance, agencies such as SCHRA are experiencing an increase in the cost of employee coverage, as we run the risk of the assessment of penalties for non-compliance. The second trend is the increased demand for assistance from social services agencies. Due to the rise in company layoffs, individuals are losing basic health insurance. Additionally, social security disability benefits are no longer easy to obtain. These orientations have increased the number of individuals who in some form require public assistance. The demand for services is indeed greater than the funding supplied to assist these individuals. The third trend regards reductions in federal funding that poses challenges for agencies to

meet the increased needs of the community. Although we continue to assist those in need with our many programs, funding cuts could cause a decline in our market position as funding streams to specific programs is decreased or is no longer available.

## **Market Position**

Overall, our market position is strong. One of our underlying assumptions is that due to the diversity of services we provide to such a wide range of customers, there isn't - nor will there be - another government agency established to replace us within the next three to five years. There are many smaller programs providing like services, however, there are few, if any agencies that come close to providing our conglomerate of programs and to such a wide age range of individuals. None of our competitors has the capability of serving individuals, age zero to 100, as we have done over the past 35 years. Additionally, we are fiscally sound, with established internal controls and systems to guard against funds mismanagement. It seems that we are in the optimal market situation; however, we do not rest on our laurels and make no assumptions. Rather, we recognize that there are forces that are sometimes greater than ourselves, that perhaps do not regard quality service delivery and could appear at any time. In the past three years, we have lost two of our major programs - families first and child care broker certificates. We, therefore, will continue to strengthen our



organization, employing innovative strategies and remaining vigilant of existing and new competitors.

## **Competitors**

An analysis of our competitors confirmed the need to continue to conduct thorough study to determine who they are and what they offer. This inquiry is to include identification of each by name, their staff/board/volunteers, the services they provide, the number of customers they serve, their media attention, funding sources, management structure, and other critical information that makes them a strong competitor. While there were several organizations and businesses identified that compete with our individual agency programs, there is only one that demonstrates the capacity to provide an array of services; however, this competitor lacks strengths in other significant areas. We will continue to monitor its progress in the community, as this organization, as well as future entrants, could indeed challenge to a large degree our competitive advantage.

## **COMPETITIVE ADVANTAGE**

Competitive advantage is the ability to contribute social value by employing a unique asset, outstanding execution of programs (activities), or both (La Piana, 2008).

We have identified several advantages in both categories.

## **Asset Advantages**

- Provision of a large spectrum of diverse services
- Assistance to people of all ages, from pregnant moms to the elderly
- Far reaching service delivery area (more than thirteen counties)
- Genuine staff who care about our customers
- A diversified funding base that includes earned income
- Fiscal Soundness

## **Execution Advantages**

- Most services at no or minimal costs to customers
- Better accountability and public reporting
- Quick delivery of services
- Institution of special programs for customers at specific times of year

While we are proud to own these advantages, we are not at all fully satisfied and seek to continually improve our service delivery and to strengthen our presence and positive affect on the community.

## **OUR IDENTITY STATEMENT**

We advance our mission of helping people in need to help themselves and each other to enrich their lives, by providing services to pregnant moms, children birth to age five, the elderly, disabled, veterans and other qualifying men and women. We emphasize our competitive advantages of low cost, high quality delivery of a diversity of services in strategic locations, with a proven reputation for efficient service provision and a caring environment. We are sustainable by diversified funding, including government grants and earned income.

---

# *Strategy Screen*

---

*There is nothing so useless as doing efficiently that which should not be done at all.*

*- Peter Drucker*

## OUR STRATEGY SCREEN

To avoid engaging in futile strategies, we have created a strategy screen. A strategy screen is a set of criteria we will use to determine if our proposed action plans are consistent with our organizational identity.

We will undertake strategies that...

	Option A	Option B	Option C	Option D
1. Support our Mission				
2. Support or enhance our current position in the community.				
3. Are consistent with our values				
4. Are financially feasible				
5. Meet a community need (We will look before we leap)				
6. Have a feasible timeline				
7. Will help us to achieve sustainability				

Along with our strategy screen, we have selected a committee that will use the strategy screen to review all actions plans for practicability. Members include the Executive Director, Director of Fiscal Operations, HR Manager, IT and select staff.

---

# *Big Questions*

---

*The questions you ask, determine your strategies.*

*La Piana*

## OUR BIG QUESTIONS

Our big questions are opportunities or threats to which we must respond. It includes barriers to our current operations that could have a negative affect on our agency. There are three categories -a new opportunity, a competitive challenge, or a challenge to our business model. Our team identified four big questions:

### **QUESTION # 1 (BUDGET CUTS)**

How will we keep the agency functioning to provide the services we offer people today?

### **QUESTION # 2 (COMMUNITY AWARENESS)**

How do we increase community awareness / support of the vital role the agency plays in the overall community well-being?

### **QUESTION # 3 (COMPETITORS)**

How do we create opportunities to learn from and to collaborate with our competitors to strengthen our position in meeting community needs?

### **QUESTION # 4 (COMMUNITY AWARENESS)**

How do we advance our position and show that we are the premier choice for service delivery?

These questions form the basis of our organizational strategies. Additional plans at the programmatic and operational levels have also been formulated.

---

# *Goals / Strategies*

---

*The future doesn't just happen-it's shaped by decisions.*

*Paul Tagliabue, former commissioner,*

*National Football League*



## Organizational Level Goals and Strategies

### SHORT TERM

#### GOAL # 1

Continue providing services to our customers by implementing activities that will sustain our agency for the next three years.

#### PROPOSED STRATEGIES

If funding from CSBG/LIHEAP is decreased, we will restructure the operations and service delivery of our neighborhood service centers. We will also use other revenue sources and divert funds, if necessary.

#### ACTION STEPS

Restructure the operations and service delivery of the neighborhood service centers.

Activity	Responsible Person(s)	Target Date	Date Achieved/ Comments
Conduct a cost analysis of each NSC office	Executive Director, Director of Fiscal Operations, CSBG Program Director, CSBG Coordinator, HR Manager	December 31, 2014	
Analyze the demographic data of each NSC	Executive Director, Director of Fiscal Operations, CSBG Program Director, CSBG Coordinator, HR Manager	December 31, 2014	
Establish internal criteria for keeping and closing NSCs	Executive Director, Director of Fiscal Operations, CSBG Program Director, CSBG Coordinator, HR Manager	January 15, 2015	

<b>Activity</b>	<b>Responsible Person(s)</b>	<b>Target Date</b>	<b>Date Achieved/ Comments</b>
Based on data analysis, restructure the operations and staffing of the remaining NSCs.	Executive Director, Director of Fiscal Operations, CSBG Program Director, CSBG Coordinator, HR Manager	April 30, 2015	
Implement Plan	Executive Director, Director of Fiscal Operations, CSBG Program Director, CSBG Coordinator, HR Manager	May 31, 2015	

**ACTION STEPS**

**Use other revenue sources and divert funds, if necessary**

<b>Activity</b>	<b>Responsible Person(s)</b>	<b>Target Date</b>	<b>Date Achieved/ Comments</b>
Research and locate potential community partners	Executive Director, Director of Fiscal Operations, CSBG Program Director, CSBG Coordinator, HR Manager	June 30, 2014	
Research available funding opportunities.	Executive Director, Program Director, Accounting Technician, HR	June 30, 2014	
Explore alternative funding methods to sustain agency operations.	Senior Staff	June 2014	

Activity	Responsible Person(s)	Target Date	Date Achieved/ Comments
Apply for available opportunities using our strategy screen as a filter	Executive Director, Director of Fiscal Operations, CSBG Program Director, CSBG Coordinator, HR Manager	As Available	
Appeal to local elected officials to advocate for the continuation of funding	Executive Director	April 2015	
Implement alternative funding strategies.	Executive Director, Director of Fiscal Operations, CSBG Program Director, CSBG Coordinator, HR Manager	July 2015	

## **GOAL # 2**

**Increase community awareness, support and advocacy.**

### **PROPOSED STRATEGIES**

We will enhance our media exposure and conduct aggressive marketing techniques. We will also maintain our connections to community groups and establish new partnerships.

### **ACTION STEPS**

Activity	Responsible Person(s)	Target Date	Date Achieved/ Comments
Conduct discussions with local elected officials to increase our presence in the community	Executive Director, Senior Staff, Designated employees	July 1, 2014	

Activity	Responsible Person(s)	Target Date	Date Achieved/ Comments
Conduct quarterly regional meetings to increase opportunities for internal communication.	Senior Staff	September 2014	
Increase presence at county court meetings and meetings with aldermen.	Senior Staff	September 2014	
Revise agency brochures to include fact sheet and contact person	Executive Secretary	July 1, 2014	
Distribute agency brochures throughout the communities we serve	Executive Secretary, Agency Employees	November 1, 2014	
Attend and participate in local expos and job, health and business fairs	Agency Staff	As Scheduled	
Organize and implement SCHRA sponsored events.	Individual Program Personnel	August 2015	
Develop video with local media.	Community Corrections Director/ Community Services Director/ Agency Staff	September 30, 2015	
Attend unconventional events and conferences to gain exposure to other venues that would benefit SCHRA	Agency Staff	As Scheduled	

### **GOAL # 3**

**Become the premier provider of services and resources to individuals within our service area.**

#### **PROPOSED STRATEGIES**

We will research our competitors and know the programs and services they offer. We will develop systems for tracking our successes and challenges comparative to those who are providing the same and similar resources and opportunities. We will research areas of unmet needs and seek ways to fill those gaps, if feasible.

#### **ACTION STEPS**

<b>Activity</b>	<b>Responsible Person(s)</b>	<b>Target Date</b>	<b>Date Achieved/ Comments</b>
Establish an agency committee to explore agency and program level competition	Program Directors, Staff Appointees	May 30, 2014	
Meet to develop strategies	Committee	June 16, 2014	
Continue to research agency and program level competition	Committee	July 1, 2014	
Compile information and deliver interim report to Senior staff	Committee	October 1, 2014	
Submit final report with analysis of information given and plans to continue	Committee	December 29, 2014	
Continue frequent scan of the market	Committee	Quarterly	

## GOAL # 4

Gain new programs and services to meet community needs.

### PROPOSED STRATEGIES

We will develop systems for data gathering and analysis and utilize the information to make decisions about new services and programs.

### ACTION STEPS

Activity	Responsible Person(s)	Target Date	Date Achieved/ Comments
Develop criteria to determine which new programs and services to acquire.	Executive Director, HR Manager, Director of Fiscal Operations, Program Directors, Designated Employees	December 29, 2014	
Begin to research the programs and services available for acquisition.	Executive Director, HR Manager, Director of Fiscal Operations, Program Directors, Designated Employees	July 1, 2015	
Pursue new programs and services based on information learned during the research and analysis process.	Executive Director, HR Manager, Director of Fiscal Operations, Program Directors, Designated Employees	As Grant Due Dates Dictate	

### PROGRAMMATIC LEVEL GOAL(S)

La Piana (2008) purports that successful programmatic strategies answer the following four questions:

1. What programs should we offer?
2. Where should the programs be located?

3. Whom should the programs target?

4. What approaches are most likely to succeed?

5. What are we mandated to do and what are we prohibited from doing?

Answering these questions requires that our agency know the community. This will be accomplished through launching a comprehensive assessment of community needs.

### **GOAL # 5**

**Develop an organized approach to program services that is driven by the specific needs and priorities of the community.**

### **PROPOSED STRATEGIES**

We will conduct an assessment of community strengths, needs and resources through the development and completion of a comprehensive community assessment (CA).

### **ACTION STEPS**

<b>Activity</b>	<b>Responsible Person(s)</b>	<b>Target Date</b>	<b>Date Achieved/ Comments</b>
Establish CA committee	Senior Staff	April 30, 2014	
Develop plan for conducting an agency wide CA	Senior Staff, Committee	May 30, 2014	
Begin the steps to implementation of CA plan	Senior Staff	July 15, 2014	
Conduct CA	Committee	October 15 - November 30, 2014	

Activity	Responsible Person(s)	Target Date	Date Achieved/ Comments
Compile data and create report	CA Lead	February 15, 2015	
Report outcomes to Senior Staff and Board	CA Lead	March 1, 2015	

## OPERATIONAL LEVEL GOALS

Just as successful programmatic strategies answer critical questions, so do operational strategies. La Piana (2008) maintains that concerns at the operational level comprise four primary questions:

1. What systems, policies, and procedures do we need to be well-run and stable?
2. What are our human, financial, and facilities resource requirements for next year?
3. What are our longer term capital, staffing and cash needs?
4. What operational information do our leaders need to make good decisions?

Our current operational goals and strategies answer the first two questions and regard enhancements to IT and facilities.



## GOAL # 6

Meet the organizational standards for community action agencies.

### PROPOSED STRATEGIES

We will develop monitoring systems to ensure full compliance with the standards set by the Office of Community Services (OCS), as well as those established by other funding sources.

### ACTION STEPS

Activity	Responsible Person(s)	Target Date	Date Achieved/ Comments
Establish committee and designate committee chairperson to develop monitoring systems	Executive Director	April 28, 2014	
Committee meets to develop monitoring system.	Committee Chair	June 23, 2014	
Present monitoring system to board and agency staff	Committee	January 15, 2015	
Begin use of monitoring system	Committee and agency department personnel	March 2015	
Evaluate monitoring system for effectiveness	Committee	September 2015	

## **LONG TERM GOALS**

Due to federal funding cuts and the uncertainties of this revenue source, it is encumbered that we continue to diversify our funding. Our vision includes broadening our image and strengthening our external collaborations to acquire new funding sources. This will deepen our impact on the community, as we will further build our capacity to continue and to expand service delivery. Additionally, we have determined that there remains an unmet need for enhanced services to Veterans. The next two goals are long term and will address these two phenomenons.

### **GOAL # 7**

**Increase individual program and agency wide funding.**

### **PROPOSED STRATEGIES**

We will align our program structure to support the acquisition of new funding.

### **ACTION STEPS**

Activity	Responsible Person(s)	Target Date	Date Achieved/ Comments
Build relationships with state funding sources.	Program Personnel	August 2016 and as opportunities present	
Continue to build relationships with community businesses to increase community awareness and to attract funding.	Program Personnel	August 2016 and as opportunities present	

Activity	Responsible Person(s)	Target Date	Date Achieved/ Comments
Locate program funds to employ a grant writer.	Executive Director, HR Manager, Director of Fiscal Operations	August 2015	
Post grant writer position.	Executive Director, Director of Fiscal Operations, HR Manager, Senior Staff	August 2016	
Hire a grant writer.	Senior Staff	August 2016	

## GOAL # 8

**Expand our services to Veterans.**

### PROPOSED STRATEGIES

We will market our services to the Veterans Administration to increase our capacity to satisfy the increasing needs of Veterans.

### ACTION STEPS

Activity	Responsible Person(s)	Target Date	Date Achieved/ Comments
Develop an area wide survey to determine area with greatest need	Senior Staff		
Meet with area VA representatives to communicate Agency's service capabilities	Executive Director, CRPP Director, Nutrition Director, CSGB Director		

Activity	Responsible Person(s)	Target Date	Date Achieved/ Comments
Meet with Regional Service Representatives in Murfreesboro, TN, to communicate Agency's service capabilities	Executive Director, CRPP Director Nutrition Director CSGB Director		
Develop a communications protocol for Service Representatives	Executive Director, CRPP Director Nutrition Director CSGB Director		
Continue to work with the area Agency on Aging to establish pilot program for Veterans services	Executive Director, CRPP Director Nutrition Director CSGB Director		
Begin expanded services to Veterans	SCHRA Staff		

## **Monitoring of Plan**

This strategic plan reflects a variety of sound strategies to enhance our service delivery and market position. The result is not one colossal organizational strategy that we revisit every three to five years, but a plan that requires constant monitoring of the market in which we exist to know where we stand. We will monitor our progress initially by reviewing the plan at monthly meetings of agency leadership, with monitoring relegated to quarterly review with leadership and agency governing bodies.

## Reference

La Piana, D. (2008). *The nonprofit strategy revolution real time strategic planning in a rapid response world*. Nashville, Tennessee: Fieldstone Alliance.