



Session 4: Continuing the Strategic Planning Process

OVC HTC's Sustainability and Strategic Planning Training Series – Spring 2023

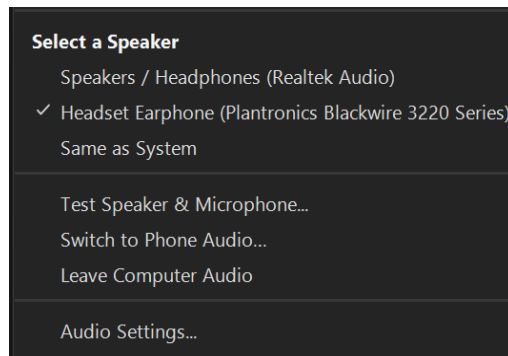
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Here are some helpful tips for using Zoom during today's session:

Audio Connection:

Select the arrow next to the audio button to access audio features and select your speakers and microphone.



Chat:

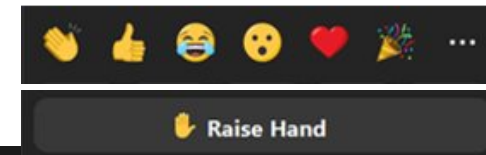
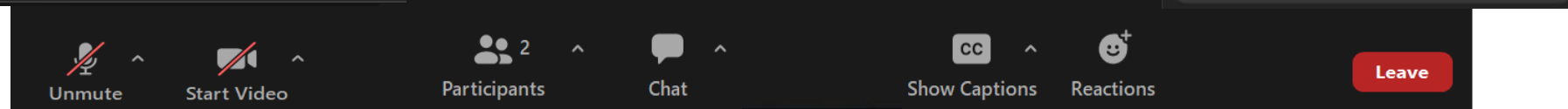
The default setting is to message everyone. Please note that if you want to send a message to one of the hosts privately, use the drop-down and select their name from the list of options.

Closed Captioning:

Please click the **Show Captions** button to view closed captioning.

Reactions:

Click **Reactions** to see/select the 'Raise Hand' function or share a reaction with the group.



Technology and Accessibility Reminders

- The material presented during the 2023 Sustainability and Strategic Planning Training Series will be recorded and shared with attendees via email in the following days.
- OVC HTC is committed to providing universal access to all of our events. To request accessibility accommodations (e.g., sign language interpreters, large print), please contact HTCollective@icf.com or call 502-259-0459 to discuss with an HTC team member. Advance notice is necessary to arrange for some accessibility needs.
- As with all technology, we may experience a momentary lapse in the breakout session. If you experience any issues re-accessing the platform or with the audio during this session, please email our technical specialist, Jameel Evans, at jameel.evans@icf.com for assistance.

Evaluation

- At the conclusion of each session, participants will be prompted to complete a short evaluation survey for that session. Please select 'continue' to be taken directly to the evaluation.
- At the end of the series, participants receiving a certificate of completion will be asked to complete a more in-depth survey focusing on the training series as a whole.
- We sincerely appreciate your feedback!

Presenters

Morgan Rumble-Whiting



Elizabeth Scaife



Learning Objectives

Review the remaining aspects of the strategic planning process and provide recommendations for monitoring/evaluating progress towards your goals.

Discuss and demonstrate how to create effective actions and actions steps to support each objective with a feasible timeline and team assignments.

Identify resources needed and/or areas for technical assistance and consultation to ensure the success of your objectives.

Pre-training Discussion



Assessments
and readings



Jamboard



What came up for you
after completing the
pre-training activities?

How do you measure your progress?

Outputs

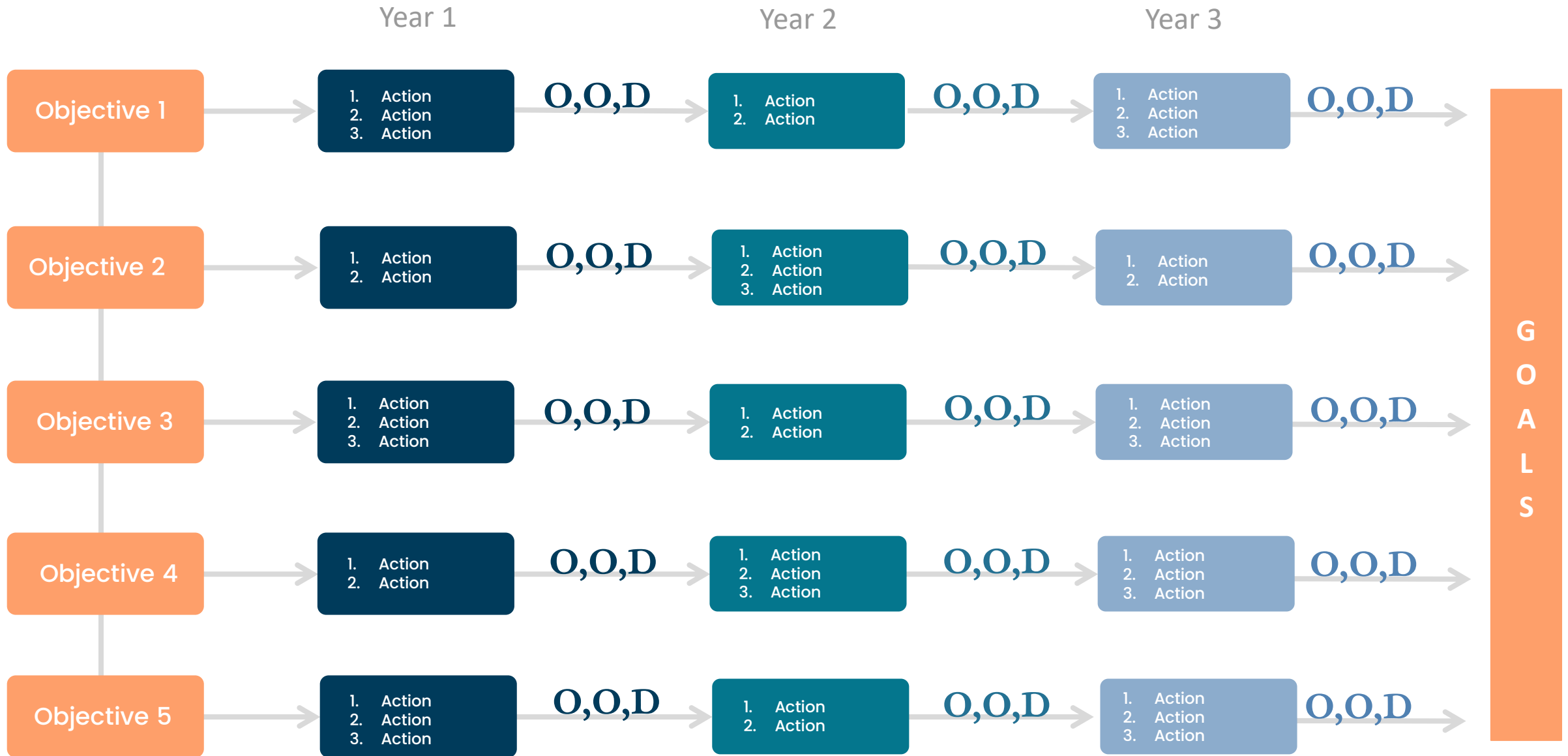
- 150 clients served
- 15 trainings for MDT professionals

Outcomes

- Streamlined trauma-informed victim assistance
- Improved confidence with MDT responses
- Victims feel supported and cared for

Deliverables

- 3 Training curricula (LE, SP, Health)
- MDT Victim Response Protocol



The Five C's of Performance

1. Client-Focused
2. Culturally Competent
3. Credible
4. Comparable
5. Comprehensive





Group Discussion

1. What are your organization/agency's 3-year outcomes and what benchmarks would you establish each year to measure your progress?
2. What annual objectives are revealed to you through the mapping of your outcomes?

Setting Priorities



Timing



Capacity



Resources

Objectives → Actions → Timeline

Develop Referral Network

- Perform gap analysis
 - Client feedback (Sandy Q1)
 - Staff feedback (Toni Q1)
- Identify community resources
 - Resource mapping (Jerome Q2)
 - Survey agencies (Jerome Q2)
- Establish partnerships
 - Meetings (Sandy, Jerome Q3)
 - MOUs (Sandy, Jerome Q4)
- Provide training to all partners
 - Develop curricula (Sandy, Toni Y2-Q1)
 - Implement (Sandy Y2-Q2)
- Develop response protocol
 - Meetings (Sandy, Jerome Y2-Q2)
 - Draft (Sandy, Jerome Y2-Q2)

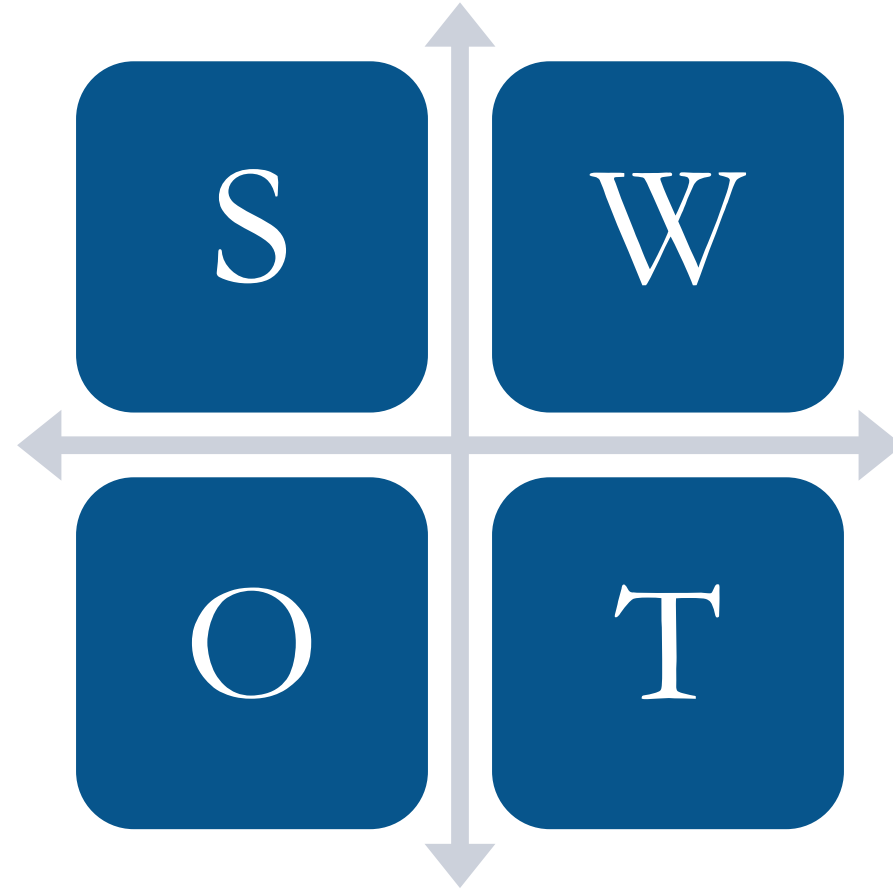
Upgrade Client Mgmt System

- Research
 - Client feedback (Sandy Q1)
 - Staff meeting/feedback (Toni Q1)
 - Finalize selection criteria (All staff Q2)
 - Compare/contrast systems (Jerome Q2)
- Test systems
 - Select top contenders (Jerome Q2)
 - Meetings with companies (Jerome/Sandy Q2-3)
 - Pilot systems (Jerome/Sandy Q3)
- Select and launch
 - Final selection (Jerome/Sandy Q3)
 - Customize (Sandy/Toni Q3)
 - Pilot (All staff Q4)
 - Launch (Q4)

Enhancing DEIA

- Address Staff Self-Awareness
 - Identify and select self-assessment (Sandy Q1)
 - Design staff feedback format (Toni Q1)
- Address Organizational Awareness
 - Identify and select organizational-assessment (Jerome Q2)
 - SWOT (Outside Agency Q2)
 - Training (Outside Agency/Partners Q2)
- Increase Staff Capacity
 - Material Review (Sandy, Jerome, Toni Q3)
 - Outreach to increase staff diversity (Sandy, Jerome, partners Q4)
 - Continued Staff Feedback

SWOT Analysis Framework



SWOT Considerations



SWOT Follow-Up: Goals

Example goals:

1. Encourage all staff to complete an individual cultural responsiveness assessment
2. Identify and reach out to 3 new partners to expand your network and develop community
3. Plan a date to complete an organizational sustainability and strategic plan

Breakouts





Breakout Rooms

1. Assign a note-taker/reporter
2. Considering your outcomes/outputs for Year 1, what are your organization/agency's objectives? What main action steps have you identified for each of these objectives?
3. Share your goal and 3-year outcomes. Using your own agency as an example, articulate the strengths, weaknesses, opportunities, and threats. What resources do you need to access to maintain your strengths? What resources do you need to acquire to take advantage of the opportunities? What resources do you need to acquire to address the weaknesses and navigate the threats?
4. In reflecting on the Organizational Capacity Assessment and the Organizational Inclusion Assessment, were any additional objectives revealed to you that should be integrated into your plan?

Report Back



Check-In



Session 5 Assignments

(choose one)

SWOT Analysis

- Assess your agency's strengths, weaknesses, opportunities, threats.
- Consider and list your needs for conducting a sustainability and strategic plan.

Strategic Plan (1-3 years)

- Outline goals
- Draft objectives
- Define outcomes/outputs
- List action steps with timeline
- List resources required
- Identify risks/threats and how your strategy addresses them

Next Session

Session 5: Putting it to Practice

Peer to Peer Support in Sustainability & Strategic Planning

- **Date:** Tuesday, May 30
- **Time:** 2:00–3:45 p.m. ET
- **Link:** Please use the link provided in your series materials to access this session.

Evaluation Reminder

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