



Strategic Plan
2011-2021



The Strategic Plan for 2011 – 2021, continues to build upon our priorities and help us work toward our shared vision of a premier social service agency that eliminates the effects of poverty by empowering people to obtain the knowledge and skills to achieve self-reliance and economic stability...one life at a time. The Plan will continually remind us of our Focus on Excellence as we continue our journey to be the best of the best in Community Action Agencies.

Nancy Ruth White

Chair, Board of Directors



Dear Partners,

In 2005, Community Action Partnership of San Bernardino County (CAPSBC) developed its first strategic plan to enhance how we provided services to San Bernardino County's low-income individuals and families through 2010. Last year, CAPSBC continued our strategic planning efforts to provide supportive services that would be beneficial to the low-income residents of the community by developing a 10-year Strategic Plan & Balanced Scorecard to guide us through 2021.

On behalf of the Board of Directors and staff, I am very pleased to present Community Action Partnership of San Bernardino County's Strategic Plan for 2011 – 2021. The Strategic Plan is the outcome of a focused planning process involving the Board of Directors, staff, stakeholders and partners over the last several months and aligns CAPSBC's vision with business strategies and day-to-day operations.



In the current economic climate, it is important to focus our efforts on continuing to provide the programs and services that are most responsive to the changing needs of our clients and the population we serve. The Strategic Plan was designed to develop strategies that will enhance CAPSBC's capacity to meet these needs and serve as a roadmap for the future; guiding our organization over the next ten years.

Thank you to all who participated in the comprehensive process and we look forward to your continued involvement and support as we implement our Strategic Plan.

Sincerely,

Patricia L. Nickols

Chief Executive Officer

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Introduction

Since 1965, Community Action Partnership of San Bernardino County (CAPSBC) has been developing and implementing programs that address the crucial needs of low-income residents in San Bernardino County. A private non-profit public benefit corporation with a 501(c)(3) status, CAPSBC is the designated Community Action Agency for the County of San Bernardino, California and is one of the 1,100 Community Action Agencies nationwide dedicated to assisting low-income individuals and families to become stable and self-reliant. Formerly known as the Community Services Department, it was established in 1965 as a result of the Economic Opportunity Act (EOA) of 1964. In 2003, the Agency separated from San Bernardino County and began operating as a private non-profit public benefit corporation.

CAPSBC serves the largest county in the continental United States, providing assistance to over 800,000 clients a year across an area of 20,167 square miles. Current programs include:

- Family Development Program (FDP)
- Food Bank
- Individual Development Accounts (IDA)
- Energy, Education, and Environmental Services (EEES)
- Homeless Management Information System (HMIS)

After the transition to a 501(c)(3) status, CAPSBC embarked on a strategic planning process in 2004, which was completed in 2005 and designed to guide the organization through 2010. In May 2010, CAPSBC engaged the Balanced Scorecard Institute (BSCI) to facilitate a strategic planning process to build on that earlier plan, and to guide the organization for the next ten years; utilizing a series of workshops that took place from June through September of 2010. Key elements of this process have included:

- Training in the balanced scorecard approach to strategy development and management for 23 members of the Board, senior management and staff
- Evaluation of internal strengths and weaknesses, using stakeholder focus groups and interviews, as well as an employee survey
- Evaluation of trends, opportunities and threats in the environment
- Review and revision of Vision and Mission statements
- Clarification of Client Value Proposition
- Development of strategic themes and objectives, including desired strategic results and outcomes
- Creation of an overall organizational Strategy Map
- Development of strategic performance measures
- Identification of strategic initiatives

Individuals representing all levels of the organization, including Board members, senior staff and line managers, were involved in the development and implementation of the strategies and scorecard. The following pages describe the process used and the results created.

How to Build a Balanced Scorecard – Nine Steps to Success®

The balanced scorecard is a strategic planning and management system designed to help everyone in an organization understand and work towards a shared vision and strategy. A completed scorecard system aligns the organization's shared vision with its business strategy, desired employee behaviors, and day-to-day operations. Strategic performance measures are used to better inform decision-making and show progress toward desired results. The organization can

then focus on the most important things that are needed to achieve its vision and satisfy customers, stakeholders and employees. Other benefits include the identification of more efficient processes focused on stakeholder needs, improved initiative prioritization, improved internal and external communications and improved linkage between budgeting and cost control processes and strategy.

The components of the management system are shown in **Figure 1**. Starting at high “strategic altitude,” Mission (or business purpose), Vision, and Core Values are translated into desired Strategic Results. The organization’s “Pillars of Excellence,” or Strategic Themes, are selected to focus effort on the strategies that will lead to success. Strategic Objectives are the “DNA” of strategy and are used to decompose strategy into actionable components that can be monitored using Performance Measures. Measures allow the organization to track results against targets, and to celebrate success and identify potential problems early. Finally, Strategic Initiatives translate strategy into a set of high-priority projects that need to be implemented to ensure the success of strategy. Engaged leadership and interactive, two-way communication are the cornerstones of a successful management system. Once the strategic thinking and necessary actions are determined, annual program plans, projects and service level agreements can be developed and translated into budget requests.

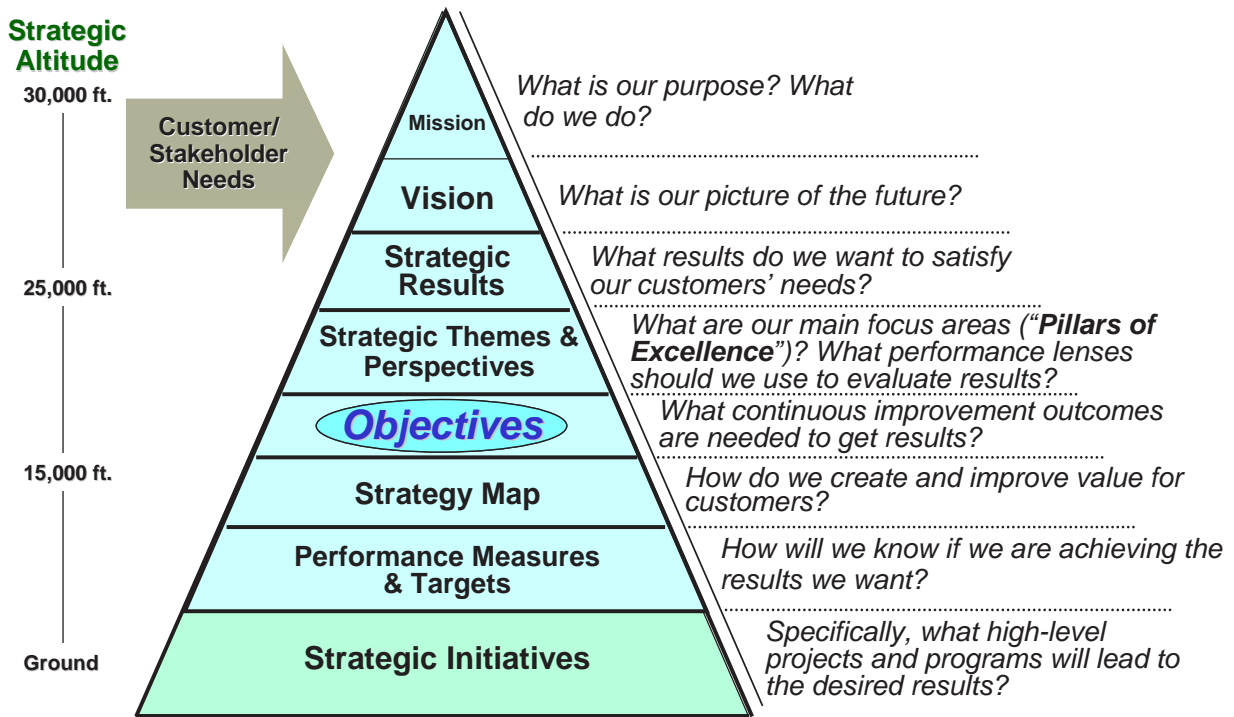


Figure 1: The components of a Balanced Scorecard Strategic Management System

The pages that follow are organized according to the framework used to develop the scorecard. The Balanced Scorecard Institute’s **Nine Steps to Success®** framework is a disciplined, practical approach to developing a strategic planning and management system (see **Figure 2**).

Step One of the scorecard building process starts with an assessment of mission (business purpose) and vision, organizational challenges and enablers, and organizational values. In Step Two, strategies, including strategic results, strategic themes, and perspectives, are developed by workshop participants to focus attention on customer needs and their value proposition. In Step Three, strategies are decomposed into strategic objectives that are linked in cause-effect relationships to produce a strategy map (Step Four) for each strategic theme. As part of Step Four, theme strategy maps are then merged into an overall organizational strategy map that shows how the organization creates

value for its customers and stakeholders. In Step Five, performance measures are developed for strategic objectives, and in Step Six, strategic initiatives are developed that support the strategic objectives. To build accountability throughout the organization, performance measures and strategic initiatives are assigned to owners and documented in data definition tables.

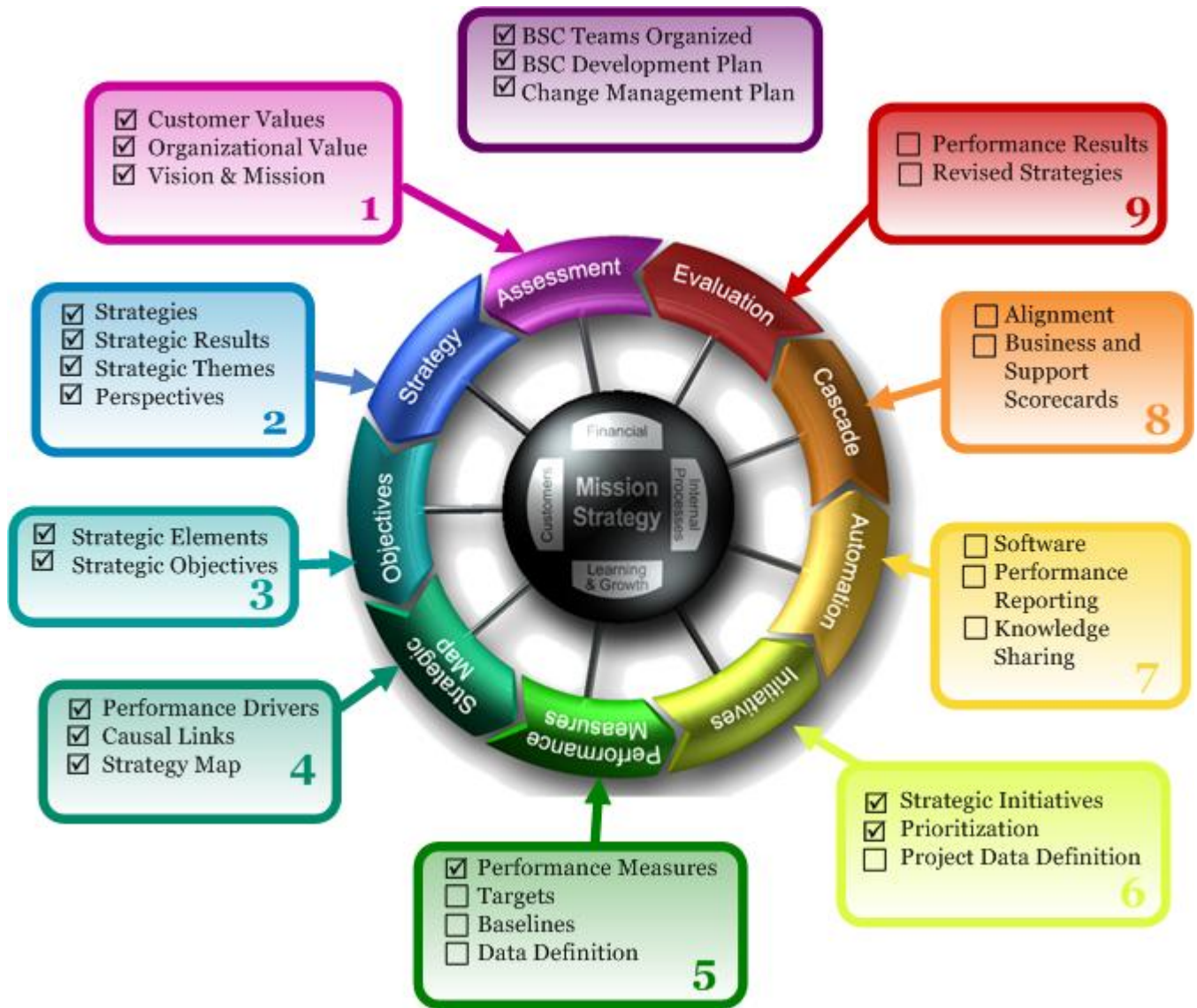


Figure 2: The Balanced Scorecard Institute’s Nine Steps to Success®

Appendix A includes a glossary of the terms used in the process.

At the conclusion of Step Six, the organization-wide balanced scorecard is built. As of September 2010, these six steps were completed at CAPSBC. As displayed by the check marks in Figure 2 above, ongoing steps include the definition and implementation of Performance Measures and Initiatives and may continue into considerations of the Automation, Cascading and Evaluation of the scorecard. Results of the completed steps are included in the following pages.

Step 1: Assessment

Step One begins with the planning and launching of the balanced scorecard process, includes an analysis of the organization’s Challenges and Enablers, and ends with an organizational assessment of mission, vision and values. This assessment builds a strong strategic foundation from which the rest of the management system will be built.

The CAPSBC Assessment Process

The assessment process began with analysis of the organization’s Internal and External Challenges and Enablers. This was accomplished through three methods:

1. One-on-one interviews with internal and external stakeholders. These are summarized in Appendix C of this document.
2. Five focus groups were conducted, including representative Employees, Partners, Sponsors/Funders, local Businesses, and Educational organizations. Notes from each of these focus groups are provided in Appendix D.
3. An online employee survey; completed by 159 employees.

The questions used in all three of these forums were based on the Balanced Scorecard Institute’s analysis of the Standards of Excellence (SOE) developed by the national Community Action Partnership (CAP), the Results Oriented Management and Accountability (ROMA) goals and key performance indicators developed for CAPs at the national level, and an assessment of overall local and national economic and social trends impacting CAPs.

Enablers and Challenges

After conducting the interviews and focus groups, and analyzing the results of the employee survey, the BSCI team summarized the findings as a set of Enablers and Challenges as shown in **Figure 3**. The Enablers are the internal Strengths, as well as the external Opportunities, that support the organization moving forward. The Challenges are the internal Weaknesses, as well as the external Threats, that must be addressed.

Strengths	Weaknesses
<ul style="list-style-type: none"> • Board and executive leadership • Fundraising and grant writing experience • Ability to partner and collaborate • Customer focus • Results 	<ul style="list-style-type: none"> • Intake and referral process, for example, phone system • Promotion, public relations, and community awareness • Office location – lack of more full service satellite offices • Controls and procedures for paperwork • Funding resources not diversified • Employee recognition • Internal communication • Fiscal transparency • Organization performance management
Opportunities	Threats
<ul style="list-style-type: none"> • Lower housing prices • Greater willingness of other agencies to collaborate • “Green” technology and associated jobs • Growth in San Bernardino County as economy revives • Opportunity to purchase group home locations • Develop business and private funding sources • Partner with more private and non-profit entities 	<ul style="list-style-type: none"> • Need for emergency services versus self-sufficiency • Continual slow economic recovery • Continual off-shoring of jobs • New face of poverty – more educated, more middle-class • Federal funds decreasing • State funds decreasing

Figure 3: CAPSBC Challenges & Enablers

The Promise, Mission, Vision, and Core Values

The **Promise** helps to define us as a Community Action brand, more than our CSBG funds and our tri-partite board system. It is the Promise that unifies all Community Action Agencies (CAAs) as a national network like no other in the country. Our mission statement is what we **DO**. Our Promise is how we **FEEL** about what we do. Based on a review of CAPSBC's Enablers and Challenges, the previous Mission, Vision and Core Values were reviewed in a workshop, and revised as needed. A Mission defines why an organization exists and reflects the organization's purpose in a few sentences. A Vision statement is an organization's picture of future success; where it wants to be in the future. Core Values are the organization's guiding principles. The Promise and the revised CAPSBC Mission, Vision Statement and Statement of Values are shown in **Figure 4** below.

The Promise

Community Action changes people's lives, embodies the spirit of hope, improves communities, and makes America a better place to live. We care about the entire community, and we are dedicated to helping people help themselves and each other.

Mission

CAPSBC works with our communities
by supporting, advocating for, and empowering low-income residents
to achieve self-sufficiency.

Vision

By 2021, CAPSBC will be the premier social service agency that eliminates the effects of poverty by empowering people to obtain the knowledge and skills to achieve self-reliance and economic stability ... one life at a time.

Core Values

- Excellence
- Advocacy
- Integrity
- Quality
- Respect
- Self-sufficiency
- Compassion
- Professionalism
- Accountability
- Personal Responsibility

Figure 4: The Promise and the CAPSBC Mission, Vision, and Core Values

Client Value Proposition

The final step in organizational assessment is to define who the primary customers of the organization are and discuss what those customers need from the organization. “Customers” are defined here as the direct recipients of an organization’s goods and services. CAPSBC uses the term “clients” in place of “customers”, and defines its clients as “low income individuals and families”.

The first step in articulating an organizational strategy is to understand the organization’s Customer Value Proposition. The Customer Value Proposition is the unique added value an organization offers customers through their operations; the logical link between action and payoff that the organization must create to be effective. For example, one organization might focus primarily on improving the customer experience while another might specialize in product-to-market excellence. Still another might focus primarily on being a low-cost leader. Three aspects of the proposition include Product/Service Attributes (performance/functionality considerations such as quality, timeliness or price), Image and Relationship. CAPSBC’s Client Value Proposition, developed in a workshop with Board, senior management, and staff, is listed in **Figure 5** below.

CAPSBC Client Value Proposition					
Product / Service Attributes of CAPSBC				Relationship with CAPSBC	Image of CAPSBC
Function	Quality	Timeliness	Economics		
<ul style="list-style-type: none"> •Emergency assistance •Housing assistance •Transportation •Food •Clothing •Tax education and assistance •Crisis resolution •Referrals •Case management •Cash match savings account •Efficient appliances •Weatherization 	<ul style="list-style-type: none"> •Thorough • Informed • Questions answered • One on one service • Flexible • Equitable •Resourceful 	<ul style="list-style-type: none"> •Fast response • Quick turn around •Fast resolution • Response time • Return calls promptly 	<ul style="list-style-type: none"> •Services based on clients’ needs •Diversity of funding sources • Level of help we can offer relative to funding 	<ul style="list-style-type: none"> • Respectful • Empathy and Compassion • Dignity • Trust • Get to know client • Listening • Fairness • Honesty • Integrity • Tactful • Non-judgmental • Deal well with emotions • Partner • Ethical 	<ul style="list-style-type: none"> •Recognized leader in community • Professional • Respected • Service oriented • Credible • Reliable • Good word of mouth • Clean and well groomed • Community presence • We fulfill our promise • Open door • Valued

Figure 5: CAPSBC Client Value Proposition

Step 2: Strategy

In Step Two, a strategy is defined around strategic elements such as strategic themes, strategic results and perspectives. Developing strategy allows the organization's vision to be decomposed into specific operational events and decisions that people can understand and support.

Strategic Themes & Results

Strategic Themes are the main focus areas of the organization's strategy; key areas in which an organization must excel in order to achieve its mission, vision and strategy. Strategic Themes are the organization's "Pillars of Excellence." For each theme, an explicit Strategic Result, or a description of the desired outcome, is articulated. Four Strategic Themes and corresponding results were developed as shown in **Figure 6** below.

Strategic Theme: Operational Excellence

Strategic Result: CAPSBC has formal integrated systems, processes and technology that enable the agency to deliver effective, accessible services with accountability, excel in customer service, and exceed customer and stakeholder expectations.

Strategic Theme: Expanding and Strengthening Partnerships

Strategic Result: CAPSBC collaborates with agencies, public and private, to expand our presence and share information and resources to better serve the communities and individuals of San Bernardino County.

Strategic Theme: High Impact Services

Strategic Result: By 2021, CAPSBC's programs and services have reduced poverty in San Bernardino County by moving clients from dependency to self-sufficiency.

Strategic Theme: Capacity Building

Strategic Result: CAPSBC responds successfully to the emerging needs of our community with diverse resources; a highly skilled workforce and technology.

Figure 6: CAPSBC Strategic Themes & Results



Perspectives

A Perspective is a view of an organization from a specific vantage point. Four basic perspectives are traditionally used in balanced scorecards to encompass an organization's activities. The organization's business model, which encompasses its mission, vision, and strategy, determines the appropriate perspective names. The perspectives for CAPSBC are shown in **Figure 7**.

Perspective	Questions Answered
Customer	How will we increase value for Customers & Stakeholders?
Financial	How do we maximize value and effectiveness of our mission?
Internal Process	To satisfy the needs of our Community, at which internal processes must we excel?
Organization Capacity	To excel in our processes, what capacities must our organization have and improve?

Figure 7: CAPSBC Perspectives

The Strategic Management System "House"

The balanced scorecard structure graphically resembles a house (see **Figure 8**.) The Strategic Elements (Vision, Mission etc.) make up the "roof" of the house while the Strategic Themes make up the "pillars of excellence." The "floors" of the house are the perspectives. The CAPSBC house graphic is displayed below.

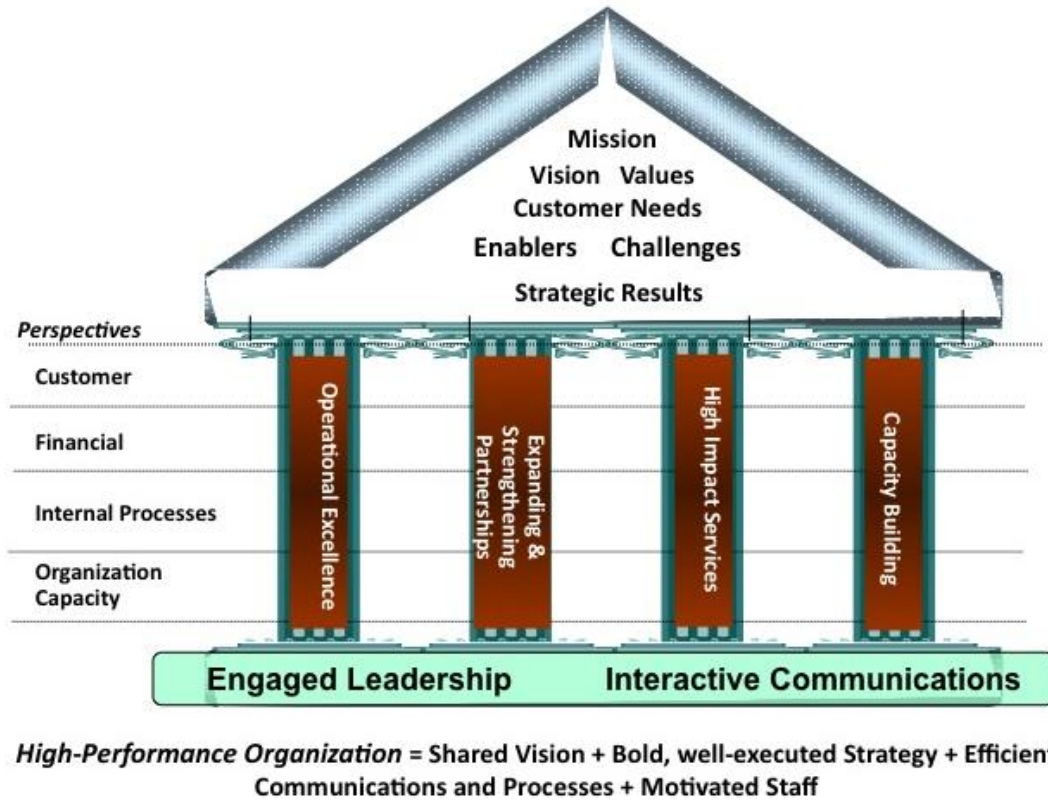


Figure 8: CAPSBC Strategic Management System "House"

Step 3: Strategic Objectives

In Step Three, strategies are decomposed into strategic objectives, which are the basic building blocks of strategy and define the organization's strategic intent. Good objectives are action-oriented statements of what must be done to be successful. They should be easy to understand, should be expressed in continuous improvement terms, and are usually not “on-off” projects or activities. Objectives are first initiated and categorized on the strategic theme level, categorized by perspective, linked in “cause-effect” linkages (Strategy Maps) for each Strategic Theme, and then later merged together to produce one set of strategic objectives for the entire organization. **Figure 9** below outlines “How to Read a Strategy Map.”

Theme Team Results

The process of developing strategic objectives begins with the Strategic Theme Teams. At CAPSBC, Theme Team members were drawn from various parts of the organization who know how key processes work and how they can be more efficient. Theme Teams defined strategies for achieving the strategic results and then broke those strategies down into specific strategic objectives. Then the cause-and-effect linkages between those objectives were developed and displayed in the form of a strategy map for each theme. These teams also brainstormed potential performance measures and strategic initiatives to support the achievement of the strategic objectives developed for each strategy map. The following pages contain the results developed by each of the teams as shown in **Figures 10 – 13**.

How to Read a Strategy Map

A graphical representation called a *strategy map* was created for each theme team in Step Three and then for the entire organization in Step Four. Strategy maps are communication tools used to tell a story of how value is created for the organization. They show a logical, step-by-step connection between strategic objectives (shown as ovals on the map) in the form of a cause-and-effect chain. Generally speaking, improving performance in the objectives found in the Organizational Capacity perspective (the bottom row) enables the organization to improve the performance of the objectives in its Internal Process perspective (the next row up), which in turn enables the organization to create desirable results in the Financial and Customer perspectives (the top two rows).

Reading the map means starting at the bottom of the map and asking the question, “Why?” For example, starting at the bottom left of *Operational Excellence* strategy map in **Figure 10**, WHY does the organization want to *Improve Employee Knowledge and Skills*? Answer: to enable the organization to do all of the things in the Process perspective (as indicated by the large red arrow). Similarly, one can begin at the top of the map and read down by asking the question, “How?” For example, starting at the top of the same strategy map, HOW will the organization *Improve Customer Satisfaction*? By *Expanding Programs and Services*.

Special Notes:

- Objectives grouped together in a box are not necessarily similar or related, but rather share a similar location within the chain of logic that makes up the organization's strategy
- Large solid arrows are often used to imply that the objective or group of objectives enables everything in the perspective above it

Figure 9: How to Read a Strategy Map

Theme: Operational Excellence

Strategic Result: CAPSBC has formal integrated systems, processes and technology that enable the agency to deliver effective, accessible services with accountability, excel in customer service, and exceed customer and stakeholder expectations.

Strategy Map

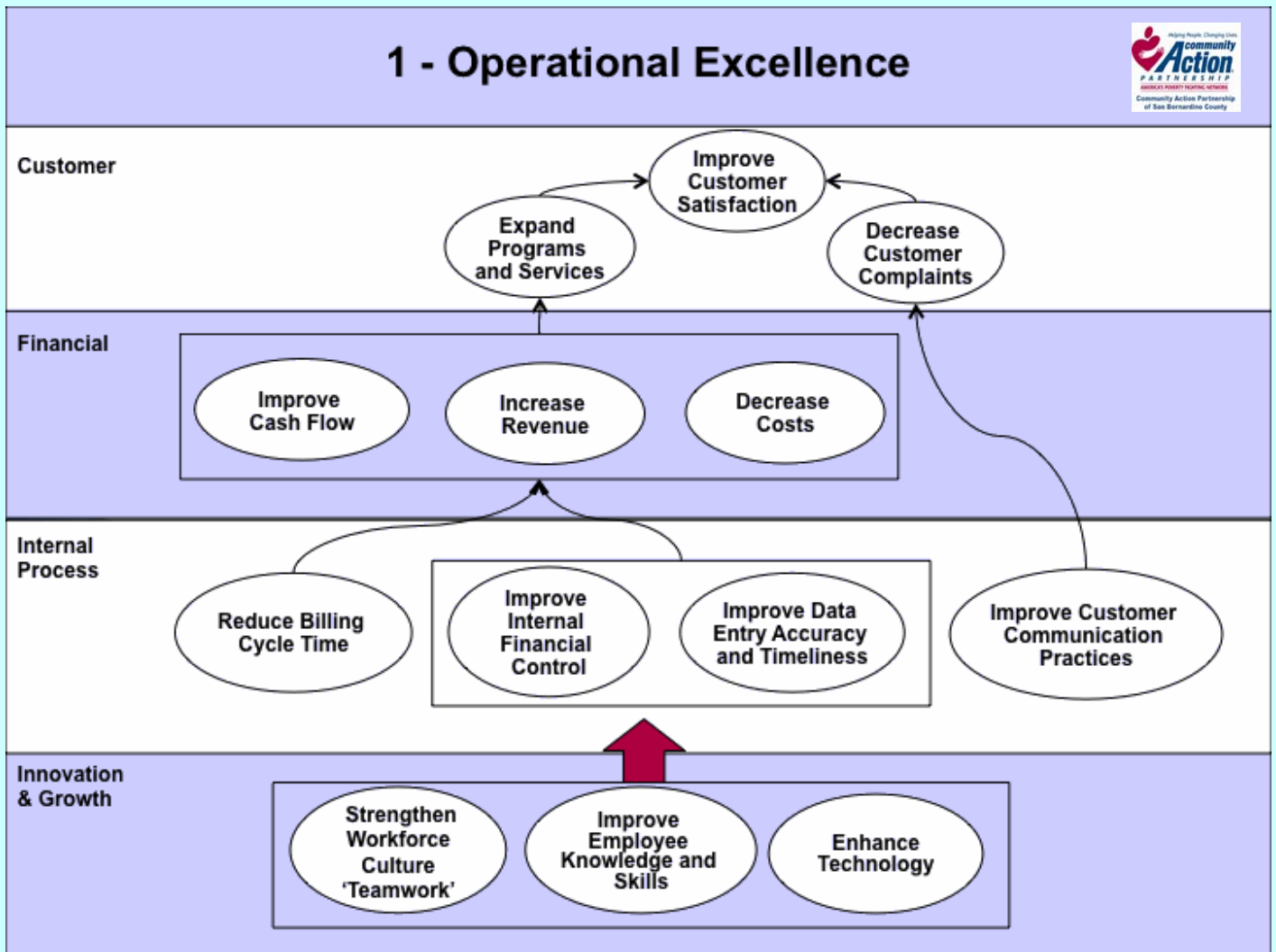


Figure 10: The Operational Excellence Theme Team Results

Theme: Expanding & Strengthening Partnerships

Strategic Result: CAPSBC collaborates with agencies, public and private, to expand our presence and share information and resources to better serve the communities and individuals of San Bernardino County.

Strategy Map

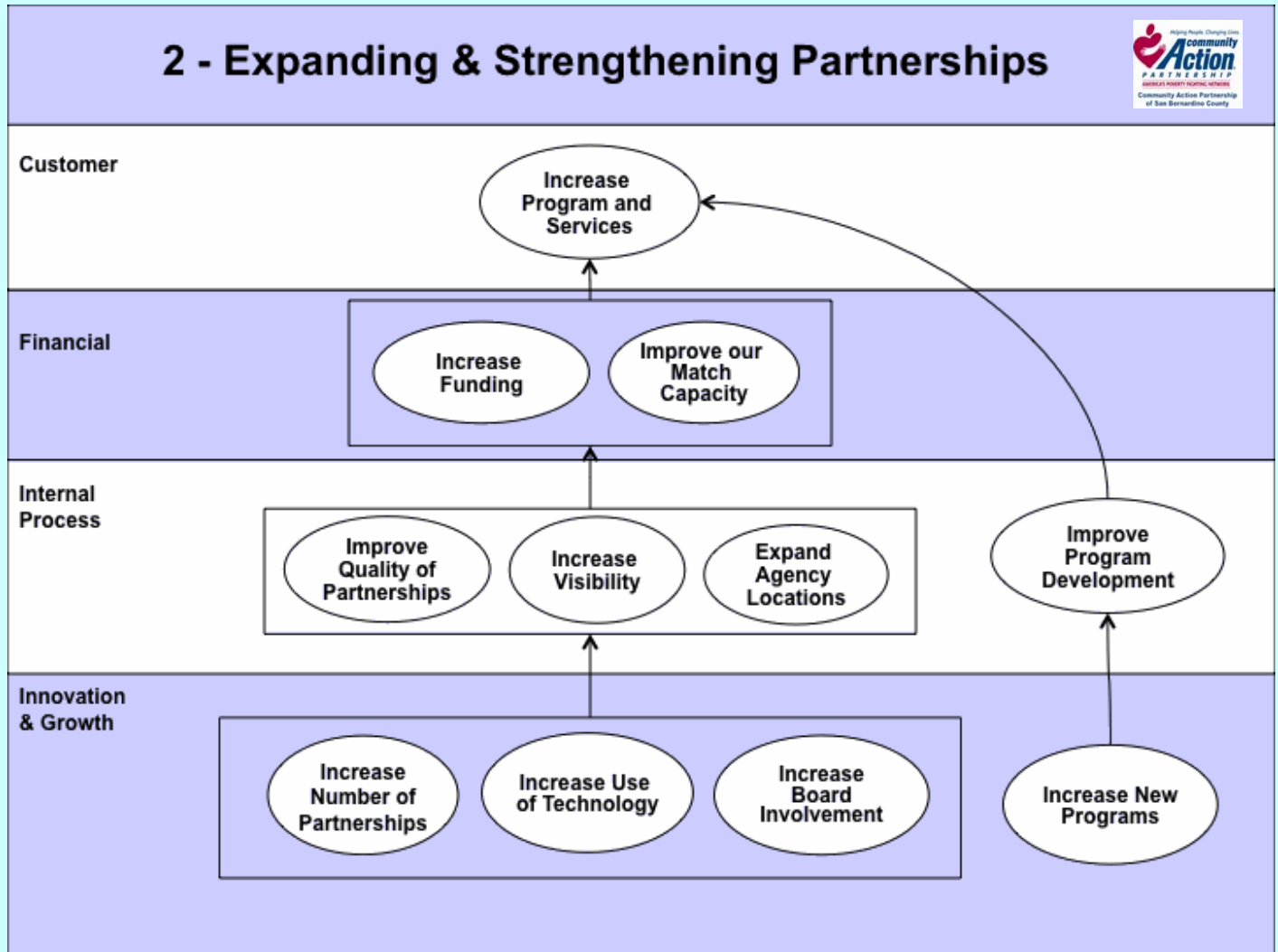


Figure 11: The Expanding & Strengthening Partnerships Theme Team Results

Theme: High Impact Services

Strategic Result: By 2021, CAPSBC’s programs and services have reduced poverty in San Bernardino County by moving clients from dependency to self-sufficiency.

Strategy Map

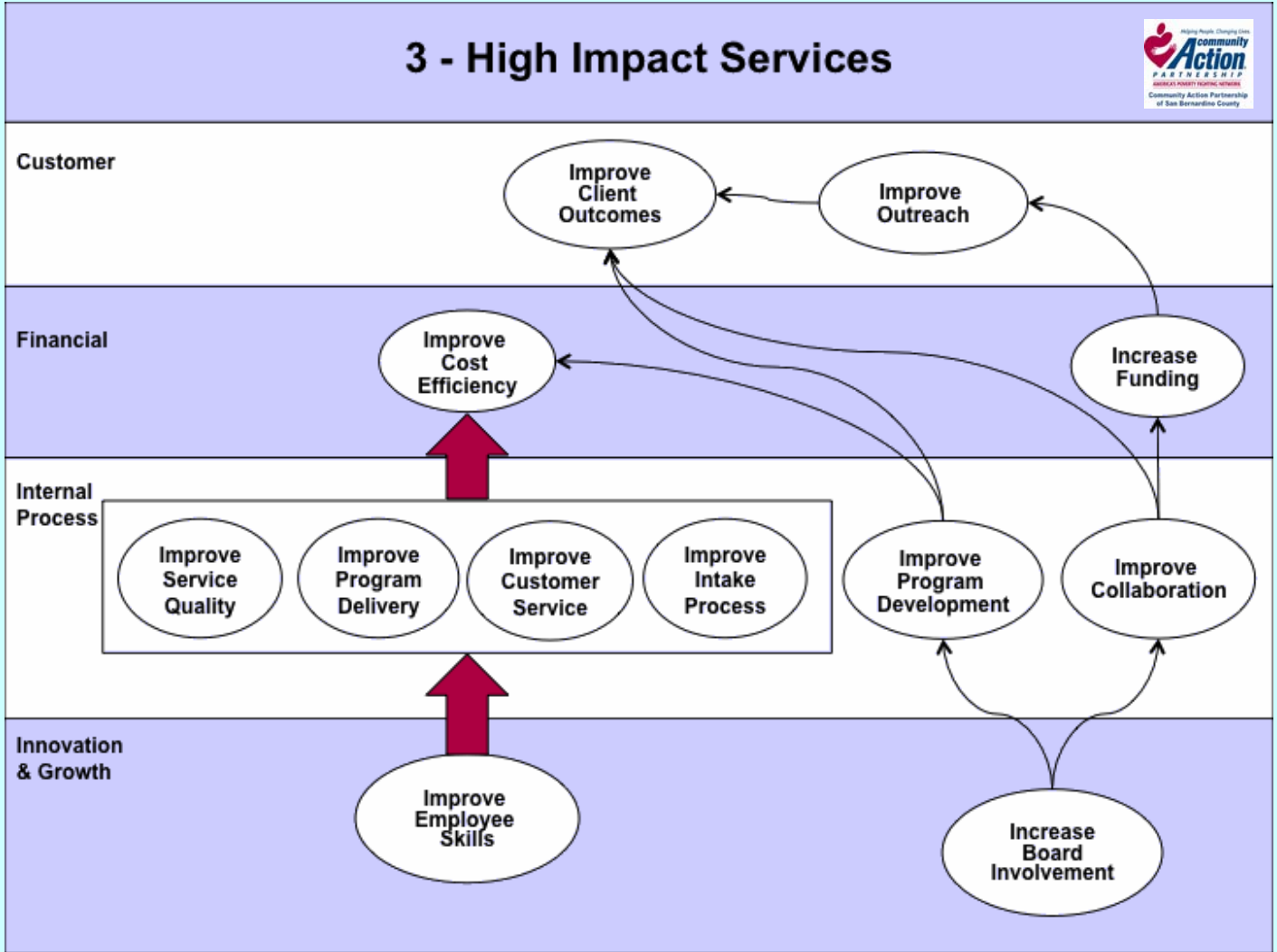


Figure 12: The High Impact Services Theme Team Results

Theme: Capacity Building

Strategic Result: CAPSBC responds successfully to the emerging needs of our community with diverse resources; a highly skilled workforce and technology.

Strategy Map

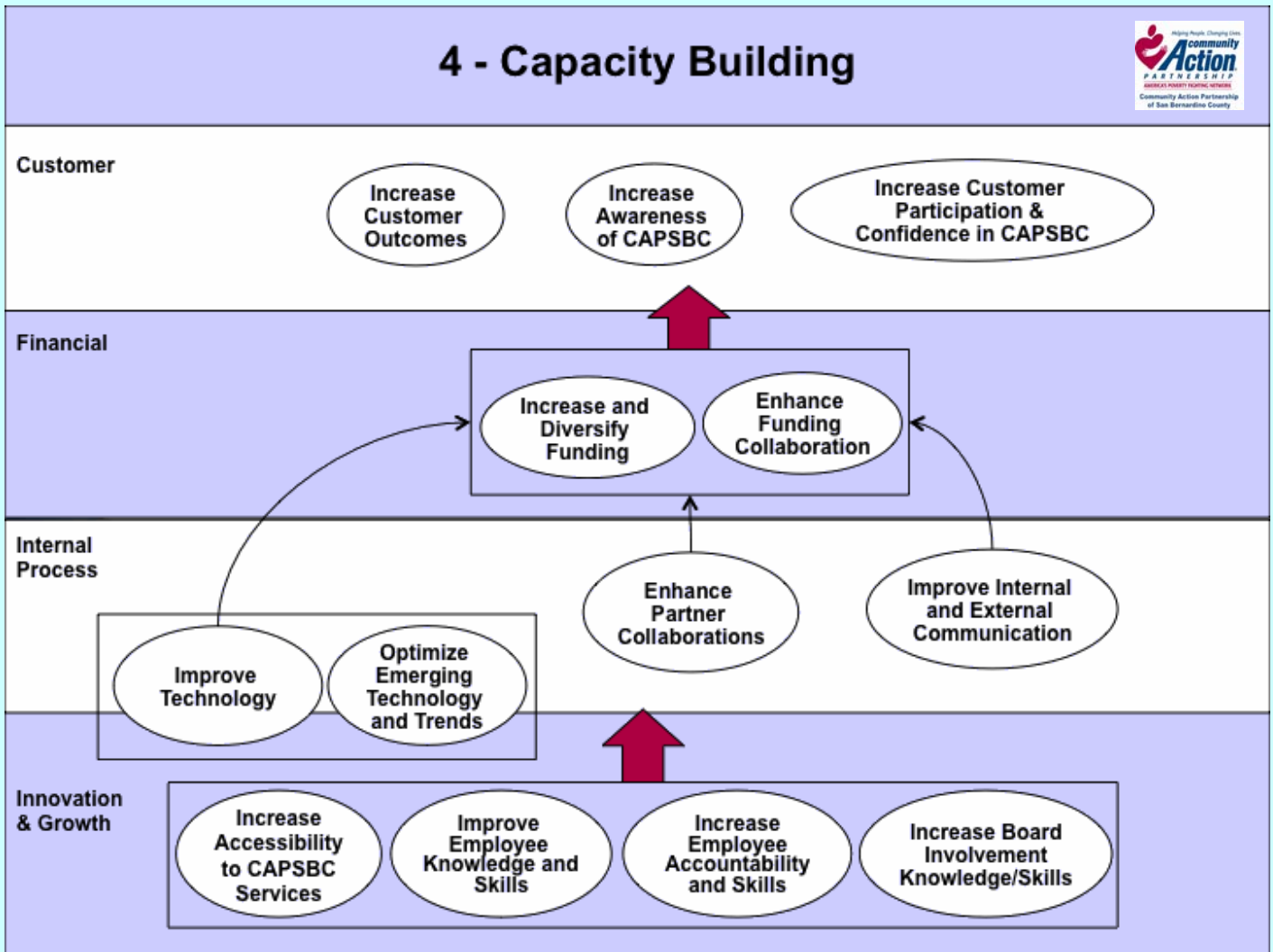


Figure 13: The Capacity Building Theme Team Results

Enterprise-Wide Strategic Objectives

Enterprise-Wide Strategic Objectives are developed by combining and merging the Theme Team Strategic Objectives into a single list of enterprise-wide Strategic Objectives by the Executive Team. The resulting objectives are described **Figure 14** below.

STRATEGIC OBJECTIVES and COMMENTARY

Perspective: Customer

1. **Improve Client Satisfaction** – Clients feel satisfied and confident with the services and interaction that CAPSBC provides. CAP delivers quality services by highly skilled staff that meet their needs in a timely manner. Desired outcomes include:
 - Improved satisfaction rating
 - Increased referrals to CAPSBC
 - Increased confidence in CAP
 - Fewer client complaints
2. **Improve Client Outcomes** – Low-income people become more stable and self-reliant, living conditions are improved, and their families and other support systems are strengthened. Their acute needs are stabilized while they gain skills to achieve self-sufficiency. They have a stake in the community.
 - Clients become stabilized, improve quality of life, community participation
 - Increased number of clients served
 - Decreased number of repeat clients
 - Reduced poverty level
 - Increased level of employment
 - Family Development Matrix
3. **Improve Awareness of CAP** – The community of San Bernardino County understands who CAPSBC is and what services CAPSBC can provide to assist eligible families and individuals. Community stakeholders are aware of and have confidence in CAPSBC services and the positive contribution CAPSBC provides to the community. CAPSBC is recognized as a state and national CAP leader.
 - CAPSBC is a household name in the county
 - Increased inquiries or contacts
 - Increased awareness and referrals by community-based organizations
 - Increased understand of what CAPSBC can do to help
 - CAPSBC is a known agency that people want to support

Perspective: Financial

4. **Increase Funding** – CAPSBC has the financial resources to sustain operations and develop and implement high impact programs. Funds are diversified and expanded to generate unrestricted funds and improve cash flow and financial position.
 - Higher level of unrestricted funds
 - Consistent, predictable funding
 - Less dependency on government grants
 - Larger, more reliable donor base that contributes regularly

- Expansion of partner financial contributions
 - Diverse funding base
 - More possibilities of grant awards
5. **Improve Financial Strength** – Agency operations are streamlined to provide cost-effective services without compromising quality. Financial policies and procedures are known, based on best practices, and consistently adhered to. Financial reports are accurate, timely and accessible. Funding is diversified and includes the generation of unrestricted funds, a cash reserve balance and a strong credit rating.
- Highest credit rating
 - Financial accountability
 - Revenues are increased and diversified
 - Costs are reduced
 - Strong cash flow
 - Operate within budget

Perspective: Internal Process

6. **Enhance Partner Collaboration** – CAPSBC has mutually beneficial partnerships that expand resource opportunities and service capacities. Partners include public agencies, private donors, corporate sponsors and service providers.
- Partners expand services
 - Partnerships are mutually beneficial
 - Partnership portfolio is strategically managed
7. **Increase Financial Accountability** – CAPSBC has transparent and responsible management of finances. Formal policies and procedures are known and consistently adhered to by all staff members. Good internal controls are in place to safeguard the assets. There is strict compliance to federal and state regulations to ensure that costs are allowable, allocable, and necessary. CAPSBC operates in accordance with generally accepted accounting principles.
- Staff demonstrate an understanding of policies and procedures
 - Clean, unqualified audits
 - Proper allocation and use of funds
 - Free from unethical behavior, fraud and abuse
 - Trust and confidence in the organization
8. **Improve Service Quality** – CAPSBC services are delivered promptly, with easier access, better record keeping, and data quality – efficiently, professionally, and respectfully. Clients understand requirements and how to get services.
- Timely, high quality services
 - Streamlined client relationship process
9. **Improve Program Development** – New and improved programs and services are developed that are designed to have high impact on results and improve customer satisfaction. We have a systematic approach to evaluating and developing or discontinuing programs.
- Increased range of services to meet client needs
 - Increased knowledge of best practices
 - New programs that are more efficient
 - Low impact programs discontinued or assigned to other agencies

- Program evaluation and development processes in place
10. **Improve Communication Practices** – CAPSBC communicates clearly and consistently to stakeholders, and has a 2-way dialogue with employees and clients. CAPSBC conducts marketing, advocacy, and client education. CAPSBC regularly solicits feedback about client and community needs and CAPSBC performance.
- Client feedback is encouraged and valued
 - Clients get reliable and consistent information they can act on
 - Employees’ feedback is encouraged and valued
 - All employees have knowledge of agency mission, vision, programs and services
 - Employees are able to communicate this information to clients
 - Effective advocacy on behalf of low-income clients

Perspective: Organization Capacity

11. **Increase Board Involvement** – Board members are knowledgeable of the agency’s operations and efficiently carry out their governance responsibility to support the agency’s mission and vision.
- Board members are knowledgeable of their roles and responsibilities
 - Better understanding of CAPSBC operations
 - Board members promote CAPSBC in the community
 - Increased Board involvement in fundraising
 - Increased Board involvement in developing partnerships
12. **Increase Access to Services** – Increase ways that clients can access our services countywide through collaboration, technology, partnerships, and satellite offices.
- More clients are provided with assistance
 - CAPSBC has more service locations countywide
 - Short service times
 - Ease of access to services
13. **Increase Staff Capacity** – CAPSBC has appropriate staff that are skilled in the areas of customer service, service delivery, communication, and information management systems.
- Excellent customer relations skills
 - Skilled workforce
 - Improved data quality
 - Healthy work culture
14. **Improve Technology** – CAPSBC utilizes technology efficiently to provide support to the overall agency systems, processes and service delivery. Technology includes information management systems, telephone, e-mail, and Internet.
- Effective client communication management
 - Effective, easy to use IT services for employees and clients
 - Network reliability and security
 - Fast access to the right information
 - Increased productivity

Figure 14: Strategic Objectives and Commentary

Step 4: Strategy Map

In Step Four, the cause and effect linkages between the enterprise-wide Strategic Objectives were formalized in an enterprise-wide Strategy Map as shown in **Figure 15**. To review how to read a strategy map, see **Figure 9** on page 11.

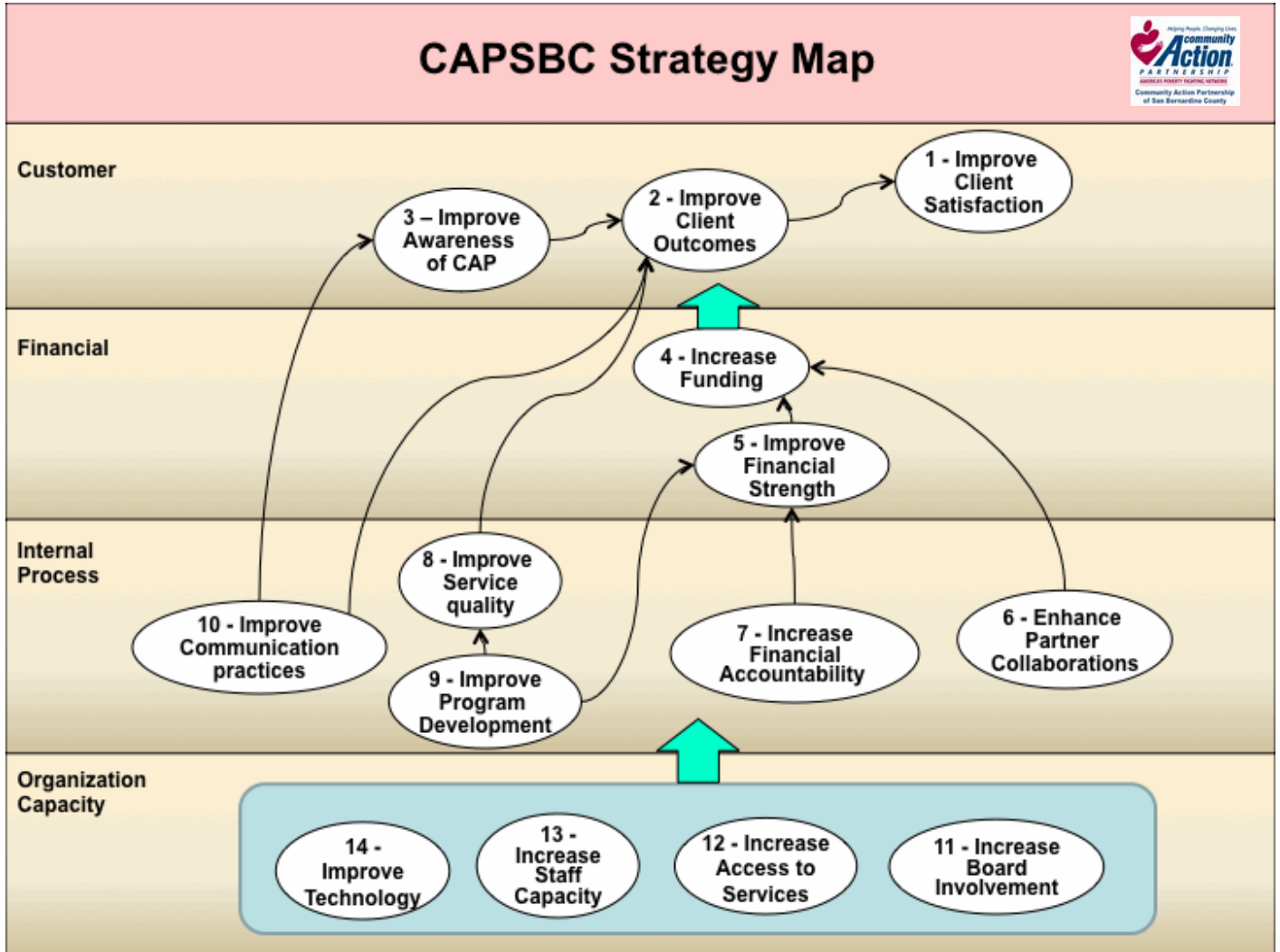


Figure 15: The CAPSBC Strategy Map

Step 5: Performance Measures

In Step Five, Performance Measures are developed for each of the Strategic Objectives. Performance Measures are metrics used to provide an analytical basis for decision-making and to focus attention on what matters most. Performance Measures answer the question, “How is the organization doing at the job of meeting its Strategic Objectives?” Lagging indicators are those that show how successful the organization was in achieving outcomes. Leading indicators are those that are a precursor of future success; a performance driver.

OBJECTIVE	CANDIDATE PERFORMANCE MEASURES
Perspective: Customer	
Improve Client Satisfaction	<ul style="list-style-type: none"> • Client feedback
Improve Client Outcomes	<ul style="list-style-type: none"> • Client outcome index
Improve Awareness of CAPSBC	<ul style="list-style-type: none"> • Community awareness of services offered • Stakeholder awareness and favorable impression of CAPSBC • Local, State & National CAP recognition
Perspective: Financial	
Increase Funding	<ul style="list-style-type: none"> • Unrestricted funds growth
Improve Financial Strength	<ul style="list-style-type: none"> • Bond rating • Financial ratios
Perspective: Internal Process	
Enhance Partner Collaboration	<ul style="list-style-type: none"> • Number of partners • Total value of all partnerships • Number of clients served by partnerships
Improve Financial Accountability	<ul style="list-style-type: none"> • Financial accountability report
Improve Service Quality	<ul style="list-style-type: none"> • Cycle time of most frequently requested services • Error rate of most frequently requested services • Customer satisfaction survey
Improve Program Development	<ul style="list-style-type: none"> • Program development effectiveness index
Improve Communication Practices	<ul style="list-style-type: none"> • Survey reliability
Perspective: Organizational Capacity	
Increase Board Involvement	<ul style="list-style-type: none"> • Board involvement index • Board knowledge index
Increase Access to Services	<ul style="list-style-type: none"> • Client access index
Increase Staff Capacity	<ul style="list-style-type: none"> • Employee skills assessment
Improve Technology	<ul style="list-style-type: none"> • Technology effectiveness index

Figure 16: CAPSBC Performance Measures

Care has been taken to ensure that the gathering of measures will be cost-effective and efficient, and will support other CAPSBC reporting requirements. Two primary reporting frameworks already used as guidelines include:

The Community Action Partnership Standards of Excellence (SOE). These standards describe thirty-four of the very best practices of the very best Community Action Agencies. These Standards help answer the question: What does an excellent Community Action Agency look like? The thirty-four best practices are organized into 7 categories:

1. Organizational Leadership
2. Strategic Planning and Direction
3. Customer, Constituent, and Partner Focus
4. Measurement, Analysis, and Performance Management
5. Human Resource Focus
6. Organizational Process Management
7. Organizational Results

The National Association for State Community Service Organizations' National Performance Indicators (NPI). These indicators were developed collaboratively within the Community Action Agency network to provide a uniform and coherent national picture of the 1,100 CAA's work and accomplishments. These indicators fall into 6 goal categories:

1. Low-Income People Become More Self-Sufficient
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 Service to Low-Income People are Achieved
5. Agencies Increase Their Capacity to Achieve Results
6. Low-Income People, Especially Vulnerable Populations, Achieve their Potential by Strengthening Family and Other Supportive Systems

Figure 17, shows how these indicators map to the measures that were developed for the Strategy Map.



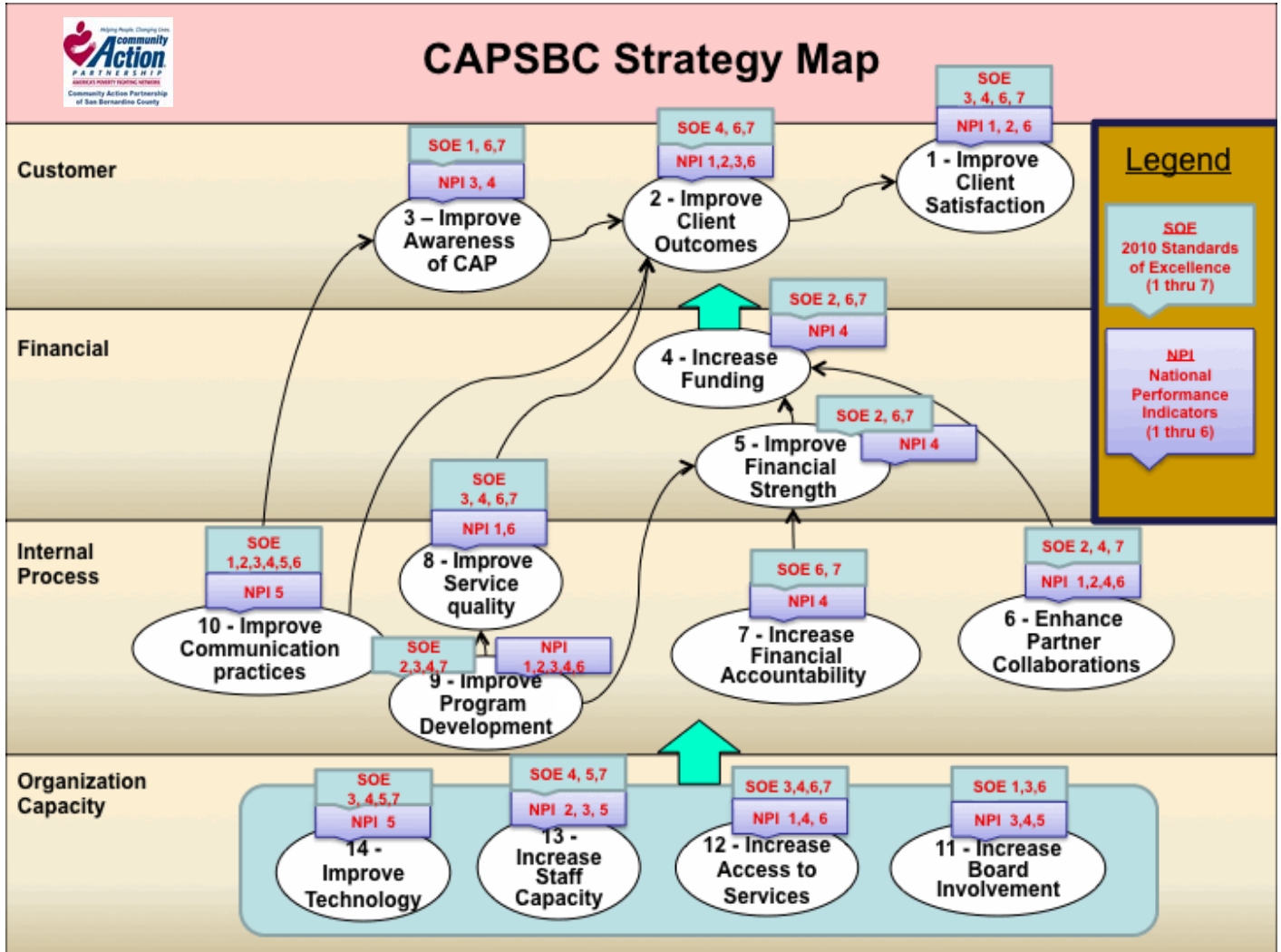


Figure 17: Strategy Map with Standards of Excellence (SOE) and National Performance Indicators (NPI)

Step 6: Strategic Initiatives

In Step Six, Strategic Initiatives are developed and prioritized with the use of selection criteria. Strategic Initiatives are programs or projects that turn strategy into operational terms and actionable items, provide an analytical underpinning for decisions, and provide a structured way to prioritize projects according to strategic impact. Strategic Initiatives answer the question, “What strategic projects must we implement to meet our Strategic Objectives?”

Many initiatives were identified during the process of developing the scorecard and are continuing to be developed at the time of this writing. The candidate initiative ideas are listed in **Figure 18** below.

PROGRAM DEVELOPMENT			
Name	Description	Deliverables	Objectives Supported
MOUs	Identify and review existing MOU's and develop a standardized MOU for CAPSBC	<ul style="list-style-type: none"> A listing of all existing CAPSBC MOU's and partners A standardized template for CAPSBC MOU 	2,6,9
Satellite Offices	CAPSBC will partner with public, private and non-profit organizations to establish satellite offices and expand CAPSBC operations in hard to reach areas of the county.	<ul style="list-style-type: none"> A listing of all existing partners and their location; Creation of new partnerships Establishment of new locations 	2,6,9
Poverty Concentration	Research and identify areas in the county where poverty is concentrated and where the greatest needs are.	<ul style="list-style-type: none"> A map showing poverty areas and where CAPSBC services exists Target areas for satellite offices 	2,6,9
Existing Programs	CAPSBC programs will be evaluated on its effectiveness and relevance; new high impact programs will be developed	<ul style="list-style-type: none"> New programs developed Report on program evaluation 	2,6,9
Needs Assessment	Research on available needs assessment conducted by other agencies; review and analyze CAPSBC needs assessment survey	<ul style="list-style-type: none"> Needs assessment survey findings available for use in program evaluation and development 	2,6,9
Best Practices	Research existing best practices from Community Action Agencies, human service agencies and private sector on program evaluation, program development, effective partnerships and needs assessment	<ul style="list-style-type: none"> Compilation of best practices 	2,6,9

MARKETING			
Name	Description	Deliverables	Objectives Supported
External Marketing & Communication Plans	Several communication pieces that will be regularly published and distributed to the community with the goal of educating and increasing awareness of CAPSBC programs and services.	<ul style="list-style-type: none"> • ARRA Bulletin • Quarterly Newsletter • Press Releases • Annual Report • Stories in State & National publications 	3, 10
Website & Social Media	An updated website for better ease-of-use and a more dynamic and interesting look. Social media techniques, including using the website, Facebook, YouTube, e-mail blasts and constant contact to increase awareness of CAPSBC.	<ul style="list-style-type: none"> • Website updated • On-line Application in Spanish • Facebook Pages updated • U-Tube Marketing (Events, Employee Testimonials, Success Stories) 	3, 10
Printed Materials	Updated printed materials for a consistency in look, ease of use and Spanish translations in order to better communicate CAPSBC programs and services, and to better brand CAPSBC with a more uniform look in materials.	<ul style="list-style-type: none"> • Updates (Annual Report, Brochures, Newsletters, Etc.) • Materials available in Spanish • New printed items 	3, 10
Media Relations	In order to increase awareness of CAPSBC, we will be doing community outreach with the media. These efforts will concentrate on personal communications, press releases, agency videos, presentations and publicity opportunities.	<ul style="list-style-type: none"> • Meetings with Editors to introduce CAPSBC & programs/services • Story ideas/interview opportunities for reporters • Agency videos for publicity • Press releases for newspaper, radio, TV • Speaker's Bureau (canned speech/presentations for multiple users) 	3, 10
Event Marketing	An established method for doing events that will increase awareness of CAPSBC.	<ul style="list-style-type: none"> • Create "Calendar of Events" to participate in throughout the year. • Create a protocol (event checklist) for doing events. 	3, 10



FUNDRAISING			
Name	Description	Deliverables	Objectives Supported
Dream House Raffle	The Dream House Raffle is an annual fundraising effort to sell a minimum of 20,000 raffle tickets for \$150 each for a chance to win a Dream House or cash, netting unrestricted funds for the agency.	<ul style="list-style-type: none"> \$1 million in unrestricted funds to the agency. 	4, 5
Car Raffle	The Car raffle is an annual fundraising effort to sell 10,000 tickets at \$120 each for a chance to win a dream car or cash, netting unrestricted funds to the agency.	<ul style="list-style-type: none"> \$300,000 in unrestricted funds to the agency. 	4, 5
Donation Solicitation Program	Direct mail, online, TV and Radio appeal to donate to CAPSBC, done twice annually.	<ul style="list-style-type: none"> \$100,000 in unrestricted funds to the agency. 	4, 5
Fee Based Training	Provide training to individuals and groups that leads to the development of employable skills in the area of energy conservation and green energy deployment.	<ul style="list-style-type: none"> \$50,000 annual net income/unrestricted funds to the agency. 	4, 5
Benefit Concert	A concert with well-known acts to draw attention to the Agency, its mission and the clients we serve.	<ul style="list-style-type: none"> \$500,000 in unrestricted funds to the agency and sponsorship opportunities for corporations and foundations. 	4, 5
Benefit Gala	Annual Gala and Community Service Recognition Event that generates unrestricted funds for the agency and honors individuals and agencies whose missions align with CAPSBC.	<ul style="list-style-type: none"> \$50,000 annual net income/unrestricted fund to the agency and sponsorship opportunities for corporations and foundations. 	4, 5
Delegate Agency Program	Delegate Agency Program		4, 5, 9



STAFF CAPACITY			
Name	Description	Deliverables	Objectives Supported
Employee Award Recognition	Employee Recognition Awards provide management the opportunity to acknowledge commitment, dedication, excellent customer service and extraordinary achievements, which will motivate employees to strive for excellence.	<ul style="list-style-type: none"> • Employee Award recipient information posted on CAPSBC website. • Publish award recipient information in CAPSBC quarterly newsletter. • Post award recipient information on the Operations Division communication board. • Present awards during the General Staff Meetings. 	13
Skills Assessment & Audit	Skill audits will assess new and existing employee skill levels in order to establish a baseline used in the performance evaluation and formalized training plan process.	<ul style="list-style-type: none"> • Workforce training needs identified. • Improved performance evaluation process. • Improved recruitment process • Generate tools to develop skill assessment tests. 	13
Cross Training	Cross training provides employees the opportunity to develop additional skills and knowledge, as well as, reinforces versatility and efficiency which aligns with the agency overall mission to promote and support professional growth.	<ul style="list-style-type: none"> • Versatile workforce • Interdepartmental task awareness. • An engaged workforce • Staff retention 	13
Training Plan for Employees	Formalized training will target skills identified in the audit and assessment process and engage a series of developmental activities to broaden employee's capabilities which will prepare them to assume a broader range of responsibilities.	<ul style="list-style-type: none"> • Training plan for each employee • Regularly scheduled training classes available. • Succession planning pool of internal candidates 	13
Hiring Process	Evaluate the hiring process to insure the identification of internal qualified candidates and the recruitment and retention of a diverse and experienced external workforce.	<ul style="list-style-type: none"> • Diversified and skilled workforce. • Succession planning pool of internal candidates 	13

STAFF CAPACITY *(Continued)*

Name	Description	Deliverables	Objectives Supported
Succession Planning	The succession process will anticipate the agency need to identify, develop, engage and mentor key employees who are qualified for leadership positions to ensure that the agency continues to meet its objectives.	<ul style="list-style-type: none"> • Training plan to mentor employees to move into management/leadership positions. • Minimal operational disruption due to transition resulting from retirements 	13

FISCAL PROCESSES

Name	Description	Deliverables	Objectives Supported
Cash Flow	Inflow and outflow of cash on all CAPSBC programs.	<ul style="list-style-type: none"> • Cash generated from billings to various funding sources, donations, owners' contribution, training center fees and other revenue. • Outflow of cash for vendor payments, payroll, and cost of business expenses. 	5, 7
Line of Credit	Borrowing money from a reputable financial institution at an established annual percentage rate.	<ul style="list-style-type: none"> • CAPSBC's line of credit increased to \$1.5 million 	5, 7
Business Process Review	Analysis of business practices to include: staff capabilities, quality & usefulness of reports to CAPSBC Board, Senior Management & Program Managers.	<ul style="list-style-type: none"> • Report with recommendations to improve efficiency in current business practices • Improved reports to Board and Management 	5, 7
Cost Allocation Plan	A written summary of the methods and procedures CAPSBC will use to allocate costs to various programs, grants and agreements.	<ul style="list-style-type: none"> • Cost Allocation Plan • Proper distribution/allocation of costs 	5, 7



TECHNOLOGY			
Name	Description	Deliverables	Objectives Supported
Paper to Electronic	Reduce amount of forms that are collected in paper from clients, potential employees, and partners. Convert paper forms to electronic intake and submittal. Reduce paper storage by implementing an electronic archiving system for the document retention.	<ul style="list-style-type: none"> • Online client intake forms for self-serve intake process and submittal • Online submittal of employment application via an online form with an electronic signature • MOUs, and other partner forms available online with an electronic signature • Implement an Electronic Archiving System for all CAPSBC achievable documents. 	12, 14
Swipe Card	The ID Card “Swipe Card” project allows more efficient tracking of clients and services previously provided to them.	<ul style="list-style-type: none"> • All clients have a service card ID (Swipe card) to identify them in the IMS database for faster determination of eligibility at the point of entry such as front desk stations. • Establish an Employee Timekeeping system with bar-coded ID cards produced in house and linked to the Great Plains Human Resources database. 	12, 14
Kiosk	Information and Referral Kiosk	<ul style="list-style-type: none"> • Establish a public interface to our Information Management System (IMS) that will create a referral list for clients and an option for electronic preliminary intake and automatic appointment service for potential service recipients. • Setup this interface kiosk at strategic locations thru partnering with other Community Based Organizations (CBOs) to host Kiosks. 	12, 14

CALL MANAGEMENT

Name	Description	Deliverables	Objectives Supported
Agency Call Center	Create/build a State-of-the-Art Call Center.	<ul style="list-style-type: none"> • Auto attendant with 24/7 call management • Recording of all Incoming and Outgoing calls • Automatic update of Enginuity system for easy access to program information; providing ability to quickly respond to client calls. 	1, 2, 8

WEATHERIZATION

Name	Description	Deliverables	Objectives Supported
Weatherization	State-of-the-Art Training Center	<ul style="list-style-type: none"> • Training on: <ul style="list-style-type: none"> ○ Solar ○ Green Technology • Increased # courses 	1, 2, 4, 8, 9



BOARD INVOLVEMENT			
Name	Description	Deliverables	Objectives Supported
Spokesperson	One Board Member per sector (Low-Income, Public and Private) to serve as a spokesperson and represent CAPSBC in the community.	<ul style="list-style-type: none"> Board members make presentations on CAPSBC at social service organizations 	11
Financial Support Direct	– Board Members provide financial support of CAPSBC	<ul style="list-style-type: none"> All 15 Board members provide financial support to CAPSBC on an annual basis 	11
Advocacy	Board Members will support and promote legislation and public/private initiatives that address the needs of the low-income.	<ul style="list-style-type: none"> CAB Advocacy Committee is in charge of fulfilling the advocacy functions of the Board of Directors. 	11
Greater Community Involvement	Board Members are actively involved in the community.	Board Members: <ul style="list-style-type: none"> Have greater participation in community events and CAPSBC activities Are active in the affairs of their local community Participate in community service 	11
Board Meetings Report & Participation	Board members attend board meetings regularly and report on community involvement activities conducted on behalf of CAPSBC	Board Members: <ul style="list-style-type: none"> Attend Board Meetings Report on community involvement (Volunteer, Presenter, Advocate or Participant) 	11



SERVICE QUALITY			
Name	Description	Deliverables	Objectives Supported
Revamp Surveys	Revise current generic surveys to create surveys that are program specific allowing each program area to track service quality by program.	<ul style="list-style-type: none"> • Single page customer survey for each service area. • Revised follow up postcard survey. 	1, 2, 8
Survey Training	Participate in trainings that focus on designing surveys that are useful, yet customer friendly.	<ul style="list-style-type: none"> • One page customer service surveys for each service area • Ability to implement new surveys as needed. 	1, 2, 8
Streamline Intake Process	Current intake to be reviewed to ensure universal data elements are captured.	<ul style="list-style-type: none"> • Intake information are completed on hard-copy at the time the client arrives at agency. • Application and the list of required documentation available on the CAPSBC website, and/or at kiosks in the lobby area. • Clients have already completed Intake at time of program entry. • CAPSBC referral sources know about new location of electronic intake 	1, 2, 8
Assess Intake Process	Analyze whether the current steps to enroll a client into a program, provide the needed service(s) then exit client from the program is efficient.	<ul style="list-style-type: none"> • Smooth transition from program entry to program exit by clients. 	1, 2, 8

Figure 18: CAPSBC Strategic Initiatives



Looking Ahead – Steps 7 – 9: Automation, Cascading & Evaluation

The scope of this project did not address the implementation steps of the Nine-Step process. These steps include:

- Step Seven: Automation
- Step Eight: Cascading
- Step Nine: Evaluation

In Step Seven, the implementation process begins by applying performance management software to get the right performance information to the right people at the right time. This automation of the scorecard adds structure and discipline to the system; helps transform disparate corporate data into information and knowledge; and helps communicate performance information. Many organizations begin this process by assigning someone to compile measures into an Excel spreadsheet and provide regular reporting. There are also low-cost “Software as a Service” (SaaS) tools available over the Internet that can get you up and running with a minimum of time and expense. These tools provide strategy mapping, tracking of measures, and a variety of reporting formats.

During Step Eight, departmental scorecards are developed to support the objectives on the corporate scorecard, and then team and individual scorecards are developed. This process of translating the corporate scorecard into divisional units is referred to as cascading. Cascading translates high-level strategy into consistent lower-level objectives, measures, and operational details and is the key to organization alignment around strategy. Performance measures are developed for all objectives at all organization levels. As the scorecard management system is cascaded down through the organization, objectives become more operational and tactical, as do the performance measures. Accountability follows the objectives and measures, as ownership is defined at each level. An emphasis on results and the strategies needed to produce results is communicated throughout the organization.

Finally, after the organization has been using the balanced scorecard for a period of time, we recommend Step Nine, an Evaluation of the completed scorecard. Evaluation answers the questions:

- Are our strategies working?
- Are we measuring the right things?
- Has our environment changed?
- Are we budgeting our money strategically?

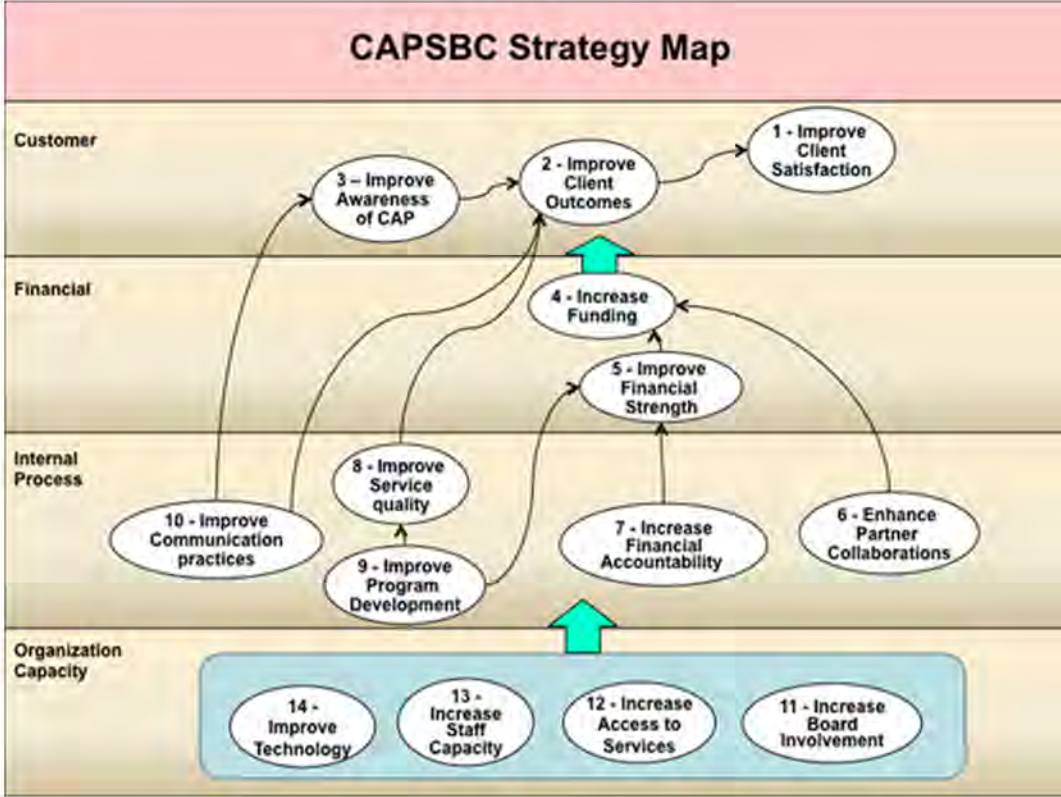


Appendix A: Glossary of Terms

Term	Definition
Customer Value Proposition:	The Customer Value Proposition is the unique added value an organization offers members through its operations; the logical link between action and payoff that the organization must create to be effective. Three aspects of the proposition include Product/Service Attributes (Performance/Functionality considerations such as quality, timeliness or price), Image and Relationship.
Customers:	Customers are the direct beneficiaries of the organization's services or products.
Mission:	A Mission defines why an organization exists.
Organization Core Values:	Core values establish the kind of organization it wants to be. They are guiding principles; what the organization believes in. They serve as the basis for decision-making and influence actions in everyday situations.
Performance Measures:	Performance Measures are metrics used to provide an analytical basis for decision making and to focus attention on what matters most. Performance Measures answer the question, "How is the organization doing at the job of meeting its Strategic Objectives?" Lagging indicators are those that show how successful the organization was in achieving desired outcomes in the past. Leading indicators are those that are a precursor of future success; performance drivers.
Perspectives:	A Perspective is a view of an organization from a specific vantage point. Four basic perspectives are traditionally used to encompass an organization's activities. The organization's business model, which encompasses its mission, vision, and strategy, determine the appropriate perspectives.
Stakeholders:	Stakeholders include any group or individuals within the universe of people with an interest in the organization's products/services and/or success, including vendors, suppliers, employees, regulators, owners, citizens, other organizations, etc.
Strategic Initiatives:	Strategic Initiatives are programs or projects that turn strategy into operational terms and actionable items, provide an analytical underpinning for decisions, and provide a structured way to prioritize projects according to strategic impact. Strategic Initiatives answer the question, "What strategic projects must the organization implement to meet its Strategic Objectives?"
Strategic Objectives:	Objectives are strategy components; continuous improvement activities that must be done to be successful. Objectives are the building blocks of strategy and define the organization's strategic intent. Good objectives are action-oriented statements, are easy to understand, represent continuous improvement potential and are usually not "on-off" projects or activities.
Strategic Result:	Strategic results are the desired outcome for the main focus areas of the business. Each Strategic Theme has a corresponding Strategic Result.
Strategic Theme:	Strategic Themes are key areas in which an organization must excel in order to achieve its mission and vision, and deliver value to members. Strategic Themes are the organization's "Pillars of Excellence."
Strategy Map:	A Strategy Map displays the cause-effect relationships among the objectives that make up a strategy. A good Strategy Map tells a story of how value is created for the business.
Strategy:	How an organization intends to accomplish its vision; an approach, or "game plan".
Targets:	Desired levels of performance for performance measures
Vision:	A vision statement is an organization's picture of future success; where it wants to be in the future

Community Action Partnership of San Bernardino County

Strategic Plan and Balanced Scorecard

The Promise, Mission & Vision				Objectives	Performance Measures	Strategic Initiatives								
<p>The Promise: Community Action changes people's lives, embodies the spirit of hope, improves communities, and makes America a better place to live. We care about the entire community, and we are dedicated to helping people help themselves and each other.</p> <p>Mission: CAPSBC works with our communities by supporting, advocating for, and empowering low-income residents to achieve self-sufficiency.</p> <p>Vision: By 2021, CAPSBC will be the premier social service agency that eliminates the effects of poverty by empowering people to obtain the knowledge and skills to achieve self-reliance and economic stability ... one life at a time.</p>				<p>Perspective: Customer</p> <ul style="list-style-type: none"> Improve Client Satisfaction Improve Client Outcomes Improve Awareness of CAPSBC 		<ul style="list-style-type: none"> Client feedback Client outcome index Community awareness of services offered Stakeholder awareness & favorable impression of CAPSBC Local, State & National CAP recognition 								
<p>Strategic Themes & Results</p> <table border="1"> <tr> <th>Operational Excellence</th> <th>Expanding and Strengthening Partnerships</th> <th>High Impact Services</th> <th>Capacity Building</th> </tr> <tr> <td>CAPSBC has formal integrated systems, processes and technology that enable the agency to deliver effective, accessible services with accountability, excel in customer service, and exceed customer and stakeholder expectations.</td> <td>CAPSBC collaborates with agencies, public and private, to expand our presence and share information and resources to better serve the communities and individuals of San Bernardino County.</td> <td>By 2021, CAPSBC's programs and services have reduced poverty in San Bernardino County by moving clients from dependency to self-sufficiency.</td> <td>CAPSBC responds successfully to the emerging needs of our community with diverse resources; a highly skilled workforce and technology.</td> </tr> </table>				Operational Excellence	Expanding and Strengthening Partnerships	High Impact Services	Capacity Building	CAPSBC has formal integrated systems, processes and technology that enable the agency to deliver effective, accessible services with accountability, excel in customer service, and exceed customer and stakeholder expectations.	CAPSBC collaborates with agencies, public and private, to expand our presence and share information and resources to better serve the communities and individuals of San Bernardino County.	By 2021, CAPSBC's programs and services have reduced poverty in San Bernardino County by moving clients from dependency to self-sufficiency.	CAPSBC responds successfully to the emerging needs of our community with diverse resources; a highly skilled workforce and technology.	<p>Perspective: Financial</p> <ul style="list-style-type: none"> Increase Funding Improve Financial Strength 		<ul style="list-style-type: none"> Unrestricted funds growth Bond rating Financial ratios
Operational Excellence	Expanding and Strengthening Partnerships	High Impact Services	Capacity Building											
CAPSBC has formal integrated systems, processes and technology that enable the agency to deliver effective, accessible services with accountability, excel in customer service, and exceed customer and stakeholder expectations.	CAPSBC collaborates with agencies, public and private, to expand our presence and share information and resources to better serve the communities and individuals of San Bernardino County.	By 2021, CAPSBC's programs and services have reduced poverty in San Bernardino County by moving clients from dependency to self-sufficiency.	CAPSBC responds successfully to the emerging needs of our community with diverse resources; a highly skilled workforce and technology.											
<p>Strategy Map</p>  <p>The Strategy Map is organized into four horizontal layers: Organization Capacity, Internal Process, Financial, and Customer. <ul style="list-style-type: none"> Organization Capacity (Bottom): Includes 14 - Improve Technology, 13 - Increase Staff Capacity, 12 - Increase Access to Services, and 11 - Increase Board Involvement. Internal Process (Second from Bottom): Includes 10 - Improve Communication practices, 8 - Improve Service quality, 9 - Improve Program Development, 7 - Increase Financial Accountability, and 6 - Enhance Partner Collaborations. Financial (Third from Bottom): Includes 4 - Increase Funding and 5 - Improve Financial Strength. Customer (Top): Includes 3 - Improve Awareness of CAP, 2 - Improve Client Outcomes, and 1 - Improve Client Satisfaction. Arrows indicate the flow of impact: Organization Capacity leads to Internal Process, which leads to Financial, which leads to Customer. Specific initiatives like 'Improve Financial Strength' and 'Increase Funding' are shown to have direct impacts on 'Improve Client Outcomes' and 'Improve Client Satisfaction'.</p>				<p>Perspective: Internal Process</p> <ul style="list-style-type: none"> Enhance Partner Collaboration Increase Financial Accountability Improve Service Quality Improve Program Development Improve Communication Practices 		<ul style="list-style-type: none"> Number of partners Total value of all partnerships Number of clients served by partnerships Financial accountability report Cycle time of most frequently requested services Error rate of most frequently requested services Customer satisfaction survey Program development effectiveness index Survey reliability 								
<p>Organization Capacity</p> <ul style="list-style-type: none"> Increase Board Involvement Increase Access to Services Increase Staff Capacity Improve Technology 				<p>Perspective: Organizational Capacity</p> <ul style="list-style-type: none"> Increase Board Involvement Increase Access to Services Increase Staff Capacity Improve Technology 		<ul style="list-style-type: none"> Board involvement index Board knowledge index Client access index Employee skills assessment Technology effectiveness index 								
<p>Strategic Initiatives</p> <ul style="list-style-type: none"> Program Development <ul style="list-style-type: none"> MOUs Satellite Offices Poverty Concentration Existing Programs Needs Assessment Best Practices Fundraising <ul style="list-style-type: none"> Dream House Raffle Car Raffle Donation Solicitation Program Fee-based Training Benefit Concert Benefit Gala Delegate Agency Program Fiscal Processes <ul style="list-style-type: none"> Cash flow Line of Credit Business Process Review Cost Allocation Plan Marketing <ul style="list-style-type: none"> Marketing Plan <ul style="list-style-type: none"> Website & Social Media Printed Materials Media Relations Event Marketing Call Management <ul style="list-style-type: none"> Agency Call Center Weatherization <ul style="list-style-type: none"> Weatherization Service Quality <ul style="list-style-type: none"> Revamp Surveys Survey Training Streamline Intake Process Assess Intake Process Technology <ul style="list-style-type: none"> Paper to electronic Swipe card Kiosks Staff Capacity <ul style="list-style-type: none"> Employee Award Recognition Skills Assessment & Audit Cross Training Training Plan For Employees Hiring Process Succession Planning Board Involvement <ul style="list-style-type: none"> Spokesperson Advocacy Financial Support – Direct Greater Community Involvement Board Meetings Report & Participation 														

Community Action Partnership of San Bernardino County

Strategic Plan and Balanced Scorecard – Theme Team Results

The Promise, Mission & Vision

The Promise: Community Action changes people’s lives, embodies the spirit of hope, improves communities, and makes America a better place to live. We care about the entire community, and we are dedicated to helping people help themselves and each other.

Mission: CAPSBC works with our communities by supporting, advocating for, and empowering low-income residents to achieve self-sufficiency.

Vision: By 2021, CAPSBC will be the premier social service agency that eliminates the effects of poverty by empowering people to obtain the knowledge and skills to achieve self-reliance and economic stability one life at a time.

Core Values

- Excellence
- Advocacy
- Integrity
- Quality
- Respect
- Self-Sufficiency
- Compassion
- Professionalism
- Accountability
- Personal Responsibility

Strategic Themes & Results

Operational Excellence

CAPSBC has formal integrated systems, processes and technology that enable the agency to deliver effective, accessible services with accountability, excel in customer service, and exceed customer and stakeholder expectations.

Expanding and Strengthening Partnerships

CAPSBC collaborates with agencies, public and private, to expand our presence and share information and resources to better serve the communities and individuals of San Bernardino County.

High Impact Services

By 2021, CAPSBC’s programs and services have reduced poverty in San Bernardino County by moving clients from dependency to self-sufficiency.

Capacity Building

CAPSBC responds successfully to the emerging needs of our community with diverse resources; a highly skilled workforce and technology.

Theme Strategy Maps

