Overview

The following document contains the results from the Project BRAVO strategic planning process that occurred in July 2020. These results are based on an analysis of the current state of Project BRAVO and a clear vision of the future. Project BRAVO leadership believe that strategically focusing on the following four focus areas will help strengthen Project BRAVO’s ability to promote healthy lifestyles, prevent illness, and protect the environment:

- Expanding holistic service offerings
- Enhancing communication and outreach
- Diversify funding sources
- Investing in people, technology, and strategic data collection and impact measurement

A process of strategic planning implementation is also highlighted in this report.

Increased impact, efficiency, and effectiveness requires strategic changes and moving away from the status quo to create new patterns of behavior and activities designed to reach the new objectives and outcomes. For any change initiative to be successful, three crucial elements must be considered: dissatisfaction, vision, and first steps toward change. To achieve significant organizational change, all three must be present.

David Gleicher’s well-known formula, described in Organization Development: Strategies and Models by Richard Beckhard, outlines the essential elements that result in change.

This model, often called Gleicher’s Formula, provides a way to assess the relative strengths affecting the likely success of organizational change efforts. The formula suggests that for successful change to occur, dissatisfaction with the current state (D), a desired future vision (V), and the concrete first steps (F) must be stronger than the natural resistance to change (R). Dissatisfaction, vision, and first steps must be combined to overcome the natural resistance to change if organizational change is to occur. If any of these three ingredients is absent or present in a weakened state, resistance will dominate and change will not occur.

An assessment of the current state of Project BRAVO was conducted to “unfreeze” the situation and create dissatisfaction with current realities. The current state assessment included an analysis of
secondary data regarding populations served by Project BRAVO (e.g. United States Census Bureau data, Centers for Medicaid and Medicare data), existing Project BRAVO data (e.g. financial data, previous needs assessments), and perceptions of Project BRAVO customers, community partners, staff and leadership regarding community needs and opportunities to strengthen Project BRAVO’s impact in the community. These data were utilized to inform Project BRAVO’s strategic priorities over the next three years. A facilitated strategic planning process was conducted to achieve the future vision.

**Project BRAVO’s Vision**

During the facilitated strategic planning session, Project BRAVO leadership considered various vision and mission statements that best reflect the purpose and work of Project BRAVO. Based on a follow-up survey with Project BRAVO board members, the following vision and mission statements were chosen.

*To bridge access to opportunities for residents of El Paso County to achieve equity and elevate their quality of life through education and social services that lead to self-sufficiency.*

**Project BRAVO’s Mission**

*Project BRAVO builds bridges to opportunities that help individuals and families thrive in our Borderland community.*

**Vision for 2023**

Project BRAVO is supporting a thriving Borderland community in El Paso County, Texas by providing resources and supports to promote self-sufficiency of people and families and empower community members to achieve their dreams. Through providing short-term relief and fostering collaborative partnerships, individuals are achieving equitable outcomes and improved quality of life.

Project BRAVO’s holistic service delivery is supported by socially and culturally competent programs to connect residents to housing, education, health, food, and employment. To help remove barriers to accessing services (e.g. locations where services are offered, limited parking), Project BRAVO reimagined service delivery and is pleased to now offer more accessible services that El Pasoans can conveniently access either in-person or virtually. Through Project BRAVO’s proactive and data-driven leadership, a strategic set of outcome measures has been implemented organization-wide to measure and communicate the impact of Project BRAVO’s services and prioritize needs within the community. Finally, with improved marketing, outreach, collaborative community partnerships, and impact measurement, Project BRAVO has diversified its funding sources, reducing a heavy reliance on funding from the federal government which has allowed for expanded populations to be served.

**Strategic Focus Areas**

Project BRAVO leadership agreed upon the following four strategic focus areas. These areas are the main strategies leadership believes will help Project BRAVO achieve its future three-year vision. Leadership determined the current baseline number for where they believe Project BRAVO has achieved this strategic focus area on a 1-10 scale. Leadership and staff also identified strengths that will help Project BRAVO achieve these objectives and the barriers that may interfere with success. The results are outlined below. This information is helpful for ongoing discussion and future action item development.
1: Expanding Holistic Service Options to Adapt to El Paso County’s Emerging Needs

Baseline: 6.47 (n = 15) on a 1-10 scale (where 10 is a fully achieved vision and 1 is opposite from the vision).

2023 Strategic Community Outreach and Education Objectives:

- Conduct and use the needs assessment to ensure services are best for clients’ needs, support the reduction of poverty while increasing self-sufficiency, and are accessible (parking and location issues, offering virtual and in-person services).
- Emphasize computer literacy in service offerings.
- Increase strategic thinking/planning among all staff; considering the strengths of the clients and their individual and/or family goals, and connecting them to resources were there are needs.
- Identify workable case management models that align with social determinants of health; integrate data collection and measurement into case management to track which services individuals/families are, or are not, receiving.
- Develop collaborative community partnerships to breakdown silos that exist in internal and external service delivery and meet collective community goals towards the reduction of poverty and revitalization of our low-income communities.

2: Strengthen Communication and Outreach

Baseline: 5.53 (n = 19) on a 1-10 scale (where 10 is a fully achieved vision and 1 is opposite from the vision).

2023 Strengthen Communication and Outreach Objectives:

- Educate stakeholders (i.e. business community, local governments, elected officials at every level) about the impact of poverty (e.g. how many people, the relationship between public health and the economy, and that needs are evolving), and need to invest in our community to lessen impact. Communicate how needs can change.
- Be more active in public policy; bring community members’ voices into public policy decisions.
- Educate the community about what our clients need to gain employment.
- Increase outreach efforts to schools.
- Increase strategic partnerships and improve understanding of who is eligible for our services.
- Develop a comprehensive media outreach strategy (including traditional media, metrics, public service advertisements or announcements). Increase innovative marketing and communication strategies (e.g. having evidence-based marketing models, investing in social media efforts). Targeted campaign for those who truly qualify. Include non-traditional markets (e.g. senior citizens, hospitals, hospice).
- Invest in outreach and commit the time and staff.
3: Diversify Funding Sources

Baseline: 4.85 (n = 13) on a 1-10 scale (where 10 is a fully achieved vision and 1 is opposite from the vision).

2023 Diversify Funding Sources Objectives:
- Increase access to workforce dollars; build relationships so Project BRAVO clients have access to these resources.
- Develop relationships with the business community to provide training to our clients to help them obtain jobs.
- Seek out state, local, and foundation grants.
- Dedicate resources to grant writing staff/support.
- Expand Project BRAVO’s housing portfolio/generate unrestrictive revenue.
- Mobilize the fundraising committee and utilize them to expand these resources.

4: Investing in People, Technology, and Strategic Data Collection and Impact Measurement

Baseline: 4.42 (n = 19) on a 1-10 scale (where 10 is a fully achieved vision and 1 is opposite from the vision).

2023 Investing in People, Technology, and Strategic Data Collection and Impact Measurement Objectives:
- Identify the technology needs among staff.
- Invest in training for staff (technology, case management model that is more engaging for the client; what can families do to better their situations, building relationships, transformational relationships).
- Establish an intentional and evolving training plan; implement an annual goal of staff training hours to be completed.
- Ensuring clients know how to utilize new technology that is integrated into Project BRAVO’s service offerings (e.g. kiosks).
- Establish key client outcomes and goals to measure the impact of our services; collect data to measure these key outcomes and goals
- Publish annual reports and create data-dashboards to guide our work.
- Focus on recruitment and new hires that have the technology skills.
- Building partnerships with University of Texas at El Paso (UTEP) and El Paso Community College (EPCC) for assistance
- Enhance Board culture (get to know one another more).
Alignment of Strategic Focus Areas with the Results Oriented Management and Accountability (ROMA) Cycle

To ensure continuous growth and improvement, Project BRAVO leadership identified strategic focus areas that align to the Results Oriented Management and Accountability (ROMA) cycle. As shown in Figure 1, the ROMA cycle emphasizes assessing community needs and resources; utilizing mission and assessment data to identify key outcomes and strategies to meet the community needs; implementing strategies and services to produce desired outcomes; collecting data to allow for the observation of progress towards intended outcomes; and evaluating data to assess whether the intended outcomes were achieved. The ROMA cycle emphasizes continuous improvement, and thus, is a continuous process. Table 1 outlines how Project BRAVO’s strategic focus areas and objectives align to each phase of the ROMA cycle.

Figure 1. ROMA Cycle

Table 1. Alignment of Strategic Focus Areas and Objectives with the ROMA Cycle

<table>
<thead>
<tr>
<th>ROMA Phase</th>
<th>Strategic Focus Area</th>
<th>Strategic Focus Area Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assessment</td>
<td>Expanding Holistic Service Options to Adapt to El Paso County’s Emerging Needs</td>
<td>Conduct the needs assessment to ensure services are best for clients’ needs and are accessible</td>
</tr>
<tr>
<td>Planning</td>
<td>Expanding Holistic Service Options to Adapt to El Paso County’s Emerging Needs</td>
<td>Increase strategic thinking/planning among all staff; considering the strengths of the clients and connecting them to resources were there are needs; Identify workable case management models that align with social determinants of health.</td>
</tr>
</tbody>
</table>
### ROMA Phase

<table>
<thead>
<tr>
<th>Strategic Focus Area</th>
<th>Strategic Focus Area Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Implementation</td>
<td>Expanding Holistic Service Options to Adapt to El Paso County’s Emerging Needs</td>
</tr>
<tr>
<td>Achievement of Results</td>
<td>Investing in People, Technology, and Strategic Data Collection and Impact Measurement</td>
</tr>
<tr>
<td>Evaluation</td>
<td>Investing in People, Technology, and Strategic Data Collection and Impact Measurement</td>
</tr>
</tbody>
</table>

### Concrete First Steps

The following first steps/goals were identified to help move Project BRAVO forward in the next six to twelve months. Project BRAVO should meet to assign/review a champion and due dates to each of these action items that are missing to ensure they are completed in a timely manner.

<table>
<thead>
<tr>
<th>1. Expanding Holistic Service Options to Adapt to El Paso County’s Emerging Needs</th>
<th>Who</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Continue implementation of the client survey to assess key needs</td>
<td>Chief Program Officer (CPO)</td>
<td>Dec 2020</td>
</tr>
<tr>
<td>b. Develop Needs Assessment Report</td>
<td>CPO/Executive Director (ED)/Outreach Coordinator</td>
<td>August 2021</td>
</tr>
<tr>
<td>c. Continue implementation of Client Satisfaction Survey to identify service accessibility needs.</td>
<td>CPO and Information Technology (IT)</td>
<td>August 2020</td>
</tr>
<tr>
<td>d. Board review of Client Satisfaction Survey results to determine accessibility needs for clients</td>
<td>IT and Board</td>
<td>October 2020</td>
</tr>
<tr>
<td>e. Identify minimal criteria/skill set for staff needed to provide virtual services</td>
<td>Management Team</td>
<td>December 2020</td>
</tr>
<tr>
<td>f. Develop assessment of technology competencies to measure and track staff skills in technology needed for virtual service offerings</td>
<td>IT and HR</td>
<td>June 2021</td>
</tr>
<tr>
<td>g. Integrate staff technology competencies assessment into performance management and evaluation processes</td>
<td>HR</td>
<td>June 2021</td>
</tr>
<tr>
<td>h. Integrate technology competencies assessment into hiring practices</td>
<td>HR</td>
<td>January 2021</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2. Strengthen Communication and Outreach</th>
<th>Who</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Develop Board Action Plan for Outreach and Communication and present to Board for review and approval</td>
<td>ED</td>
<td>January 2021</td>
</tr>
</tbody>
</table>
b. Develop a Communications Plan and Strategy that includes branding and marketing needs | Executive Assistant/Outreach Coordinator | January 2021

c. Identify potential community partners, specifically faith-based and school districts, in accordance to the CSBG partnership domains and establish reciprocal and referral based partnerships. | Executive Assistant/Outreach Coordinator, CPO, & ED | February 2021

3. Diversify Funding Sources | Who | Due Date

| a. Assemble Fundraising Committee and develop a Fundraising Action Plan. | ED & Board | January 2021
| b. Identify funders to promote elements of the strategic plan and Community Needs Assessment. | ED | June 2021

4. Investing in People, Technology, and Strategic Data Collection and Impact Measurement | Who | Due Date

| a. Identify and assess client database strengths and weaknesses, data entry and reporting processes efficiency, and turnaround time. | CPO/CSM/IT | March 2021
| b. Identify and coordinate monthly staff training topics and resources needed; integrate training topics with technology competencies identified in 1e-1g. | TBC/Management/HR | January 2021
| c. Align the Standard Operating Procedures (SOP) and Client Database Manual to ensure consistent and systematic data collection processes that support a move towards paperless methods and more technology-reliant/data-driven processes. | IT/CPO/CSM/ED | March 2021
| d. Implement staff training to increase understanding of services and outcomes data and how to use this data to inform their work. | CPO/Program Managers | January 2021
| e. Integrate discussions of services and outcomes data between supervisors and staff in monthly meetings (i.e. review and discuss each employees’ services and outcomes goals and data) | CPO/Program Managers | January 2021
Strategic Planning Implementation/Meeting Structure

Successful strategic planning relies on the extent an organization takes ACTION! Use the following process to guarantee success.

1. **Weekly/Monthly:** During regular leadership or manager meetings, time should be allotted on the agenda for each strategic focus area to report on the action items due within the time period. These should be short conversations that include the following topics:
   a. Have any action items been completed? If yes, acknowledge and celebrate the success.
   b. For each of the action items due that quarter, say if it is off track or on track.
   c. If it is off track, why? What needs to be done to get it back on track?
   d. Commit to the implementation of the strategies needed to get a focus area back on track.

2. **Quarterly:** A special strategic-planning focus time should occur at least quarterly at the Project BRAVO Board meetings. The purpose of this section of the meeting is to establish the current state, and design and identify any broad concrete next steps to reach the vision. The following process should occur in each meeting for each strategic focus area.
   a. **Review strategic focus area definition.** The Executive Director should read the strategic focus area aloud to the group.
   b. **Establish the “current state” number.** The Executive Director should update the Board on where they believe the organization currently is on a scale from 1 to 10 (where 10 equals fully living the vision and 1 equals the opposite of the vision) for each focus area.
   c. **Acknowledge progress/discuss stagnation.** If the current state number has increased from the previous quarter, celebrate this forward movement. If there has been no progress or a lower score was identified from the previous quarter, discuss what has happened to prevent progress.
   d. **Review the strengths and barriers list.** Identify any barriers or strengths that are currently true for the organization. Add any new barriers or strengths that have developed.
   e. **Identify the next broad concrete steps.** Discuss any new broad action items that staff should consider implementing to move the organization toward the goal. Make sure to include due dates for the work.

Repeat this process until the organization achieves a score of 9 or 10 in each of the strategic focus areas.

3. **Annually:** Hold an All-Staff/Board Meeting to celebrate progress on the strategic plan over the year and ask staff for feedback regarding how the organization is doing to achieve its goals.
Project BRAVO Strategic Planning Day

Meeting Notes

Below are comments and notes from the strategic planning meeting in July 2020.

Defining the Current State: What stands out from the Current State Report? What must be considered in the planning process?

Future Vision – In 2023, what will Project BRAVO look like, and what will you be celebrating?

What focus areas should Project BRAVO consider to achieve the 3-year vision?

What don’t you see in the report? What is missing from the data and information compilation that you want to add?

- I wish there was more information about our immigrant population. One of the biggest hurdles is helping this population find living wage work because of their language barriers or immigration status.
- I would also like to see data on how many people are eligible for services and how many people access those services. For example, we have many families that are eligible for CHIP and SNAP, but the system is structured in a way that people are dropped from the program.
  - More people likely qualify but cannot access it due to systemic issues – how do we connect people to service?
- How are we using “Holistic” for the population? We do not provide all services; how should those issues be addressed if we do not directly work to solve them? What is the distribution of labor in the community to provide services in a holistic approach?

Current Project BRAVO Mission: Project BRAVO, Inc. is a non-profit 501(c)(3) organization that exists to maximize resources for an improved quality of life for the economically disadvantaged residents of El Paso County.

- Project BRAVO connects people to opportunities that empower them to achieve the American Dream.
- Maximizing, for me, means utilizing resources efficiently... most bang for your buck style.
- Strengthen, promote, represent
- Connector or a bridge
- I think we do all those things- serve, provide, bridge, connect
- Agree, if we can use bridge it will bring in our history of being a border community.
- Yes, bridge and connect have significant meaning for our community
- Project BRAVO builds bridges to opportunities that connect families to education, jobs, and resources that help families to thrive.
- Project BRAVO builds bridges to opportunities that connect people to education, jobs, and resources that help families to thrive.
- We exist to connect El Pasoans (or people) to resources that empower them to attain equity in quality of life....
- Project BRAVO builds bridges to opportunities that connect people to education and resources that help families thrive in our Borderland community.
**Current Project BRAVO Vision:** Project BRAVO, Inc. is committed to putting an end to poverty by mobilizing resources and promoting self-sufficiency as we strive to achieve a better tomorrow for our community.

- Project BRAVO is committed to bridging access for El Paso citizens to achieve equity and elevate quality of life through education, self-sufficiency, and passion for creating a community that can be independent and freed from financial restraints and achieve a better tomorrow.
- Yes! A vision should function almost like a slogan or motto: a tagline easily added to all materials.
- To achieve equity and elevate the quality of life for El Pasoans.
- Do we use the present vision statement in materials?
- To achieve an equitable quality of life for all El Pasoans.
- So, equity and quality of life are not mutually exclusive... quality of life is made possible through equity.
- I think statements regarding education and the "how we do it" are best suited for the mission statement.

**Describe your vision for Project BRAVO 3 years from now.**

- People will have the opportunities and resources to support their families and achieve their dreams.
- In three years, every household that comes to Project BRAVO will receive holistic service delivery. Project BRAVO services are short-term connectors with the goal of long-term solutions and truly achieving self-sufficiency for households. Project BRAVO will have developed (or collaborated with others) an active, engaging, and growing community partnership coalition to ensure holistic approaches to immediate community needs and promote healthy and progressive discourse for deeper systemic barriers.
- GED program, allocation, and dissemination of resources during the Pandemic- how did we help community members navigate staying out of poverty or getting out of poverty? How did we collaborate with our partners to meet needs and bridge resources?
- Project BRAVO's holistic model of services developed in concert with partners, community and consumers have nurtured self-sufficiency and are advancing harmony in the community.
- All will have equitable access to education, jobs, housing, and healthcare.
- To me, a successful Project BRAVO is an organization that is able to track and trend the people that are using the program. As Alfonso mentioned, sometimes these programs become a crutch instead of a cane. We want to help people, but we also do not want them to make this something that they rely on indefinitely. We need to be able to determine what root causes are, help while they are using services, but also help them off the program at some time. We should have targets of how long a person uses these services.
- In three years, Project BRAVO will make a difference in the total amount of educated people and/or people that will be able to transition out of poverty due to better paying jobs.
- Educate and teach our community on how to achieve and maintain a sustainable quality of life. I agree with Mona in seeing Project BRAVO services being short-term connectors and so on.
- The goal is to bring an end to poverty for our community. If we reach this goal, we'll run out of people to serve! Ideally, Project BRAVO will adjust services to continue assisting these families in stages. We begin by offering those services they need immediately such as utility assistance and
transfer them to educational services and end with housing services to achieve that better quality of life.

- Project BRAVO can be a hub for Borderland community members to reach out. All needs are addressed and channeled to proper resources regarding education, health, and employment.
- Our innovative undertakings have fostered a thriving community.
- The organization is able to produce quantitative and qualitative measurement criteria to demonstrate its work.
- Project BRAVO had achieved outstanding recognition for organizational leadership for their outstanding results, management, and accountability standards through their implementation of self-sufficiency programs and asset accumulation.
- Families can find a relief through Project BRAVO because we are determined to help them with resources.

**Share your vision to the whole group using the chat function.**

- There is a need of quantitative and qualitative data, how do we define the measure of success for our clients
- People have different ideas of what poverty looks like, lots of reasons and barriers
- Relief, RELIEF!
- Assistance to meet basic needs such as housing, health, and food.
- As well as connection to education and employment to promote self-sufficiency.
- To Laura: Is the employment part overstated? How do we lead to employment? Through education?
- We have a case management program that pays for training and then helps people find jobs.
- Our TOP clients get coaching on resume writing, dressing for success, etc.
- Data driven to shift resources based on volume
- Social and culturally competent services to connect
- I like the word "responsive" as it alludes to being able to adapt to current and emerging issues.
- Project BRAVO's holistic service delivery is supported by social and culturally competent programs to connect residents to housing, education, healthcare, and food.
- Translatable and meaningful metrics/data
- Holistic approach to service delivery through collaborative and comprehensive partnerships
- Diversity in funding resources; expand accessibility/locations- letting people know we are a resource for them (to Laura’s point on poverty); upgrade tools for staff
- Maybe focus on advertising for the fact we can offer relief and getting people to recognize they qualify for it. This goes to Alfonso’s and Fred’s point on COVID- Cares Act
- Ensuring we get the technology/systems in place as we look to the future, so the employees have what they need
- We also need to provide better training for staff, so they know how to maximize their impact whether they provide services in person or using technology.
- Having established technological hardware/software that is compatible for all to use.