

# cef Strategic Plan 2022-2025

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## Background & Methodologies

This document was created by CEF to serve as a strategic vision for 2022-2025, and the content will guide us as an organization as we work to move closer to our shared mission, vision, and values. This strategic plan is not a workplan or a task list, but it will help inform our day-to-day decisions and overarching goals.

To remain in alignment with our Guiding Principles, this strategic plan was developed as the result of a participatory process that included focus groups, surveys, office observation visits, and a series of planning meetings that engaged the voices of more than 65 community leaders, CEF Staff, Board, Volunteers, and Members over the course of a seven-month period, both in-person and virtually.

The initial round of feedback—a survey with 64 respondents—rooted us in collective power and voice, and guided the methodologies and decision making of the remainder of the process. The second round of planning was a group meeting that included CEF Staff, Members, and Board; this round helped organize the thoughts from the survey and identify the major priority areas (Objectives) that are reflected in the framework now. The third round of planning was a smaller group meeting that included CEF staff from all levels and a variety of focal areas within the organization; this round helped develop more detail (Key Results) for each of the priority buckets. The process was iterative and used participatory methodologies to call forth as many voices as possible in an effort to flatten hierarchies on the way to designing an accessible, clear plan that has collective buy-in across all areas of the organization.

To learn more about the process and findings of the survey, please see the [CEF Organizational Assessment](#) document from December 2021.

### *Values/Guiding Principles*

- **People-Centered Relationships**
- **Active Reflection and Co-Learning**
- **Participatory Ownership**
- **Financial Independence**
- **Community in Power**
- **Welcoming Connectors**
- **Quality and Accountability**

## The Strategic Plan, Explained

In partnership with consultants Jaclyn Gilstrap and Hope Tyson from A Visual Approach, CEF's strategic plan is presented using an adaptation of an "Objectives and Key Results (OKR) Framework."

At the highest level of the strategic plan, the Big Goal and Key Contribution articulates CEF's vision of community and its mission. These components are the guiding light of the strategic plan and connect the various areas of CEF's work to the organization's mission and its greater purpose in the community. In addition to the Big Goal (CEF's Vision Statement), the survey data showed that Staff, Members, Volunteers, Board, and Community Leaders across the board saw an essential part of CEF's efforts to be centered around Building Joyful Community. It was mentioned so often that it has risen to the level of the Big Goal. It is a complement to and expansion of the Big Goal, a doubling down and a re-commitment to this essential component of the organization's character and culture.

- Big Goal: Ending the Racial Wealth Gap, Empowering Community
- Key Contribution (CEF's Mission): Cultivate opportunities, assets, and communities that support the alleviation of homelessness and poverty

In order to achieve the Key Contribution, CEF believes that it must work towards all of the Objectives outlined in the strategic plan. The Objectives are significant and concrete, and there is a word attached to each that explains not only *what* the goal is but *how* it should be achieved (responsive, strong, adaptable, impactful, growth). As a whole, the Objectives make up the key areas of CEF's work. The relationship between them is illustrated by the visual framework (FIG 1).

As we move forward in the direction of 2025, our organization is sure to experience many shifts and changes. This document is meant to help us navigate those changes, assisting us during times when decision-making feels hard and priorities are overwhelming. We thank each and every voice that contributed to this collective vision for CEF.

## cef Strategic Framework

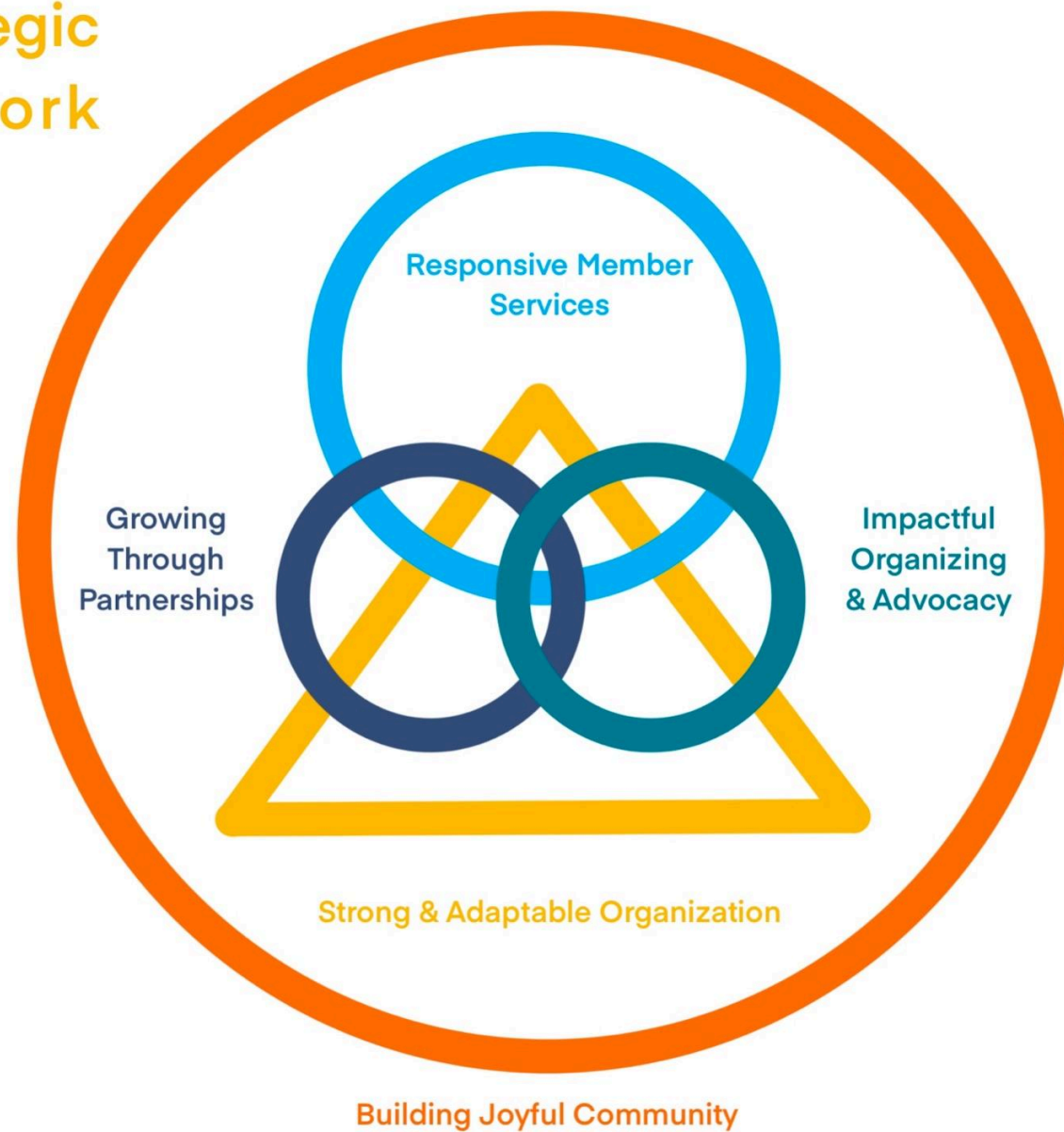


FIG. 1

## BIG GOAL

Ending the Racial Wealth Gap, Empowering Community

## CEF's KEY CONTRIBUTION :: CEF MISSION

Cultivate opportunities, assets, and communities that support the alleviation of homelessness and poverty.

**In order to make our key contribution, we need to achieve these Objectives & Key Results (visionary, not a task list):**

### 1. Responsive Member Services

Corresponding Values	<i>People-Centered Relationships</i> <i>Participatory Ownership</i> <i>Community in Power</i> <i>Financial Independence</i>
Key Result #1	CEF is informed of Members' needs
Key Result #2	CEF provides holistic support where Members feel whole, resourceful, and creative
Key Result #3	Members have trusting relationships with CEF staff & volunteers
Key Result #4	CEF shares power with Members
Key Result #5	CEF has a prepared and practiced group of Advocates

## 2. Strong & Adaptable Organization

Corresponding Values	<i>People-Centered Relationships</i> <i>Active Reflection and Co-Learning</i> <i>Quality and Accountability</i>
Key Result #1	CEF staff operate in a culture of trust
Key Result #2	CEF staff has a clear understanding of the organization's collective direction
Key Result #3	CEF maintains a strong connection to community
Key Result #4	CEF has secure funding streams to support its work

## 3. Growing Through Partnerships

Corresponding Values	<i>People-Centered Relationships</i> <i>Welcoming Connectors</i> <i>Community in Power</i>
Key Result #1	CEF is an active, valued partner and member of the community
Key Result #2	CEF is contributing to an interdependent community system
Key Result #3	CEF has the internal organizational structures to effectively manage partnerships and community relationships
Key Result #4	CEF prioritizes relationships that respond to Member needs

## 4. Impactful Organizing & Advocacy

Corresponding Values	<i>People-Centered Relationships</i> <i>Participatory Ownership</i> <i>Community in Power</i>
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Key Result #1	CEF's organizing and advocacy work is Member-led
Key Result #2	Organizing and advocacy work has a supportive and clear structure
Key Result #3	CEF staff are aware of and knowledgeable on local issues
Key Result #4	CEF maintains intentional relationships with local leaders and decision makers
Key Result #5	Approach efforts with a spirit of care

### Milestones (additional detail for each Key Result):

Responsive Member Services	<ul style="list-style-type: none"> <li>• CEF is regularly informed of Members' needs</li> <li>• CEF provides holistic support where Members feel whole, resourceful, and creative <ul style="list-style-type: none"> <li>◦ CEF provides responsive programming</li> <li>◦ CEF staff provide accurate and accessible information to Members</li> <li>◦ CEF staff know organizational capacity limits and communicate them transparently</li> <li>◦ Staff are aware of current events and community resources</li> <li>◦ CEF maintains accurate, updated resources</li> <li>◦ Mechanisms exist for clear, consistent Member feedback</li> </ul> </li> <li>• Trusting relationship with Members</li> <li>• CEF shares power with Members <ul style="list-style-type: none"> <li>◦ CEF explicitly acknowledges power dynamics between staff and Members</li> <li>◦ CEF shares power with Members</li> </ul> </li> <li>• CEF has a prepared and practiced group of Advocates <ul style="list-style-type: none"> <li>◦ Advocate training encourages critical thought and self-reflection</li> <li>◦ Advocate role is designed to be accessible to Members and other community stakeholders, especially those with lived experience</li> </ul> </li> </ul>
Strong and Adaptable Organization	<p>Culture of Trust</p> <ul style="list-style-type: none"> <li>• Open, consistent, multi-directional dialogue</li> <li>• Open and clear communication practices</li> <li>• Staff mutually assume good intent and respect one another's leadership</li> </ul> <p>Person-centered practices</p> <ul style="list-style-type: none"> <li>• Transparency around strategic decision making</li> </ul>

	<ul style="list-style-type: none"> <li>• Values-based, supportive policies</li> <li>• Encouragement of leadership in staff and Members</li> </ul> <p>Clear direction</p> <ul style="list-style-type: none"> <li>• Collective understanding of mission and vision</li> <li>• Clear organizational structure</li> <li>• Adapting to change is values-driven</li> </ul> <p>Connection to community</p> <ul style="list-style-type: none"> <li>• Maintain long-term relationships with Members and Advocates</li> <li>• Diversity of board, greater representation of the overall Durham and Orange County communities</li> <li>• Opportunities for community engagement (like being an Advocate)</li> </ul> <p>Secure funding streams</p> <ul style="list-style-type: none"> <li>• Long-term relationships with major donors and foundations</li> <li>• CEF is seen as an important part of the overall ecosystem -- thought as an important entity to invest resources into</li> <li>• Ongoing relationship with individual donors, cultivating opportunities for long-term engagement</li> </ul>
<p>Growing Through Partnerships</p>	<ul style="list-style-type: none"> <li>• Active and valued <ul style="list-style-type: none"> <li>◦ Attend partner events</li> <li>◦ Collective organizing in community</li> <li>◦ Seek feedback</li> </ul> </li> <li>• Interdependent System: <ul style="list-style-type: none"> <li>◦ coalition building</li> <li>◦ clarify efforts amongst partners</li> <li>◦ prevent duplication</li> <li>◦ Defined relationship between finances and partners</li> </ul> </li> <li>• Internal structures <ul style="list-style-type: none"> <li>◦ spreadsheets + systems</li> <li>◦ staff at all levels are involved/have a role</li> <li>◦ Scoping potential partners</li> <li>◦ Distinguish between partnerships and referrals</li> <li>◦ Clear internal structure that defines partnership roles</li> <li>◦ Clear and direct onboarding process</li> </ul> </li> <li>• Member-responsive prioritization: <ul style="list-style-type: none"> <li>◦ Designing partnerships to meet needs</li> <li>◦ CEF meets Member needs through creative, mutually beneficial partnerships</li> </ul> </li> </ul> <p>◦ Connection to the community enables CEF to prioritize</p>

## Impactful Organizing and Advocacy

- CEF's organizing and advocacy work is Member-led
  - Structure exists for Members to identify issues and name needs
  - Structure exists to regularly collect and incorporate Member voices
- Organizing and advocacy work has a supportive structure
  - Staff roles are funded and filled
  - Strong community relationships support advocacy work
  - Staff are clear about advocacy roles
  - Policies support consistent advocacy practices
  - Trainings aim to create consistent, prepared organizing approach
  - Organizing and advocacy team maintains a calendar of goals
- CEF staff are aware of and knowledgeable on local issues
  - info-sharing
  - Council meetings
  - local news
  - presence IN community spaces
- CEF maintains intentional relationships with local leaders and decision makers
  - staff of all levels
- Approach efforts with a spirit of care