



## **Community Action Organization Strategic Planning Team 4/4/96**

Present: Amy Brackin, Lori Balch, Carolyne Westlake, Carla Tungwenuk, Diane Hess, Pilar Kleier, Nick Green, Sharon Bolmeier, Cheryl Hilbert, Carren Woods, Leon Laptook, Debbie Wetzler, Katrina Pirkle, Sandra Miller, Chuck Carpenter, Jeff Fish, Jerralynn Ness, David Drake, Connie Sherrard

Expected outcomes of this session:

- Clarity about the purpose of the team
- Values statements, prioritized
- Accompanying principles
- Key opportunities

Working from the personal values identified in the last session, the group began to develop values statements that reflect the values of CAO.

Jeff Fish volunteered to "cluster" the values into categories. These categories were assigned to small groups so they could craft values statements and guiding principles.

The groups and clusters were as follows:

1. Achievement of goals, Empowerment, Self sufficiency, Strengths-based approaches, Responsibility, Effectiveness, Non-duplication, Teamwork: *Chuck, Cheryl, Debbie*
2. Respect, Dignity, Fairness, Justice, Honesty, Trustworthiness, Integrity: *Jerralynn, Jeff, Carolyne*
3. Helpfulness, Compassion, Humaneness, Service, Advocacy: *Sharon, Diane, Amy*
4. Dedication, Commitment, Excellence, Quality, Realistic Approaches, Frugality: *Katrina, Pilar, Sandra*
5. Broad-based approaches, Holistic approaches, Inclusiveness, Flexibility, Creativity, Proactive approaches, Change, Leadership, Independence: *Carren, Connie, Carla*
6. Employee growth, Employee achievement, Employee support: *Leon, Nick, Lori*

The groups drafted values statements and shared them with the larger group, who provided input. The small groups then got back together and began to refine their values statements and guiding principles.

Time was short, so each group assigned a representative who will take the work they have accomplished so far, finalize it, and turn it in to Connie by Monday, April 8. Connie and Leon will compile the values statements, and produce a draft values statement for the agency. The draft will be distributed to the planning team and Board before the next joint meeting, April 17.

Strategic Planning Kickoff  
Wednesday, March 21, 1996

Present: Cindy Hirst, Greg Zuffrea, Holly Grant, Katrina Pirkle, Carren Woods, Maria Loreda, Lupe Flores, Margaret Eickmann, Bob Shoemaker, Amy Brackin, Lydia Cruz, Leon Laptook, Diane Hess, Cheryl Hilbert, Sharon Bolmeier, Russ Wilkinson, Dick Stenson, Darlene Greene, Sandy Miller, Jeff Fish, Sherry Robinson, Pilar Kleier, Jerralynn Ness

Guest: Marc Smiley

Facilitator: David Drake

Recorder: Connie Sherrard

Marc Smiley presented a brief summary of the needs assessment, "the Face of Poverty." David Drake then asked that participants write down three thoughts/concepts/ideas that particularly struck them from the report and find three people to share them with. Afterwards, David asked for volunteers to share some of what they had discussed:

- 79% of people who live at or below 200% of Federal poverty level do not receive public assistance.
- Just one type of support is not enough; a variety of supports are necessary.
- People's vulnerability to crisis--one paycheck away.
- 1 of 5 people in Washington County lives at or below 200% of poverty.
- Work has lost its intrinsic value.
- The categorization of the poor--ie working poor, situationally poor, the new poor, chronically poor, etc.
- Invisibility of the poor--many struggling in the midst of affluence
- Affluence is paradoxically creating the category of working poor.
- How deep the poverty is.
- The difference between our awareness and that of the general public.
- Public stereotype of "chronic" poverty vs. the reality of poverty
- Recognition of the factors that can lead to poverty, i.e., disability.
- Connection of poverty to political and economic policy decision vs. "blame the victim" syndrome.

### **Strategic planning team 3/27/96**

Present: Sandra Miller, Sharon Bolmeier, Maria Loreda, Nick Green, Leon Laptook, Pilar Kleier, Cheryl Hilbert, Lydia Cruz, Diane Hess, Amy Brackin, Lori Balch, Carla Tungwenuk, Greg Zuffrea, Carren Woods, Holly Grant, Katrina Pirkle, Charlotte Karvia, Debbie Wetzler, Dick Porn, Jeff Fish, Jerralynn Ness, Andy Duyck, Chuck Carpenter, Cindy Hirst, Darlene Greene, Priscilla Orozco, Margaret Eickmann. Facilitator: David Drake Recorder: Connie Sherrard

### **Values we have seen demonstrated in our experience with CAO**

teamwork

future orientation (preparing people for the future, i.e., Head Start)

people are empowered to/given permission to act on things

effective use of people's strengths

helping people grow--supportive/opportunities to grow professionally

respect for individuals

open to ideas

represent the diversity of the community

self sufficiency

opportunities for people to achieve self sufficiency

### **Our experience with/feelings about money**

\$ does not bring happiness

didn't know poverty until compared with others

gave money away

schools should understand that not all can pay, should let people know that schools can help out

pay cash for everything

learning about mother's poverty led to understanding parents' values about money

parents lived through Depression--created wariness about feeling too secure about money

lost money given by father--lesson in responsibility, strong value of not wasting money

money = independence and maturity

## **Our personal values**

creativity  
flexibility

helping others

empathy  
respect  
tolerance  
equality

relationships--people are more important than things  
need to be needed

enjoying life

integrity  
follow-through  
personal responsibility

education

spiritual well-being  
balance, being in tune

## CAO's organizational values

promote achievement of goals  
empowerment  
self sufficiency  
independence/fostering independence  
strengths-based

realistic  
fiscally frugal  
responsible  
effective, non-duplicative

flexible  
creativity  
proactive

teamwork

broad-based approach  
holistic  
excellence  
quality

change

inclusiveness  
respect for self and others  
advocacy  
humane, helpful  
dignity  
fairness  
justice

compassionate leadership  
service  
committed  
dedicated

honesty/trust/trustworthiness  
integrity

supporting employees  
promote employee growth  
promote achievement of employees' goals  
value employees as whole people