



## CRA STRATEGIC PLAN 2021: DRAFT WORK PLAN

March 15, 2021

In 2014, the CRA Board was able to reimagine its role in the city and used a strategic planning process to compose a new mission, set strategic objectives, and identify projects and a staffing plan necessary to achieve its goals. The 2014 process considered the context at that time and the initiatives of the City and other organizations. The plan was based on Board and community engagement, research into the role of other Urban Redevelopment Authorities, and identification of potential projects.

Since then, the CRA staff has grown significantly, from two to now eight people. Many projects have been set in motion and completed, and the context in the City continues to change. Against this backdrop, the CRA is embarking on an update of its Strategic Plan. This document provides a draft road map for that process for discussion with the CRA Board.

### **2020-2021 Goals**

A preliminary set of goals for the current strategic planning effort are to:

1. Engage CRA staff in managing and shaping the strategic plan elements, with input from the CRA Board at key milestones.
2. Critically evaluate the CRA's strengths, challenges, and capacity through a review of key projects.
3. Identify current needs in the community or gaps in service that the CRA could be filling.
4. Determine how best to complement, partner, and/or extend the work of other community development organizations and the City.
5. Establish criteria for project decisions, addressing relevance to mission as well as whether to go broader geographically and/or to go deeper into specific topical areas.
6. Make strategic decisions regarding use of CRA funds, establishing priorities and identifying appropriate financial tools such as grants, loans, and technical assistance.

### **Strategic Plan Process**

The 2014 Strategic Plan is organized around a balanced scorecard (Kaplan 1996, 2004). This robust framework can be used again as we update the plan. The balanced scorecard considers four key areas that should align with and advance the central mission:

- External actions and relationships (projects, partners, maintenance, events, etc.)
- Internal operations (staffing, policies, office space, etc.)
- Financial considerations (budget, sources and uses of funding, financial tools, assets)
- Learning and growth (outreach, professional development, innovation, etc.)

In early 2020, we began to engage the staff and the Board (January 27, 2020, and February 12, 2020 respectively) to discuss needs in Cambridge and how the CRA might engage with the City and various non-profit partners to advance projects and programs that have a public benefit. The CRA Annual Reports between 2014 and 2019 were reviewed to understand the scope of work to date. Once the

pandemic hit in March 2020, other priorities took center stage, and the strategic planning was set on hold. During recent months, the CRA staff have been working on a number of initiatives that will inform the Strategic Plan, including evaluation of Forward Fund activities, Diversity, Equity, and Inclusion (DEI) planning, and revisiting investment policies among others.

### Strategic Plan Draft Schedule 2021

A preliminary schedule for planning activities is outlined below along with Board review and engagement timelines, for discussion and refinement. Some phases and tasks will be overlapping.

Month	Staff Forum / Deliverables	Board Review/Engagement
February	<b>OVERVIEW OF STRATEGIC PLAN PROCESS</b> Review 2014 Plan, Mission, and 2020 Draft Notes. Refine scope.	
February	<b>DISCOVERY PHASE</b> Update on staff projects (DEI, forward fund, historic plans) Establish Balance Scorecard framework <i>Learning &amp; Engagement:</i> brainstorm past stakeholders/partners, strategies for outreach to others	
March	<i>External Activities:</i> summarize recent and ongoing projects, inventory projects not pursued; draft evaluation criteria; review precedents	Board Update on Process – March 17th
	<i>Internal Operations:</i> review of policies, vendors; process to identify staff goals	
	<i>Financial Considerations:</i> financial status, approach, tools, and precedents for other financial tools	Engagement with individual Board members
	Summarize Discovery Phase to date and finalize engagement strategy.	Outreach to City leadership
April	<b>OUTREACH PHASE</b> Overall Discovery Phase report out: Define redevelopment authority broadly, refine findings from criteria, create survey content	Board Update on Discovery- April Meeting Schedule Stakeholder Interviews
	Refine external presentations, Prepare for Community Forum(s)	Stakeholder Interviews Launch Survey
May	Discuss opportunities across topics; Prepare for Community Forum	Stakeholder Interviews Community Forum –May/June
June	<b>MISSION ALIGNMENT</b> Rebalance external, internal, financial, and learning strategies	
	Rebalance external, internal, financial, and learning strategies; Prepare for Board Retreat	Board Retreat on Mission – June Meeting
	Refine and align mission and decision-making tools	
July	Summary and Presentation	Board presentation – July Meeting

## 2021 Proposed Work Plan

Working together as a team, the CRA staff will meet in a series of biweekly meetings to review and refine the work plan, carry out discovery tasks and share findings, reflect on engagement input, and shape strategic recommendations. At key points in the process, the CRA staff will review and discuss progress with the CRA Board and elicit input, including interactive work sessions.

### 1. DISCOVERY PHASE

#### 1.1 Learning, Growth, and Engagement

- a. **Partners and Constituencies:** The CRA works within a complex network of public, non-profit, and private organizations with many overlapping missions. Map relationships, priority partners, and key constituencies to define subsequent outreach strategies.
- b. **Review of Past Processes:** scour the documentation from previous outreach processes in Cambridge to understand community needs related to the CRA's mission.
- c. **Professional Development:** Identify recent and current professional development opportunities within the organization; identify gaps.

#### 1.2 External Activities

- a. **Recent/Ongoing Projects:** Establish a rubric for evaluation; critically review recent and ongoing projects; summarize findings in series of brief memos:
- b. **Precedents:** Identify other organizations that are taking innovative approaches and/or have relevant lessons to share; determine which precedents to research and which to interview.

#### 1.3 Internal Operations

- a. **Policies:** Review office policies and processes to understand how they advance or hinder mission and external activities, including DEI goals
- b. **Staff:** Summarize staff goals and targets; revisit job descriptions, incorporate DEI goals
- c. **External Vendors:** Summarize current list of external vendors, their capacity, procurement processes, and DEI metrics.

#### 1.4 Financial Considerations

- a. **Existing Financial Status:** Analyze CRA assets, annual budgets, and financial systems in terms of effectiveness and ability to realize the CRA mission and objectives.
- a. **Existing Financial Tools:** Analyze types of financial tools currently in use (technical assistance, grants, loans) in terms of effectiveness and ability to realize the CRA mission and objectives.
- b. **Precedents:** research potential financial tools, which could help achieve mission.

## 2. OUTREACH PHASE

### 2.2 Engagement Strategy

- a. Identify key stakeholders and focus groups to interview, weighing both strategic relevance to CRA mission and representation of CRA constituencies.
- b. Create an outreach email script; create a script/prompts for questions; and align staff to interview assignments.

### 2.3 CRA Board Interviews

- a. Match staff to Board members to conduct early interviews with individual Board member to gain their insights and perspectives.

### 2.4 Stakeholder Interviews

- a. Using CRA engagement protocols, deploy staff to reach out and interview stakeholders and document findings.

### 2.5 Community Forums

- a. Establish a strategy for community forums and other engagement tools.
- b. Set dates, find venues; advertise and outreach.
- c. Create materials to share info and prompt dialogue with participants; assign tasks.
- d. Hold forums and document input.

## 3. MISSION ALIGNMENT

### 3.1 Mission and Objectives:

- a. In a collaborative process with Board and staff, review and refine the mission statement, as necessary, to reflect findings from Strategic Plan process; revisit and finalize as process concludes.
- b. Review and refine objectives during the mission alignment phase, especially as it affects decision-making.

### 3.2 Learning, Growth, and Engagement

- a. Evaluate all the input received and other engagement findings against the CRA mission.
- b. Incorporate findings and recommendations on outreach strategies from the Inclusion Drives Innovation (IDI) and DEI processes.
- c. Identify opportunities to continue to learn and innovate, including future professional development.

### 3.3 External Activities

- a. **Potential Projects:** Drawing on interviews and community input, establish priorities according to CRA mission and community urgency; identify potential partners for key projects; identify measurable outcomes.

- b. **Decision Making Tools:** Define strategic areas of work by geography, topic, and need; refine 2014 Operating Principles and Decision Tree, and establish evaluation criteria to enhance decision-making processes.

### 3.4 Internal Operations

- a. **Mission Alignment:** Rebalance staff portfolios based on potential scope of external activities; revise job descriptions; identify gaps, new hires, changes to vendor procurement, if any; and revise policies as necessary.

### 3.5 Financial Considerations

- a. **Potential Financial Approach:** Project future revenues, especially against scope of external and internal activities.
- b. **Potential Financial Tools:** identify most appropriate financial tools given size of CRA operation and mission objectives, and summarize for board discussion.

Strategic Planning Advisory Committee

## ADVISORY COMMITTEE

Through discussions regarding our DEI goals, or over community engagement strategy, and the work plan for the Strategic Plan Update, the idea of forming an external Strategic Planning Advisory Committee has been raised multiple times. While the community outreach proposed above seeks to collect a broad set of inputs into the CRA's plan for the future, there are constraints around the scope of the CRA's work that are likely to evolve and require ongoing engagement with the community. The state law restricts the membership of the CRA Board; therefore, an Advisory Committee could serve as an additional structure for input. The CRA staff would like to discuss this concept with the Board including how to define its role relative to the Board and other engagement efforts.

## DELIVERABLES:

- **Discovery Report:** compilation of working memos from Discovery Phase; summarize in Board presentation.
- **Engagement Input:** compile input from interviews and community forums
- **Draft and Final Strategic Plan:** document plan in graphic report and presentation materials
- **Media Information:** Summary text and information for website and other CRA documents (e.g., CRA transportation annual report)