



# BMC, ICN, TCN Strategic Plan Report - 2023



Prepared for the Bucks-Mont Collaborative  
(BMC), Interagency Council of Norristown (ICN),  
and Tri-County Community Network (TCN)

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Prepared by



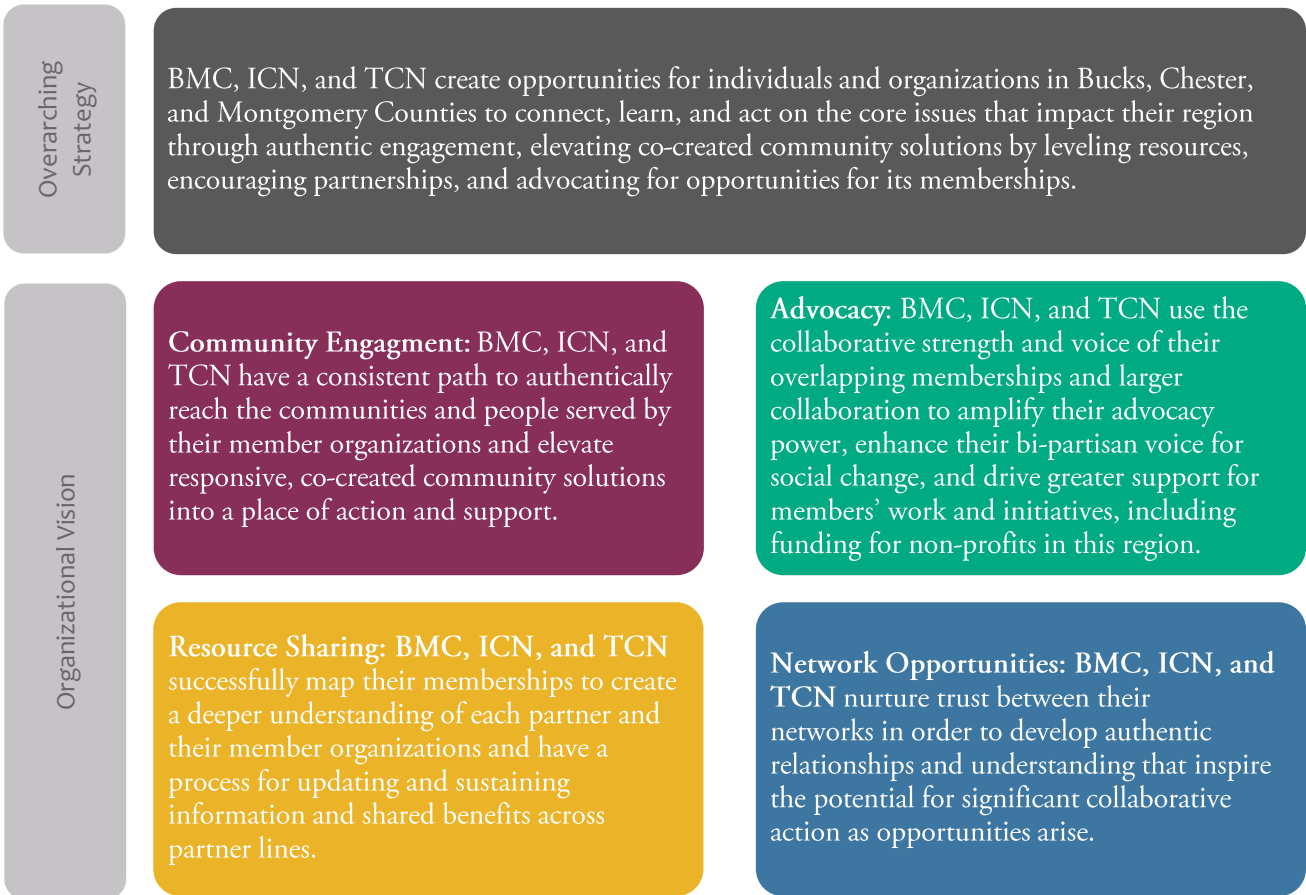
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## EXECUTIVE SUMMARY

The Bucks-Mont Collaborative (BMC), Tri-County Community Network (TCN), and the Interagency Council of Norristown (ICN) undertook a shared strategic planning process that sought to establish shared priorities and divide responsibilities to take strategic action. The process sought to build upon a recent successful history of close collaboration between the three partners. The strategic planning process engaged stakeholders from each collaborative in a research phase and brought together members of each Board to make strategic decisions and select the projects that will frame the collaboratives' shared work over the next few years. A summary of those strategic decisions is provided below.



### Two-Year Strategic Projects

1. **Community Engagement** - Enact a standard of approach to community engagement that elevates community voice and empowers action through the leveling of resources.
2. **Resource Sharing** - Capture what is offered by each partner and their members and judiciously share data and benefits to maximize the value of the collaboration.
3. **Advocacy** - Develop and steward trust with key stakeholders that leads to timely information sharing, actions, campaigns, and relationship building for advocacy and larger systemic change.
4. **Network Opportunities** - Build trust to advance networking, professional development, and information sharing, including issue-based affinity groups that builds community.

## INTRODUCTION

**Planning Project Objective:** Facilitate a strategic planning process for the Bucks-Mont Collaborative (BMC), the Interagency Council of Norristown (ICN), and the Tri-County Community Network (TCN) that establishes shared priorities and divides responsibilities between the collaboratives for strategic action.

In fall of 2022 the Bucks-Mont Collaborative (BMC), the Interagency Council of Norristown (ICN), and the Tri-County Community Network (TCN) sought to undertake a collaborative strategic planning process. The collaborative partners contracted with Strategy Arts, a Certified B Corporation strategic planning firm, to assist them with this effort.

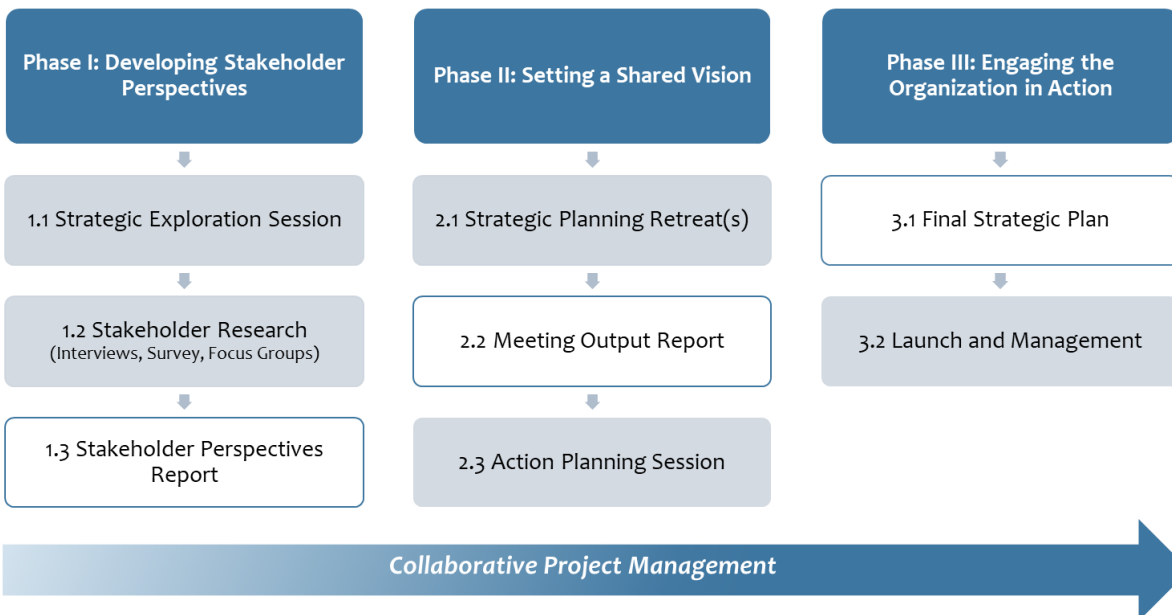


This strategic plan follows a recent history of close collaboration between the three partners that focused primarily on adapting and reacting to needs that emerged from the COVID-19 Pandemic and an increased focus on racial equity. Working together on these big issues seeded this opportunity for the three collaboratives to form a joint strategy and to build upon the strong relationship between each organization.

This plan seeks to identify overarching strategic concepts and specific projects that the three partners can hold-to in order to build stronger collaborative mechanisms, increase the individual and shared value for each member organization, and drive at creating a stronger, more impactful network across the region

## PLANNING OVERVIEW

BMC, ICN, and TCN followed three phases of Strategy Arts’ stakeholder-inclusive planning process. The project grounded itself with independent, inclusive stakeholder research during Phase I. It next established an aligned vision, overarching strategy, and specific projects in Phase II, and developed the tools to put the plan into action in Phase III. The process was held in place by recurring collaborative project management sessions that ensured the project would yield usable results for each partner.



## PHASE I: DEVELOPING STAKEHOLDER PERSPECTIVES

The first phase of the project focused primarily on conducting stakeholder research. Strategy Arts led three research activities that collected, assessed, and then reacted to stakeholder perspectives.



- Stakeholder Interviews – Nine interviews with individuals that were familiar with each of the collaborative partners
- Community Conversations – Two conversations with 15 BIPOC (Black, Indigenous, People of Color)-led or serving organizations recruited from the VNA Foundation of Greater North Penn Inclusion Grantees and the HealthSpark Foundation Dr. Frank E Boston Black Justice Fund Grantees
- Stakeholder Survey – 152 unique responses to a survey that received input from the members and stakeholders of each collaborative partner

The stakeholder research concluded with Phase I data presented to BMC, ICN, and TCN along with a set of considerations from Strategy Arts that suggested major strategic issues to be considered during the planning sessions in Phase II. The full report is linked in the appendix and available under the cover *BMC, ICN, TCN Collaborative Strategic Planning – Stakeholder Perspectives Report* dated February 01, 2023.

## PHASE II: CREATING A SHARED VISION

In order to form a shared strategic vision, define overarching strategies, and identify specific projects, Strategy Arts facilitated two half-day strategy planning sessions with the directors of each collaborative and selected members of each member’s Board. The sessions took place on February 15 and February 17, 2023. The content from these sessions formed the priorities and agreements that are presented in this final plan report.

The output of these sessions is linked in the appendix under the cover *BMC, ICN, TCN Strategic Planning: Meeting Output Report* dated March 06, 2023.

Following the retreat, the directors of each collaborative participated in a two-hour action planning session to further build out the details of each strategic project. The projects were developed to include specific task level detail, name project managers, and set timelines for each step of the plan’s completion. The initiatives were captured in Monday.com, an online project management platform, where permissions were shared so each individual has control to track, edit, and add to the tasks named during the session.

### Strategic Planning Session Outcomes:

- Draft a shared vision for BMC, ICN, and TCN
- Develop an overarching strategy for the collaboratives
- Identify a set of strategic projects for the collaborative partners to pursue

## PHASE III: ENGAGING THE ORGANIZATION IN ACTION

The final step in the process focused on the development and adoption of this report. Additionally, there will be a final Launch and Management session that will reinforce the significance of the strategic work and make agreements on how the plan will be managed over its life course.

## OVERARCHING STRATEGY

An overarching strategy establishes **policies and plans for action that guide an organization in relationship to its evolving ecosystem.** When developing a shared overarching strategy, BMC, ICN, and TCN responded to a need to access and elevate the perspectives of their communities into opportunities that can be acted upon. They also wanted to define who will be served and what the collaboratives’ roles will be in acting. While the strategy is broad, it speaks to an alignment point between the three organizations and builds up the collaboratives processes to be able to support current and emerging issues for the next five years.




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BMC, ICN, and TCN create opportunities for individuals and organizations in Bucks, Chester, and Montgomery Counties to connect, learn, and act on the core issues that impact their region through authentic engagement, elevating co-created community solutions by leveling resources, encouraging partnerships, and advocating for opportunities for its memberships.

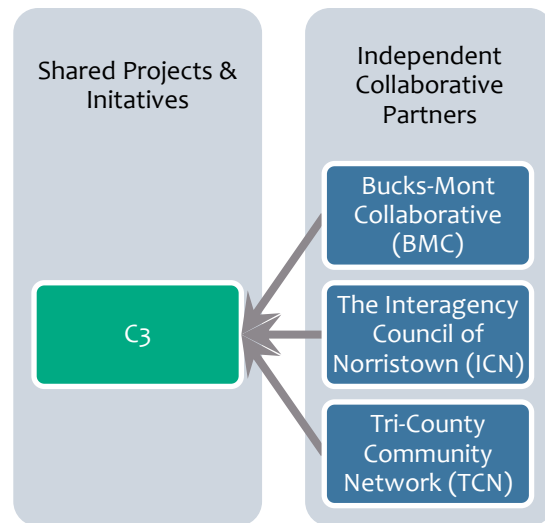
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### C3

The Bucks-Mont Collaborative (BMC), the Interagency Council of Norristown (ICN), and Tri-County Community Network (TCN) have used “C3” as an emerging name and potential brand for their shared projects and initiatives. This name was coined in fall 2022 to describe the work of the three collaboratives in response to COVID-19 pandemic recovery efforts.

During this process, BMC, ICN, and TCN were referred to as the “collaboratives”; “BMC, ICN, and TCN”; and “C3”. The shared name, C3, was referenced by some stakeholders in the research phase and during the strategic planning sessions. While the collaboratives decided to refer to themselves as BMC, ICN, and TCN in this report, it is possible that, as the strategy develops, they may choose to use the C3 name for their collective work.

Going forward, Strategy Arts recommends the collaboratives develop clear guidelines on when to use their shared name and when to refer to themselves as a collaborative or as individual organizations. Doing so will help to preserve the value of each individual organization while establishing a shared identity that can hold the overarching strategy in place.



## ORGANIZATIONAL VISION

BMC, ICN, and TCN looked five years into the future as they considered their vision for their collaboration. They agreed on four focus areas or broad concepts that provide categories to construct a picture of the future. These areas are **community engagement, resource sharing, advocacy, and network opportunities**.

The section below includes organizational vision statements that define a future state for the collaboratives in each focus area. Each vision statement is supported by vision elements that frame the critical supporting details.

### 1. COMMUNITY ENGAGEMENT



BMC, ICN, and TCN have a consistent path to authentically reach the communities and people served by their member organizations and elevate responsive, co-created community solutions into a place of action and support.

#### Vision Elements

- BMC, ICN, TCN have a consistent, recurring method for gathering input and feedback from the community/people served by the organizations that is safe for the individual to connect to, feeds actionable information back, and engages on significant regional issues (e.g. housing).
- The collaboratives offer specific-action plans to support grassroots and BIPOC led organizations across the shared memberships and geographic areas.
- BMC, ICN, and TCN partner with funders (e.g. the county and foundations) so they can fund projects that address issues identified by the community.
- BMC, ICN, and TCN are better at collaborative data collection.

### 2. RESOURCE SHARING



BMC, ICN, and TCN successfully map their memberships to create a deeper understanding of each partner and their member organizations and have a process for updating and sustaining information and shared benefits across partner lines.

#### Vision Elements

- The collaboratives have a shared resource map which is easily accessible to members (first) and the community (second).
- BMC, ICN, TCN consider how to support 2-1-1 with a team-approach that improves its effectiveness as the regional resource for human services.
- BMC, ICN, and TCN consider dues structures and systems that might support a collective membership with all three collaboratives.
- The collaboratives share institutional and internal resources to maximize efficiency and deepen their commitment to the C3 shared initiative.

### 3. ADVOCACY



BMC, ICN, and TCN use the collaborative strength and voice of their overlapping memberships and larger collaboration to amplify their advocacy power, enhance their bi-partisan voice for social change, and drive greater support for members' work and initiatives, including funding for non-profits in this region.

#### Vision Elements

- BMC, ICN, and TCN advocate for greater amounts of funding as a shared voice for the region.
- BMC, ICN, and TCN funnel the power of all of their member agencies when speaking to the government and community stakeholders.
- The collaboratives are a hub for issues-education, developing relationships with legislators, building advocacy strategies, and outreach that the community perceives as valuable and bi-partisan.
- BMC, ICN, TCN participates in and activates its members to work on specific issue-based policy across Montgomery, Chester, and Bucks Counties.

### 4. NETWORK OPPORTUNITIES



BMC, ICN, and TCN nurture trust between their networks in order to develop authentic relationships and understanding that inspire the potential for significant collaborative action as opportunities arise.

#### Vision Elements

- BMC, ICN, and TCN have an updated directory of members, contacts, and information that is shared among the collaboratives.
- Each collaboratives' members have access to thought leadership, best practices, and a forum for addressing urgent problems.
- BMC, ICN, and TCN serve as a strong partner in workforce development in the nonprofit sector - sharing job opportunities, professional development, and addressing barriers to equity in employment.
- The collaboratives establish issue-based affinity groups that build deep relationships for all members.
- BMC, ICN, and TCN's increased focus on networking creates a multitude of partnerships for members including mergers, grant ventures, and shared back office/support.

## STRATEGIC PROJECTS

Strategic projects are individual initiatives with beginning and end dates, that are specifically designed to improve an organization’s ability to pursue its overarching strategies and achieve its vision. Each project has a set of activities which are aligned sets of task level details that have a specific timeline and manager responsible for ensuring its completion.



Each project below has been fully developed in the online project management tool Monday.com. This tool will allow the collaboratives to track, edit, and expand the projects as they make accomplishments and learn more about what is effective.

BMC, ICN, and TCN’s strategic projects establish a set of actions for the next two years. While the organizational vision goes beyond this point, there are too many variables, decisions, and opportunities to plan beyond a two-year horizon in sufficient detail. However, using the tool and the processes established between the groups, they will be able to evolve each project and move it closer to achieving the vision in each focus area.

The summaries below show each project, its objective statement, the project manager responsible for guiding the project to completion, and the main activities for each project.

### 1. Community Engagement

<b>Objective:</b> Enact a standard of approach to community engagement that elevates community voice and empowers action through the leveling of resources		<b>Project Manager:</b> TCN & BMC
<b>Activities</b>	<ul style="list-style-type: none"> <li>1.1 Examine and select from best practices for community engagement from other collaboratives.</li> <li>1.2 Secure operational funding to do the community engagement work.</li> <li>1.3 Create a system for noting, tracking, and sharing community level data, with internal workflow.</li> <li>1.4 Develop a community advisory board or partnership to add consistent community voice.</li> </ul>	

### 2. Resource Sharing

<b>Objective:</b> Capture what is offered by each partner and their members and judiciously share data and benefits to maximize the value of the collaboration.		<b>Project Manager:</b> TCN
<b>Activities</b>	<ul style="list-style-type: none"> <li>2.1 Support the improvement and leverage the potential of 2-1-1 as a hub.</li> <li>2.2 Create a map and process to support understanding and collaboration between membership.</li> <li>2.3 Support institutional resource sharing.</li> <li>2.4 Identify a plan for shared membership.</li> </ul>	

### 3. Advocacy

<p><b>Objective:</b> Develop and steward trust with key stakeholders that leads to timely information sharing, actions, campaigns, and relationship building for advocacy and larger systemic change.</p>		<p>Project Manager: BMC</p>
<p><b>Activities</b></p>	<ul style="list-style-type: none"> <li>3.1 Develop a strategy for funders to understand and support the work of organizations (members and partners) and C3.</li> <li>3.2 Actively drive issues and serve as a hub for issues education, outreach, and action.</li> <li>3.3 Develop non-partisan voter information and mobilization materials in partnership with PA Youth Vote.</li> <li>3.4 Develop and maintain issue work groups (affinity groups) on identified priorities through CAB and other advocacy work.</li> </ul>	

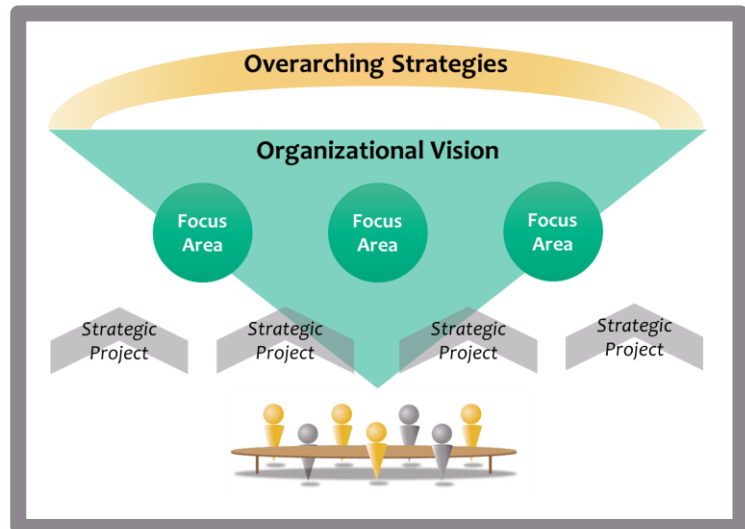
### 4. Network Opportunities

<p><b>Objective:</b> Build trust to advance networking, professional development, and information sharing, including issue-based affinity groups that builds community.</p>		<p>Project Manager: ICN</p>
<p><b>Activities</b></p>	<ul style="list-style-type: none"> <li>4.1 Create and utilize a platform for shared member information and C3 initiatives.</li> <li>4.2 Utilize the collaboratives as a means of professional development for member employees.</li> <li>4.3 Add common facilitation practices to meetings that allow for better collaboration and tracking collective action.</li> </ul>	

## APPENDIX

### STRATEGIC PLANNING TERMINOLOGY

- **Overarching Strategies:** Policies and plans for action that guide an organization in relationship to its evolving ecosystem
- **Organizational Vision:** A desired future state for an organization, defined with sufficient specificity and details to enable the development of a plan to achieve it
- **Focus Area:** Broad concepts that provide categories to construct a picture of the future that is time-bound and concrete
- **Strategic Projects:** Projects with beginning and end dates, that are specifically designed to improve an organization's ability to pursue its overarching strategies and achieve its vision
- **Objective:** Statements that operationally define an initiative
- **Activity:** The major steps (sets of tasks) in a project that are needed to achieve its objective\
- **Task:** The detailed project steps needed to complete an activity
- **Manager:** The individual responsible for a given tasks progress (they do not necessarily need to be the person doing the work)
- **Outputs:** Specific achievements in place once a task is finished
- **Milestones:** Major points in the project that are appropriate for board review



### DOCUMENT LINKS

*[BMC, ICN, TCN Collaborative Strategic Planning – Stakeholder Perspectives Report](#)*

*[BMC, ICN, TCN Strategic Planning: Meeting Output Report](#)*

*[Monday.com Board - BMC, ICN, TCN Strategic Projects](#)*