



2015-2017 Strategic Plan

Approved by the NACEDA Board of Directors on: December 12, 2014



Executive Summary

Organization Background

The **National Alliance of Community Economic Development Associations (NACEDA)** is an association of state and regional membership organizations who promote community development and affordable housing. NACEDA was founded in 2006. NACEDA’s founders believed that an organization was needed to advance a strategic, national community and economic development public policy agenda and provide peer-to-peer learning among organizations that support this agenda at the national, state, and regional level.

Mission Statement

Lead the community development field and its partners in shaping and influencing strategies that advance community prosperity.

Strategic Direction & Results

In the next three years NACEDA will seek to add value to the community and economic development field by being a: **service provider** for its members, **convener, advocate**, for the field and **partner** for those with interest in the health of low and moderate-income neighborhoods and people. NACEDA’s institutional strength comes from its strong relationships with community practitioners and relationally organized member-based associations at the national, state, and local level.

NACEDA is a:

| | |
|--------------------------------|--|
| Member-Service Provider | NACEDA will strive to provide value to its dues paying members. These services could include: financial resources, capacity building services, and relevant and timely information. |
| Convener | NACEDA sees itself at the center of an interwoven web of expertise and trusting relationships. Many connect through the middle. Others connect on their own. Trust is developed with and among participants by individual and small group interaction. |
| Advocate | Outside actors intentionally and unintentionally influence the ability of practitioners to develop low and moderate-income communities and neighborhoods. NACEDA provides a practitioner voice to outside actors, be they in government, philanthropy, academia, or elsewhere. |
| Partner | The community economic development field routinely faces challenges that are not solvable by existing means. NACEDA chooses to meet these challenges through partnerships built on overlapping interest, mutual trust, and shared responsibility. |



Acknowledgements

NACEDA extends a sincere thanks to board members, staff members, funders, and partner leaders who contributed time to inform this strategic planning process. Their perspectives were invaluable and were carefully considered in selecting the priorities reflected in this plan. A special thank you goes to Rose Scovel and the Indiana Association for Community Economic Development for donating their time and expertise to convene and guide this project.

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NACEDA Staff

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Other Interviewees

NACEDA Member: Staci Berger

Housing and Community Development Network of New Jersey

NACEDA Member: Gloria Bruce

East Bay Housing Organizations (Oakland)

NACEDA Partner: Lisa Hasegawa

National Coalition for Asian Pacific American Community Development

NACEDA Partner: Noel Poyo

National Association of Latino Community and Asset Builders

NACEDA Grant Relationship Manager: Paige Carlson-Heim

TD Bank

2015 - 2017 Strategic Planning Process Overview

Consultant Rose Scovel performed interviews in January and February 2014 with selected NACEDA board members, members, partners, staff, and funders to gather perspective about the organization. On March 13, 2014, the NACEDA Board of Directors and staff convened with Ms. Scovel to initiate the development of a new strategic plan. A working group of board members and staff were convened after the planning session to iteratively develop the following plan and product over a period of nine months.

Detailed Strategic Plan 2015 - 2017

Introduction

This strategic plan is intended to guide NACEDA in accomplishing its goals for 2015 - 2017. The goals and objectives offer direction about how NACEDA will allocate financial resources and focus staff and board time and energy for pursuing the organization's mission and achieving its goals.

This detailed strategic plan is organized in three sections.

- **Section I (Identity)** outlines the organizational identity of NACEDA. An organization's understanding of its identity is the anchor from which all work flows, including its strategic plan.
- **Section II (Environment)** includes a summary of key aspects of the environment that helped formed the strategic direction of this plan, and outlines the strategic direction and goals and objectives that will guide the work of NACEDA.
- **Section III (Objectives)** considers NACEDA's identity and environment to clearly state 15 objectives for the organization to accomplish by 2017.



I: Organization Identity

Organization Background

The National Alliance of Community Economic Development Associations (NACEDA) is an association of state and regional membership organizations who promote community development and affordable housing and building the capacity of our member organizations. NACEDA's founders believed that an organization like NACEDA was needed to advance a strategic, national community and economic development public policy agenda as well as promote peer-to-peer learning and support among organizations promoting this agenda at the state and regional level.

During its first seven years, NACEDA developed the reputation as a voice for the smaller, locally based community development corporations (CDC) and as an advocate for a progressive and robust affordable housing agenda. The organization prioritized relationships, growing from an initial 11 members to 43 state and regional association members representing over 3500 local community-based organizations and, therefore, thousands more community economic development practitioners. Key results during its first seven years include:

- A profitable and recognized Annual Summit that is important for members and partners.
- Providing members with access to federal officials on issues of importance to the field.
- Supplying sufficient value to its members by tracking federal policy issues, offering professional development opportunities specific to associations, and providing a platform for ideas-sharing and peer learning.
- An enthusiastic board of directors, membership, and staff.
- Professionalized communications infrastructure that enables us to advocate, share information, and build capacity.
- Unique partnerships developed to solve intractable problems.

Current Mission Statement

Lead the community development field and its partners in shaping and influencing strategies that advance community prosperity.

Meaning behind the Mission

"Lead the community development field and its partners":

State and regional associations for community and economic development organizations represent some 3500 organizations and thousands more professional staff and volunteers that are working on the ground, day-to-day to ensure all residents have the opportunity for a good quality of life in their neighborhoods and communities. The community economic development field and its partners work in a wide variety of areas including affordable housing, microenterprise, workforce development, small business development, commercial corridor development, financial services including banking and credit and more to attract and retain resources to urban and rural neighborhoods and communities across the US. NACEDA's mission



is to lead this field by offering a platform for it to convene new and traditional partners, inspire innovative strategies, and add critical capacity.

“Shaping and influencing strategies that advance community prosperity”

NACEDA, its members and its partners are experts in crafting ideas and mobilizing advocates to inform public policy, local, state and national initiatives and business strategies that build financially strong and welcoming neighborhoods and local communities. By shaping all three of these things, we shape the future of this work and help achieve community prosperity.

Core Operating Values

These core operating values - listed in alphabetical order - guide the way in which NACEDA wants its members and partners to experience us. NACEDA demonstrates its serious commitment daily by living out these core operating values in our work.

Assertive practitioner voice – An active, articulate, and thoughtful practitioner voice provides direction and clarity to the needs and strategies used to improve low and moderate-income neighborhoods and people.

Entrepreneurial and creative – We push the boundaries of what’s possible with fresh and risky ideas.

Expansive and evolutionary – We reach across fields and disciplines to create new opportunities for leadership and prosperity in local communities.

Reciprocal – We add value for everyone that participates with us by listening, learning, and sharing in solutions.

Relational – We exist because our members value us. And external partners value the relationships NACEDA fosters with its members and the broader field.

Pragmatic - We draw from the infrastructure of our members, and employ electronic technology and networking to be pragmatic and efficient with our resources.

Theory of Change

As NACEDA pursues its mission, its top priority is supporting its members and their members and partners in creating prosperous local communities. The approach of NACEDA to achieving its mission is rooted in the following underlying principles and beliefs about the value of community and economic development. These principles and beliefs guide how NACEDA develops and delivers our programs and services.

We believe that successful community economic development:

- Requires a long-term commitment;



- Must be comprehensive, drawing on all parts of a community and supporting improvement on many different levels;
- Demonstrates incremental improvement;
- Begins in many different places depending on a community's history and context; the key is to start is rooted in the themes of social justice while remaining culturally, ethnically, and racially relevant;
- Attracts private investment;
- Engages local institutions and residents that lead and own local change; and
- Builds and supports the voices of local leaders who understand both the needs and assets in their communities and have the wisdom to create local, regional, state and national policy solutions.

Customer Groups

Primary Customers

NACEDA's primary customers are relationally organized national, state, and regional associations of community economic development and their members and partners. This includes paid practitioner staff members, advocates, and volunteer leaders.

Secondary Customers

Supporting Entities: national funding intermediaries, and complementary national and regional organizations (i.e. builders, bankers, other nonprofits)

Audience

Mainstream media

Elected and appointed officials

Practitioners

Funders

Evaluators, thought-leaders, and scholars



II: Strategic Environment 2015-2017

Summary of Most Important Points in our Environment

The direction outlined in this strategic plan is a response to the opportunities and challenges NACEDA identified in its review of the current community economic development operating environment. This review was informed by member perspectives represented on the board of directors and research conducted by staff and consultants.

Key Environmental Drivers 2015-2017

- **Political**
 - Presently, traditional federal administrative resources (HUD for example) are not responsive in ways they have in the past or may be in the future.
 - The United States Congress will continue to force a narrowing of appropriations for neighborhood resources.
 - Elections in 2016 and 2018 offer an opportunity for new agenda items to come forward.
 - State and local policy will be where the action is
- **Economic**
 - Income inequality is increasingly problematic for our constituents.
 - The broader economy is responding to major changes in the healthcare field.
 - Regulation around banking (CRA) is not as responsive to community needs as it has been previously.
- **NACEDA's perception by peers, partners, funders, and members.**
 - NACEDA is seen as a CDC voice, particularly for small organizations.
 - Our leadership is viewed positively.
 - NACEDA is seen as a housing advocacy organization, though that perception is less pronounced now than before.
 - NACEDA is seen as an organization that is growing.
 - The organization does not have a 'signature' it is identified with (issues, message, identity/voice, or program).
 - Members see a major benefit provided by peer-to-peer learning.
 - NACEDA could do more to build capacity for its members.
 - NACEDA uses partnerships to connect the field with new trends and ideas. The organization could build on that reputation to strengthen itself.
- **State of CDCs; evolution of the field; trends**
 - The environment for CDCs increasingly calls for collaboration and partnership with diverse entities.
 - The number of CHDOs may be shrinking, particularly due to the regulations laid forth in the 2013 HOME rule change.
 - CDCs are seeing isolated examples of merging and closures.



- CDCs are more open to new lines of business, thinking of themselves through a social enterprise lens: healthcare, arts and culture, public safety, and financial empowerment.
- Traditional business lines (including counseling and housing development) no longer provide the organizational revenue needed for sustainability. And that revenue is not seen as returning in the foreseeable future.
- Significant competition from community non-profit organizations, national non profits, and private sector companies that are newer to the community development space.

Strategic Direction & Results 2015-2017

The following strategic direction and goals and objectives are a response to key environmental drivers identified by NACEDA board members, partners, and funders during our strategic scan. NACEDA will work through and with its members and partners to connect local practitioners to a national movement designed for their unique needs and attributes. The connection will foster: linkages to new trends and resources, greater advocacy strength, and tighter bonds among members and practitioners.



III. Goals & Objectives

NACEDA's identity will have four cornerstones, that of: partnership, advocacy, capacity building, and organizational resiliency. The cornerstones position NACEDA and its members as national connectors and spokespeople for community-based development organizations.

A - Partnership

NACEDA partnership definition: *"A partnership is a collaboration between two or more parties from the civil, private, and/or public sectors to improve the condition of a target population using the assets and resources of all the parties, along with other contributions, under a set of specified terms and conditions."*

Objective 1

Form and collaborate in 3-5 close partnerships with other national or regional entities, with the goal of connecting practitioners with broader trends and resources affecting their communities. Success will include those 3-5 partnerships: meeting regularly, agreeing to a decision-making process, and defining clear goals and implementing activities targeted at a specific population.

Immediate partnership opportunities exist among the arts, health, and financial empowerment/services sectors. Partnerships with those sectors are to be explored first.

- Potential partners can be regional in nature, for example with NACEDA's regional caucuses.
- Potential partners can be industry-based, for example, utility companies, green development entities, or for-profit developers.
- Potential partners can be topical in nature, for example, transportation-oriented organizations, arts & CED groups, health care and hospitals, attracting (and keeping) young people to community development, environmental groups, and labor unions.

Objective 2

Form a funded, functional, and governed partnership collaboration with other member-driven community development associations (CAPACD, NALCAB, etc.)

- Success will be measured by meeting the attendance (500 people) and fundraising (at least meet expenses) goals for our joint conference in Spring 2015.
- Success will be achieved by securing longer-term funding to coordinate activities.
- Success will result in a relevant, clear, and strategically effective policy agenda agreed to by the partners and their members.



B - Capacity Building and Member Services

NACEDA believes that low and moderate income neighborhoods have the opportunity to thrive where strong networks of community development practitioners exist and languish when such networks are weak. NACEDA's goal is to build the capacity of these networks with: *sharing, tools, and information.*

Sharing

Objective 1 - Summit: Convene annual summit of associations. The NACEDA Summit will achieve three primary goals. Success will be measured by the metrics listed under each goal:

Goal A: Association Capacity Building

- Offer at least three professional development-oriented sessions at each summit. The sessions are to be designed for non-management level staff of state and regional associations within NACEDA's membership.
- Each summit should draw representation from no less than 60% of NACEDA's member associations.
- Recruit at least two responses to the 'Host-city RFP' each year, making summit-hosting a desirable activity.

Goal B: Idea inspiration

- Engage at least two new partners to help NACEDA's members stay informed of trends in the field.
- At least twenty-five percent of summit attendees should be from outside NACEDA's core membership.

Goal C: Raise money

- Each summit should raise net funds for NACEDA, ideally raising at least 30% more than the direct expenses.
- NACEDA will raise 'break-even' expenses from traditional national sponsors and registrations.
- Net positive dollars are to be raised from sponsors local to the host association.

Objective 2 - Communications: NACEDA's communications plan engages the community development field around relevant and timely information pertaining to: trends, resources, best practices, and advocacy opportunities.

Goal A: Disseminate

- Newsletters – 12/year with an open rate of 20% or more
- Friday Tidbits - 45/year or more.
- Promotion of the NACEDA Summit with "Sneak Peek" blogs on content - at least 4/year



- Promotion of People & Places Conference with blogs that highlight content - at least 4
- Maintain 60%+ of NACEDA member email lists to our mailing list.
- Gradually increase number of social media followers.

Goal B: Engage

- Six or more blogs per year on practitioner trends and achievements.
- Retain a timely and prudent strategy regarding action alerts on federal legislation and funding on topics identified by the policy committee.
- Follow members' social media sites and re-post content related to trends and best practices.
- Promote disseminated pieces via social media.

Goal C: Measure

- Develop a new contact relationship management (CRM) system that makes measurement easier.
- Use our communications strategy to drive more traffic to the NACEDA website.

Objective 3 - Affinity Groups: NACEDA's affinity groups add to member capacity by relying on the expertise and creativity of the network. NACEDA's model for affinity groups is unique. NACEDA and members must both have ownership over activities and direction in order for the groups to remain meaningful and active. NACEDA will help in the development of:

- Two to four geographic affinity groups.
- And at least three professional development affinity groups among NACEDA members (communications professionals, training managers, executive directors, etc).
- Provide content suggestions and administrative support.

Groups/members must:

- Maintain a meaningful level of participation.
- Designate a 'chairperson' or similar to finalize the agenda for meetings.
- Set annual or regular goals.
- Respond to feedback mechanisms generated by NACEDA staff on the group's value and direction.

Tools

Currently NACEDA offers its Grantstation program, NDC discounts, and a Rooflines/Shelterforce subscription. While, members find these tools valuable, they also recognize the need for them to be financially sustainable for NACEDA.

Objective 1

Grantstation should generate at least as much revenue as the direct cost of licensing.



Objective 2

Additional tools offered as a member benefit should not be considered unless a plan exists for them to be cost-neutral.

Information

NACEDA is distinctively positioned to gather information from the field that is unique to the work of state and regional CED associations. Given NACEDA's theory change, information gathered by and on NACEDA's members must remain critical to maintain and grow capacity in its membership.

Objective 1

NACEDA will conduct a comprehensive survey and report on its membership at least every three years, to include: budgets, memberships, governance, programs, attitudes, compensation and other areas.

Objective 2

NACEDA will conduct an ongoing in-person listening tour of member associations. The tour will culminate in some sort of final product (blog, written report, article, summary etc.)

Objective 3

NACEDA will remain responsive to partners and funding entities desiring deeper and narrower analysis on issues/topics relevant to member associations. (Past examples include, arts and culture, financial empowerment, CDC survey)

C - Policy and Advocacy

NACEDA proactively asserts the community economic development voice in advocacy, academia, thought-leadership, and philanthropy. Simultaneously, NACEDA observes and prudently protects models and programs of value to practitioners.

Objective 1

Be proactive

NACEDA develops a policy framework with National CAPACD, NALCAB, and the National Urban League that:

- Provides for and/or shapes resources to the needs of community development practitioners and the communities they serve.
- Empowers nonprofit community developers to be more effective and efficient.
- Improves the lives of low and moderate-income neighborhoods and communities of color.
- Is identified as a product and priority for NACEDA and its partners in the collaboration.
- Capitalizes on the strengths of additional national partners (NCRC, NLIHC, NWA, etc.) as appropriate.



Objective 2

Be protective

For communications and information purposes, NACEDA observes the advocacy-related trends of programs, agencies, and public resources that affect the work of community practitioners.

- Play an observatory role in up to five advocacy coalitions that cover programs effecting community development. Share that information with the field.
- Place a priority on direct advocacy (ie, with a legislator or decision-maker) only when a practitioner or community member can actively participate through the coalition.
- NACEDA will assist member associations with state and local advocacy efforts when called upon.

D - “Resilient NACEDA”

NACEDA thrives financially with sufficient infrastructure to support its mission and aligns its operations with the goals set forth in this strategic plan.

Objective 1

Financial Stability

NACEDA’s finances became more stable in 2013 and 2014. Future growth will require continued vigilance by staff and board members, creativity, and investment by members and grantors.

- Develop reliable multi-year funding and revenue opportunities that support an expanded staff and earned income - 180 days of operating support in the bank at all times.
- Update NACEDA’s member dues structure by the beginning of 2016, if not 2015.

Objective 2

Steady operational and staff growth

NACEDA’s day-to-day operations must grow during this strategic plan in order to achieve the goals set forth. NACEDA must add staff capacity, at a minimum one more FTE, in either a member services and/or advocacy capacity.

Objective 3

Governance modifications

The composition and role of NACEDA’s board of directors must remain relevant, diverse, and representative of the organization as it grows.

- Staff of board members will be actively engaged in NACEDA committees/groups.
- Board membership must be expanded to represent the general membership, as needed. For example, web members (Grantstation members) should be included on the board of directors.
- The board of directors is to initiate a process to explore a modest change to NACEDA’s name.



Implementing the Plan

Successful implementation of this strategic plan requires a consistent commitment and shared leadership between the Board of Directors and staff. To support implementation of the 2015 – 2017 strategic plan, the NACEDA Board of Directors and Staff will

- **Track & Improve Performance**
 - Staff develops and continually updates an annual implementation action plan.
 - Board reviews strategic plan progress twice per year.
 - Board uses the plan as a framework for assessing annual performance of the Executive Director.
 - Executive Director uses the plan as a framework for assessing annual staff performance.

- **Align Financial Resources**
 - Board and Executive Director annually align the organization’s budget with strategic plan goals and objectives.
 - Board and Executive Director consider sources of funds to support new strategic initiatives.

- **Update the Strategic Plan**
 - Staff regularly seeks input from members and their members and partners about issues affecting local community economic development. .
 - Board formally reviews progress on strategic plan implementation, reviews the relevance of the strategic plan, and considers an update of the plan at least every 12-18 months.