



# Strategic Planning Best Practices Toolkit

**C**ongratulations on being selected for a Gateways for Growth Technical Assistance grant! The Gateways for Growth Team has put together this toolkit to help guide you through the process of building a comprehensive strategic plan for immigrant integration. While every community planning process has its own challenges, after helping awardees through the first few rounds of G4G, we noticed a few questions that arose in many communities around the country. The information we shared in response—how to organize the initial stages of the planning process, how to best incorporate community feedback, how to structure the written plan, etc.—forms the backbone of this best practices toolkit. Please read this toolkit in full before any formal planning meetings are held, and look forward to working with you this year!

For more information, contact your G4G point person or email [Challenge@GatewaysForGrowth.org](mailto:Challenge@GatewaysForGrowth.org).

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## CHAPTER ONE: ORGANIZING THE PROCESS

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You have been selected for a G4G Technical Assistance grant because you have shown commitment from local partners across sectors to build a comprehensive strategic plan for immigrant integration. Ideally, you have partnerships between local government, community leaders, and the business community to help lead this effort. It is important to keep these partners actively involved throughout all steps of the planning process, from beginning to end, and even after the plan is completed. How to do that is outlined in this chapter.

### STEP 1: Lay the Groundwork

Ensure an individual is able to devote at least five hours per week to lead the planning process from start to finish. This person should begin by connecting with key government, community, business, and philanthropic partners about potential needs and establishing an initial vision for the process. Identify resources for staffing and running the process. By the time you begin working with the Gateways for Growth Team, much of this work will already have been completed.

### STEP 2: Establish the Planning Team

Successful planning processes bring many partners to the table. Some processes engage 15 to 20 people; others engage 100 or more. No matter the number of people you want to involve, a smaller group of core partners that convene and support the work behind the scenes (a “planning team”) is needed to give direction to the process. This is a smaller group than the full task force or steering committee (discussed in the next chapter) that will help guide the process substantively. You may also wish to hire an outside coordinator to help manage the process and handle meeting logistics.

1. Identify members of the planning team. This should be a small team (usually two to four individuals) who will make key decisions regarding the planning process and be the points of contact with the Gateways for Growth Team.
2. Set expectations with members of your planning team. How many work hours do you think they will be required to work on the process? How many times do you anticipate needing to meet? These can be estimates; A formal schedule will be decided later. We recommend planning teams touch base for at least one hour per week to move the process along.
3. Identify an outside coordinator. Many communities find it helpful to hire an outside coordinator to handle logistics like setting agendas, leading meetings, and meeting deadlines. This is recommended if your budget allows. If you received a matching grant through G4G, those funds can be used to hire this person.

#### SPOTLIGHT ON

#### ANCHORAGE, AK

In Anchorage, AK (G4G Round I), a small team of representatives from city government, the local school district, and the local economic development corporation led the planning process. They engaged a larger steering committee (discussed in the next chapter), as well as community volunteers to get feedback on their plan, which was adopted by the City in September 2017.

*See a detailed list of parties involved in this plan and others in the Appendix.*

### STEP 3: Design the Process

At this phase, the core team and coordinator (if you have one) design the planning process, answering questions such as: Who else should be involved? Who makes final decisions and how? How long will the

process last? How will the results be shared with the community? What information is needed to make sound decisions? A key part of this step is creating a timeline with key milestones to keep you on track. This is likely to change over time but whatever you come up with at this stage will be a good reference point.

#### SPOTLIGHT ON

### AKRON, OH

The International Institute in Akron, OH (G4G Round I) began their planning process with a high-level leadership summit hosted by the mayor and the county council president in June 2016. The process culminated with the release of the Strategic Welcoming Plan for Akron and County of Summit: Phase One in October 2017. Implementation is ongoing.

*See a detailed version of this timeline and others in the Appendix.*

## CHAPTER TWO: ENGAGING PARTNERS AND COMMUNITY FEEDBACK

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### STEP 1: Identify and Engage the Planning Participants

After you design the process and the timeline, key participants are identified and recruited. This may result in the creation of a formal body, such as a steering committee, which would be made up of community leaders from multiple sectors (e.g. government, business, non-profit). Later, you may choose to further break out your steering committee with sub-committees or working groups focusing on specific issues areas.

1. Meet with your planning team to decide the structure of your steering committee. At this stage, decide

#### BEST PRACTICES

- ▶ **Be sure to include representatives from the immigrant and refugee communities on your steering committee.** Other taskforce members can come from education, government, business, legal, immigrant and refugee serving, transportation, faith, and healthcare organizations, or other sectors, but it is important to include direct representation of the immigrant community in the process.
- ▶ **Planning committees will often focus the work of planning processes into themes, and sub-committees will reflect those themes.** Members of the working group or task force will break into smaller groups according to their expertise and interest area, and lead more in-depth, often community-focused conversations. We recommend the following: Equitable Access to Services, Economic Development and Education, Civic Engagement, and Safe and Connected Communities.
- ▶ **Consider using Welcoming America's Welcoming Standard as a framework for planning.** The Welcoming Standard provides a comprehensive roadmap for immigrant inclusion and serves as the backbone of Welcoming America's Certified Welcoming program, a formal recognition of welcoming for city and county governments. Planning around the Standard can set communities up for certification should they chose to seek it down the road.

how many people your steering committee will include, what sectors will they represent, if you will include sub-committees or working groups, and what members will be responsible for throughout the process.

2. Set expectations with members of your steering committee, like goals of the process, work hours expected, and number of meetings required.
3. Create a system where decisions made by the working groups are funneled up to the steering committee (e.g. by having a member of the steering committee sit in on each working group meeting).
4. Set and share a meeting schedule. Prepare for meetings by writing an agenda, sharing relevant materials, and reserving a comfortable meeting space.
5. Kick-off the planning process with a public event or press conference and invite steering committee and members of the community.

SPOTLIGHT ON

**INDIANAPOLIS, IN**

The Indianapolis Immigrant Welcome Center in Indianapolis, IN (G4G Round I) worked with a team of graduate students to develop and distribute a survey to immigrants in the city. The results of that survey played a major role in the plan Indianapolis ultimately produced.

*See results from this and other surveys in the Appendix.*

**STEP 2: Gather and Assess Data on Community Needs and Assets**

Before drafting recommendations, you should ask the following questions: What is the area currently doing to attract, welcome, and integrate immigrants, and where are the gaps? Research partners like local professors or research-oriented nonprofits can be great collaborators in providing additional data, particularly around business or economic case to both inform and strengthen support for efforts. Many planning committees also place a strong emphasis incorporating community or resident input through surveys, focus groups, town halls, and other forms of dialogue. Members of the steering committee will also have important insights on what needs should be addressed through the planning process.

**STEP 3: Conduct the Process**

Length of the planning processes has ranged from 12 weeks up to a year or more and involves regular and well-facilitated interactions among participants. The process should culminate in the creation of a written plan that identifies a community vision, goals, strategies, and tactics, benchmarks, as well as the resources that exist or are needed to achieve them. A few key parts of the process are outlined here, and you may refer to Welcoming America’s **Community Planning Process Guide** for additional detail.

1. Assess strengths, needs, and resources. An important part of the process will be to lean on subject matter experts and to identify areas of strength and the availability of community assets that your plan can build on; unmet

**BEST PRACTICES**

▶ **NAE has developed a best practices guide with tips for getting community input, as well as examples of surveys from communities across the country.**

Our partners have used town hall meetings, focus groups, and surveys to solicit feedback from residents on their experiences and priorities. These feedback tools can help identify where there are gaps in services or barriers to accessing services and inform a strategic plan to create a more welcoming environment where all residents can succeed. See that resource **here**.

needs within your community that are limiting the achievement of its full potential; and resources that either have the potential to promote the execution of your plan or that need to be developed in order to overcome a potential roadblock.

2. Establish goals and objectives. Based on your detailed assessment of strengths, needs and resources, you should set priorities for action. These priorities will lead you to establish your goals and objectives. Goals come first: they are high level overarching principles that represent an ideal, or something close to it. Objectives support the goal with tangible, measurable outcomes.
3. Design action steps for achieving objectives. Just as every goal will be supported by a number of objectives, every objective will be accomplished by taking a well-defined set of action steps.
4. Measure progress and evaluate outcomes. Although tracking outcomes and measuring success are really continuous elements of your planning process, most of the focus on outcomes will be at the end of the planning process. This step brings the entire process back to the beginning (full circle) in that outcomes relate inextricably to the goal.

## CHAPTER THREE: WRITING AND PUBLISHING YOUR PLAN

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### STEP 1: Writing the Plan

This step is in many ways the culmination of all your work of the last few months. You should devote six to eight weeks to solely drafting the plan, and expect a few rounds of revisions as you receive recommendations from your steering committees or working groups, compile them, and share them with your planning team.

1. Include any available data as rationale for why an immigrant integration plan is necessary in your community. If you are receiving a Research Award from the American Immigration Council through Gateways for Growth, information from the award may fit well in an opening section of your strategic plan.
2. List or describe the partners involved.
3. Summarize data from community feedback portion of the planning process, including gaps and challenges identified.
4. Explain your recommendations for immigrant integration.
  - a. State your goals followed by recommendations to reach them and a list of clear action steps for each. Keep the language here brief and easy to understand.
  - b. If you have settled on more than 20 recommendations, prioritize 10 to 15 key ones to feature at the top of this section.
  - c. Make sure to standardize the drafting process across working groups (both as they are being written, and by having the planning standardize language once the steering committee leads or working groups submit their drafts.)

#### SPOTLIGHT ON

#### DALLAS, TX

Dallas, TX'S Office of Welcoming Communities and Immigrant Affairs (G4G Round II) produced a strategic plan for immigrant integration in 2018. In the plan, they walk through the initial planning stages and the community feedback process before diving into goals and proposed activities for immigrant integration. Many plans do the same.

*See the table of contents from Dallas's plan and others in the Appendix.*

- d. Include the lead organization(s), timeline, and budget consideration for each recommendation. Prioritize actions in short term, mid-term, and long term categories.
5. Design your plan. Designing the plan with graphics, clearly defined sections, and photos can make the document more accessible and easier to understand.

## STEP 2: Finalize, Publish and Disseminate the Plan

Transparency and communication are hallmarks of a successful effort, and once completed, it is important to share the plan not only with participants and partners leading implementation, but with the wider community to highlight the expected impact and benefits for all community members, both recent arrivals to and long-term residents.

1. Create a communications strategy for the release of your plan. This should include agreeing on the messages that you think will resonate with key audiences in the community. Communications framing that emphasizes how all residents will benefit from the plan (not just immigrants) typically work best, and engaging highly credible spokespeople from your task force in the communications effort is also beneficial.
2. Hold an event to mark the release of the plan. Ideally, the plan should be released at a public event featuring leaders from local government, the community, the business community, and any other organization that has played a large role throughout the planning process, or who you would like to be involved in its implementation. Some communities choose to have their G4G staff site visit occur in conjunction with this event, seeing it as a way to strengthen local and national recognition of their work.
3. Notify press of the release of the plan to maximize chances of it being covered in local news outlets. Send out a media advisory or a press release about the plan release event. Encourage partner organizations to do the same.
4. At the same time, plan an initial meeting with all stakeholders to make sure they remain aware of expectations for implementing various parts of the plan. Consider holding regular meetings and designing a work plan to ensure each piece of implementation stays on track (discussed in the next chapter).

## CHAPTER FOUR: IMPLEMENTING YOUR PLAN

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### STEP 1: Implement, Monitor and Adjust the Plan

Well-designed plans involve many partners in implementation, which means there may be significant coordination and often a staggered approach to implementation because some activities may be easily carried out, while others require resource development or further design. Plans should be viewed as living documents that can be revisited, and from time to time, updated in consultation with the community.

1. Make sure someone remains in charge of the process to keep implementation moving forward.
2. Continue to convene your planning team to monitor efforts and ensure that the plan is carried out, meets established goals and metrics, and is refined as needed.

#### SPOTLIGHT ON

#### SALT LAKE COUNTY, UT

In June 2018, a year after completing their Gateways for Growth grant and publishing a strategic plan for immigrant integration, Salt Lake County (G4G Round I) was deemed Certified Welcoming by Welcoming America. SLCO was the first community in the country to receive this distinction.

3. Keep in regular contact with partner organizations to make sure they understand their role in the plan's implementation.
4. Publish formal quarterly or biannual progress reports. This provides accountability to the planning team and keeps community partners informed on how implementation is progressing.
5. After six to twelve months have passed since plan implementation begins, consider having your community's integration work evaluated through existing programs like Welcoming America's **Certified Welcoming** or check your progress on the **NAE Cities Index**.

## **CHAPTER FIVE: EXAMPLE RECOMMENDATIONS**

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Many communities have already undergone a strategic planning process and produced strategic plans for immigrant integration. The Gateways for Growth Team alone has helped produce over 30 strategic plans in communities large and small around the country, so we know firsthand that communities do best when they learn from each other. Besides best practices for the planning process, plans and programs out of other communities are excellent resources for you to consult as you decide how to address the needs of your own immigrant and refugee populations. The **NAE Cities Index Best Practices Guide**, which summarizes some of the best integration strategies, initiatives, and programs from around the country, is one place to start collecting this information. Welcoming America offers its own **Community Planning Process Guide**, and G4G recipients are also encouraged to explore WA's **Welcoming Standard**.

## **CHAPTER SIX: OTHER WAYS TO STAY CONNECTED**

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Many participants recognize the value of being part of a peer network of leaders who are working to advance welcoming efforts across the nation. Through G4G, you have the opportunity to join the Welcoming America Network, where you can engage with local governments, nonprofits, and others working to advance inclusion in their communities.

To learn more about the network and how to get more involved, visit [WelcomingAmerica.org](https://www.WelcomingAmerica.org).

**SEE APPENDIX ON FOLLOWING PAGE**

# Appendix

Here you can find examples from immigrant integration plans from around the country.

## Chapter One, Step 2: Establish the Planning Team

### THE 5-PARTNER "GATEWAYS FOR GROWTH CHALLENGE TEAM" (AKA PROJECT TEAM)

**THE STRATEGIC WELCOMING PLAN PROCESS WAS A PARTNERSHIP OF FIVE ORGANIZATIONS. THE PARTNERSHIP MET ON A REGULAR BASIS TO OWNERS THE ENTIRE PROCESS FROM THE WRITING AND PUBLICATION OF THIS PLAN.**

**County of Summit**  
 Drew Kelly, Executive Assistant to County Executive Shupe  
 Summit County sits in the Northeast region of the state of Ohio. The County is home to forty-one distinct municipalities, ranging from large cities to small townships. Located immediately south of Cuyahoga County (Cleveland Metro), it is also surrounded by Portage, Stark, and Medina Counties. As of the 2010 census, Summit County is home to 54,178 people, making it the fourth most populated County in Ohio. The Summit County Executive's Office serves as the administrative branch of Summit County government.

**Summit County Executive Line Shupe** also oversees 3 different departments: Community and Economic Development, Finance and Budget, Human Resources, and Small Family Services, Law, Insurance and Risk Management, Safety, Senior Services and the Medical Center. "Providing a breadth of services to the County, The Executive's Office is also the overseer of the County's budget. The Executive's Office is a proud partner of the Welcoming project, working to assist and provide for all citizens of Summit County, regardless of their race or national origin.

**Asian Services in Action, Inc. (ASIA)**  
 Michael Ryan, CEO  
 Founded in 1999, ASIA, Inc. and International Community Health Centers (IHC) initiatives that individuals, families, and communities are at risk of health and well-being. ASIA believes in a "no wrong door" approach that goes back to the traditions of welcoming refugees to the United States. ASIA is a non-profit organization that provides services to newly arrived people of all race, creed, and ethnic background. ASIA is a proud partner of the Welcoming project, working to assist and provide for all citizens of Summit County, regardless of their race or national origin.

**Global One Team**  
 Michelle Wilson, Executive Director  
 Global One Team brings 40 years of experience in welcoming the world to the local community and creating opportunities to celebrate and build mutual understanding of Akron's diverse population. Global One Team programs include: developing professional and educational programs for youth and offering Global One's services to welcome international students, scholars and immigrants. Global One Team programs integrate academic, cultural, organizational and personal skills between northeast Ohio and the world.

**City of Akron**  
 Anna McAllen, Deputy Chief of Staff to Mayor Herrigan  
 Akron is the 16th largest city in Ohio with a population of over 197,000. The city is governed by the Mayor and City Council with the assistance of various departments and agencies and commissions. Akron consists of 24 neighborhoods many of which have rich traditions and characteristics. Akron is a gateway for growth to the northeast and southeast corridors. Originally known as a workforce powerhouse in rubber manufacturing until the mid-twentieth century, Akron has now diversified to business sectors, with major operations in Goodyear, Geop Industries, First Energy and Huntington Bank as key employers. Akron continues to evolve into a higher creative and innovative center for excellence, with economic focuses in manufacturing, education, healthcare, and biomedicine. The city has been a known leader for new Americans for generations. Akron continues to be a proud partner in the welcoming movement, as history has shown that the city truly benefits from a diverse population.

Akron, OH

### Our Process

The People

A Core Team brought the resources and energy to drive the development of the roadmap. The core team consisted of the major partners in the grant:

- First Lady of Anchorage, Mara Krimmel
- The Municipality of Anchorage, Office of the Mayor staff Amy Coffman, George Martinez, and Municipal Ombudsman Daniel Hess
- The Anchorage School District, specifically Kalle Bission of the English Language Learners Program
- The Anchorage Economic Development Corporation, Moira Sullivan.

A representative, knowledgeable, and engaged Steering Committee was developed to include community leaders, policy makers, service agency representatives, educators, business community members and other individuals and organizations who represent Anchorage's diverse communities. The Steering Committee helped to guide the effort and provide leadership and perspective to roadmap development. They were a sounding board and creative problem solver as well as a liaison between the planning process and the community. The steering committee galvanized community stakeholders to work together to make Anchorage a welcoming community for refugees, immigrants, Alaska Native people, people of color, differently abled and LGBTQ people.

A broad, ever-evolving and growing group of community members and stakeholders have been engaged throughout the development of the roadmap providing critical input and insight and shaping the direction of this initiative. Interested community members have been encouraged to sign up to be involved through the Welcoming Anchorage page on the Municipality's website as well as follow activities on the Welcoming Anchorage Facebook page. Approximately 800 people have signed up to be involved in the work of Welcoming Anchorage and receive updates on progress through the Municipality's webpage.

Anchorage, AK

### The New Americans Task Force

The New Americans Task Force was established by Mayor Stephanie Rawlings-Blake to contribute to administration's ongoing efforts to attract 10,000 families by addressing the retention and attraction of New Americans within the city. To determine the direction of the discussions and define high-priority areas for the Task Force opportunities for growth, members of the Mayor's Office conduct extensive discussions with high-level representatives from 10 agencies and stakeholders from community-based organizations, foundations, and private partners. Based on these conversations, broad priority areas were identified: **Economic Growth** and **Community Wellbeing**. These areas served to narrow the focus to the topics that the greatest potential to leverage existing resources and identify additional gaps and opportunities in order to recognize and benefit from the valuable assets that New Americans bring to Baltimore.

Upon the completion of the initial round of small group discussions, dozens of partners were invited to join the New Americans Task Force chaired by Michael Mitchell, Vice President for Programs and Product.

<sup>11</sup> U.S. Census Bureau, 2007-2011 American Community Survey

The Role of Immigrants in Growing Baltimore

at the Lutheran Immigration and Refugee Service, and Lourdes Montes-Greener, Assistant Vice President Community Development Banking at PNC Bank. Prior to the convening of the Task Force in July 2013, members were assigned to their respective priority area and workgroup based on their expertise and input. The Economic Growth priority area included the Workforce Development, Small Business Development, and Housing workgroups. Community Wellbeing priority area included the Welcome & Diversity, Safety, and Youth workgroups.

Over a period of eight (8) weeks, the individual workgroups discussed the potential challenges and opportunities experienced by immigrant populations in Baltimore, and began to identify strategies for the City to address these gaps utilizing both existing resources and new partnerships. Task Force chairs provided instrumental leadership as they guided the workgroups. In their initial development strategies that recognized the diverse assets of New Americans, identified gaps and opportunities creatively leveraged existing resources to retain

Baltimore, MD

## Chapter One, Step 3: Design the Process

### TIMELINE OF EVENTS

High-level, process leadership summit hosted by Mayor Herrigan and then Summit County Council President, Hans Shapiro

June 29, 2016

Summer 2016

Convening of small groups of select experts within Summit County across the six sector groups

October 18, 2016

Open-to-the-public Akron/Summit County Welcoming Summit

November 2016

Survey Monkey to all 386+ attendees of the Public Welcoming Summit to gain additional feedback

January 2017

Distribution of a survey designed specifically for refugees and immigrants

February 2017

Compiling of all the data to define the vision, goals, strategies and overall outline of the Welcoming Plan

March 1, 2017

Convening of a smaller cross section of Public Welcoming Summit participants to review and receive feedback on the draft vision, goals and process for Phase 2

Akron, OH

### TIMELINE

2017

July Strategic Planning begins

September "Gateways for Growth Award" received

September/October Public Announcement and Website launched

November Kick Off Meeting: Identify Vision and Key Priorities

December-May Prioritize Goals and Initiatives

May Wrap Up Meeting: Review input and determine strategic priorities

July Plan Launch

2018

Northwest Arkansas

## Chapter Two, Step 2: Gather and Assess Data on Community Needs and Assets

**FOCUS AREAS**  
 The group consensus was that 2 focus areas were most critical to pursue over the next 5 years. This reflects an understanding that Austin, as a mid-sized community, has limited resources and therefore needs to focus those resources where they can make the biggest impact. While other aspects of building a Welcoming Community are important, making those areas a priority should be reserved for a later timeframe when there has been substantial progress made against the 2 priority focus areas.

**Key Focus Area #1: Empowering Multicultural Leadership**  
**Definition of Success:** Leadership and workforce of city government, community organizations, and businesses reflects the population they serve

This focus area is about empowering communities to help themselves by developing a deep leadership bench and enabling them to fully participate in maximizing the potential of Austin. The Welcome Report had several findings around this focus area:

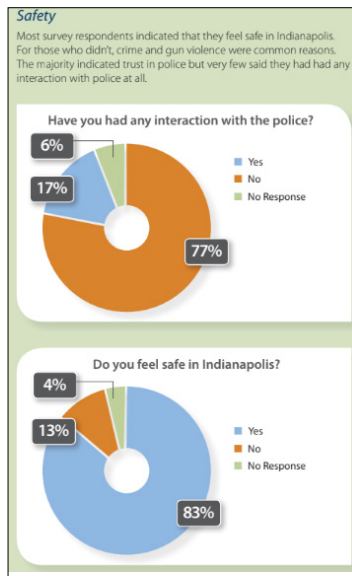
**A small number of leaders are relied on for nearly everything within newcomer communities.** There are many outstanding leaders in newcomer communities. The challenge is that these leaders tend to get stretched incredibly thin because they are one of a small number of people who can easily interact in both the traditional Austin community and their own community of newcomers. They end up tasked with an overwhelming burden of helping others while also trying to run their own individual lives, which can create the very natural consequence of burnout. Being able to develop a deeper bench of leaders within the newcomer communities would not only help ease the burden on these current leaders, but would also help increase and strengthen relationships with these communities.

**A challenge to creating this deeper bench is that potential leaders often don't see anyone who looks like them in positions of community leadership.** Role modeling can be a powerful force in helping someone visualize themselves in a position of power. There are, however, very few visible role models within the normal channels of community power that accurately reflect the true population of Austin.

### Austin, MN

PRELIMINARY SURVEY RESULTS		
BIGGEST BARRIERS	TOP 5 GREATEST NEEDS	WHAT CAN DALLAS DO?
1. Fear of immigration enforcement	1. Knowledge of rights and immigration information	1. Community outreach between law enforcement & government leaders
2. Lack of English language skills	2. Access to civil immigration legal services	2. Celebrate contributions of immigrants & refugees
3. Poverty/Lack of resources	3. Access to and utilization of available services & benefits	3. Promote & provide ESL & U.S. Citizenship instruction
4. Transportation	4. ESL, Literacy and Citizenship instruction	4. Support diversity initiatives & include immigrants
5. Affordable housing	5. Promotion of U.S. Citizenship	5. Break down social & economic barriers

### Dallas, TX



### Indianapolis, IN

## Chapter Three, Step 1: Writing the Plan

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### Dallas, TX

For more information, download the full plans for each of these communities:

**Akron, OH**

**Anchorage, AK**

**Aurora, CO**

**Austin, MN**

**Baltimore, MD**

**Dallas, TX**

**Indianapolis, IN**

**Northwest Arkansas**

More strategic plans can be found at [GatewaysForGrowth.org](http://GatewaysForGrowth.org).