

# OCCORD Strategic Plan

## 2022-2027

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# Introduction

In its 17 year history, OCCORD's work has been critical to key progressive victories in Anaheim and Santa Ana, leading to dynamic shifts in power. Over the past few years, OCCORD has weathered a season of disruption and change. Many Orange County partners and funders who have been introduced to OCCORD in the last five years have a narrow view of its role that represents just a fraction of OCCORD's legacy and potential. After this period of disruption, OCCORD has regained its footing and is poised to rebuild trust and renew the legacy of grassroots leadership development and cutting edge policy research and organizing achievements.

OCCORD is now under new leadership, with several new staff, and continued growth on the horizon. OCCORD is embracing the opportunity to fill current gaps in areas where they have a strong past record: neighborhood leadership development, regionally-based policy research, and broad-based coalition building. The organization's role must be clearly defined in the Orange County movement eco-system for both staff and partners. The emerging role builds upon OCCORD's old legacy while incorporating new strategies relevant to a post-pandemic world and increasingly digital reality. This plan represents OCCORD gradually rebuilding its capacity while continuing to reinvent and embrace new strategies.

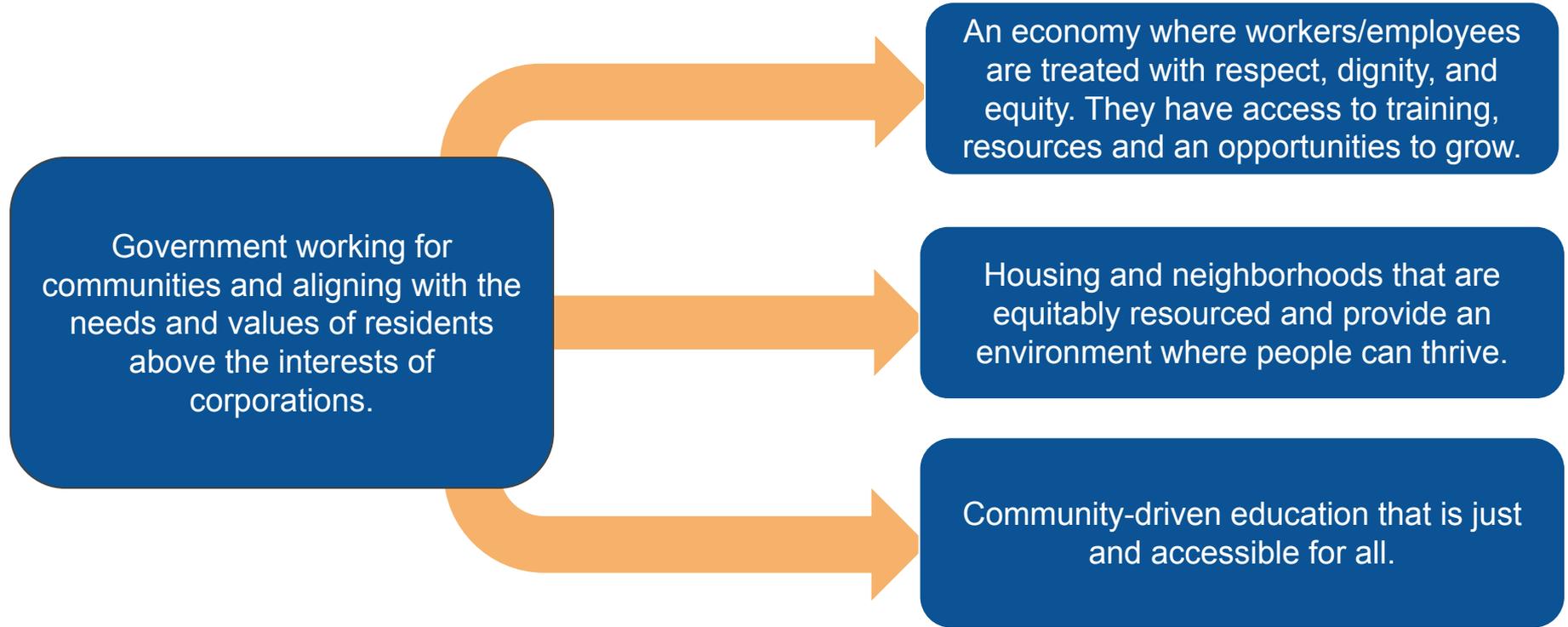
This planning process began with an articulation of the unique values that guide OCCORD's work and internal culture and policies. The values then became a touchstone for reflection for each of the other parts of the plan. A holistic Theory of Change ties together the broad list of strategies and platforms that OCCORD uses to achieve its vision. With so many pressing issues impacting neighborhoods, it is important that OCCORD is clear about expectations and what opportunities it will pursue. OCCORD can rely on the policy expertise of partners for the broad issues that impact neighborhoods and schools (housing, education reform, good jobs, safety) while leaning into its role as an organizational leader in creating research and policy advocacy that leads to an inclusive and responsive democracy. Inclusive and responsive government will lead to tangible gains and improved equity and quality of life for our communities. In order to provide clarity and a shared understanding among staff, leaders, and partners, this strategic plan includes three frameworks: policy, leadership development, and growth. These frameworks are intended to provide high level guidance on OCCORD's role and expectations moving forward. The goals and strategies then flow out of the groundwork established by a clear set of values, the Theory of Change, and frameworks.

# OCCORD Guiding Values

OCCORD is guided internally and externally by these values.

- **Community Independence:** The ability of communities to identify their own interests, maintain and grow community leadership, and exert influence over their local government.
- **Inclusive Power:** Power that is shared among people from diverse backgrounds, ideologies, and situatedness.
- **Integrity:** Operating in alignment with core values, including transparency, respect, and truth.
- **Transformational Strategy:** Strategies that lead not only to policy wins, but also internal transformation, redistributed power, and a world more aligned with community values.
- **Radical Awakening:** Coming into a knowledge and analysis of yourself and your community that leads to intentional and strategic action. Understanding the historical and ideological drivers of inequity and injustice and the levers of power that communities can pull to enact change.

OCCORD envisions an awakened and organized community with responsive local government, building systems and policies that lead to a community-centered economy, neighborhoods, and schools.



# Mission

"OCCORD's mission is to build the power of historically marginalized communities in Orange County. OCCORD utilizes community organizing and policy research as strategies to build leadership and a collective voice. We pursue policy changes that lead to an inclusive economy, community-driven education, and responsive democracy."

# Theory of Change

OCCORD's work begins with strengthening the foundation of a strong democracy. OCCORD organizes communities to develop an awakened and empowered populace with capacity to organize and redistribute power for long-term justice. OCCORD utilizes three of its programs to build the awakened community. Citizenship: to increase the number of citizens in impacted neighborhoods and funnel new citizens into active participation in their democracy as voters and leaders. Neighborhood Unions: Building or partnering with existing neighborhood groups to develop independent leadership with the capacity to identify their neighborhood's unique vision and interests and then to navigate local democratic structures to advocate for that vision. Voter Engagement: to increase the voting power of disenfranchised voters of color in impacted neighborhoods.

**Citizenship:** Increasing the number of active citizens in impacted neighborhoods.

**Neighborhood Unions:**  
Development of independent and awakened neighborhoods with capacity to identify and advocate for unique vision and needs.

**Voter Engagement:**  
Increasing engagement of disenfranchised voters of color in impacted neighborhoods.

Community organizing for an awakened and organized independent leadership and communities, building and redistributing power for long-term social and economic justice.

# Theory of Change

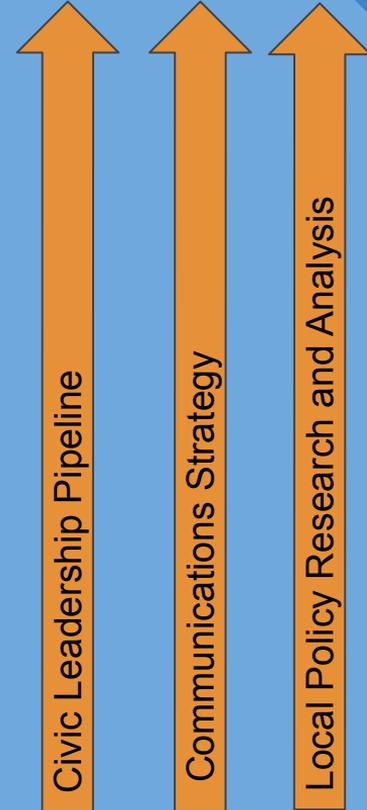
In response to the interests and vision emerging from Neighborhood Unions, OCCORD brings together the Neighborhood Organizing Committee. The NOC is a city-wide committee with representatives from active neighborhood unions where leaders set priorities and strategize for broader community change. OCCORD also provides training for both OCCORD leaders and strategic partners to develop a shared analysis of how local democracies function, the impact of current policies, and drivers of injustice. Based on the identified common interests and analysis, OCCORD will establish Broad Based Community Collaboratives for policy change with the dual impact of strengthening democracy while also delivering on tangible improvements in the lives of low-income residents.

*Strategic partners include organizations and individuals who are aligned with OCCORDs values, vision, and analysis of historic drivers of inequity, and who share a commitment to transformational strategy. Campaign stakeholders are short-term partners who find alignment around the outcomes of proposed policy change.*



# Theory of Change

There are three community organizing strategies that flow throughout all of the programs and activities that OCCORD pursues. **The Civic leadership pipeline:** OCCORD works to support the placement of neighborhood leaders and strategic partners in positions of influence where they can represent the interests and vision of their community. **Communications Strategy:** OCCORD provides support for neighborhood leaders, trainings, policy research, and campaigns to harness the power of communications to organize and build support. **Local policy research and analysis:** OCCORD supports local Neighborhood Union leaders to understand how their city works and what levers to pull to increase investment in their disenfranchised neighborhoods as well as cutting edge research and policy analysis to support ground-breaking policy change at the regional level.



# Theory of Change:

Local policy change leading to responsive government accountable to the community.

Community Organizing for Broad Based community collaboratives for policy change

OCCORD Neighborhood Organizing Committee

Training and analysis on local democracies, current policy, and drivers of injustice

Strategic partner and campaign stakeholder development

**Citizenship:** Increasing the number of active citizens in impacted neighborhoods.

**Neighborhood Unions:** Development of independent and awakened neighborhoods with capacity to identify and advocate for unique vision and needs.

**Voter Engagement:** Increasing engagement of disenfranchised voters of color in impacted neighborhoods.

Civic Leadership Pipeline

Communications Strategy

Local Policy Research and Analysis

Community organizing for an awakened and organized independent leadership and communities, building and redistributing power for long-term social and economic justice.

Thriving Jobs, Schools, Neighborhoods

# Policy Framework

*To guide decisions on which campaigns to join, which to lead, and who decides.*

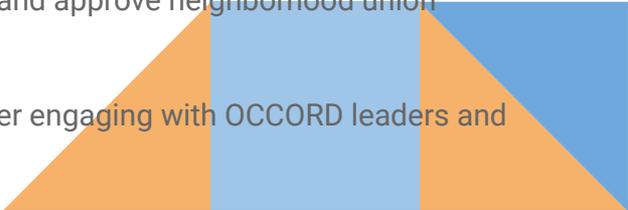
## **OCCORD will lead policy campaigns that:**

- Are grounded in an analysis of issues identified by community members
- Address root causes of injustice and inequity
- Land on the intersection of good governance and community needs that results in:
  - Tangible community benefits
  - Redistributed power
  - Expanded community autonomy
  - Inclusive decision making & resident participation

## **OCCORD will support policy campaigns that:**

- Are grounded in issues and vision identified by community members
- Intersect with OCCORD policy goals/vision
- Build the collective power and autonomy of low-income communities of color in Orange County

## **Roles to determine which campaigns OCCORD will lead on:**

- OCCORD leaders (as defined in the OCCORD Leader Framework on slide 14) will identify and prioritize community concerns and participate in root cause analysis of those issues, consult on policy campaigns, and approve neighborhood union participation in campaigns
  - OCCORD partners will consult on policy campaigns
  - OCCORD staff will initiate and research policy opportunities and make a decision after engaging with OCCORD leaders and partners.
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# OCCORD Leadership Framework

*To provide clarity for OCCORD staff and leaders on the role and authority of community leaders in OCCORD*

OCCORD works to develop organized neighborhoods with a local vision whose leadership can serve as co-conspirators to identify common interests and pursue policies that redistribute power and lead to better governance and tangible improvements in the lives of community members.

- **Definition of OCCORD Leaders**

- Leaders who have proven skills in neighborhood unions, citizenship, or voter engagement
- Committed to the vision and values of OCCORD
- Have completed OCCORD leadership trainings and embraced OCCORD's values and root cause analysis
- Have a clear understanding of root causes of community concerns
- Represent OCCORD in a way that is consistent with OCCORD vision & values
- Actively listen to their own communities and neighborhoods and bring forth new leaders

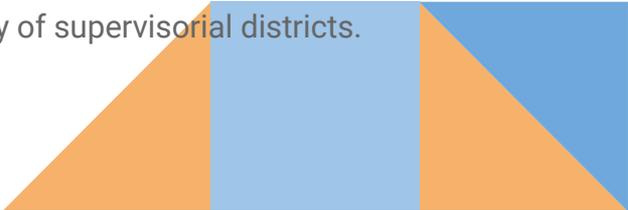
- **Commitment from OCCORD to Leaders. OCCORD will:**

- Engage as co-conspirators in identification and implementation of policy campaigns
  - Support neighborhood campaigns with technical assistance and policy analysis
  - Create a space for OCCORD leaders to participate in strategic decisions for OCCORD (Neighborhood Organizing Committee)
  - Provide information about local issues and policies that will impact them
  - Communicate regularly
  - Provide cutting edge & innovative leadership trainings
  - Recognize the diversity of contributions made by different community members
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# OCCORD Framework for Growth

*To guide decisions toward sustainable growth that builds power rather than dilutes it.*

OCCORD seeks to develop strategic capacity in order to leverage power in a majority of districts in the cities it serves (currently Anaheim and Santa Ana) through: neighborhood unions, engaged voters, strategic partnerships, and potential allies (temporary, issue-based).

- Anaheim has a greater need for investment in development of neighborhood unions.
    - a. Prioritize development of neighborhood unions.
    - b. Determine priority districts important for moving city-wide policy.
  - Santa Ana has more existing neighborhood leadership infrastructure.
    - a. Prioritize strategic partnerships through development of policy analysis.
  - Growth into new cities:
    - a. Should be contingent upon reaching strategic capacity for Anaheim and Santa Ana first.
    - b. Should use the same framework
      - Identify cities where there is potential to have influence in a majority of districts/ or with a majority of council members through development of neighborhood unions, engaged voter lists, strategic partnerships.
      - Identify cities where there is potential to grow influence in a majority of supervisorial districts.
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# 5 Year Goals

2022-2027

- Citizenship
- Neighborhood Unions
- Voter Engagement
- Coalition Building
- Staff Development

# Citizenship Goals

- Increase the number of new citizens in target neighborhoods/districts.
- Demystify and increase access to citizenship for eligible residents across Orange County.
- Integrate citizenship work with OCCORD's power-building and community organizing efforts.

Key Strategies	Indicators of Success	Year Begins	Year Complete
Streamline Citizenship Process	Increased annual number of naturalized citizens	2022	2023
Establish an online process for citizenship	Clients complete the process online. Increased annual number of naturalized citizens.	2022	2023
Establish an online presence for the Citizenship program for promotion, engagement, and process. Create tools for partners and neighborhood leaders to promote citizenship events.	Partners and public officials are aware of the impact of OCCORD citizenship program. Increased number of program clients are signing up and/or completing the process online. Neighborhood leaders and partners are promoting OCCORD citizenship events and opportunities using their own social media.	2022	2023
Establish Citizenship Centers	Open one or more citizenship centers in each targeted neighborhood/district in Anaheim and Santa Ana. Increased annual number of naturalized citizens in target neighborhoods. Funding source identified and mini-grants provided to partners.	2023	2024
Increase and diversify partnerships	Citizenship fairs in new locations. Partner organizations actively promoting citizenship fairs/events. Citizenship centers opened in diverse locations. Increased diversity of clients.	2023	2024
Align location of citizenship events with Neighborhood Unions and Target Neighborhood/Districts	Citizenship fairs are owned and promoted by Neighborhood unions. Voter turnout increases in neighborhoods with citizenship events/centers/fairs.	2023	2024
Integrate policy education and data collection into naturalization process	Citizenship fairs produce research data in the form of surveys, focus group recruitment. Participants of citizenship events/fairs receive information about campaigns on site and through follow-up emails or other communications.	2023	2024
Develop a process to ID and funnel potential community leaders into Neighborhood Unions and Community Leader Table	Neighborhood unions have leaders who have been introduced through citizenship fairs. Neighborhood unions are sponsoring and promoting citizenship events/fairs. Explicit agreement developed with neighborhood unions.	2023	2024

# Neighborhood Unions

- Support the establishment of autonomous neighborhood unions in strategic locations to increase OCCORD's influence within Anaheim.
- Strengthen local neighborhood leadership.
- Establish a reciprocal, interdependent relationship between OCCORD and Neighborhood Unions.

Key Strategies	Indicators of Success	Year Begins	Year Complete
Develop a definition and trajectory for OCCORD leaders	OCCORD leaders and staff have clarity. OCCORD leaders are inspired by their possible trajectory.	2022	2022
Provide an annual budget to affiliated neighborhood unions for local work	OCCORD affiliated neighborhood unions create a budget, infrastructure to support accountability and transparency, and expend funding on locally owned and chosen purposes.	2022	2023
Provide trainings and technical assistance to neighborhood unions on organizing skills and running campaigns	Number of community leaders attending trainings. Number of neighborhoods/locations where trainings are taking place.	2023	2024
Provide trainings and technical assistance to neighborhood unions on leadership development including building teams, leadership structures, effective communication and transformational leadership.	Number of community leaders attending trainings. Number of neighborhoods/locations where trainings are taking place.	2023	2024
Provide communications training, branding, and toolkit to Neighborhood Unions.	Neighborhood union leaders utilize social media to promote events, campaigns, and conduct outreach.	2023	2024
Engage neighborhood Unions in design and data collection for research	Neighborhood union leaders participate in design, collect data for, and utilize research for local campaigns.	2023	2024
Increase neighborhood unions in the city of Anaheim by at least 2 through building or establishing membership with existing groups.	Number of community groups who identify as OCCORD affiliates.	2023	2025
Conduct an analysis and identify strategic priority districts and neighborhoods in Anaheim and Santa Ana	OCCORD has clarity on and identifies plans for outreach to key strategic neighborhoods. OCCORD Neighborhood Unions and campaigns have increased clout and influence on city policy.	2023	2025
Support local leaders to achieve local leadership positions (school site council, neighborhood associations, boards, and commissions, etc.)	Number of leaders who identify with OCCORD, have been active in OCCORD neighborhood unions, or who have attended OCCORD trainings successfully run for nonpartisan office.	2024	2025
Develop strategies for multicultural, multi-language outreach,	Neighborhood Unions reflect the diversity of the neighborhoods		

# Voter Engagement

- Transform the local electorate through the engagement of recently naturalized citizens and disenfranchised people of color.
- Increase voter turnout in strategic neighborhoods/districts in Santa Ana & Anaheim.

Key Strategies	Indicators of Success	Year Begins	Year Complete
Align Voter engagement with presence of Neighborhood Union neighborhoods and target districts	Increased ownership of voter engagement efforts by Neighborhood Unions.	2022	2024
Increase coordination with strategic partners	OCCORD is part of at least one coordinated table for GOTV efforts in Santa Ana and Anaheim	2022	2024
Integrated Voter Engagement campaigns and citizenship work	100% of naturalized citizens from OCCORD citizenship program are registered to vote and 85% of those are regular voters.	2023	2024
Utilize voter contact list for policy research	Increased voter engagement in ongoing organizing campaigns. Increased voter turnout in targeted neighborhoods/districts.	2023	2024
Engage list of voter contacts 2-3x annually via email or texting application	Increased voter engagement in ongoing organizing campaigns. Increased voter turnout in targeted neighborhoods/districts.	2023	2027
Develop digital strategies for voter engagement and GOTV to align with field strategies	Neighborhood union utilization of materials. Number of posts and engagements.	2024	2025
Engage NU leaders in strategy and recruitment for VE campaigns	Volunteers know how to run an effective campaign (data, strategy, communications).	2024	2025
Hold regular candidate forums in partnership with Neighborhood Unions	Candidates actively seek out Neighborhood Unions and leaders for endorsements. OCCORD leaders frame key issues for candidates to run on.	2024	2025
Recruit neighborhood volunteers as poll workers and for voter protection work including, observing ballot counting post elections.	Number of OCCORD leaders working as poll workers or doing voter protection work.	2024	2025

# Coalition Building

- Lead a broad based campaign for housing justice in Anaheim.
- Reestablish OCCORD's unique role in Orange County's eco-system as a leader in community-driven policy research.
- Establish strategic capacity in a majority of the districts in Santa Ana and Anaheim through establishing neighborhood unions, voter lists, or strategic partners.
- Lay the groundwork to achieve strategic capacity in a majority of supervisorial districts in Orange County

Key Strategies	Indicators of Success	Year Begins	Year Complete
Participate in local coalitions led by strategic partners through co-strategizing, mobilization of OCCORD's base, and providing policy research.	OCCORD leaders are sought-after and recognized for contributions to collaborative campaigns. Other campaigns are citing OCCORD policy research.	2023	2024
Conduct outreach to other organized groups in Anaheim and Santa Ana to learn about common interests and consult on research project & focus	Identification of a list of potential allies for housing justice campaign, including key labor allies.	2023	2024
Organize and publish a research project on impacts of the COVID pandemic and distribution of resources and transparency for local spending on federal COVID funding with a focus on housing and rental assistance.	Report published and promoted. Report cited by other campaigns, news articles, and public officials.	2023	2024
Establish a partnership with an Academic Institution to support policy research.	Agreement drafted and signed and funds raised to produce a research report.	2023	2024
Develop a policy agenda for housing justice in the city of Anaheim in partnership with strategic allies.	Written document outlining clear recommendation for policy at the intersection of good housing policy and good governance.	2023	2025
Establish a neighborhood organizing committee for OCCORD leaders and neighborhood unions to co-strategize on coalition campaigns.	Leadership from neighborhood unions are meeting regularly to co-strategize, identify common interests, conduct power analysis, and make decisions about OCCORD campaigns.	2024	2025
Develop messaging strategy and digital tools for coalition campaigns and research reports.	Toolkits created for campaigns and research report. Number of posts generated and engagements.	2024	2025
Conduct an analysis for moving county-wide policy and identify strategic priority cities for expansion once OCCORD has achieved a baseline of strategic capacity in Anaheim and Santa Ana.	Concept paper with written analysis and list of key cities/constituencies for expansion.	2026	2027

# Staff Culture

- Develop a collaborative and transparent staff culture where all staff are committed to each other's success, respect personal boundaries, and understand each other's leadership/work styles, and diverse backgrounds.
- Create a staff culture where proven strategies are respected and staff have freedom and flexibility to adapt strategies to different and changing populations and are accountable for outcomes
- Develop a staff culture where leadership is supportive and moving workers on a trajectory from heavy involvement towards greater freedom and autonomy

Key Strategies	Indicators of Success	Year Begins	Year Complete
Develop an all-staff training calendar, including trainings on C3/C4 guidelines, database use and strategy,	Staff complete shared trainings on topics	2022	2022
Create a dedicated wellness budget for each staff member and goals into annual work plan	Each staff member has a clear set of goals for their professional development, resources to achieve goals, and are able to collaborate with supervisors and other staff to achieve goals.	2022	2023
Develop a staff agreement concerning boundaries and expectations for office culture.	Staff have a living document that they can reference with clear expectations for response to communications, work from home hours, and conflict management. Agreed upon boundaries for work-life balance. Clear systems for use of office space and equipment.	2022	2023
Set regularly scheduled time time for building relationships/having fun together.	Calendared and completed staff relationship building events. Staff deepen respect and empathy towards one another.	2022	2025
Transparent annual work plans with clearly outlined roles, including collaborative roles where staff play a supportive role or depend on one another.	Staff understand their role in implementing the strategic plan, expectations for collaboration, and accountability to each other.	2023	2023
Create and update a power & landscape analysis annually. (Recommended: SCOPE Power Analysis)	Staff have a shared understanding and analysis of key players and power brokers in Orange County that grows and develops over time. Staff are able to identify useful strategies to move policy.	2023	2024
Annual feedback & review of role.	Staff and leadership share clarity on strategic direction, vision for the year, development of roles. Leadership gain feedback and clarity on how to support staff for success. Staff receive helpful feedback to grow in their roles.	2023	2024
Institute wellness fridays policy wherein each staff member will be able to utilize 1 Friday a month to practice self care and personal development.	Staff report having time and flexibility to invest in personal development and cope with vicarious trauma.	2023	2024
Hold an annual staff retreat to check in on culture and strategies (add check in on strategies and outcomes )	Staff have a safe place to address issues, build relationships, and refine policies for staff culture	2023	2024

# Strategic Plan Cost

Item	Year 1	Year 2	Year 3	Year 4	Year 5
Staff Training	5,000.00	5,000.00	5,000.00	5,000.00	5,000.00
Staff Wellness	5,500.00	6,500.00	7,500.00	8,750.00	8,750.00
Misc. New Staff			66,500.00	66,500.00	66,500.00
New Organizing Staff		66,500.00	133,000.00	199,500.00	199,500.00
New Citizenship Staff		66,500.00	133,000.00	166,250.00	166,250.00
Communications	5,000.00				
Website/App development		40,000.00	5,000.00	5,000.00	5,000.00
Social Media/Online Ads	2,000.00	3,000.00	4,000.00	5,000.00	6,000.00
Research		10,000.00	10,000.00		
Neighborhood Union Budgets		10,000.00	12,000.00	12,000.00	12,000.00
Mega Fair		2,000.00	2,000.00	2,000.00	2,000.00
GOTV	40,000.00		50,000.00		60,000.00
<b>Totals</b>	<b>57,500.00</b>	<b>209,500.00</b>	<b>428,000.00</b>	<b>470,000.00</b>	<b>531,000.00</b>
<b>Increase from Previous Year</b>	<b>57,500.00</b>	<b>152,000.00</b>	<b>218,500.00</b>	<b>42,000.00</b>	<b>61,000.00</b>

# Fund Development Strategies

FD Strategies	Year 1	Year 2	Year 3	Year 4	Year 5
Grants	\$53,500	\$128,500	\$314,000	\$323,000	\$341,000
Increase in Grants	\$53,500	\$75,000	\$185,500	\$9,000	\$18,000
Contracts	\$0	\$70,000	\$100,000	\$130,000	\$170,000
Increase in Contracts	\$0	\$70,000	\$30,000	\$30,000	\$40,000
Events	\$2,000	\$8,000	\$10,000	\$12,000	\$14,000
Increase in Events	\$2,000	\$6,000	\$2,000	\$2,000	\$2,000
Donors	\$2,000	\$3,000	\$4,000	\$5,000	\$6,000
Increase in Donors	\$2,000	\$1,000	\$1,000	\$1,000	\$1,000
<b>Cost of Plan</b>	<b>\$57,500</b>	<b>\$209,500</b>	<b>\$428,000</b>	<b>\$470,000</b>	<b>\$531,000</b>
<b>Annual Increase</b>	<b>\$57,500</b>	<b>\$152,000</b>	<b>\$218,500</b>	<b>\$42,000</b>	<b>\$61,000</b>