

# **Ohio Heartland Community Action Agency, Inc**

## **Strategic Plan 2009-2012**



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**Outcome #1: Improved agency communication systems remove obstacles to staff job satisfaction.**

Goal (Destination)		Rationale (Identifies the reason (motivation) for the goal)					
Staff enjoys working at and participating fully in the agency's mission		Staff needs to feel that they can effectively perform their jobs. Staff needs to feel that they are important to the agency.					
Objective: (Performance Target) - Must be stated in quantifiable or measurable terms and must be date bound; measures success.							
During program years 2009 – 2011, all staff will be provided with expanded information on agency programs and activities.							
Strategies - Ideas on "What to Do"	Responsible Party	01/01/09 - 12-31-09				2010	2011
		Jan-Mar	Apr-Jun	Jul-Aug	Sep-Dec		
Bi-monthly agency news letter	Bonnie, Jennifer	X	X	X	X	X	X
Expanded activities at annual staff training session	Joe, Pat, Peg			X		X	X
Review agency "employee of the month" program	Joe, Karen, Linda		X				

**Outcome #2: Improved agency communication/marketing tools to increase the community's awareness of the agency and our customers needs.**

Goal (Destination)		Rationale (Identifies the reason (motivation) for the goal)					
Ohio Heartland Community Action Commission is well known and well respected by residents throughout the county and the region.		The Community At Large needs to understand about the services which OHCAC provides in order to be able to partner with our organization whether it be as a customer for services, as another agency for collaboration or as an investor in funding.					
<b>Objective: (Performance Target) - Must be stated in quantifiable or measurable terms and must be date bound; measures success.</b>							
The agency will publicize its program activities through media, meetings and community contacts, 192 over the three year period.							
Strategies - Ideas on "What to Do"	Responsible Party	01/01/09 - 12-31-09				2010	2011
		Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec		
Promote agency programs in all counties through monthly news articles.	Bonnie, Jennifer, Karen	3	3	3	3	15	15
Staff sits on local boards collaborating in sharing resources.	Joe, Karen, Hazel, John, Pat, Jennifer	5	5	5	5	25	30
Expand existing collaborations and explain/promote to all staff.	Karen, Hazel, John, Pat, Jennifer	5	5	5	5	25	30

**Outcome #3: Develop a formal Plan for Fund development while developing a Planner position to increase and diversify funding and fundraising efforts.**

Goal (Destination)	Rationale (Identifies the reason (motivation) for the goal)						
To improve our efforts in funding our programs and services.	To be able to increase funding, expand programs and services, and free up staff time for better time management on the job.						
<b>Objective: (Performance Target) - Must be stated in quantifiable or measurable terms and must be date bound; measures success.</b>							
Increase new agency funding by \$375,000.00 by December, 2011.							
Strategies - Ideas on "What to Do"	Responsible Party	Jan 09- Dec 09				2010	2011
		1 <sup>st</sup> Qtr.	2 <sup>nd</sup> QTR.	3 <sup>rd</sup> QTR	4 <sup>th</sup> QTR		
Seek out, expand and/or develop new program opportunities.	Jenny, Pat, Joe, Karen, John, Hazel, Jennifer	1	1	1	1	5	6
Add an additional \$100,000.00 in new agency funding annually.	Jenny, Pat, Joe, Karen, John, Hazel, Jennifer				100,000	125,000	150,000
Establish and fund an OHCAC Planner Position.	Joe						X

**Outcome #4: Create a succession plan and staff back-up training for all positions**

Goal (Destination)		Rationale (Identifies the reason (motivation) for the goal)					
All staff will have a back-up for absences while building an internal succession plan for each position		Succession planning is critical to moving the mission and programs forward. It is fiscally, timely, and organizationally necessary to provide back-ups to each positions in case of absence, resignations, retirements, or dismissals.					
Objective: (Performance Target) - Must be stated in quantifiable or measurable terms and must be date bound; measures success.							
During program years 2009 through 2011, a succession plan will be in place for key agency positions.							
Strategies - Ideas on "What to Do"	Responsible Party	01/09-12-09				2010	2011
		Jan-Mar	Apr-May	Jul-Sep	Oct-Dec		
Develop key versatile staff back up positions for CSBG, HEAP, HWAP, Head Start, and Administration.	Joe, Jim, Karen, John, Jennifer	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing
Schedule training opportunities for back up staff.	Joe, Jim, John, Jennifer, Karen	1	1	1	1	5	6
Designate who would act for key staff members.	Joe, Jennifer, John, Hazel, Karen				X	X	X

**Outcome #5: The Agency will renovate, build and/or update all of its facilities**

Goal (Destination)		Rationale (Identifies the reason (motivation) for the goal)					
The facilities will be updated, refurbished, or purchased in order to provide the best services to the customers and the communities we serve		The facilities are the first impression of the self-sufficiency programs. Fiscally, new and updated buildings save money, while providing better space for the programs, staff, and customers.					
<b>Objective: (Performance Target) - Must be stated in quantifiable or measurable terms and must be date bound; measures success.</b>							
Monitor improvements at six owned facilities and work with landlords to maintain and improve various rented sites through 2011.							
Strategies - Ideas on "What to Do"	Responsible Party	01/09-12-09				2010	2011
		Jan-Mar	Apr-May	Jul-Sep	Oct-Dec		
Search for improvements in Crawford office	Joe, Karen	Ongoing	Ongoing	Ongoing	Ongoing	Improved Location	
Continually update owned facilities according to available funding	Joe, John	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing
Plan to improve Grace Street facility - updated windows and utilities.	Joe, John	Planning	Planning				
Secure funding for Grace Street improvements	Joe, Jennifer					Financing	Implementation

**Outcome #6: The Agency will provide staff empowerment and skills trainings**

Goal (Destination)		Rationale (Identifies the reason (motivation) for the goal)					
The staff will have opportunities to increase their knowledge as well as team build, and boost morale by offering a variety of staff trainings for all employees		Staff morale and skill sets are directly related to an organizations ability to provide team oriented trainings that give staff the opportunity to learn, discuss, build positive professional relationships, and team build.					
<b>Objective: (Performance Target) - Must be stated in quantifiable or measurable terms and must be date bound; measures success.</b>							
Annually provide at least 50 staff the opportunity to attend trainings to improve skills and morale.							
Strategies - Ideas on "What to Do"	Responsible Party	01/09-12-09				2010	2011
		Jan-Mar	Apr-May	Jul-Sep	Oct-Dec		
Seek out additional trainings that staff can attend to improve skills.	Joe, Karen, John, Jennifer	X	X	X	X	X	X

# OCATO

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The Ohio Community Action Training Organization has a training and technical assistance grant from the Ohio Department of Development, Division of Community Development, Office of Community Services to provide training and technical assistance to Community Action Agencies in the Ohio Community Services Network.

OCATO has assisted over 20 agencies in completing or revising their strategic plans. The model utilized by OCATO is adapted from *The Institute of Cultural Affairs, Technology of Participation: Participatory Strategic Planning*. This methodology requires certification from a authorized ToPs Facilitator. OCATO staff and consultants have been trained and certified to utilize this method by ToPS and ICA.

The focus of this methodology is on getting maximum interaction and participation from various levels of the community and organization. This is done through both focus groups, survey tools, and follow-up encounters. Below is a summary of the five principal areas of the work OCATO engages with agencies to develop their strategic plans, and their strategic thinking:

- Vision
- Current Reality
- Commitment
- Goals
- Action Plans

The Action Plans are customized to meet the ROMA (Results Oriented Management and Accountability) Model that Ohio CAA utilize as a requirement of their CSBG (Community Services Block Grant) funding. This formatting allows the strategic plan to be immediately integrated into the agency's CSBG plan, current ROMA operations, and quarterly measurement systems.

## VISION

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**Vision: Tells the world who the organization is, channels our values into our work environment, is a statement of optimism and hope. It is not a mission statement.**

“Our visions grow as we do and the visioning process is a dynamic one which provides for re-articulating the shared vision as appropriate.” - Unknown

Visioning takes place during the first section of a focus group. Participants are asked to “dream big” and create a picture of what they would like the organization to be. Limitations, including money, staff, regulations, and facilities are not enforced during this session of the focus group.

It is during this section we discover new ideas and potential for the organization.

## **CURRENT REALITY**

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**Current Reality: A gauge of the organization's strengths, weaknesses, potential successes and dangers.**

"Don't be afraid of the space between your dreams and reality. If you can dream it, you can make it so." - Davis

Determining the current reality of your organization is a very important step in the strategic planning process. In the focus groups facilitated, we have various levels and perspectives from which to draw. From Board Members to front line staff, we collect individualized responses regarding the current state of the organization. It is in this section that we also explore potential successes and dangers that could arise if the organization achieves its vision.

## **COMMITMENT**

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**Commitment: Accepting one's personal role in the success or failure of implementing new goals and changes relating to the strategic plan.**

"Individual commitment to a group effort -- that is what makes a team work, a company work, a society work, a civilization work." - Lombardi

The commitment section serves as the "personal buy-in" time. During this stage, participants decide what they are willing to do personally to make the plan successful. It involves collecting "I will" statements from the group and providing practical tools to implement the plan.

## **Action Plan**

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**Action Plan: Tangible action steps that will be taken within the next twelve months.**

"Nobody made a greater mistake than he who did nothing because he could do only a little." - Burke

During Action Planning, participants develop a plan that can be put into place within a twelve month time frame. The steps determined are all feasible steps the organization can put into action. Each step brings the organization closer to the ideal vision that was set at the beginning of the process. Steps are broken into categories and utilize previous ideas developed by the focus group. The steps are designed to amass the vision, the strengths and weaknesses, the potential success and failure, and the personal commitment to the plan.

## **Staff Survey**

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**Staff Survey: A survey is distributed to each employee of with a deadline for completion. Answers provided by staff are kept confidential and reported in such a manner to maintain anonymity.**

“No question is so difficult to answer as that to which the answer is obvious.” - Shaw

Staff surveys give CAA employees the opportunity to input suggestions and praise in an unthreatening manner. The questions are designed to gauge what the organization is doing right and what can be improved. This is a helpful tool to identify patterns of dissatisfaction or contentment with current procedures and programs. It is also a venue to allow for new ideas, both administrative and programmatic.

## **Community Partner Survey**

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**Community Partner Survey: A survey is conducted with each community partner of the CAA with a deadline for completion. Answers collected during this process are kept confidential and reported in a manner to maintain anonymity.**

“The key to wisdom is knowing all the right questions.” - Simone

Community Partner Surveys provide a unique view of how the community views your organization. The organization compiles a list of community partners who work with the organization in many capacities. These partners are contacted by OCATO to complete an interview. Responses gathered during this process gauge community perception, community awareness, and marketing strengths and weaknesses. Participants also provide feedback on successful programs and/or areas that need improvement. Ideas and solutions are often offered in these surveys as well as praise for current successes.

## **OCATO Consultant**

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The OCATO Consultant that provided the Strategic Planning Services is Linda M. Cunning. Ms. Cunning has been an OCATO Consultant for 6 years. Ms. Cunning's gift of the leader/trainer motivates and delivers results as she trains and consults in strategic planning, creative methods, planning and development, organizational structures, collaborations, multi-facet diversity, accountability, faith-based topics adult training specialties and other areas specialized to the needs of businesses, schools, churches, and organizations.

Ms. Cunning has written numerous articles, reports, and workbooks on the subjects of strategic planning, family, finances, staff empowerment, board and staff manuals, among others. Ms. Cunning has and is on numerous Boards throughout NW Ohio, working especially for those who have no voice. Ms. Cunning has worked as direct service worker to program developer for individuals include those incarcerated and formerly incarcerated, the low-income, minorities, and others challenged by society's barriers. Ms. Cunning holds a Master's Degree in Organizational Development, A Bachelor's Degree in Family Life Education, and another Degree in Early Childhood Development. Ms. Cunning has also been trained in specialized organizational and behavioral courses.