



Empowering People, Enriching Communities

# STRATEGIC PLAN

2024-2027

Prepared By:



# PURPOSE

The Strategic Plan is a document that is used to communicate what the organization's goals are and what actions need to take place to meet those goals. It is used to set priorities, focus resources, ensure that the agency is working toward common goals, and to strengthen operations of the agency. OACAC will use the Strategic Plan as well as the findings from the Community Needs Assessment to create the agency's Community Action Plan as well as inform agency and program planning.

OACAC will complete a Strategic Plan every three years as it is a requirement of Community Action Agencies under the Community Service Block Grant (CSBG) and is defined within the CSBG Organizational Standards (OS). This Strategic Plan is a three-year plan spanning FFY25 – FFY27. The plan becomes effective on 10/1/2024 and ends on 9/30/2027. This plan was adopted by the OACAC Board of Directors on 8/27/24 and is a plan designed for the OACAC service area, which includes the counties of Barry, Christian, Dade, Dallas, Greene, Lawrence, Polk, Stone, Taney, and Webster.

This Strategic Plan was developed with input by OACAC staff, Board Members, community members, and clients.



## OUR MISSION

To create lasting solutions to poverty for families and communities within Southwest Missouri.

## OUR VISION

OACAC envisions people living an optimal, empowered life, free from poverty.

## OUR VALUES

 **Diversity**

 **Equity**

 **Inclusion**

 **Dignity**

 **Collaboration**

 **Confidentiality**

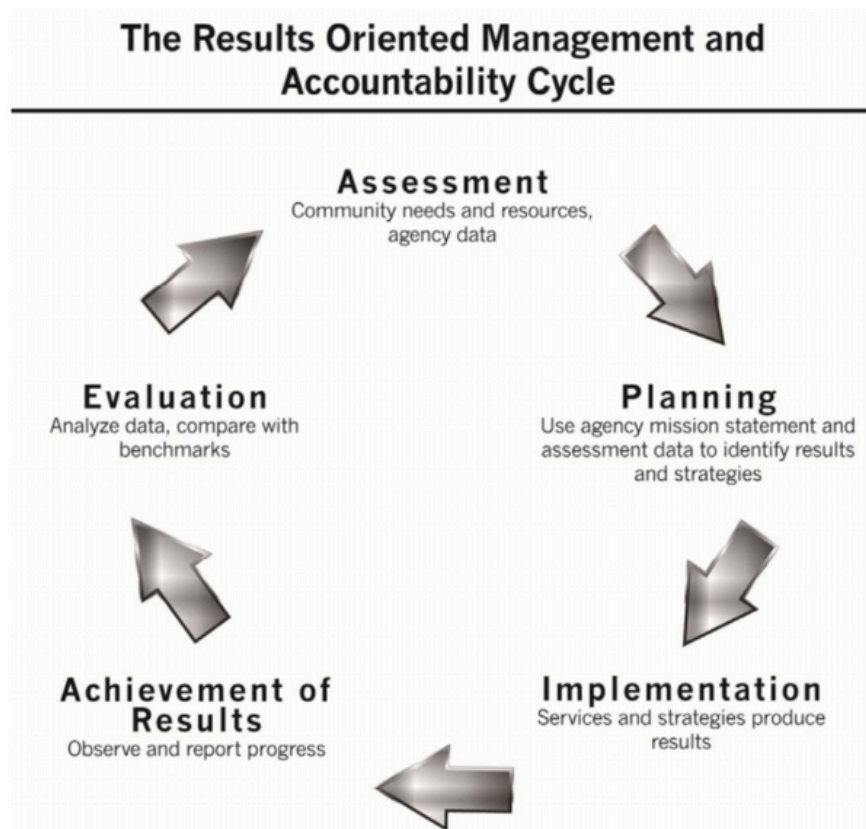
*As part of the planning process through this strategic planning cycle, the governing board reviewed the Agency's mission, vision, and values. The Board of Directors reviewed, voted, and approved that the mission statement addresses poverty and the programs align with the mission on 8/27/24.*

# RESULTS ORIENTED MANAGEMENT & ACCOUNTABILITY (ROMA)

Results Oriented Management and Accountability (ROMA) is a complete management and accountability process that is focused on the results achieved as a result of the agency's activities. ROMA is used exclusively within Community Action Agencies. In the 1998 CSBG Act, ROMA was defined as, "A sound management practice that incorporates the use of outcome results into the administration, management, and operation of Community Action Agencies." ROMA includes an accountability cycle.

The Strategic Plan falls under the "Planning" stage of the ROMA Cycle. You will see in the following graphic that the planning stage is to come after the completion of the "Assessment" stage of the cycle. OACAC completed the most recent Community Needs Assessment in 2023. The OACAC Community Needs Assessment includes data collected from the community and draws conclusions about the communities' resources and needs.

OACAC has certified ROMA implementers on staff that guides the agency and agrees that Community Needs Assessment, Strategic Plan, and Community Action Plan support the full ROMA cycle.



# OACAC COMMUNITY NEEDS ASSESSMENT

A copy of the assessment used to inform and guide the Strategic Plan can be found at:

<https://oac.ac/wp-content/uploads/2023/08/Updated-CNA-FY-23.pdf>



## CUSTOMER SATISFACTION DATA

A customer satisfaction survey is given to participants who receive services from OACAC. This data was analyzed during the Community Needs Assessment and Strategic Planning process. Discussions around the customer satisfaction survey results data and other program and agency data led to the development of family, community and agency level goals.

### **Reduction in Poverty, Revitalization of Low-Income Communities, and/or Empowerment of People with Low-Incomes to Become More Self Sufficient**

Organizational Standard 6.2 states, “The approved strategic plan addresses reduction in poverty, revitalization of low-income communities, and/or empowerment of people with low-incomes to become more self-sufficient.” The ways in which OACAC will address these areas through the strategic plan:

#### **Reduction In Poverty:**

OACAC will work to increase family outcomes, increase access to agency services and programs, and to increase impact of services on poverty.

#### **Revitalization of Low-Income Communities:**

OACAC will work to increase community outcomes, increase partnerships within the community, and increase legislative advocacy activities.

#### **Empowerment of People with Low-Incomes to Become More Self-Sufficient:**

OACAC will work to increase family outcomes, increase access to agency services and programs, and increase impact of services on poverty.

# FAMILY, AGENCY, & COMMUNITY GOALS

The delineation of family, agency, and/or community goals are in accordance with the operating procedures defined by the Organizational Standards. The Organizational Standards require OACAC's strategic plan to include family, agency, and/or community goals. Further detail on the levels of goals are outlined below and was obtained by La Piana Consulting as part of the strategy pyramid.

- Community levels goals are “Organizational-Determine mission, vision, trends, competitors, partners, and market position.”
- Family level goals are “Programmatic-Decide on approaches and offer programs and activities to achieve specific outcomes related to the target audiences.”
- Agency level goals are “Operational-Administer and oversee systems, policies, and personnel in areas such as finance, human resources, communications, and information technology.”



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# FAMILY, AGENCY, & COMMUNITY GOALS, cont.

The following Organizational Standards apply to the development and implementation of the Agency Strategic Plan.

<b>1.1</b>	Demonstration of low-income participation in CAAs activities.
<b>1.2</b>	Analyze information collected directly from low-income individuals as part of the community assessment.
<b>1.3</b>	A systematic approach for collecting, analyzing and reporting customer satisfaction data to the board.
<b>4.1</b>	Governing board has reviewed the organization's mission statement with the past 5 years and assured that it addresses 1) poverty, and 2) the organization's programs and services are in alignment with the mission.
<b>4.3</b>	The entities' Strategic Plan document the continuous use of full ROMA cycle or comparable system and the organization documents having used the services of a ROMA certified trainer/implementer (or equivalent) to assist in implementation.
<b>6.1</b>	An agency-wide strategic plan in place approved by the governing/advisory body within the past 5 years.
<b>6.2</b>	Develop a strategic plan that addresses reduction of poverty, revitalization of low-income communities, and empowerment of people with low incomes to become more self-sufficient.
<b>6.3</b>	Strategic plan that contains family, agency, and community goals.
<b>6.4</b>	Customer satisfaction data and customer input collected through the Community Needs Assessment is included in the strategic planning process.
<b>6.5</b>	Governing board/advisory body receive an update(s) on meeting the goals of the strategic plan/comparable planning document within the past 12 months.
<b>9.3</b>	Present to the governing board/advisory body for review or action: analysis of agency outcomes, operational or strategic program adjustments, and improvements identified within the past 12 months.

# COMMUNITY NEEDS ASSESSMENT & STRATEGIC PLAN

## Partners in Planning Agency Work

As detailed earlier in this plan, the ROMA Cycle guides the work of Community Action Agencies, including OACAC. The ROMA Cycle graphic shows that the Community Needs Assessment comprised of community needs and resources, alongside agency data, informs the planning function of the cycle where agencies use the agency mission statement and assessment data to identify the results and strategies detailed throughout this plan.

OACAC has detailed several strategic issue areas and community, family, and agency goals. All of these issue areas and goals have been informed by OACAC most recent Community Needs Assessment completed in FY2023.

OACAC's prioritized needs out of the most recent Community Needs Assessment include the following:

### Health and Nutrition

- Food Access
- Mental and Physical Health Stigma

### Housing

- Safe and Sanitary Housing
- Access to Affordable Housing

### Diversity, Equity, Inclusion, and Belonging

- Advocacy
- Education



## STRATEGIC PRIORITY AREAS

**Community-Centered Services**

**Community Connections**

**Engaged Workforce**

**Sustainable, Diverse Funding**

# PRIORITIES & OUTCOMES

## Community-Centered Services

**OUTCOME ONE:** Increase community outcomes.

**OUTCOME TWO:** Increase family outcomes.

**OUTCOME THREE:** Increase access to agency services and programs.

## Community Connections

**OUTCOME ONE:** Increase impact of services on poverty.

**OUTCOME TWO:** Increase legislative advocacy.

**OUTCOME THREE:** Increase partnerships within the community.

## Engaged Workforce

**OUTCOME ONE:** Strengthen employee satisfaction.

**OUTCOME TWO:** Reduce turnover rate.

**OUTCOME THREE:** Strengthen employee engagement.

## Sustainable, Diverse Funding

**OUTCOME ONE:** Maximize organizational efficiencies.

**OUTCOME TWO:** Increase unrestricted revenue.

**OUTCOME THREE:** Expand mission-aligned, diversified funding sources.



# Community-Centered Services

## OUTCOME ONE: Increase community outcomes.

### Performance Goal:

Achieve 6 community outcomes by 9/30/27.

### Annual Performance Goals:

- Year 1: 1 by 9/30/25.
- Year 2: 2 by 9/30/26.
- Year 3: 3 by 9/30/27.

### Action Steps:

- Identify community projects that support prioritized needs of the Community Needs Assessment by 1/31/25.
- Develop project creation timeline by 3/31/25.
- Obtain community partners/resources by 9/30/25.
- Implement community projects by 9/30/27.

## OUTCOME TWO: Increase family outcomes.

### Performance Goal:

Increase percentage of families who reach their identified outcomes by 25% by program by 9/30/27.

### Annual Performance Goals:

- Year 1: Establish baseline and procedures by 9/30/25.
- Year 2: 10% by 9/30/26.
- Year 3: 25% by 9/30/27.

### Action Steps:

- Establish each program baseline and all applicable outcomes with ROMA-trained staff by 1/31/25.
- Establish programmatic targets by program by 1/31/25.
- Provide program specific training to staff to support clients regarding outcome achievement by 9/30/26.
- Provide quarterly outcome achievement reporting to all programs and departments by 1/31/27.

## OUTCOME THREE: Increase access to agency services and programs.

### Performance Goal:

Develop 10 program application methods or access points by 9/30/27.

### Annual Performance Goals:

- Year 1: 2 by 9/20/25.
- Year 2: 3 by 9/30/26.
- Year 3: 5 by 9/30/27.

### Action Steps:

- Identify application methods currently not in use by 3/31/25.
- Identify potential gaps in access points by 3/31/25.
- Prioritized list of access points/application methods based on identified gaps by 6/30/25.
- Implement access points/application methods in the community by 9/30/27.

# Community Connections

## OUTCOME ONE: Increase impact of services on poverty.

### Performance Goal:

Increase the number of people served by 10% by 9/30/27.

### Annual Performance Goals:

- Year 1: 3% by 9/30/25.
- Year 2: 6% by 9/30/26.
- Year 3: 10% by 9/30/27.

### Action Steps:

- Develop marketing plan by 1/31/25.
- Develop referral system by 1/31/25.
- Implement marketing plan by 7/31/25.
- Create centralized intake system by 9/30/26.

## OUTCOME TWO: Increase legislative advocacy.

### Performance Goal:

Complete 8 advocacy efforts by 9/30/27.

### Annual Performance Goals:

- Year 1: Development and training of advocacy team.
- Year 2: 1 overall OACAC advocacy effort from Advocacy Team by 9/30/26.
- Year 3: 1 advocacy focused effort per program/department from the Advocacy Team by 9/30/27.

### Action Steps:

- Create an advocacy team/committee by 1/31/25.
- Develop advocacy plan by 7/31/25.
- Train appropriate staff members on skills necessary for this area by 1/31/26.

## OUTCOME THREE: Increase partnerships within the community.

### Performance Goal:

Increase the number of partnerships by 15% by 9/30/27.

### Annual Performance Goals:

- Year 1: 5% by 9/30/25.
- Year 2: 10% by 9/30/26.
- Year 3: 15% by 9/30/27.

### Action Steps:

- Identify current partnerships and share organization-wide by 1/31/25.
- Identify partnership gaps for targeted marketing by 4/30/25.
- Create partnership outreach plan (may include community events in the counties - Chamber meetings, City meetings, etc) by 7/31/25.
- Implement partnership outreach plan by 8/31/26.

# Engaged Workforce

## OUTCOME ONE: Strengthen employee satisfaction.

### Performance Goal:

80% of employees report satisfaction with terms and conditions of employment by 9/30/27.

### Annual Performance Goals:

- Year 1: Establish satisfaction baseline by 9/30/25.
- Year 2: 50% by 9/30/26.
- Year 3: 80% by 9/30/27.

### Action Steps:

- Create employee satisfaction and survey by 12/23/24.
- Distribute the survey to all OACAC employees by 3/31/25.
- Establish baseline satisfaction number 5/31/25.
- Develop satisfaction improvement plan by 10/31/25.

## OUTCOME TWO: Reduce turnover rate.

### Performance Goal:

10% or less of employees who voluntarily depart the agency (excluding retirement/death) by 9/30/27.

### Annual Performance Goals:

- Year 1: 20% by 9/30/25.
- Year 2: 15% by 9/30/26.
- Year 3: 10% by 9/30/27.

### Action Steps:

- Analyze turn-over by program/department by 10/31/24.
- Create "stay" survey for people who are employed with us long term by 11/15/24.
- Improve training and support for new employees by 3/1/25.
- Create a leadership academy by 10/30/25.

## OUTCOME THREE: Strengthen employee engagement.

### Performance Goal:

80% of workforce are actively engaged by 9/30/27.

### Annual Performance Goals:

- Year 1: Establish engagement baseline by 9/30/25.
- Year 2: 50% by 9/30/26.
- Year 3: 80% by 9/30/27.

### Action Steps:

- Create employee engagement survey by 12/23/24.
- Distribute the survey to all OACAC employees by 1/15/25.
- Establish baseline satisfaction number 3/15/25.
- Develop engagement improvement plan by 10/31/25.

# Sustainable, Diverse Funding

## OUTCOME ONE: Maximize organizational efficiencies.

### Performance Goal 1:

Increase the number of staff cross-trained across programs with shared goals (i.e., 2-Gen approach) to 20 by 9/30/27.

### Annual Performance Goals:

- Year 1: Research.
- Year 2: Increase cross-trained staff per target program (total of 8 staff) by 9/30/26.
- Year 3: 1 cross-trained staff per target program (total of 12 staff) by 9/30/27.

### Performance Goal 2:

Decrease expenditures related to "overhead" by 5% by 9/30/27.

### Annual Performance Goals:

- Year 1: Decrease by 1% of baseline by 9/30/25.
- Year 2: Decrease by 3% of baseline by 9/30/26.
- Year 3: Decrease by 5% of baseline by 9/30/27.

### Action Steps:

- Research CAA best practices/internal potential cross training opportunities by 9/30/25.
- Implement cross trained positions internally by 9/30/26.
- Track progress of cross trained positions by 3/31/27.
- Identify strengths and needs for support of cross trained positions by 9/30/27.

## OUTCOME TWO: Expand mission-aligned, diversified funding sources.

### Performance Goal:

Add 3 new mission-aligned funding streams to support programs by 9/30/27.

### Annual Performance Goals:

- Year 1: 1 new funding source by 9/30/25.
- Year 2: 1 new funding source by 9/30/26.
- Year 3: 1 new funding source by 9/30/27.

### Action Steps:

- Research sources that list new funding opportunities by 9/30/25.
- Research potential of hiring/contracting/apprenticeship a grant writer by 9/30/26.
- Apply for grants under existing/new funding sources by 9/30/27.

# Sustainable, Diverse Funding, cont.

## OUTCOME THREE: Increase unrestricted revenue.

### Performance Goal:

Grow donations & event proceeds by 50% by 9/30/27.

### Annual Performance Goals:

- Year 1: Expand the number of Board Members/CAB Members/ community volunteers actively engaged in increasing unrestricted revenue by 5 from the 2024 baseline by 9/30/25.
- Year 2: Expand the number of Board Members/CAB Members/ community volunteers actively engaged in increasing unrestricted revenue by 10 from the 2024 baseline by 9/30/26.
- Year 3: Increase net event revenue & donations by 50% from the 2024 baseline by 9/30/27.

### Action Steps:

- Identify/invite AB/CAB/Volunteers to co-chair subcommittees of each event (task-focused) by 10/31/24.
- Identify untapped donation commitments for events by 6/30/25.
- Implement plan to follow up on on untapped donation commitments by 9/30/25.
- Research potential of hiring/contracting/apprenticeship of fundraising assistant by 9/30/27.