

# 2015 Strategic Plan



**Ozark Action, Inc.**  
Helping people. Changing lives.  
A Community Action Partnership



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*\*All descriptions of the ToP Facilitator Process come directly from the International Cultural Affairs and Missouri’s Community Action ToP Facilitator Bureau.*



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## **The Mission**

*“To coordinate and provide services for people with needs so they can improve their quality of life.”*

## **Our Values**

- *Caring and empathy for all we serve.*
- *Honesty and integrity in all we do, utilizing our resources wisely.*
- *Concern, respect and teamwork among co-workers.*
- *Commitment to provide an appropriate referral to those we are unable to directly serve.*

## **Our Vision**

*Communities throughout the South Central Ozarks in which:*

- *The opportunities and resources are present for individuals and families to move from poverty to self-sufficiency, and where...*
- *All citizens are empowered to realize their full potential and participate in decisions that affect them, and...*
- *Communities mobilize broad partnerships involving the public and private sectors together with those affected, to build full individual, family and community self-sufficiency.*

# Executive Summary

In 2013 Ozark Action began the Community Needs Assessment. A Community Needs Assessment is an assessment report on the demographics, needs, and trends affecting the six counties covered by *Ozark Action, Inc.* (OAI) in southern Missouri. It is designed to lead the Strategic Planning Process for the agency for the next three to five years. The counties covered include Douglas, Howell, Oregon, Ozark, Texas, and Wright.

Below are the results of the Comprehensive Needs Assessment process that will be used to *prioritize* and lead the agency in the coming years:



In January of 2015, OAI invited two Technology of Participation Facilitators to assist the agency in the development of the Strategic Plan. The Technology of Participation Participatory Strategic Planning Process is a specific group facilitation methodology used to facilitate strategic plan development. The ToP Participatory Strategic Planning Process was developed by the Institute of Cultural Affairs USA and uses a participatory consensus approach involving individual, small group, and whole group work.



The planning process takes about sixteen hours and can be completed in a variety of ways. Identified key stakeholders such as board members, frontline staff, and directors are involved in the agency's planning process as seen above.

The planning process consists of the following four components: practical vision, underlying contradictions, strategic directions, and focused implementation.

# Preparation and Design

*What is the agency's current reality and trends?*

*What accomplishments has the agency achieved?*

*What are benefits and advantages to creating a Strategic Plan with the help of ToP facilitation?*

## Basic Facts

- ❖ High rate of individuals without healthcare
- ❖ Increased competition with schools for Pre K services
- ❖ Head Start demands are changing
- ❖ High unemployment rate
- ❖ Loss of jobs/employers
- ❖ Less access to services with state agencies
- ❖ Access to technology to receive services are needed
- ❖ Technology has become an impediment to accessing services
- ❖ Transportation is an issue
- ❖ Missing human element
- ❖ Agency Capacity
- ❖ Legal/Funding requirements
- ❖ Frustrations of not being able to succeed is leading to drug use and dependence
- ❖ 1 in 4 people are living in poverty
- ❖ See more transient and desperate population
- ❖ Low cost of living
- ❖ Low wages
- ❖ Jobs with no benefits
- ❖ Significant substance abuse and domestic violence in area
- ❖ Families being separated for employment opportunities
- ❖ Grandparents raising grandchildren

## Recent Accomplishments

- ❖ Maintained all county offices
- ❖ Good customer services
- ❖ VITA
- ❖ Weatherization
- ❖ Community Gardens & food prep
- ❖ Improved community referral system
- ❖ Interagency integration-less of a silo
- ❖ Agency has grown
- ❖ Outward community focus – increased public perception
- ❖ Trained and dedicated staff to agency and families they serve
- ❖ Staff longevity
- ❖ Increased media focus: website updated, radio spots, social media, newsprint
- ❖ Developed new programs -gotten rid of ones that don't work
- ❖ Adapted to decreased funding
- ❖ Seeking alternative funding and opportunities
- ❖ Good job of managing budget
- ❖ Adaptive agency
- ❖ Budget for most valuable resource: staff
- ❖ Directors and communication line continue to improve
- ❖ Training in Head Start has become more focused
- ❖ Restructure to family outreach
- ❖ ACA Access







## Trends

- ❖ Support for Head Start at State and Fed level is decreasing
- ❖ OAI Outreach offices becoming one stops for all agencies' services
- ❖ Budget pressure in State agencies
- ❖ Single parents births are increasing over two parent households
- ❖ Public schools providing Pre K services resulting in less money for Head Start
- ❖ Competition is chasing after the big money without the service focus or commitment to mission
- ❖ Aging population requires increased services
- ❖ Increased teen pregnancy
- ❖ New partnerships
- ❖ Organizational standards
- ❖ Increased accountability
- ❖ Less manufacturing and more service jobs – resulting in lower pay and less benefits
- ❖ Users and abusers
- ❖ Private higher education moving to rural area (driven by revenue)
- ❖ Community willing to help and be a part
- ❖ Seen as a resource to community

## Benefits/ Advantages of Top Strategic Plan

- ❖ Make some tough decisions
- ❖ Look at the big picture
- ❖ All levels of staff involved
- ❖ Be Proactive
- ❖ Frame-work to continue to move forward
- ❖ Creativity
- ❖ Keeps you focused
- ❖ Prevents mission drift
- ❖ Prepares people for change
- ❖ Reminds of us our strengths

## Practical Vision

*What do we want to see in place in 3 – 5 years  
as a result of our actions?*

Parts of an organization's practical vision remain latent in the imagination of its individual members. Consequently, the breadth of a group's vision is hidden from each member until it becomes evolutionary and dynamic. It needs to be constantly reviewed, and more importantly, renewed. It is founded on the learning that takes place while doing the mission. It is changed by both accomplishment and failure. If a mission statement is the assertive statement of purpose, the practical vision is the responsive description of that purpose manifested in the short term within the organization.

### **Provide & Grow Outreach Education and Services**

- ❖ Affordable Healthcare
- ❖ More transportation available for clients
- ❖ More food pantries
- ❖ Affordable healthcare available to everyone
- ❖ Safe affordable housing
- ❖ Help others' dreams – No rubber stamps
- ❖ Adult dental care
- ❖ How to maintain after WX
- ❖ Access to Technology
- ❖ Awareness of Domestic Abuse/ Substance Abuse
- ❖ Technology Class/Resource Centers
- ❖ Life Skills Classes (Parenting, budgeting, health literacy and nutrition)

### **Maximize Return on Investment**

- ❖ Evaluate Program effectiveness
- ❖ No issues in Rental Program
- ❖ Stability in Apts
- ❖ Eliminate duplicate services
- ❖ All Head Start classes are full
- ❖ More people completing family support
- ❖ Results oriented to outside referrals

## **Increase Agency Visibility & Branding**

- ❖ More outreach to community
- ❖ Become the community hub
- ❖ Strengthening Community partnerships
- ❖ Continue involvement (us to them; them to us)
- ❖ Community Improvement Fair

## **Obtain Additional Funding**

- ❖ Private funding increase
- ❖ Additional \$ Stable outside of Fed/State
- ❖ Strong funding for programs
- ❖ Diversified Funding

## **Improved Customer Service**

- ❖ Visible in all communities
- ❖ Lobby changes
- ❖ Maintain personal touch
- ❖ Easy access to services

## **Enhance Interagency Communication**

- ❖ Strengthening internal partnerships
- ❖ Better communication between departments for referrals

## **Support Economic Development**

- ❖ More jobs coming into area

## **Expand Services to Un-Served Population**

- ❖ Support for grandparents
- ❖ Assistance for elderly and resources

# Underlying Contradictions

*What is blocking us from moving towards our vision?*

Real issues facing an organization become apparent when examined in light of a practical vision. Without a vision, problems and anxieties are relegated to lists of things to do or are explained away as personal conflicts. As a group considers the entire range of its issues together, root causes are uncovered and objectified for deeper analysis. Analysis allows a group to identify its role in holding the current system in place. Once named, a solution often manifests itself from within the root cause.

## Understanding Client Population

- ❖ Recruiting those never served
- ❖ Getting the word out
- ❖ No education currently provided
- ❖ Clients pride & embarrassed
- ❖ Listening to needs and ideas
- ❖ Client disabilities
- ❖ Substance Abuse
- ❖ Poor communication
- ❖ Client image “those kind of people”

## Hiring Practices do not match Agency Priorities

- ❖ Time Management
- ❖ Effective use of time
- ❖ Communication with team
- ❖ Staff Complacency
- ❖ Personality Conflicts
- ❖ We do not follow through (all the time)

## **Understanding Program Objectives**

- ❖ Continual Motivation and Delegation
- ❖ Priorities and Planning get set aside
- ❖ Forget or Lose Focus
- ❖ Agenda's that clash
- ❖ Passion

## **Unrealistic Workload**

- ❖ Increase responsibilities of staff = increase pressure
- ❖ Conflicting Responsibilities
- ❖ Time – so much to do with limited staff
- ❖ Manpower
- ❖ Burnout
- ❖ Initiative to speak up

## **Fear Affects Action and thus Outcomes**

- ❖ Fear of Failure
- ❖ Fear of Change
- ❖ Job Security
- ❖ Trying to be “PC”

## **Segments of the Community don't know OAI**

- ❖ Community Support
- ❖ Getting more involved in Community
- ❖ Community Apathy
- ❖ Community Acceptance
- ❖ Knowledge of the Community

## **Institutional Anxiety**

- ❖ Adapting to change
- ❖ Culture (change) mindset
- ❖ Knowledge or reluctant to change

## **State/Federal Mandates Conflict with Agency Mission**

- ❖ No control
- ❖ Regulatory Pressure
- ❖ ROI

## **Funding is too Restrictive**

- ❖ Competition for funding
- ❖ Funding Resources
- ❖ Where to apply for funding

# Strategic Directions

*What innovative substantial actions will deal with the underlying contradictions and move us toward our vision?*

Strategic directions are an arena of work a group chooses when it has identified the contradictions to its vision. If an organization plans only in relation to its vision, the strategies it chooses run the risk of being nullified or limited by unforeseen obstacles. When it plans strategically, giving due consideration to the real situation and underlying contradictions, an organization has a chance of realizing its vision.

## 1. Enhancing hiring practices and staff development

- **Strengthening Hiring Practices**
- **Inspiring Staff**
- **Rejuvenating Staff**

**Strengthening Hiring Practices:** revamping hiring process (potentially including an aptitude test), interview questionnaire, improve tools for hiring, and do not hire someone just to hire someone

**Inspiring Staff:** less time off during busiest work load, rewarding staff to increase motivation, try or do something

**Rejuvenating Staff:** refit staff responsibilities to plan-as appropriate, engaging with a purpose, active investment of staff in agency (Americorps, etc)



## 2. Bridging Communication to Enhance Relationships

- **Staying in Touch**
- **Generating Awareness**

**Staying in Touch:** stay current in community, more client involvement, client trend discussion

**Generating Awareness:** publicize more, work with churches, marketing, call to action sent out, public awareness campaigns



## 3. Analyzing and Evaluating for Success

- **Evaluating Program Status**
- **Ensuring Results**

**Evaluating Program Status:** Sell rental property

**Ensuring Results:** Regular meetings for everyone with minutes and sign in sheets, communications (internal), follow through and follow up, provide better training (management training for all staff), re-visit plan regularly, support for all levels (teamwork), talk positive, good planning good delegating, set targets/ goals from top down to completion, match programs to mission and not mission to programs



#### 4. Empowering Staff for Positive Change

- **Expanding Staff Knowledge**

**Expanding Staff Knowledge:** poverty simulation for staff, educate staff, promote CCAP Certification, training strength assessment, ROMA, everyone knows mission

#### 5. Growing Opportunities for Resource Stability

- **Diversifying Resources**

**Diversifying Resources:** Increase unrestricted funds

## First Year Accomplishments

### Strategic Direction: Enhancing Hiring Practices and Staff Development

| Current Reality   | 1 <sup>st</sup> Year Accomplishments  | Success Indicators<br><i>(what would be different in 2- 3 years as a result of our actions)</i>   |
|---|---|---|
| <ol style="list-style-type: none"> <li>1. Hire quickly and hope for best</li> <li>2. Not all departments have planned staff development</li> <li>3. Staff development is inconsistent</li> <li>4. Take what we get</li> <li>5. Shallow pool of applicants</li> <li>6. Pay rate determines the pool</li> <li>7. Hiring process is sometimes preselected</li> <li>8. Job descriptions don't match jobs</li> <li>9. Adequate orientation for new staff</li> <li>10. 4 Standard interview questions</li> <li>11. Ineffective use of HR tools</li> </ol> | <ol style="list-style-type: none"> <li>1. Development plans for 85% of staff</li> <li>2. 100% of agency job descriptions reviewed and updated</li> <li>3. Evaluation process reviewed and revised</li> <li>4. Enhance application availability</li> <li>5. Begin development/explore internship process</li> <li>6. Explore mentoring program for staff</li> <li>7. Quarterly HR trainings conducted</li> </ol> | <ol style="list-style-type: none"> <li>1. Better applicant pool</li> <li>2. Updated Job descriptions that are realistic</li> <li>3. Updated evaluation process</li> <li>4. Consistent use of evaluation process and HR tools</li> <li>5. Individualized staff goals</li> <li>6. Individual Development Plans agency wide</li> <li>7. Basic orientation for all</li> <li>8. Each employee spends one day with each program</li> <li>9. Enhanced Recruitment efforts</li> <li>10. Enhanced and expanded internship opportunities</li> </ol> |

## First Year Accomplishments

### Strategic Direction: Empowering Staff to Make Positive Change

| Current Reality   | 1 <sup>st</sup> Year Accomplishments   | Success Indicators<br><i>(what would be different in 2- 3 years as a result of our actions)</i>   |
|---|--|---|
| <ol style="list-style-type: none"> <li>1. Staff eager and willing to learn</li> <li>2. Staff are included in the decision making process of the agency</li> <li>3. Management staff is open to empowering staff</li> <li>4. Staff are encouraged to participate in their community</li> <li>5. Respect for staff in most areas of the agency</li> <li>6. Sense of community in Central Office</li> <li>7. Staff have the opportunity to be more engaged if they desire to participate</li> <li>8. Newer staff may see cliques</li> <li>9. Community may not be as familiar with OAI as OAI is with the community</li> </ol> | <ol style="list-style-type: none"> <li>1. 24 community events held throughout the service area</li> <li>2. 1 department will have completed a ROMA experience</li> <li>3. 22 ½ % of staff have completed basic ROMA training</li> <li>4. One idea from staff is implemented</li> <li>5. Develop mechanism for regular staff communication</li> <li>6. Conduct staff satisfaction survey</li> </ol> | <ol style="list-style-type: none"> <li>1. Staff is informed of all agency programs</li> <li>2. Each department has gone through ROMA process on one issue</li> <li>3. Annual employee satisfaction survey implemented</li> <li>4. Staff freely express program ideas</li> <li>5. Communities know OAI</li> <li>6. Increased referrals and participation from community</li> <li>7. Decreased staff turnover</li> <li>8. Increased community referrals made from staff</li> <li>9. Departments share program status with all staff</li> <li>10. Agency bulletin</li> <li>11. Monthly conference calls</li> <li>12. Accurately report services</li> </ol> |

## First Year Accomplishments

### Strategic Direction: Analyzing and Evaluating for Success

| <b>Current Reality</b>  | <b>1<sup>st</sup> Year Accomplishments</b>   | <b>Success Indicators</b><br><i>(what would be different in 2- 3 years as a result of our actions)</i>  |
|---|--|---|
| <ol style="list-style-type: none"> <li>1. Each department reviews own work</li> <li>2. Report card shared with the board</li> <li>3. Clean Audit</li> <li>4. Program monitoring</li> <li>5. Review Agency Funding</li> <li>6. HS at full capacity</li> <li>7. HS TTR Data</li> <li>8. Monitor all Program Targets</li> <li>9. Agency safety policy is in place</li> </ol> | <ol style="list-style-type: none"> <li>1. Identify point person in each location (resource committee)</li> <li>2. Resource Committee will have a clear directive in writing</li> <li>3. Identify resource development tasks by individual</li> <li>4. Access community efforts to date and develop a plan to move forward</li> </ol> | <ol style="list-style-type: none"> <li>1. Implemented Safety 1<sup>st</sup></li> <li>2. Front Line Staff understands how their work impacts agency success</li> <li>3. Staff have codes of work plans that mandate their work</li> <li>4. Meet all program goals and standards</li> <li>5. Agency wide program assessment process is implemented</li> <li>6. Success shared with all stakeholders (staff, board, funders, community)</li> <li>7. Regular Documentation of agency efforts</li> </ol> |

## First Year Accomplishments

### Strategic Direction: Bridging Communication to Enhance Relationships

| <b>Current Reality</b>   | <b>1<sup>st</sup> Year Accomplishments</b>  | <b>Success Indicators</b><br><i>(what would be different in 2-3 years as a result of our actions)</i>   |
|--|---|---|
| <ol style="list-style-type: none"> <li>1. We provide customer satisfaction surveys</li> <li>2. Customers are involved in the Needs Assessment</li> <li>3. We haven't built a volunteer (from clients) base for Poverty Simulation and REALL Simulation yet.</li> <li>4. CSBG department tries to go to interagency and chamber meetings.</li> <li>5. We have family advocates that can attend these meetings</li> <li>6. Agency e-mail blast</li> <li>7. Social media</li> </ol> | <ol style="list-style-type: none"> <li>1. Create a volunteer (client) bank for each county of people who can help with events.</li> <li>2. Create client advisory committees in each county.</li> <li>3. Plan for customer satisfaction surveys</li> <li>4. Set dates for Family Advocates and CSBG to meet monthly or quarterly (they create a plan for communication with the help of a client advisory committee to promote the agency)</li> <li>5. County informational meetings between CSBG and Head Start Staff</li> </ol> | <ol style="list-style-type: none"> <li>1. Each Poverty Simulation and REALL Simulation will have local client involvement.</li> <li>2. Customer Satisfaction Surveys for the entire agency instead of individual surveys for each department.</li> <li>3. Family Advocates and CSBG staff attend local meetings as well as meet as a county to discuss trends and successes they are having in their community</li> </ol> |

## First Year Accomplishments

### Strategic Direction: Growing Opportunities for Resource Stability

| <b>Current Reality</b>   | <b>1<sup>st</sup> Year Accomplishments</b>  | <b>Success Indicators</b><br><i>(what would be different in 2- 3 years as a result of our actions)</i>  |
|--|---|---|
| <ol style="list-style-type: none"> <li>1. Obtained additional grants</li> <li>2. Started the first phase of Resource Development Plan-Awareness</li> <li>3. Have a Resource Development Plan</li> <li>4. Confusion about the Resource Development committee and roles</li> <li>5. One educational/ fundraising event planned</li> <li>6. Heavy reliance on Federal Grants</li> <li>7. Donate Now button</li> <li>8. Pledge to End Poverty page</li> <li>9. E-mail Blast</li> <li>10. Strong community partnerships</li> <li>11. Call to Action created, but not used</li> <li>12. No prospecting done</li> </ol> | <ol style="list-style-type: none"> <li>1. Board approved Resource Development Plan</li> <li>2. Everyone involved in Resource Development committee has signed off that they understand their roles</li> <li>3. Create a plan for what quarterly events the agency would like to have</li> <li>4. Meet monthly with directors and apply for grants</li> <li>5. Begin prospecting (include the Board)</li> <li>6. Look into donor software</li> <li>7. Begin phase of mailing campaign around the holidays</li> </ol> | <ol style="list-style-type: none"> <li>1. Board approved Resource Development Plan</li> <li>2. Clear job descriptions of what each person is doing on Resource Development Committee</li> <li>3. Set up quarterly fundraiser/ education events</li> <li>4. Meeting of directors at least monthly about potential grants</li> <li>5. Major donor campaign</li> <li>6. Mailing campaign/ Call to Action</li> <li>7. Prospecting</li> <li>8. Board involvement in fundraising</li> </ol> |