



# 2020-2025 STRATEGIC PLAN

Facilitated By

*Rebecca Kraus & Associates LLC*

## Table of Contents

<b>Section 1: Executive Summary .....</b>	<b>3</b>
<b>Section 2: History .....</b>	<b>4</b>
<b>Section 3: Community Profile.....</b>	<b>5</b>
<b>Section 4: The Strategic Planning Process.....</b>	<b>7</b>
<b>Section 5: Core Values.....</b>	<b>8</b>
<b>Section 6: The Agency’s Social Challenge .....</b>	<b>9</b>
“Improving and Sustaining Quality of Life For Those We Serve”.....	9
<b>Section 7: Key Client Needs .....</b>	<b>10</b>
<b>Section 8: The Agency Purpose, Mission .....</b>	<b>11</b>
<b>Section 9: The Environmental Scan .....</b>	<b>11</b>
<b>Section 10: The Vision .....</b>	<b>12</b>
<b>Section 11: The SWOT &amp; The Agency’s Key Expertise.....</b>	<b>12</b>
<b>Section 12: The Strategic Result .....</b>	<b>14</b>
<b>Section 13: Impact Areas.....</b>	<b>15</b>
<b>Section 14: Strategic Priorities and Goals .....</b>	<b>17</b>
<b>Section 15: 2021-2022 Implementation Targets .....</b>	<b>19</b>
<b>Section 16: The NEMCSA Theory of Change Model .....</b>	<b>22</b>
<b>Section 17: Alignment with Communication Action Network Goals, ROMA and CSBG Standards.....</b>	<b>23</b>
<b>Section 18: Integrating Programmatic Services to the Agency Plan.....</b>	<b>24</b>

## Section 1: Executive Summary

In collaboration with consultant Rebecca Kraus, Rebecca Kraus & Associates, Northeast Michigan Community Service Agency (NEMCSA) developed a five-year strategic plan with adaptive strategies to better position the agency to reduce poverty. The plan is the result of a comprehensive process inclusive of stakeholder engagement and participation including clients, governing board, funders, collaborative partners, and staff. The planning process utilized information from the 2020 Community Needs Assessment and other data-driven sources to determine how to best meet the needs of our clients and our community.

In tandem with the drive to deliver sustainable solutions is the need to demonstrate impact. The plan utilizes an adaptive strategy model and Result Oriented Management and Accountability (ROMA) balanced scorecard approach to track goal attainment on related agency-wide core strategies. Agency and program strategies unify the Agency with a focus on achieving impact in three targeted areas – Organizational Capacity, Coordination of Services, and Individual and Family Success for low-income people and communities in the NEMCSA region.

The 2020-2025 Strategic Plan represents the next cycle of growth for the Agency moving to a more adaptive organization. The implementation phase will support a culture where all levels of the Agency think in terms of impact, real-time action, and results through cross-matrixed agency collaboration, streamlined operations, and data-driven decision making led by highly trained staff.

As a Community Action Agency, the mission of NEMCSA is rooted in the principles of the Community Action Network, and a commitment to the Promise of Community Action. The plan serves as a guide to ensure infrastructures are in place to reduce poverty, staff and the Board of Directors will assure the plan is implemented using ROMA monitoring and assessment processes to achieve organizational and program goals. This strategic plan is a roadmap to help drive actions toward alleviating the causes and conditions of poverty in our region.

We extend our gratitude to our stakeholders including members of the Board of Directors, strategic planning committee, staff, and clients for their time, expertise, and effort to ensure a quality strategic plan.



A special thanks to the members of the Strategic Planning Team:

**Gina Bey   Kimberlee Hincka   Frances Ommani   Dorothy Pintar**  
**Victoria Purvis   Nicole Smith   Kristina Warner**

## Section 2: History

In 1964, The Great Society, as envisioned by President Lyndon Johnson, was a sweeping plan to improve the lives of all Americans, regardless of their circumstances. Inspired by President Kennedy and his New Frontier, Johnson pledged to fulfill his promise of equal opportunity for all by enacting several comprehensive changes within the federal government. In August of that same year, the Economic Opportunity Act was signed into law by President Johnson creating the nationwide Community Action Network.

In 1963, shortly before he was assassinated, President Kennedy had asked his economic advisors to draw up some proposals to address the problem of American poverty. Johnson took up this charge after he succeeded Kennedy as President. In Johnson's first State of the Union address in 1964 he called for an unconditional war to defeat poverty. He expanded and revised the proposals given to Kennedy and developed the Economic Opportunity Act of 1964. The act included a variety of initiatives including Head Start; Job Corps; Work-Study program for university students; VISTA (Volunteers in Service to America) - a domestic version of the Peace Corps; Neighborhood Youth Corps; basic education and adult job training and Community Action Programs (CAPS) which turned out to be the most controversial part of the package, as it proposed the "**maximum feasible participation**" by poor people themselves in determining what would help them the most. CAPS were a radical departure from how government had run most social reform programs in the past.

Community Action is a coordinated effort to address the root effects of poverty and to, ultimately, move families and individuals to self-sufficiency, rather than foster dependency. There are now over 1,000 Community Action Agencies (CAAs) throughout the United States and Puerto Rico. There are 29 in Michigan. NEMCSA serves the most counties and with 6,436 square miles covers a territory equal to Connecticut and Rhode Island combined (6,755).

NEMCSA was incorporated in 1968 as this region of Michigan's response to the War on Poverty. Initially there were three Community Action Agencies that merged. ThunderCAP, which was Alcona, Alpena, Montmorency and Presque Isle, became the core. Then 7CAP (many were numbered in those days) which was located in West Branch came in with Arenac, Iosco, Ogemaw and Oscoda. The third, on the western boundary, was Emmet, Charlevoix, Cheboygan and Otsego. Crawford remained alone attached to Traverse City. In a trade, Emmet and Charlevoix went to the west and Crawford came east. At last, in 1968, the eleven counties were under one umbrella, then called Northeast Community Action Agency. The main office was located in a house built by the Alpena High School building trades class with offices in the basement and the garage. That year NEMCSA had a budget of just under \$500,000. It has grown over 100 times the original allocation to \$52.6 million in 2019.



Community Action agencies have some unique characteristics. They are required to have a tripartite board consisting of local private sector, public sector, and consumer sector community representatives. NEMCSA operates with a 30- member board.

Core funding for CAAs is the Community Services Block Grant (CSBG), a line item in the Federal Budget. Nationally, every CSBG dollar spent leverages nearly \$4 of state, local, and private contributions combined. The Michigan Bureau of Community Action and Economic Opportunity administers nearly \$24.3 Million across 29 Community Action Agencies in the State of Michigan. For 2021, NEMCSA's CSBG

expenditures of \$524,691 is about 1% of its total agency revenue of just over \$50 million.

In addition to the 11 counties that NEMCSA serves from its central offices in Alpena, it also serves 11 other counties with some programming. Head Start, the largest program, covers 21 Michigan counties. The additional 10 counties outside of the basic area are in mid- Michigan and "The Thumb." The counties are Bay, Clare, Gladwin, Huron, Lapeer, Mecosta, Midland, Osceola, Sanilac and Tuscola. Our Early Childhood Services (Head Start, Early Head Start and the Great Start Readiness Program) comprise 53% of the budget. Because of the vast territory, NEMCSA operates a central Michigan administrative center in Bay City. NEMCSA has the designation of the Region 9 Area Agency on Aging and adds one additional county, Roscommon. Its services are provided mainly to those 60 and older. Between Community Based Care and Aging Programs, this department has 30% of the budget. NEMCSA has a presence in nearly every town in its service area and prides itself on being a part of the local community.

NEMCSA has grown its staffing along with its programs and budget. In 2019, there was a roster of over 725 full and part-time staff. They lived in 38 counties, had gross wages of \$17.4 million and benefit of \$7.4 million for a total compensation of \$24,840,853.

### **Section 3: Community Profile**

Northeast Michigan Community Service Agency, Inc. (NEMCSA) is a private, nonprofit Community Action Agency, part of a state and national network of Community Action Agencies. The basic service area is eleven northeast Michigan counties covering 6,436 square miles. The core counties include Alcona, Alpena, Arenac, Cheboygan, Crawford, Iosco, Montmorency, Ogemaw, Oscoda, Otsego, Presque Isle and Roscommon. The agency is governed by a 30-member Board of Directors. This Board, in compliance with P.A. 230, brings together equal representation of the public and private sectors and the consumers who receive services. In this manner, policy and fiscal matters as well as program and service issues are reviewed by those who have the insights to provide meaningful guidance to NEMCSA.

The 11 core counties making up the primary service area for NEMCSA, are essentially rural. The largest city in the region is Alpena (home to NEMCSA's central offices) which has approximately 10,000 people. Evidence of the rural nature of the region is the population density with a regional average of 31 persons per square mile ranging from a high of 50.24 in Alpena County to a low of 14.68 in Oscoda County. The service area stretches about 200 miles north/south and is approximately 100 miles wide.

There are some portions of the territory nearly 100 miles from the nearest freeway. The region has 1,850 miles of shoreline with six counties bordering Lake Huron.



Current population, demographics and changes in composition over time play a determining role in the type of services, plans and goals NEMCSA and its partners make. Most of the residents in the core service region are 18-64 years of age (56%). This age group is also responsible for 70% of the working individuals. There has been a steady *decrease* in the total population of the region over the last 16 years resulting in a -6.15% loss; This is vastly different than Michigan's overall population change of -0.13%. The area has almost an even distribution of gender, is predominately white and has just over 16% of residents living in poverty, a 3.18% increase since 2000.

At the time of this report, the federal poverty income level is \$12,490 per year for a single individual, meaning a bi-weekly take home wage of \$443.64 (without a reduction for healthcare and/or 401K). A family of four would have an annual income of \$32,190 gross/\$24,142 net, resulting in a bi-weekly take home of \$928.53. Of the households in poverty, married couples and single female head of households have the highest percentage with both at 5%.

According to the U.S. Census Bureau's 2011 Current Population Report, 46.2 million Americans are considered impoverished – 15 % of the country's population. Approximately 16.4 million (22%) under the age of 18, live in poverty, while 32% of those 5 years and younger do. Young adults are struggling too, with 24% of 18-34 year olds living in poverty. The rate for people 65 and older is 8.7%. According to the most recent census reports for NEMCSA's service area, the individuals who are most at risk are:

- Female-headed and married households (5% & 5.3% live in poverty) living in Ogemaw, Arenac or Roscommon County.
- Male and Females age 18-64 (specifically 18-34 years)
- Households with children (specifically under the age of 5)
- Those living in a family whose head is unemployed (32.9% nationally live in poverty).
- Individuals with a high school diploma or less

### **Total Population:**

A total of 218,602 people live in the 6,436 square mile area defined for this assessment according to the U.S. Census Bureau American Community Survey 2013-17 5-year estimates. The

population density for this area, estimated at 31 persons per square mile, is less than the national average population density of 90.88 persons per square mile.

## Section 4: The Strategic Planning Process

*“Strategic planning is the task of thinking through the mission of the business that is of asking the question ‘what is our business and what should it be?’ This leads to the setting of objectives, the development of strategies and plans and the making of today’s decisions for tomorrow’s results.*

*Peter Drucker*

The NEMCSA strategic planning process was designed for broad stakeholder engagement, thorough analysis of data and increased strategic focus on the most critical needs of those served by the Agency. Ten agency leaders representing the breadth of programs and services comprised the Strategic Planning Committee. As a result of COVID-19, the originally proposed face-to-face meetings were conducted via Zoom over thirteen 3-hour meetings from July 8-September 30, 2020.

The plan has been built on the findings of the recently completed community needs assessment representing stakeholder feedback from clients, community and staff. Additionally a Board, Partner, Funder survey was completed to gather feedback on agency perception, needs of the community, strengths and areas of opportunity to best serve the region.

The planning process was conducted in four phases:

1. Phase 0: Planning Preparation and Data Gathering
2. Phase I: The Theory of Change, Values, Mission, Vision
3. Phase II: Targeting of Specific Problems/Needs, Agency Role and Prioritized Areas for Focus
4. Phase III: Assess Capacity to Achieve Goals and Determine How NEMCSA Will Succeed
5. Phase IV: Board Presentation, Roll Out & Implementation Planning (NEMCSA led)

Specifically, the steps of the planning process included:

- Embracing the Theory of Change and adaptive planning
- Refining agency values and mission
- Increasing clarity on the agency vision
- Assessing environmental trends, risk factors
- Identifying the most critical areas of need and agency core areas of expertise
- Reviewing Community Network Goals and ROMA principles
- Completing a SWOT analysis
- Determining the Strategic Result to be achieved by the overall plan
- Identifying the key Impact areas of focus to achieve the result
- Determining the overarching Priorities (goals) to drive the plan
- Identifying the strategies required to realize the Strategic Result and address the Impact areas
- Prioritizing the strategies to set the first 18 month focus of the plan period with plan actions, measurements of success and owners.

### The Stakeholders

The NEMCSA strategic planning process has sought input and has focused on addressing the needs of its keystakeholders. These entities were determined as:



- Individual and families (clients)
- Agency workforce
- Communities
- Community Partners
- Schools
- Political representatives
- Funders
- Contractors
- Counties
- Court Systems
- Landlords

## Section 5: Core Values

Core Values serve as the foundation of an organization. They identify the beliefs that an agency holds dear and strive to uphold in action every day. Every decision ultimately is held up to the litmus test of whether or not it aligns or is contrary to agency values. It underpins and shapes the philosophical attitudes of the Agency's culture.

The 2020-2025 process held thoughtful discussions on the core values and presents them below. Additional time was spent on articulating examples of how values are “lived” at NEMCSA to increase staff and community understanding of these principles.

### PROPOSED NEMCSA VALUES

The four cornerstones of our beliefs and values are *dignity, empowering people, diversity, accountability*.

We treat everyone with *dignity* and respect.

We strive to *empower people* in our work and our service.

We value *diversity* and honor individual differences.

We are *accountable* to each other, our programs and those we serve.



### How Do We Live These Values?

#### *Dignity*

- By communicating and interacting fairly and respectfully with our board members, team and program participants.
- By holding each other accountable for treating everyone with dignity and respect.
- By accepting people for who they are and valuing individual beliefs and choices.
- By being mindful of our behavior and how it affects those around us.
- By measuring, surveying, and reporting results from program participants.



### ***Empowering People***

- By participating in our many programs and services, we empower people to become more self-sufficient.
- By including participants as representatives in our Board of Directors and other committees that help to govern our agency.
- By offering our team continued education and training.
- By utilizing a “person-centered” approach to ensure the household is part of the collaborative team and is included in the decision-making process to help in identifying its own needs.

### ***Diversity***

- By proclaiming loud and proud that we value and appreciate diversity exemplified in the recent logo change and Executive Director public proclamation.
- By creating a Diversity and Inclusion Committee.
- By enforcing zero tolerance for staff not abiding by diversity policy.
- By providing poverty education to agency team and community partners.

### ***Accountability***

- By recognizing when there needs to be improvement and embracing changes.
- By clearly and transparently communicating to staff, funders, and program participants.
- By utilizing a data-driven decision making process.
- By being consistent with policies and procedures.
- By consistent execution and delivery of agreements with funders.
- By using performance improvement-training and data mapping to improve workflows.

## **Section 6: The Agency’s Social Challenge**

The planning process explored the question of “What social challenge is NEMCSA, through our existence, striving to address?” It was determined that this social challenge was founded in self-sufficiency (long-term stability and resiliency), empowering people for success and reducing barriers leading to poverty. Specifically, the social challenge this strategic plan targets is:

**“Improving and Sustaining Quality of Life for Those We Serve”**



## Section 7: Key Client Needs

### Key Stakeholder Needs

The plan further clarified key stakeholders needs as they emerged through the needs assessment and survey findings:

- *Individual and families (Clients):* Case management, providing basic needs, programs and services, helping to navigate the services system.
- *Communities:* Impacting quality of life by reducing poverty, furthering productive members of society.
- *Community Partners:* Providing support and leveraging resources, collaborating to help others. NEMCSA also holds them accountable in meeting their obligations.
- *Schools:* Preparing children for entry into school as well as helping increase parent engagement and reduce barriers within the school. Act as a bridge between parents and the school system.
- *Workforce:* NEMCSA develops great people as a good employer, fulfilling opportunities to help others and helps to create workforce ready individuals, they provide poverty education to workforces, enlightening on poverty and providing strategies when dealing with their clientele.
- *Funders:* Fulfilling funder mandates and maintaining compliance.
- *Contractors:* Providing avenues for contractor services, exhibiting servant leadership and creating the ability to do the work with us.
- *Counties:* Complementing the services of counties and expanding their reaches.
- *Court Systems:* Supporting the court systems through their work in truancy and neglect, School Success, and education of businesses on truancy and behavior. NEMCSA serves in the role of family advocacy and through its Eviction Diversion program.
- *Landlords:* Providing access to people ready to rent, conducting home inspections, providing guaranteed rental payments, mediation, and easing negotiations. Apprising landlords of family situations and conducting home visits to assess units.
- *Accrediting Bodies:* NEMCSA's relationships with accrediting bodies supports providers in aiding them to more quickly work through channels to do work.

## Section 8: The Agency Purpose, Mission

The planning process further articulated the Agency's Purpose and Mission – its very reason for existence.

### **Proposed Purpose Statement**

*“Empowering People, Enhancing Lives”*

### **Proposed NEMCSA Mission Statement**

*Enhancing quality of life by empowering individuals  
and strengthening communities.*

## Section 9: The Environmental Scan

The environmental scan considers findings from the Community Needs Assessment and The Board, Partner, Funder Survey and Trends Analysis completed by the Planning Committee. As a result, key stakeholder assumptions relative to poverty within the region are made. Particularly powerful is the voice of the client. These findings included:

### **The Reality of Poverty within the Community:**

- **Education domain** – Clients named critical needs as emotional and behavioral issues, bullying and learning disabilities.
- **Healthcare services domain**- Clients indicated there are not enough doctors accepting Medicaid and that they must drive too far to doctors. This tends to be different than the perspective of the community who believe there is great access to ER's, doctors, prescriptions, affordable access to dental care, and drug and alcohol treatment.
- **Income and finances** – Clients have indicated that families can't make enough to make ends meet, jobs are less than full time, and they can't save for unexpected expenses.
- **Community domain**- Clients have indicated heating and electric bills are too high, homes have light showing under doors and they can't afford the cost of their cars. Contrary to these perspectives are the communities who believe people are happy with ambulance time, there is ample heating assistance and affordable transportation. Community weakness feedback included not enough affordable rental properties and that public transportation is affordable but has poor schedules.
- **Food access** - Clients indicated they do not have enough money for food, they do not qualify for food assistance or they lack transportation to get to food and reside in food deserts.
- **Summary** - Social segregation exists in the region. The need for education on the plight of those living in poverty is critical.

## Section 10: The Vision

A vision is an organization's desired future. It looks to the future and articulates what an entity aspires to achieve through its efforts. Visions state the hopes and dreams people strive for through their daily work.

### Proposed Vision Statement

*Every person is empowered to achieve their fullest potential.*

## Section 11: The SWOT & The Agency's Key Expertise

The planning process assessed the strengths, weaknesses, opportunities and threats of the Agency relative to its capacity to strive toward the vision. The SWOT serves to lay the initial groundwork for plan strategies and action planning.

### SWOT Findings



#### Agency Strengths

- Agency resources and the ability to pivot.
- An extremely creative and passionate staff.
- Senior leadership.
- Taking risks without punitive actions, changing the culture.
- A staff that really understand programs and is forward thinking.
- A willingness to change.
- The capacity to diversify due to agency resources.
- Reputation.
- Strong audits.
- Performing well

programmatically.

- Continuous demand for agency programs and services.
- Creative and adaptive uses of technology efficiencies with access to minimal costs.

#### Agency Weaknesses

- Our large geographic footprint creates challenges in service and client access.
- Internal and external communications (marketing, modes of communication, and exposure to our services).
- Setting expectations.
- Accountability.

Funding constraints. The primary source of revenue is out of the agency's control (grants).

- Lack the technology to support staff.
- Greater utilization of technology to expedite processes like time sheets, data sharing, etc.
- Lacking seamless integration across the agency.
- Inconsistent leveraging of funds internally and with partners externally.
- Service models lack creativity.
- Fear of change and loss of security.
- Lack of staff dedicated to fund-raising and grant scouting.
- Lack of employee knowledge of agency services and how to access them via internal referral, etc.
- Lack of inter-departmental collaborations.

### **Agency Opportunities**

- Partnering.
- Funding – Grant seeking opportunities.
- Expand Board commitment as agency champions.
- Mobile (roaming) medical care.
- Healthcare expansion working with health systems to reach people not often served.
- Cross-sharing (realignment) of program staff.
- Educating funders and collaborating with like-minded rural agencies to increase our voice and convey how we are serving a diverse geographic base.
- Enhance Human Resources processes to better serve employees.
- Building our private-pay services and case management.
- Adding day care services.
- Addressing technology gaps and how we support our needs.
- Community perception of our agency.
- Impact of COVID and remote work. Opportunity to lower operational cost through remote work virtual presence, less brick and mortar, sharing of space, and clustering office locations.
- Consider utilizing space in a commercial workspace to create revenue.
- Focus on family homelessness.
- Streamline data collection and retrieval for efficient access to data. Collaborate on internal data, determine what data is needed and how to share it to convey our impact.
- Grow volunteer opportunities.
- Assess right fit/roles of our employees. Balancing work-loads within the agency.
- Move beyond acting like a government entity to more of a business mindset.
- Creation of a cross-functional restructuring assessment/design team to develop a model for us with recommendations. Institute a decision-making process methodology to be used when considering critical criteria/impacts so decisions made consider the holistic impact.

### **Agency Threats**

- Educating our funders may result in a loss of the ability for people to understand the unique rural nature of the service area.
- Impacts of the election and potential budget cuts.
- The perennial threat of budget cuts.
- Perception of our communities.
- Staffing retention and recruitment.
- The aging workforce and loss of institutional knowledge as they retire.
- The COVID impact on the overall functioning as an agency.
- The lack of representation in Lansing and rural vs. metros.
- The need to re-educate new legislators, superintendents due to term limits, retirements.
- The impact of the census due to decrease in population which could impact program participation.
- Large health plans that are both partners and competitors.

## Key Expertise

Deep discussion determined key areas of expertise the Agency possesses to impact particular areas of need. By understanding what these capabilities are the Agency can powerfully focus their efforts on the areas that align with the voice of the client and their greatest needs. This expertise can be leveraged in-house or through partnerships.

### These areas of expertise include:

- Comprehensive case management.
- Strong relationship management with vulnerable populations.
- Grants management; the ability to write and deliver on grants.
- Rural service delivery.
- Knowledge of the local communities.
- Housing stability.
- Early Childhood education, including health and family wellbeing, financial stability.
- Agency nimbleness and adapting to change.
- Serving all from birth to seniors.
- Experts in food insecurity with the opportunity to educate and advocate for proper food.
- Positioned to be experts in coordination and education on food needs.
- Poverty education in general.
- Positioned to be a driver for long term vision for communities and community development.



## Section 12: The Strategic Result

Having considered the data findings, environmental scan, SWOT, and key areas of expertise, the Planning Committee determined the Strategic Result – the overarching five-year plan goal.

**The Strategic Result is the culmination of discussions that determined the need to drive cultural change within the Agency by targeting systems and processes crucial to seamless client service. By streamlining and coordinating services, clients are more greatly empowered to realize their desired goals. Critical to further empowering clients is enhancing the Agency's organizational capacity to lead and galvanize staff toward goals and strategies and managing change.**

These findings resulted in the 2020-2025 plans' Strategic Result:

***Enhancing quality of life and empowering individuals through increased organizational capacity and service coordination.***



## Section 13: Impact Areas

Thus, as seen in the Strategic Result, **three areas** emerged as most critical to focus upon over the next five years in the march toward helping to alleviate the causes and conditions of poverty. To increase understanding, the Committee further defined the impact areas, specific needs and described potential outcomes/ measurements of success to guide the Agency in its future work.

The Focus/Impact Areas were determined to be:

- Organizational Capacity
- Coordination of Services (Internal and External)
- Individual and Family Success

### **Organizational Capacity Definition:**

*Increasing the ability to deliver extraordinary service by addressing cultural, communication, process and individual empowerment barriers standing in our way.*

### **Specific Focus:**

- Implement a long term supervisory/leadership training model to include clear expectations, accountability and transparent communications.
- Develop a clear, consistent agency communication process.
- Shift the culture to build greater capacity for increased trust, transparency and conflict management.
- Reassess policies that limit the ability for employees/leaders to effectively develop individuals and serve the agency.
- Build our funding capacity to give us greater flexibility in supporting and launching initiatives, staffing, etc.
- Strengthen the technology capacity to meet the needs of staff to better support clients.
- Create a leader mentoring program involving seasoned staff in leadership roles working with new/existing leaders to grow talent.
- Reassess how we evaluate people from initial hire to advancement in the agency utilizing tools such as behavioral interviewing, the hiring mindset, balance of education vs. drive, etc.

### **Desired Outcomes/Potential Measurements:**

- 360 baseline and training follow up assessment and evaluation to measure increased skill.
- Develop a supervisor curriculum for training from basics to advanced leadership/agency knowledge.
- Create a profile of the successful leader, including competencies and expected behaviors.

**Coordination of (Internal/External) Services Definition**

*Coordination of communications, data and services to streamline, increase collaboration and access that maximize our resources and programs for key stakeholders and staff.*

**Specific Focus:**

- Coordination of data, services through increasing cross collaboration, communication, and breaking down silos within the agency.
- Identify redundancies and streamline services and processes.
- Increase ease of access.
- Working with external partners taking a team approach to maximize resources and available services.
- Determining data systems, evaluating data collected, using systems that share data considering restriction, privacy and partner limitations to data.
- Client Pre-screening (one time), linkage from Head Start, or any program to another program.
- Sharing of common client data to reduce redundancy and offer more attractive client experience.
- Conduct feasibility study to create a phased model that leads toward a universal application, coordinating services and reducing redundancy.

**Desired Outcomes/Potential Measurements:**

- Ability to produce a profile of the NEMCSA client when aggregated.

**Individual and Family Success Definition**

*Empowering others to reach their highest level of self-sufficiency through access to programs, services, resources and education to achieve their current and long- term goals.*

**Needs:**

- Meeting people where they are at.
- Measure starting and end points (self-sufficiency matrix).
- People reaching their highest level of self-sufficiency.
- Through education, assist clients in developing a plan utilizing available resources and knowledge to provide a customized path to achieving their immediate goals.

**Specific Focus:**

- Increase holistic service delivery including internal and external services.
- Explore the potential of becoming “a one stop shop”.
  - Increase the ability to assess the family unit accurately and quickly.
  - Create a NEMCSA training for staff and clients to increase understanding of its programs/services.
  - Utilize technology such as video chats to develop innovative experiences that further agency knowledge.
  - Create a job shadowing program.
  - Take staff education to the next level on our programs, services in an effort to have increased collaborative service delivery.

- Success of the participant through program services. Identify the progress made of a client/family because of NEMCSA services/intervention.

#### **Desired Outcomes/Potential Measurements**

- Ability to report outcomes on a client profile and how NEMCSA impacts him/her.
- Ability to report outcomes by county/region.
- Quantitative/Qualitative analysis of impact
  - Defining what success looks like (internally and externally). Creating the ability to measure for understanding, community reporting/relay and staff morale and insight.
- Increased client ease of access to programs, services, and staff as evidenced in client feedback.
- Grant/Fundraising – Securing additional resources to ensure clients’ needs are more fully met.
  - Investigating and discussing unmet client needs.
- Evaluating the top external referrals to develop a collaborative approach to funding.
- Determine if program guidelines restrict client accessibility and work towards resolution.

## **Section 14: Strategic Priorities and Goals**

The 2020-2025 priorities emerged over extensive planning, thoughtful consideration and a passion to best serve families and individuals. This effort resulted in the realization that the Agency is at a crucial life-cycle moment in its history that affords the opportunity to energize its culture and its mission by realigning and *coordinating* its structural processes and systems - its *operational capacity* - while strengthening its staff capabilities and leadership to best create *individual and family success* serving clients, community and its key stakeholders. Thus, the priorities and strategies that follow reflect the need to define, create, collect and assess its organizational and human capacity to achieve its vision of “*Every person is empowered to achieve their fullest potential.*” In essence, at this point in its history, the Agency is reconfirming and strengthening its structural and human capacity for the future to provide extraordinary service to those in need.

**Strategic Priorities/Goals** are broad statements of what the organization will achieve. They state what must be done, not how it is done. The priorities/goals are the foundation of the plan. They are measurable and quantifiable points on the way to reaching the Agency objectives.

The 2020-2025 plan identifies five Agency priorities. Each priority will be achieved by their supporting strategies.

### **NEMCSA Priorities and Strategies**

#### **Priority #1: Shift/ Align the Culture and People’s Abilities to Lead and Support the Organization into the Future.**

##### **Strategies:**

Develop a comprehensive communication strategy to educate and align the organization on “where we are going (cultural norms, expectations, etc.)”

Develop highly trained supervisors as servant leaders for all levels of management.

Provide staff trainings to help shift the culture and increase professional/personal interpersonal skills/emotional intelligence.

## **Priority #2: Engage and Educate Clients and Key Stakeholders**

### **Strategies:**

Provide a greater voice for our clients to advocate, increasing understanding of poverty and what we do.

Re-assess how we attract and educate our Board members and Councils to best serve the agency.

Continue building our relationships/partnerships with key stakeholders to help us address our greatest customer needs.

Continue to conduct outreach and educate communities.



## **Priority #3: Streamline and Embed Consistent Processes and Services within the Agency**

### **Strategies:**

Adopt a cultural mind-set and methodology to question and challenge current processes.

Evaluate the organizational structure to deliver world-class service.

Create and implement the use of unified data to break down programmatic silos and better serve our clients and community.

Optimize workflows to increase efficiencies and customer interface time across the agency.

Create a comprehensive policy and procedures review to increase efficiencies.

## **Priority #4: Strengthen Support Services to Allow Programs the Ability to Further Focus On Programmatic Areas for Our Clients**

### **Strategies:**

Unburden the work of support departments to allow them to be more responsive to agency needs.

Create vehicles for regular infrastructure feedback, collaboration and process improvement.

Institute cross-training to fill staffing gaps and increase efficiency.

Proactively streamline and document communication to provide greater clarity and efficiency.

Maximize technology to overcome our geography and improve our efficiency.

#### **Priority #5: Drive Individual and Family Success by Serving as a Catalyst for the Unmet Needs of Our Clients**

##### **Strategies:**

Evaluate and analyze unmet customer needs and tact upon those we have the capacity to deliver.

Determine our role as a catalyst.

Determine the human capacity needed to deliver on our targeted unmet client needs.

### **Section 15: 2021-2022 Implementation Targets**

Experience has shown that a successfully implemented plan focuses an organization's combined efforts on select aspects of planning per phase rather than attempting to implement an entire five-year plan and all its supporting strategies immediately. Realistically, certain actions must occur, frameworks must be established, and research and planning completed to set the stage for the implementation of next level strategies. This approach contributes to a far greater likelihood of implementation success, with organizational sharing of achievement and pride fueling the efforts required for the next planning stage. Thus, planning is thoughtful and thorough with each step integrally linked to a solid foundation that supports it.

The 2020-2025 plan has further identified select priorities and strategies for agency focus during an approximate period of 18 months for 2021-2022. Specifically, implementation will focus on the following priorities, select strategies and actions. The presented measurements of success are in some cases incomplete. These particular measurements will require actions such as initial benchmark surveying to develop a baseline that will then set the desired measurement target.

#### **The 2021-2022 Targets are:**

##### **Target 1: Shift/ Align the Culture and People's Ability to Lead and Support the Organization into the Future.**

##### **Strategy:**

*Develop highly trained supervisors as servant leaders for all levels of management.*

**Actions:**

1. Determine who will deploy the program/resources, including potentially bringing in an outside consultant, etc.
2. Develop a budget for training.
3. Develop employee baseline satisfaction survey (refer to Google survey, etc.).
4. Develop agency communication on the program to make visible.
5. Develop a vetting/nomination process for participation.
6. Develop leadership development and NEMCSA specific curriculum for supervisors and other interested employees.

**Measurements of Success:**

Employee satisfaction scores increase based on starting baseline. Turnover will be analyzed and measured regularly.

**Target 2: Engage and Educate Clients and Key Stakeholders****Strategy:**

*Re-assess how we attract and educate our Board members and Councils to best serve the Agency.*

**Actions:**

1. Clarify the role and expectations of a Board/Council member.
2. Implement a Board satisfaction survey.
3. Restructure the Board By-Laws.
4. Evaluate the structure and demographics of the Board/Council composition.
5. Assess how we recruit Board/Council members.
6. Evaluate how we meet/engage with the Board and Councils.
7. Determine the best way to engage and educate Board/Council members.
8. Revamp meetings to include out of the box approaches to deliver Board/Council education increasing buy-in, engagement and learning.
9. Develop more attractive messaging and materials for Board/Council recruitment.

**Measurements of Success:**

Creation of a wait list for Board positions.

Increased local action by Board members as champions.

Increase participation at meetings.

**Target 3: Streamline and Embed Consistent Processes and Services Within the Agency****Strategy:**

*Optimize our workflows to increase efficiency and increase customer interface time across the agency.*

**Actions:**

1. Secure leader buy-in to continuous improvement.
2. Identify technology bottlenecks that impact Finance and HR and implement improvements.
3. Identify and train a process mapping person in each department as a champion and key driver working with peers across the agency using a standard consistent mapping process.
4. Educate staff on process improvement, mapping and LEAN.
5. Map processes, assess gaps and implement solutions at an all-agency and department level.



**Measurements of Success:**

- Improved employee satisfaction scores.
- Improved employee retention scores.
- Improved client experience.
- Increase in number of grants pursued.

**Target 4: Strengthen Support Services to Allow Programs the Ability to Further Focus On Programmatic Areas for Our Clients**

*Strategy 1. Create vehicles for regular infrastructure feedback, collaboration and process improvement*

**Actions:**

- Address culture issues to further trust, constructive communication and engagement in the agency.
- Conduct Social and Emotional Intelligence type trainings for all staff.
- Strive to increase open, timely communication among staff and support services.
- Create an annual feedback survey for support services teams.
- Hire an internal training coordinator to support diverse agency trainings.

**Measurements of Success:**

- Increased staff retention resulting from Social and Emotional Intelligence training.
- Increase percentages from annual support services feedback survey.
- Increased staff response rate to survey.
- Tracking staff responsiveness in regular correspondence by open reads.

*Strategy 2. Maximize technology to overcome our geography and improve our efficiency*

**Actions:**

- Develop a technology asset management plan.
- Develop the means to provide proactive technical consulting to each program.
- Explore the means to streamline disparate systems to reduce gaps and redundancies.
- Identify and address agency data security needs.
- Increase staff competencies in use of technology through training opportunities.
- Continue to deploy and support our mobile workforce.

### Measurements of Success:

Significant progress on the action steps

Increase in support satisfaction scores

Increase in positive narrative feedback

Increase in depth of data available to given programs

## Section 16: The NEMCSA Theory of Change Model



## Section 17: Alignment with Communication Action Network Goals, ROMA and CSBG Standards

### *Communication Action Network Goals and Organizational Standards Alignment*

The NEMCSA plan is rooted in the three Community Action National Goals:

1. Individuals and families with low incomes are stable and achieve economic security.
2. Communities where people with low incomes live are healthy and offer economic opportunity.
3. People with low incomes are engaged and active in building opportunities in communities.



Supporting these three goals are organizational standards set forth by the Network:

- The Strategic plan addresses family, agency, and/or community.
- The plan assesses performance toward meeting goals.
- A structure and process is in place to analyze customer satisfaction and recommend changes to strategic plan goals, programs, and services based on results.
- Monitoring of progress on strategic plan goals occurs through scorecard, evaluation committee, or mechanisms to help implementation.

Alignment of the NEMCSA plan to each of these goals and standards can be confirmed through review of the strategy section of this plan.

### *Results Oriented Management and Accountability System (ROMA)*

NEMCSA's 2020-2025 priorities, strategies, action plans and its increased focus on measurement through the adoption of a balanced scorecard monitoring complements the ROMA performance management model of assess, plan, implement, achieve results and evaluate via logic modeling utilized within the individual program delivery areas.

### *Community Service Block Grant (CSBG) Standards Alignment*

In an effort to help the CSBG Network increase accountability and achieve results, OCS launched several initiatives in 2012. One focused on establishing organizational standards for eligible entities. Under this effort, CSBG Network leaders developed and recommended a set of organizational standards to strengthen the capacity of the more than 1,000 eligible entities providing services across the country.

A second performance management initiative focused on enhancing the CSBG Network's performance and outcomes measurement system for local eligible entities – identified in the CSBG Act as Results Oriented Management and Accountability System (ROMA- see above.) Finally, a third initiative focused on creating State and Federal-level accountability measures to track and evaluate organizational performance by State CSBG Lead Agencies and OCS. The NEMCSA strategic plan achieves each of the following requirements as a recipient of CSBG funds. They adhere to and will continue to perform the following initiatives in support of requirements as set down by the organizational standards by the Centers of Excellence body. These standards include:

- Maximum Feasible Participation
  - Consumer Input and Involvement
  - Community Engagement
  - Community Assessment
- Vision and Direction
  - Organizational Leadership
  - Board Governance
  - Strategic Planning
- Operations and Accountability
  - Human Resource Management
  - Financial Operations and Oversight
  - Data and Analysis

## **Section 18: Integrating Programmatic Services to the Agency Plan**

The strategic plan will guide agency-wide planning. It is a living document integrated into routine operations and management as part of the Results Oriented Management and Accountability (ROMA) framework. NEMCSA utilizes the ROMA framework starting with conducting the community needs assessment to determine the needs and service gaps in its service area. The five-year strategic plan utilized an adaptive strategies model to be relevant, flexible, and responsive to the changing needs of internal and external environments.

Annually, the Agency-wide integrated strategies will be reviewed to ensure relevancy and progress toward achieving the strategic result. Yearly planning will be connected to the Community Action Plan (CAP), submitted annually to the State CSBG Lead Agency, detailing specific program activities and performance indicators. A new balance scorecard will be created to reflect new strategies, targets, and actions focusing on agency-wide strategies for organizational capacity, coordination of internal and external services and individual and family client successes.

Staff and the Board of Directors will ensure the plan is implemented using a monitoring and assessment process to achieve organizational and program goals. The ROMA cycle provides an understanding of



how programs are producing results and strategic planning goals are being met. The ROMA Balance Scorecard for Agency-wide strategies will track performance and demonstrate impact on strategies.



NEMCSA will communicate and cascade strategies, goals, targets, and actions. The implementation plan incorporates other actions such as coordinating partnerships, managing initiatives, using a balanced scorecard, and identifying specific improvements to achieve the strategic result - *Enhancing quality of life and empowering individuals through increased organizational capacity and service coordination*. Using the ROMA cycle for operational and program goals ensures structures and processes are in place to implement actions and evaluate performance.

#### Qualitative and Quantitative Data Assessment – Quarterly-Ongoing

- \* **The 2020-2025 plan highlights the emphasis on gathering and assessing data to improve the client experience and increase proactiveness in determining clients and community needs. The emphasis on furthering the use of technology, establishment of benchmarks through surveying and refining the Agency’s processes and structures will all result in greater access to data and enhanced decision making. As these “new foundations” are constructed and implemented within NEMCSA, services will be delivered more effectively, increasing the customer experience, as well as the speed of response, resulting in a greater integration of services across the agency. Ultimately, the initiatives of this plan will drive increased client wrap-around services; an improved client experience of a one-stop shop; and continuous improvement through the internal data collection and sharing of information with departments.**
- \* Designated agency representatives will continuously collect and review community level and program/services data for awareness of changing needs and opportunities in the community. The Balance Scorecard will be updated to review progress on meeting targets where actions and targets may need to be adjusted.
- \* Triennial Community Needs Assessment (CNA) for the NEMCSA region will be conducted. The next CNA will be in 2023.

#### Planning - Annually

- \* Each core service department develops National Performance Indicators (NPIs) and logic models for programs and services. They develop their individual programmatic plans while linking these plans to one or more specific agency-wide strategies to contribute to its’ achievement; thus the agency and department plans become further integrated.

- \* Senior leadership and strategic planning staff representatives will review Balance Scorecard (BSC) progress to date and work with departments to develop and link annual goals, targets, and actions to achieve agency wide strategies.
- \* Each core department will develop a BSC to track their performance to achieve agency-wide strategies.
- \* Annually, a balanced scorecard will be created identifying strategies, goals, targets, and actions for the year.  
These initiatives can be found in this report with the 2021-2022 Priorities and Strategies detail
- \* The next strategic plan will be prepared in 2025.

### Implementation

- \* Committees and task-force teams consisting of a cross-section of staff will be created to implement actions and review progress.
- \* Trained process-mapping staff as well as ROMA certified trainers will assist with the implementation of the strategic plan.
- \* Staff will be engaged in diverse actions to achieve goals.

### Achievement of Results

- \* The Agency will share reports with staff on a quarterly basis at all-staff meetings, and the Board on a bi-monthly basis at regular board meetings.
- \* Departments will track the status of their contribution to the agency-wide strategies along with program/service results of achievement on a monthly and/or quarterly basis.
- \* Internal and external communication (i.e. newsletters, email, website, annual meeting) will be used to share the progress of the strategic plan.

### Evaluation - Continuous

- \* Data will be captured, analyzed, and compared with benchmarks regularly for continuous improvement and responsiveness to gaps in meeting targets.
- \* Goals, targets, and actions may be updated to meet current needs of the internal and external environments.