



STRATEGIC PLAN 2016-2020

“Strategy is a commodity, execution is an art.” - Peter Drucker

STRATEGIC PURPOSE IN ACTION

INTRODUCTION:

UCAN, embarking on its 46th year of service, has built a history of success and innovation based upon the strategic planning process as a cooperative, collaborative endeavor that provides direction and promotes momentum to the organization. This plan is the most recent manifestation of this process.

WHO WE ARE:

UCAN is an independent, non-profit **Community Action Agency (CAA)** that serves the diverse needs of individuals and families throughout Douglas and Josephine County. Community Action Agencies are a part of the legacy created by the Economic Opportunity Act of 1964, designed to address the War on Poverty. UCAN’s contemporary focus is on removing the barriers created by poverty, whether these obstacles are a result of an immediate crisis or experienced by individuals as a generational culture of scarcity or from the lack of critical community resources or infrastructure needed to support people in their battle against poverty. UCAN is determined to increase prosperity and wellness within our communities by deploying services and programs that target needs such as housing & homelessness, food security, energy efficiency, child development, elder supportive services, transportation and a platform for advocacy to ensure those who are in need have a voice in their own future. Over 55,000 consumers annually are served by UCAN, with an entrepreneurial spirit that allows us to take on the trials of today by collaborating with our partners for a more sustainable future.

UCAN’s Mission and Vision Statements and its Core Values were established by UCAN’s Board of Directors as follows:

UCAN’s Mission Statement:

“Creating solutions to poverty...Improving lives in our community”

UCAN Vision Statement:

Our vision is that every Douglas and Josephine county resident has the resources and opportunities needed to reach their full social, civic, and economic potential, to be secure in their own lives and to be vital participants in their communities.

UCAN's Core Values:

Respect, Dignity, Compassion, and Equity: UCAN board, staff and volunteers embrace these qualities in their interactions with the people who use our services, the staff and the community.

Accountability: UCAN provides services in a manner that is effective, efficient and meaningful to the community and people's lives. UCAN uses public and private funds in a prudent manner and has fiscal controls that assure superior accountability.

Making a Positive Difference: UCAN's services make a positive difference in people's lives, because all people have the ability to grow, improve and change. UCAN makes a positive difference in communities by providing meaningful, quality services.

Quality and Excellence: UCAN is committed to performing all its functions to the highest caliber and strives for "best practices" in all aspects of its operations. UCAN is a "learning organization" that values creativity and flexibility and embraces the concept of continuously improving the quality of its services throughout the agency.

Partnering: UCAN is an interactive partner with the people using UCAN's services, other agencies and the community.

Courage: UCAN is willing to take new risks, try new things, and encourages staff ideas for new projects.

Honesty and Integrity: UCAN is committed to honesty and integrity in all aspects of its organization.

STRATEGIC PLAN CONTEXT (ROMA STRATEGIES):

Community Action Programs (CAP's) nationwide are charged with the responsibility to establish goals, objectives and services based upon the six national ROMA (Results-Oriented Management & Accountability) goals. The Monitoring and Assessment Task Force (MATF), as a result of the GPRA principles (Government Performance and Results Act of 1993) enacted ROMA, to provide a cyclical process for performance improvement of CAP's and were deployed as a means of assessing and evaluating the needs in three specific categories:

- 1) The consumers of the services designed to alleviate the barriers experienced by those living in poverty (**FAMILY**)
- 2) The community of which the service area is designed to engage (**COMMUNITY**)
- 3) The community action agency and the internal resources utilized to achieve its mission (**AGENCY**)

Each of the categories listed above are directly linked to anti-poverty initiatives that are represented in the six national ROMA goals as follows:

Goal 1: Low-income people become more self-sufficient (**FAMILY**)

Goal 2: The conditions in which low-income people live are improved. (**COMMUNITY**)

Goal 3: Low-income people own a stake in their community (**COMMUNITY**)

Goal 4: Partnerships among supporters and providers of service to low- income people are achieved. **(AGENCY)**

Goal 5: Agencies increase their capacity to achieve results. **(AGENCY)**

Goal 6: Low-income people, especially vulnerable populations, achieve their potential by strengthening family and other supportive systems **(FAMILY)**

Based upon this model, community action agencies will now be evaluated against specific Organizational Standards (IM 138, finalized January 26, 2015) and will begin October 2015. UCAN has prepared for this by dedicating efforts in 2013 to self-assessing agency performance through Pathways to Excellence and by incorporating understanding of recent Theory of Change principles which were collectively developed by the Community Action agencies throughout the Northwest.

STRATEGIC PLANNING PROCESS – METHODOLOGY:

Through a variety of facilitated stakeholder meetings, outreach events, focus groups and staff and board retreats, UCAN used this framework to align these 6 goals to connect with these suggested themes:

- How do we currently approach alleviating the conditions of poverty within the community;
- What resources currently exist, within the agency and through our external partnerships that fortify current success and promote innovation both internally and externally;
- What resources and/or partnerships are needed to achieve, among low-income people and the community, a services delivery network that provides a correct balance, effectiveness and efficiency while respecting economic boundaries;
- Who is best suited to respond, organize and deploy the program services and/or activities needed, to achieve proposed results, as well as determining where UCAN serves best as lead and where our external partners should be relied upon for leadership.

Lastly, documents that have been utilized for the synthesizing of this strategic plan include:

- Pathways to Excellence Agency Self-Assessment & Feedback
- Theory of Change charts
- Annual Report
- CSBG data report
- UCAN Community Needs Assessment 2014 (Draft)

- Employee Engagement Survey

Mapping was performed on the feedback from each facilitated event, charts scribed and then reviewed against current services and activities. Some examples of implemented change during the previous Strategic Plan period of 2009-2015 were:

- Intentional cessation of services of the Confidence Clinic due to funding and alternative independent programming available in Douglas County;
- Integration of additional Senior Corps programming in Douglas County – FGP, SCP, RSVP. Expansion subsequently occurred with SCP into Josephine County for wider opportunity of addressing independent living among the aging;
- Determination to wrap up the VISTA Team network due to lack of clear identified community need;
- Creation of Raptor Creek Farm in Josephine County and the new construction of the UCAN Josephine County Food Bank Warehouse on that property;
- UCAN property development and opening of Trillium Terrace and Camas Ridge, and the collaborative partnership through NWU to create Eagle Landing.

Review of this strategic plan and adoption will be contingent on review, acceptance and official adoption by the UCAN Board of Directors and utilized as a guidance tool by UCAN's Executive Director.

STRATEGIC PLANNING PROCESS – RESULTS:

OPPORTUNITIES & CHALLENGES:

Feedback from the UCAN Board, stakeholders, staff and volunteers identified a series of clear strengths as well as opportunities for improvement. Upon analysis there were themes that crossed over all goals and spoke to operational improvements.

They are as follows:

- The community at large relies upon the diversity of services that UCAN provides. There is a critical need:
 - To fortify the current service menu UCAN provides
 - To flexibly and entrepreneurially expand services.
 - To be able to adapt to a volatile landscape, pressed by our harsh economic realities.
- Financial strength, flexibility and ability to readily engage foundations and community support for programs is critical to ensure a nimble responsiveness and to act when an opportunity is present.

- UCAN needs to continue to identify sustainable funding resources that contribute to the stabilization of staff and our volunteers, so we can ensure services are delivered reliably to the community.
- While the identity between Douglas and Josephine County has become stronger for UCAN, there is a distinct need to unify all programs, and for the public and its partners to understand the entire scope of services UCAN offers. It was identified that the community possesses a fragmented understanding of the relationship of UCAN, the Food Bank of Douglas County and the Josephine County Food Bank/Raptor Creek Farm as one entity. Opportunity exists to clarify operations to ensure the community has clarification on the overarching goals of UCAN. The programs must be observable as cohesive operations in order for UCAN to achieve the fiscal strength and overall effectiveness that our communities require while balancing this with the value that can come from connecting community members with specific program services.
- Douglas and Josephine County UCAN operations needs its “identity branding” updated, as the communities we serve tend to rely on historical knowledge rather than present day information on current operations. Steps toward branding have been a reoccurring activity (and include updated website, dashboard development and informational materials) however a demonstrated cohesive presence within our service areas and within UCAN as an agency has remained elusive.
- Facility issues are a concern internally and externally, as service delivery can be compromised due to lack of space and appropriate environmental resources. This is specifically true in Douglas County where the progressive development for the Head Start program faces inadequate space and site access for early child learning as well as administrative space to coordinate operations in concert with UCAN. This need to enhance Early Childhood services has recently been made even greater by UCAN’s recent expansion into other Early Childhood services such as WIC, Healthy Families and Healthy Start, and Nurse Home Visiting programs. In Josephine County, the main facility needs a stable physical presence to meet the needs of the high demand of services required within that community. The leadership that is requested by the community from UCAN requires an environment for it’s programs that is accessible and promotes internal cross-collaboration among departments to increase the efficacy to those being served. Ultimately UCAN needs to own its own JOCO facilities to enhance its fiscal viability.
- Consumers of services, partners and stakeholders were specifically concerned about the lack of “bridge” programs and sees UCAN as an optimal leader in connecting UCAN’s rental assistance programs to a continuum of care of housing. It has been directly requested that UCAN determine options that contribute to the affordable housing market through transitional models, re-vitalizing existing structures and ultimately finding a means to create more housing projects. Due to the low housing inventory in both Douglas and Josephine County it is becoming increasingly more

difficult to find affordable, safe housing in which rental assistance programs can support low income individuals and families. Without the bridge projects or buildings that can accommodate the practice of Housing First principles, many individuals and families within our communities will not be able to transition to self-sufficiency. Target populations needing these resources are the chronically homeless, formerly incarcerated, drug and/or mental health court graduates, child welfare reunification households and those experiencing generational poverty.

- It was articulated in several discussions that the consumers within both counties are suffering far greater barriers than previously seen. This is occurring at a time when the economic landscape is recovering at a slower than average rate, and some programs are experiencing eligibility restrictions that are causing a decline of services to a greater number of potential consumers. UCAN needs to find a means of creating flexible funding that can address gaps in services when consumers are in need but do not fit into the smaller frame provided by program rules and regulations or limited by governmental budget cutbacks.
- UCAN has a need to plan for the future leadership throughout the agency, by developing current staff's administrative capacity, planning abilities and by retaining staff that are innovative and creative in program development and service delivery. Cross-training and cooperative work projects are highly effective and desirable. There is a distinct need to standardize the vision of the agency to create a foundation of collective focus. ROMA implementation and organizational standards require awareness among staff throughout the agency in order to deploy cohesive services and work practice. Internal communication, interdepartmental awareness and communication regarding customer service (for both external and internal customers) continues to be an opportunity to improve.

STRATEGIC PLANNING PROPOSAL - VISION FOR CHANGE:

The following initiatives are intended to address the feedback, comments and analysis with suggested activities that will mobilize the agency. The format attempts to be concrete while allowing maximum flexibility to capitalize on potential prospects as trends change, funding is created and/or legislation is manifested.

INITIATIVES:

Initiative #1 - Unite Agency Behind Consumer Needs & Community Priorities

To promote consumer centered services, UCAN will focus on:

- A holistic service delivery platform that includes, cross-collaboration and healthy community stakeholder relationships.
- Securing capital project enhancements

-Designing programs that are progressive, measurable and meaningful to the people we serve.

-Advocacy on policy issues at the local, regional, state and federal levels impacting our clients, our partners and the agency.

Initiative #2 - Fortify Foundation of Agency for Success as CAA

--To maintain, establish and implement benchmarks that meet or exceed the performance-based outcomes demonstrated by successfully operating Community Action Agencies.

--To enact service leadership as a management practice.

Initiative #3 - Operational Modernization, Excellence in Fiscal Stewardship

--To ensure agency operations are achieving the balance between consistent results and fiscal responsibility;

--To provide credible evidence that services are necessary and effective and vital to community wellness.;

--To expand technology and other tools to coordinate agency programmatic systems so duplication of effort is minimized thus forging a more efficient agency.

Initiative #4 - Strengthen Agency Branding, Enrich Communication

-To ensure UCAN's mission, vision and values are embraced and embodied by all staff in all activities;

--To promote the agency's identity through clear, direct communication to reflect its excellence in service;

--To make the agency's Mission, Vision and Values clearly understood and identified by consumers, stakeholders, and funders;

--To provide pathways for future cooperative strategies and efforts.

ASSESSMENT OF INITIATIVES:

In accordance with best practices and the ROMA cycle, UCAN will continue to fortify qualitative and quantitative data and synthesize it into a dashboard that will represent tangible outcomes, as well as reflecting the human experience of people in poverty. In the long run UCAN will be measured by the success we have in empowering those we serve with an articulate voice and by providing them with the tools to use that voice effectively, and ultimately the ability to utilize those skills to achieve the ideal of self-sufficiency, as well as by the services we provide to these households and by the improvements we make in the human support infrastructures within our communities.

UCAN AS CAA IMPACT:

UCAN is determined to create an agency where department silos are eliminated, and programs are actively engaged with one another for the collective benefit of the people we assist. Departments must be visionary, with dedicated team members, and promote service leadership inside and outside of the agency walls. Programs, services and departments must be balanced between internal operations and external collaborations. A

unified agency identity will provide an environment that makes the agency strong and resilient during unpredictable economic times. Staff and volunteers throughout the agency need to understand their role in the achievement of performance standards and need to demonstrate a formidable skill, knowledge and expertise in all we do.

UCAN will strive to achieve social equity within the community, removing barriers as they are revealed through evaluative tools, such as ROMA, Theory of Change, and implementation of the CAA Organizational Standards. UCAN will create tangible projects that withstand scrutiny and will be proactive in demonstrating the evidence of the impact made through our services. The strategic goals are broad enough to encompass the demands of multiple interests, challenging enough to stretch staff and encourage growth, and are aimed at thrusting the agency into a new era of operation where it excels, and is competitive and accountable.

INITIATIVES (with detail):

Expanded examples of activities and services that link to initiatives.

#1. Unite Agency Behind Consumer Needs & Community Priorities:

Potential Activities:

- Utilize community wide input from existing needs assessments to evaluate current programs, service efficacy and deploy individual/family-centered programming that can be tailored to identified consumer needs;
- Integrate ROMA into a data based dashboard that ensures outcomes that services are appropriate and meet fiscal requirements and that communicates these accurately and effectively;
- Establish a regular consumer/stakeholder assessment tool at all points of entry to evaluate quality of customer service, usefulness of services and determine success of coordinated service delivery;
- Create and/or acquire and then implement agency-wide management tools to effectively communicate needs for financial resources, resource development and prioritization of ventures;
- Promote publicly, with consumers, and internally current capital projects (Head Start, Jo Co facility);
- Establish a prospect analysis team to ensure the agency's responsiveness and flexibility in pursuing entrepreneurial opportunities which capture the spirit of our community's unique needs.
- Ensure programs cross-collaborate to increase efficiency in delivery and increase focus on consumers as capable participants in the determination of self-sufficiency for his/her households.

#2. Fortify Foundation of Agency for Success as CAA:

Activities:

- Train all UCAN staff, operating volunteers and governance bodies in Results Oriented Outcomes & Accountability (ROMA) practices ;
- Assess agency composition and operations against Organizational Standards and set it into alignment with those standards;
- Identify, assess and submit department objectives in ROMA format for roll up into agency dashboard profile that substantiates activities and shows measureable outcomes that can be tracked over time;
- Complete design of agency data dashboard for publication, internally and externally, for tracking measurable results that are quantifiable and provide qualitative information for consumer, stakeholders, funders, staff and governance
- Assure that agencies long-term capital and facility needs are adequately identified and addressed

#3. Operational Modernization, Excellence in Fiscal Stewardship:

Activities:

- Conduct agency-wide evaluation of current service integration and outcomes that identify examples of cross-stream activities;
- Create tools to quantify the value of our services. These can include such things as, coordinated intake/assessment and other activities that measure the service efficacy and demonstrate economic value and/or social investment;
- Utilize cost comparisons and track ROI of programs annually and use data to assess whether UCAN should bring on or maintain services or if other outside entities are more appropriate. UCAN will ensure what is necessary to retain is strengthened and what is no longer needed is graduated or abandoned without sacrificing goals;
- Identify, create and implement social capital measurement tools that allow agency to capture a quantifiable value that acknowledges community enhancement, tangible deliverables and achievable successes that builds good will.
- Publish and utilize evidence of ROI costs analysis and social capital value gauges to determine future focus and support prospective project development thus maximizing the ability of agency to meet the needs of the community, as tracked over time.

#4. Strengthen Agency Branding, Enrich Communication:

Activities:

Create formal communication plan that addresses internal and external communications and that assigns responsibilities, addresses expectations, standards, uses, and limitations of verbal, written and electronic communication;

- Establish a unified approach and process, to communication across the agency, that can be referenced by all staff & volunteers and which supports a positive, professional UCAN image and to inspire the staff, volunteers, and our partners;
- For consumers of services whose primary language is not English, or where sensory or cognitive ability is limited, impaired or in need of support, establish a unified

process of communication and materials, in order to achieve successful service engagement.

- Create a public relations/marketing plan that is reflective of agency strategies and branding and is then implemented throughout the agency
- Engage governance in review of consumer focus groups outcomes, other assessments and relevant data, to aid in a balanced discussion of service prioritization, agency funding, with the intent of planning for the next strategic cycle;
- Facilitate, foster and fortify service leadership to seek out projects and activities that stretch the agency toward achieving income producing microenterprises or fee-based activities that might serve a wider span of the community.
- Schedule quarterly opportunities for staff engagement with executive leadership to connect mission, vision and values to current achievements and objectives;
- Provide annual setting to review mission, vision and values, in accordance with organizational standards and dashboard feedback, to ensure they are consistent with current goals and objectives and remain effective to meeting the needs of the community.

UCAN STRATEGIES AND SERVICES LINKED TO NATIONAL ROMA GOALS:

Goal 1: Low-income people become more self-sufficient (FAMILY)

- 1) Assess existing services for efficacy
- 2) Maintain existing strength based service platform
- 3) Create Coordinated Intake System
- 4) Increase client oriented skill development trainings for supporting self-sufficiency and self-determination of goals
- 5) Build agency infrastructure that strengthens outreach to pocket communities of county
- 6) Promote advocacy for target populations and for targeted policy issues at the local, regional, state and federal levels
- 7) Promote services and projects that involve and strengthen low-income individuals and households
- 8) Provide health information, referrals, resources and access to healthcare to encourage treatment and wellness.

Goal 2: The conditions in which low-income people live are improved. (COMMUNITY)

- 1) Communicate service platform for all points of entry and referral
- 2) Maintain existing affordable housing units
- 3) Provide development of safe, adequate, affordable and sustainable housing and rental assistance programming
- 4) Provide access to energy assistance, weatherization, education on conservations and energy efficiency
- 5) Ensure food systems are reliable, accessible, and decrease food insecurity through appropriate deliverable means

- 6) Connect households with appropriate health care supports
- 7) Provide mobile outreach services, promoting consolidated intake with community stakeholders to maximize potential for crisis intervention
- 8) Ensure agency programs work toward giving low income kids the best possible foundation and start in life nutritionally, environmentally, educationally, and developmentally.

Goal 3: Low-income people own a stake in their community (COMMUNITY)

- 1) Enhance tripartite governance with training, support and tools to ensure low-income member's success in leadership positions
- 2) Record and track Head Start Policy Council, National Service Advisory Councils and other ad hoc committee activities within UCAN to ensure maximum feasible participation of low-income members is achieved.
- 3) Involve Board of Directors in UCAN agency activities, program visitations and department presentations
- 4) Provide opportunities for skill development and volunteerism within the agency for low-income individuals and then intentionally recruit those low income individuals who have mastered appropriate skills needed by the organization
- 5) Provide meaningful and productive volunteer activities for low-income people that are connected to our performance outcomes
- 6) Provide Board of Directors, Head Start Policy Council, National Service Advisory Councils and all ad hoc committee activities within UCAN with education on poverty, local barriers, and information on trends affecting low-income community
- 7) Provide advocacy training for consumers and volunteers and make provisions for opportunities for individuals to be heard publicly, and/or the content of their opinions to be published

Goal 4: Partnerships among supporters and providers of service to low- income people are achieved. (AGENCY)

- 1) Advance public perception of UCAN's leadership, resources, services and expertise to enhance UCAN's ability to lead, inspire and promote innovation
- 2) Seek out opportunities to elicit feedback and foster relationships with existing partners, funders and community members to increase awareness of the agency and to provide advocacy on common policy issues that impact our partners and our mission
- 3) Educate and inform broadly the agency's current performance goals and their benefit to community wellness, civic engagement and community development
- 4) Maintain & promote UCAN stakeholders, consumers and community volunteers as assets for the community in addressing the fundamental issues related to poverty
- 5) Advance volunteerism and emphasize service as a leadership ethic in all UCAN programs

Goal 5: Agencies increase their capacity to achieve results. (AGENCY)

- 1) Implementation of ROMA agency wide, with staff, volunteers and governance utilizing this model for design and measurement;
- 2) Implementation of the Organizational Standards criteria and articulation of how these standards demonstrate that the agency is meeting national performance objectives;
- 3) Finalize and publish agency outcome dashboard for internal and external use in planning, assessment and evaluation;
- 4) Continue to address agency improvement through Pathways to Excellence materials and feedback
- 5) Increase HR capacity to address trends in work-force, training initiatives and wellness programs to enhance staff and volunteer engagement;
- 6) Develop focused resource development plan (organized grant acquisition, fund-raising, donor development, planned giving, etc.) with guidance for departments to follow for maximum effectiveness
- 7) Create a formal UCAN Communication Plan that articulates roles, expectations and standards for internal and external communication;
- 8) Create a formal UCAN Marketing Plan that integrates visual profiles such as web presence, social media, print and other forms of media in a manner that is uniform and representative of UCAN branding;
- 9) Continue to investigate microenterprise opportunities, fee-based activities and other income generating activities that may also promote skill-building and consumer development
- 10) Expand scope of funding through "Prospect Group" implementation, and maintain UCAN's entrepreneurial spirit though preparedness for opportunistic and potential activities as they present themselves

Goal 6: Low-income people, especially vulnerable populations, achieve their potential by strengthening family and other supportive systems (FAMILY)

- 1) Expand housing inventory and/or property that can be utilized for expanded rental assistance & Housing First objectives;
- 2) Expand the ability to enhance early childhood development, through Head Start and other early childhood services, through new facility creation & development;
- 3) Increase accessibility and outreach for individuals with multiple barriers;
- 4) Provide education and training for better utilization of governmental benefits, tenancy skills, and money management
- 5) Procure resources to support consistent residential services for UCAN's residential properties
- 6) Utilize consumer driven response assessments to evaluate and aid in planning services that are better suited for recipients to maintain independence.
- 7) Ensure agency programs work toward giving low income kids the best possible foundation and start in life nutritionally, environmentally, educationally, and developmentally.

CONCLUSION:

The initiatives, suggested activities, and ideals expressed in this plan are rooted in the voices that indicated a need for UCAN to continue to provide and expand a variety of barrier removal activities. Through these UCAN will rise to a new level of effectiveness and identity in a complex world. Communication, leadership, fiscal integrity, effective and expanded service delivery capacity, fund development and the building of stronger relationships are all reoccurring themes in this planning document. Improving an agency's processes and operations creates excellence in stewardship, enhances community trust and is the basis for strong relationships with its clients, funders, the community, and partners.

UCAN as a Community Action Agency has the responsibility to be an active convener of community resources and an advocate for those seeking the prosperity they dream of for themselves and their children. Daily, UCAN chooses to acknowledge those who are disenfranchised, disengaged, or disregarded in our society due to their lack of economic capacity. UCAN helps remove the humiliation and hardships that society often subjects people in poverty to, and practices service delivery that respects and preserves the dignity that all in our society deserve. The work is difficult, but UCAN's history speaks to the ability to take on challenges and transform lives, successfully.

