

INCA COMMUNITY SERVICES



STRATEGIC PLAN



2017 - 2022

Helping People. Changing Lives.

EXECUTIVE SUMMARY

INCA Community Services, Inc. enlisted the assistance of strategic planning consultant and NCRT, Julia Teska PhD, of Quiet Cove Enterprises, Inc., to conduct a strategic planning meeting on December 6, 2016. This strategic session was critical to determining priorities, establishing goals, and creating objectives.

Multi stepped analysis was conducted with leadership staff, board and advisory members, and other key staff prior to the planning session, including an agency review, assessment, and SWOT analysis. This included individual and group activities which promoted understanding and buy-in amongst staff in the strategic planning process.

The goal of this plan is to provide direction for the strategic growth and continuing evolution of the agency. Pursuing a plan with goals and objectives that are developed to meet the needs of the community and not just the agency are critical to serving the ever changing face of poverty.

PLANNING PROCESS

Development of the planning process included the following two major phases with multiple steps and analysis in each phase. The report that follows is organized in these two phases as well.

ASSESSMENT	Understanding current state of agency activities, mission, vision, values, and community needs as well as strengths, weaknesses, opportunities, and threats that exist within the agency and community environment. <i>Agency Review, SWOT Analysis, Organizational Standards & Six National Community Action Goals, Community Needs Assessment, and Customer Satisfaction Data.</i>
GOALS & OBJECTIVES	Setting goals and determining objectives to establish the results to be achieved, determining specific outcome measures, and deciding on a means to achieve the results. Based on strategic needs determined by information gathered in the assessment phase.



ASSESSMENT

The assessment phase included a review of the current environment and agency activities.

AGENCY REVIEW	Mission & Vision Statement review
SWOT ANALYSIS	Strengths, weaknesses, opportunities, and threats
ORGANIZATIONAL STANDARDS & SIX NATIONAL COMMUNITY ACTION GOALS	Provide guidance for Community Action Agencies
COMMUNITY NEEDS ASSESSMENT	Top identified needs

AGENCY REVIEW

On Monday November 14, 2016 eleven individuals (SWOT Team #1) from INCA management, policy council, board of directors, and advisory council attended the first of two strategic planning meetings. The second team (SWOT Team # 2) comprised of fourteen front line staff from various programs and met on Thursday November 17, 2016. These groups provided input on the mission statement, vision statement, and their alignment with current programs and services.

Alignment of Mission with Programs/Services

Both groups also commented they felt like our services help fill the basic needs of food, shelter, and health either directly or indirectly, and our programs all focused on proving decency and dignity to their customers.

INCA'S MISSION STATEMENT	CONCLUSIONS
<i>INCA Community Service, Inc. shall operate programs to alleviate the causes of poverty and enhance the public health and welfare by opening to everyone the opportunity to work, have safe and affordable housing, transportation, training and education, and the opportunity to live in decency and dignity.</i>	Both groups identified the population served as everyone, citing that we strive to help anyone that is struggling because low income is not the only determination of need. SWOT Team # 1 identified the supporting customer as those with low to moderate income because they comprise a majority of our customers, but that “everyone” can experience a life circumstance or be affected by a cause of poverty.

INCA'S VISION STATEMENT	CONCLUSIONS
<i>The opportunity exists for our communities and citizens to maintain dignity, a quality lifestyle, be self-sufficient and to benefit from a more productive, responsible and economically stable society.</i>	Both groups agreed that if we accomplish our mission we will work ourselves out of a job. SWOT Team #1 felt the vision statement may need revising to include INCA in statement to show ownership or influence in the vision.

SWOT ANALYSIS

The stakeholders were divided into two groups and asked to provide feedback individually and within their groups. After reviewing all the input collectively every person was given a chance to vote which best represented their view of the strengths, weaknesses, opportunities, and threats of the agency. Participants were provided agency documents for reference including mission and vision, CNA, agency wide customer satisfaction survey results, previous strategic plan, latest ROMA report, and financial information. The top items from each section are outlined below.

	INTERNAL	EXTERNAL
HELPFUL	<p>STRENGTHS</p> <ul style="list-style-type: none"> Strong Leadership Compassionate & Caring Staff Technology Teamwork & Collaboration 	<p>OPPORTUNITIES</p> <ul style="list-style-type: none"> Offer New Programs Internships & HR Outreach Fundraising & Funding Extend Current Programs Increased Community Outreach Volunteers Employee Incentives
HARMFUL	<p>WEAKNESSES</p> <ul style="list-style-type: none"> Limited Qualified Job Pool Funding Pay Scale Community Perception/Promotion Inter Agency Training Workload Turnover/Key Staff Changes 	<p>THREATS</p> <ul style="list-style-type: none"> Funding Cuts Political Environment Competitive Wages Income Guidelines Competition

INTERNAL FACTORS		
STRENGTHS	Strong Leadership	Executive Director Leadership, Board & Advisory/Policy Council
	Compassionate & Caring Staff	Customer focus, willingness to help everyone
	Technology	Technology within agency and classrooms
	Longevity	Staff and agency longevity
	Teamwork & Collaboration	Internal collaboration, help amongst programs
WEAKNESSES	Limited Qualified Job Pool	Recruitment and retention of qualified/committed employees
	Funding	Fluctuating/limited funding, mandates getting more strict and many areas unfunded
	Pay Scale	Pay too low, some programs without benefits
	Community Perception/Promotion	More awareness of programs offered
	Inter Agency Training	Cross training for employees on all programs/services offered
	Workload	Too much paperwork, employees with too many duties
	Turnover/Key Staff Changes	Retirement/illness or turnover of leadership and key staff

EXTERNAL FACTORS		
OPPORTUNITIES	Offer New Programs	Examples given: Emergency shelter, community gardens, adult education classes, financial management, literacy, job placement, rehab/counseling child care/before and after school programs, youth activities
	Internships & HR Outreach	Expand internship program, job fairs
	Fundraising & Funding	Seek more diverse grants, agency grant writer
	Extend Current Programs	Examples given: Early Head Start, summer school for Head Start, housing, clothing bank in all counties, transportation/rural routes
	Increased Community Outreach	Attend more community meeting, build deeper partnerships, and build new partnerships
	Volunteers	Utilize volunteers more and/or church partnerships
	Employee Incentives	Boost employee morale
THREATS	Funding Cuts	Budget cuts, funding restrictions, defunding, major program loss, no carryover
	Political Environment	Unknown leadership, lack of knowledge/support
	Competitive Wages	Employee retention and recruitment difficult because of other options
	Income Guidelines	Too low to provide assistance to all in need
	Competition	Tribal, Schools, other agencies competition for services/funding

CSBG ORGANIZATIONAL STANDARDS

Establishing the vision for a Community Action Agency is a big task and setting the course to reach it through strategic planning is serious business. CSBG eligible entities take on this task by looking both at internal functioning and at the community's needs. An efficient organization knows where it is headed, how the board and staff fit in to that future, and how it will measure its success in achieving what it has set out to do. This agency-wide process is board-led and ongoing. A “living, breathing” strategic plan with measureable outcomes is the goal, rather than a plan that gets written but sits on a shelf and stagnates. **Often set with an ambitious vision, strategic plans set the tone for the staff and board and are a key leadership and management tool for the organization.**

STANDARD 6.1	The organization has an agency-wide Strategic Plan in place that has been approved by the governing board within the past 5 years.
STANDARD 6.2	The approved Strategic Plan addresses reduction of poverty, revitalization of low-income communities, and/or empowerment of people with low incomes to become more self-sufficient.
STANDARD 6.3	The approved Strategic Plan contains Family, Agency, and/or Community goals.
STANDARD 6.4	Customer satisfaction data and customer input, collected as part of the Community Assessment, is included in the strategic planning process.
STANDARD 6.5	The governing board has received an update(s) on meeting the goals of the Strategic Plan within the past 12 months.

SIX NATIONAL COMMUNITY ACTION GOALS

The work of Community Action Agencies is expected to address one or more of these goals

GOAL #1	Low-income people become more self-sufficient.
GOAL #2	The conditions in which low-income people live are improved.
GOAL #3	Low-income people own a stake in their community.
GOAL #4	Partnerships among supporters and providers of service to low-income people are achieved.
GOAL #5	Agencies increase their capacity to achieve results.
GOAL #6	Low-income people, especially vulnerable populations, achieve their potential by strengthening family and other supportive systems.

COMMUNITY NEEDS ASSESSMENT

As part of the planning process the planning committee reviewed key findings and results from the 2015 Community Needs Assessment including primary and secondary data of each key poverty issue. Review of top concerns as related to poverty issues is integral in the process since our service area has a higher poverty rate than state or national averages.

POVERTY RATE	18.67% SERVICE AREA
	16.85% OKLAHOMA
	15.37% UNITED STATES

		JOHNSTON	ATOKA	MARSHALL	MURRAY
SERVICES NEEDED	#1	Transportation	Transportation	Transportation	Literacy/ Ability to Read
	#2	Head Start	Energy Assistance	Free Clinic for Uninsured	Head Start
	#3	Emergency Assistance	Emergency Assistance	Head Start	Free Clinic for Uninsured

BOARD OF DIRECTORS PRIORITIES	#1 EARLY HEAD START
	#2 TRANSPORTATION
	#3 HOMELESS SHELTER

CUSTOMER SATISFACTION / INPUT

As part of the planning process the planning committee reviewed the customer satisfaction data. Results from the 2015 Customer Satisfaction Survey were reviewed and analyzed in comparison to the input gathered during SWOT analysis. Results were discussed in detail to help provide insight and direction in establishing goals. Customer satisfaction data from Head Start, JAMM, RAVE, RX, and Weatherization was also reviewed.

The Agency Wide 2015 Customer Satisfaction Survey received 262 responses from people who sought services from INCA throughout the four counties.

THE OFFICE WAS EASY TO FIND, WELL MARKED, AND CONVENIENT.	95%
WHEN I ENTERED THE BUILDING, I FELT WELCOME.	91%
THE OFFICE WAS CLEAN, TIDY, AND COMFORTABLE.	90%
I MET WITH STAFF AT OR NEAR THE TIME OF MY APPOINTMENT TIME.	93%
I DIDN'T HAVE AN APPOINTMENT, BUT WAS SERVED IN A TIMELY MANNER.	93%
STAFF WAS COURTEOUS, RESPECTFUL, FRIENDLY, AND HELPFUL.	95%
STAFF WAS SENSITIVE TO MY SITUATION AND NEEDS.	91%
MY NEED OR REASON FOR VISIT WAS MET.	93%
INCA WAS UNABLE TO MEET MY NEED(S), BUT I WAS REFERRED TO OTHER PROVIDER(S).	88%
STAFF OFFERED INFORMATION ABOUT OTHER SERVICES AVAILABLE.	93%
I WOULD RECOMMEND INCA TO FRIENDS AND FAMILY.	93%
INCA HELPS IMPROVE THE CONDITION IN WHICH LOW-INCOME PEOPLE LIVE.	94%
INCA'S WEBSITE IS EASY TO NAVIGATE.	92%
RATED INCA'S SERVICE 7 OR HIGHER. (1 INADEQUATE TO 10 OUTSTANDING)	86%

GOALS & OBJECTIVES

On Tuesday December 6, 2016 fourteen stakeholders, including leadership, key staff, and board members attended a strategic planning session to determine priorities and establish goals. Julia Teska, PhD, NCRT facilitated this process to help with the analysis of information gathered from previous strategic planning sessions.

The group discussed the conclusions from the meetings covering the agency review and SWOT Analysis. The 2015 Community Needs Assessment (CNA) was also reviewed including the top needs/priorities identified by the board and community as well as customer satisfaction data. The group was asked to provide insight into the key findings from the CNA and identifying contributing factors of the needs in each of their counties. The top three board priorities were discussed in detail. Weaknesses from the SWOT Analysis were correlated with results from the agency wide customer satisfaction survey to identify potential priorities but also to identify how they may affect ability to accomplish other strategic goals. It was important to review all these pieces collectively to ensure feedback from all sectors was included to provide an unbiased view of needs as well as the agency and community environment. Strategic plan includes goals and objectives to address the needs identified as priorities. Action plans/logic models will also be developed by the programs as supportive tools of the strategic plan and included in operational planning.

PRIORITY NEEDS

Six priority needs were identified by the planning committee as strategic issues that should be addressed with the strategic plan. **Three were identified as community level needs**, and the other **three were identified as agency level needs**. Goals and strategies were developed to address each of the needs.

Need #1	Our community does not offer ample childcare options for families with children from birth to three years of age.
Need #2	Our community has a need for expanded public transportation services to support self sufficiency and increase independent living.
Need #3	Our community has a need to provide temporary assistance for individuals at risk of becoming homeless.
Need #4	Our agency has a need for increased awareness to strengthen the investment in our mission and services both internally and externally.
Need #5	Our agency has a need for additional resources & diversified financial assets to enhance our ability to fight poverty in our community.
Need #6	Our agency has a need to research expansion of supportive operational activities to ensure sustainable growth for our programs and services.

2017-2022 INCA STRATEGIC MAP

GOAL Open at least one early childcare (0-3yrs old) facility in each county in service area.	GOAL Restructure/ expand transportation services to meet community needs.	GOAL Open at least one transitional emergency homeless shelter in our service area.	GOAL Develop agency wide communication management plan to increase awareness.	GOAL Seek diversified funding and support for organizational activities.	GOAL Make expansions/ changes to support sustained program growth.
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STRATEGIC PLAN SUMMARY

3 Community Level Goals & 3 Agency Level Goals to be addressed with the following goals & objectives

COMMUNITY LEVEL	<h2>#1 CHILDCARE</h2> <p>Our community does not offer ample childcare options for families with children from birth to three years of age.</p> <p>GOAL Open at least one early childcare (0-3yrs old) facility in each county in service area.</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Convert current head start slots to Early Head Start slots <input checked="" type="checkbox"/> Expand number of Early Head Start classrooms <input checked="" type="checkbox"/> Seek partnerships to help fulfill need 	<h2>#2 TRANSIT</h2> <p>Our community has a need for expanded public transportation services to support self sufficiency and increase independent living.</p> <p>GOAL Restructure/ expand transportation services to meet community needs.</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Promote transportation services to educate public and increase accessibility <input checked="" type="checkbox"/> Determine viability of Mobility Management Plan <input checked="" type="checkbox"/> Restructure and seek funding and other resource opportunities to support expanded services 	<h2>#3 HOMELESS</h2> <p>Our community has a need to provide temporary assistance for individuals and their families at risk of becoming homeless.</p> <p>GOAL Open at least one transitional emergency homeless shelter in our service area.</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Obtain expertise needed to operate shelter <input checked="" type="checkbox"/> Develop community rapport and support for project <input checked="" type="checkbox"/> Restructure and seek funding to support start up and continuing costs
	<h2>#4 AWARENESS</h2> <p>Our agency has a need for increased awareness to strengthen the investment in our mission and services both internally and externally.</p> <p>GOAL Develop agency wide communication management plan to increase awareness.</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Strengthen employee education to increase internal support <input checked="" type="checkbox"/> Develop community promotion/education to increase external support <input checked="" type="checkbox"/> Research Advocacy policies/practices 	<h2>#5 FUNDING</h2> <p>Our agency has a need for additional resources & diversified financial assets to enhance our ability to fight poverty in our community.</p> <p>GOAL Seek diversified funding and support for organizational activities.</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Research other funding sources that support our mission and services <input checked="" type="checkbox"/> Strengthen partnerships and collaborations in communities <input checked="" type="checkbox"/> Utilize volunteer/intern support for organizational activities 	<h2>#6 EXPANSION</h2> <p>Our agency has a need to expand supportive operational activities to ensure sustainable growth for our programs.</p> <p>GOAL Make expansions/ changes to support sustained program growth.</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Formulate preliminary steps for full service maintenance facility for JAMM Transit <input checked="" type="checkbox"/> Identify potential expansion of facilities for growth of RAVE's developmental disabilities services
	AGENCY LEVEL		

#1 CHILDCARE

Our community does not offer ample **childcare** options for families with children from birth to three years of age.

GOAL OPEN AT LEAST ONE EARLY CHILDCARE FACILITY IN EACH COUNTY OF OUR SERVICE AREA		
OBJECTIVE A	OBJECTIVE B	OBJECTIVE C
Convert current Head Start slots to Early Head Start slots	Expand number of Early Head Start classrooms	Seek partnerships to help fulfill need
STRATEGIES	MEASURES & BENCHMARKS	
<p>CONVERT CURRENT HEAD START SLOTS TO EARLY HEAD START SLOTS</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Research conversion <input checked="" type="checkbox"/> Determine location(s) based on need <input checked="" type="checkbox"/> Write/plan conversion grant <input checked="" type="checkbox"/> Submit conversion grant <input checked="" type="checkbox"/> Make preparations to designated classrooms <input checked="" type="checkbox"/> Determine which Head Start slots to convert based on qualified staff and needs based on target surveys <input checked="" type="checkbox"/> Research feasibility of additional conversions 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Track Head Start Applications & Enrollment totals in all counties (Continuous) <input checked="" type="checkbox"/> Conversion Application completed and submitted by Year 1 <input checked="" type="checkbox"/> Receive conversion grant for minimum of 16 EHS slots (2 classrooms) by end of Year 1 <input checked="" type="checkbox"/> Complete conversion of 48 Head Start slots to 16 Early Head Start (0-3 yrs old) slots (2 classrooms, 8 children each) in pre-determined classroom(s) by end of Year 2 	
<p>EXPAND NUMBER OF EARLY HEAD START CLASSROOMS</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Research cost and requirements for new facilities <input checked="" type="checkbox"/> Research variety of funding sources <input checked="" type="checkbox"/> Determine location(s) based on unmet need <input checked="" type="checkbox"/> Be prepared to submit Early Head Start expansion grant when released <input checked="" type="checkbox"/> Seek funding from at least 2 new sources for start up and additional costs <input checked="" type="checkbox"/> Research and identify new/existing facility options 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Track Head Start Applications & Enrollment totals in all counties (Continuous) <input checked="" type="checkbox"/> Complete pre-grant application process <input checked="" type="checkbox"/> Secure funding by end of Year 5 <input checked="" type="checkbox"/> Secure at least 2 facilities for classrooms by end of Year 5 <input checked="" type="checkbox"/> Complete expansion of 1-2 new Early Head Start classrooms by end of Year 5 	
<p>SEEK PARTNERSHIPS TO HELP FULLFILL NEED</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Strengthen current community partnership and collaborations <input checked="" type="checkbox"/> Build new partnerships with local resources to strengthen growth of program and community support <input checked="" type="checkbox"/> Referrals made to other providers when appropriate and available 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> New community partnerships/collaborations secured by end of Year 5 <input checked="" type="checkbox"/> Additional resources secured for start-up/ ongoing support of program through new or increased partnerships by end of Year 5 	

#2TRANSIT

Our community has a need for expanded **public transportation** services to support self sufficiency and increase independent living

GOAL RESTRUCTURE/EXPAND TRANSPORTATION SERVICES TO MEET NEEDS		
<p>OBJECTIVE A Enhance promotion of transportation services to educate and increase public accessibility</p>	<p>OBJECTIVE B Assess viability of Mobility Management Plan</p>	<p>OBJECTIVE C Restructure and seek funding and other resource opportunities to support expanded services</p>
STRATEGIES		MEASURES & BENCHMARKS
<p>ENHANCE PROMOTION OF SERVICES TO EDUCATE AND INCREASE PUBLIC ACCESSIBILITY</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Monitor transportation needs with variety of tools <input checked="" type="checkbox"/> Analysis of tracking data completed on yearly basis <input checked="" type="checkbox"/> Analysis of transportation needs data (CNA, Customer Satisfaction, etc.) completed on yearly basis <input checked="" type="checkbox"/> Improve tracking to monitor ridership and effectiveness of promotion <input checked="" type="checkbox"/> Increase participation in community meetings <input checked="" type="checkbox"/> Improve web presence by enhancing user friendliness <input checked="" type="checkbox"/> Increase social media presence <input checked="" type="checkbox"/> Research, develop, and implement marketing plan <input checked="" type="checkbox"/> Explore promotional activities <input checked="" type="checkbox"/> Provide additional training opportunities related to marketing & advocacy 		<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Improved quarterly tracking report & procedure complete by end of Year 1 <input checked="" type="checkbox"/> Research and develop marketing plan by end of Year 1 <input checked="" type="checkbox"/> Extended hours based on need established by end of Year 1 <input checked="" type="checkbox"/> Expanded routes based on need established by end of Year 2 <input checked="" type="checkbox"/> Implement marketing plan by end of Year 2 <input checked="" type="checkbox"/> Evaluation of additional services in Year 3, additional changes needed made by end of Year 5 <input checked="" type="checkbox"/> Increase ridership 7,500 additional trips per year (approximately 25%) growth by Year 5
<p>ASSESS VIABILITY OF MOBILITY MANAGEMENT PLAN</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Research opportunities for technical assistance <input checked="" type="checkbox"/> Evaluate program <input checked="" type="checkbox"/> Develop research data sheet 		<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Obtain technical assistance by end of Year 2 <input checked="" type="checkbox"/> Implementation of plan by end of Year 4
<p>RESTRUCTURE /SEEK FUNDING AND OTHER RESOURCE OPPORTUNITIES</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Identify funding need to support changes <input checked="" type="checkbox"/> Restructure current funding to support expanded services <input checked="" type="checkbox"/> Seek additional funding <input checked="" type="checkbox"/> Research other supportive opportunities including volunteer opportunities, road to work, etc. 		<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Receive permission from current funders to make adjustments to funding and resources to implement changes needed on yearly basis. <input checked="" type="checkbox"/> Identify at least 2 new funding sources to pursue by end of Year 5

#3HOMELESS

Our community has a need to provide **temporary assistance** for individuals at risk of becoming homeless.

GOAL ESTABLISH AT LEAST ONE TRANSITIONAL EMERGENCY HOMELESS SHELTER IN OUR SERVICE AREA		
OBJECTIVE A	OBJECTIVE B	OBJECTIVE C
Obtain expertise needed to operate shelter	Develop community rapport and support for project	
STRATEGIES		MEASURES & BENCHMARKS
OBTAIN EXPERTISE NEEDED TO OPERATE SHELTER <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Research best practices and successful projects <input checked="" type="checkbox"/> Research codes associated with conversion from commercial to residential <input checked="" type="checkbox"/> Research zoning requirements <input checked="" type="checkbox"/> Discuss project with zone enforcement agency <input checked="" type="checkbox"/> Develop procedure manual <input checked="" type="checkbox"/> Determine location based on need, cost, and other key factors 		<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Complete needed preliminary research by end of Year 1 <input checked="" type="checkbox"/> Attend training and needed consultation by end of Year 1 <input checked="" type="checkbox"/> Determine Location by end of Year 1 <input checked="" type="checkbox"/> Develop procedure manual by end of Year 2
DEVELOP COMMUNITY RAPPORT AND SUPPORT FOR PROJECT <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Increase community participation to build support of project <input checked="" type="checkbox"/> Promote project to build awareness and recognition of need <input checked="" type="checkbox"/> Develop & strengthen partnerships <input checked="" type="checkbox"/> Build partnerships that will support the project in a variety of ways including financial, labor, and other basic supportive needs 		<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Complete community surveys, focus groups, and forums for shelter projects by end of Year 1 <input checked="" type="checkbox"/> Secure at least 3 community partners in support of the project by end of Year 2 <input checked="" type="checkbox"/> Secure at least 2 significant community partners that commit to providing in-kind services/support by end of Year 3
RESTRUCTURE AND SEEK FUNDING TO SUPPORT START UP AND CONTINUING COSTS <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Research grant opportunities <input checked="" type="checkbox"/> Prepare research and presentation to submit to ODOC <input checked="" type="checkbox"/> Request permission to use ESG funds to pay for transitional housing from ODOC to make allocation for hotel/motel costs paid to INCA 		<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Complete pre-grant application process by Year 2 <input checked="" type="checkbox"/> Obtain permission to restructure ESG funds by end of Year 2 <input checked="" type="checkbox"/> Obtain grant by end of Year 3

#4 AWARENESS

Our agency has a need for increased **awareness** to strengthen internal and external investment in our mission and services.

GOAL DEVELOP AGENCY WIDE COMMUNICATION MANAGEMENT PLAN		
OBJECTIVE A	OBJECTIVE B	OBJECTIVE C
Enhance employee education to increase internal support	Develop community promotion/education to increase external support	Research advocacy policies/practices
STRATEGIES		MEASURES & BENCHMARKS
ENHANCE EMPLOYEE EDUCATION TO INCREASE INTERNAL SUPPORT <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Provide information on agency activities, outcomes, services, mission & vision to employees in all programs <input checked="" type="checkbox"/> Establish an employee orientation program <input checked="" type="checkbox"/> Provide annual refresher training for all employees <input checked="" type="checkbox"/> Research and develop employee survey to track effectiveness and increased understanding <input checked="" type="checkbox"/> Offer employee recognition/incentives to increase morale and investment 		<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Implement employee orientation by end of Year 2 <input checked="" type="checkbox"/> Implement refresher training by end of Year 2 <input checked="" type="checkbox"/> Administer employee survey on annual basis after Year 2 <input checked="" type="checkbox"/> Evaluate survey to determine effectiveness after Year 2 <input checked="" type="checkbox"/> Evaluate new orientation/refresher by end of Year 5
DEVELOP COMMUNITY PROMOTION/ EDUCATION TO INCREASE EXTERNAL SUPPORT <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Research effective communication techniques/ practices, including best practices for social media <input checked="" type="checkbox"/> Regularly update and post newsletters, annual reports, and other publications/news to the agency's website and social media outlets <input checked="" type="checkbox"/> Better utilize social media and traditional media to reach an increasing number of people and promote the agency's accomplishments to the community <input checked="" type="checkbox"/> Develop effective marketing tools on an ongoing basis for distribution throughout service area <input checked="" type="checkbox"/> Create strong unified branding to be utilized by all programs 		<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Maintain updated news and publications on website and social media (Continuous) <input checked="" type="checkbox"/> Increased promotion of events, projects, programs, etc (Continuous) <input checked="" type="checkbox"/> Implement community communication/ promotion plan by end of Year 2 <input checked="" type="checkbox"/> Increase website hits by total 10% by end of Year 5 <input checked="" type="checkbox"/> Increased reach on social media by total 10% by end of Year 5 <input checked="" type="checkbox"/> Unified branding tools implemented for use of each program by end of Year 5
RESEARCH ADVOCACY POLICIES/PRACTICES <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Research effective advocacy policies and practices implemented by other non-profits and community action agencies <input checked="" type="checkbox"/> Determine viability for our agency 		<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Develop advocacy platform by end of Year 5

#5FUNDING

Our agency has a need for new and **diversified financial assets** to enhance our ability to fight poverty in our community.

GOAL SEEK DIVERSIFIED FUNDING AND SUPPORT FOR ORGANIZATIONAL ACTIVITIES			
OBJECTIVE A	OBJECTIVE B	OBJECTIVE C	OBJECTIVE D
Research other funding sources that support our mission & services	Develop fundraising plan	Strengthen community partnerships & collaborations	Utilize volunteer/ intern support for organizational activities
STRATEGIES		MEASURES & BENCHMARKS	
RESEARCH OTHER FUNDING SOURCES <ul style="list-style-type: none"> ✓ Develop an ongoing schedule for funding research to discuss program sustainability as well as to explore new avenues of funding ✓ Develop fund development reporting ✓ Research private/foundation grants as a new avenue of support ✓ Monitor additional funding opportunities for all programs 		<ul style="list-style-type: none"> ✓ Identify at least 1 new opportunity through current funders by end of Year 1 ✓ Develop and implement funding research schedule and procedure by end of Year 2 ✓ Develop fund development report by end of Year 3 ✓ Identify at least 3 new funding opportunities through private or foundation opportunities by end of Year 5 	
DEVELOP FUNDRAISING PLAN <ul style="list-style-type: none"> ✓ Research effective fundraising techniques and campaigns used by other non-profits and community action agencies ✓ Determine schedule for fundraising plan and schedule of campaigns ✓ Develop report to track community feedback and effectiveness of plan 		<ul style="list-style-type: none"> ✓ Develop annual fundraising plan by end of Year 3 ✓ Establish fundraising campaign schedule by end of Year 4 ✓ Implement reporting on fundraising by end of Year 5 ✓ Evaluate effectiveness of fundraising efforts on annual basis 	
STRENGTHEN COMMUNITY PARTNERSHIPS & COLLABORATIONS <ul style="list-style-type: none"> ✓ Increase participation in community meetings and events ✓ Provide more education on services offered to current partners and community ✓ Motivate stakeholders and other important groups towards change ✓ Encourage partners to share the information we are sharing 		<ul style="list-style-type: none"> ✓ Attend and participate in at least 2 additional community meeting in each county in service area (Continuous) ✓ Increase presentations on services and key issues to stakeholders by end of Year 2 	
UTILIZE VOLUNTEER/ INTERN SUPPORT FOR ORGANIZATIONAL ACTIVITIES <ul style="list-style-type: none"> ✓ Recruit volunteers and interns for projects and other organizational activities ✓ Promote agency activities and services to inform community of support needs ✓ Track efficiency and employee satisfaction of additional support 		<ul style="list-style-type: none"> ✓ Increase utilization of volunteers and interns by end of Year 2 ✓ Track an increase in employee satisfaction due to efficiency of support by end of Year 5 	

#6 EXPANSION

Our agency has a need to research expansion of **supportive operational activities** to ensure sustainable growth for our programs and services

GOAL EXPLORE EXPANSIONS/CHANGES TO SUPPORT SUSTAINED PROGRAM GROWTH	
<p>OBJECTIVE A Perform full-service maintenance facility groundwork needed for JAMM Transit</p>	<p>OBJECTIVE B Identify facility expansion opportunities for growth of RAVE's developmental disabilities services</p>
STRATEGIES	MEASURES & BENCHMARKS
<p>PERFORM FULL-SERVICE MAINTENANCE FACILITY GROUNDWORK FOR JAMM TRANSIT</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Research & formulate preliminary steps needed <input checked="" type="checkbox"/> Develop ongoing schedule for completion of each step <input checked="" type="checkbox"/> Monitor funding opportunities 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Complete pre-grant required steps by end of Year 5
<p>IDENTIFY FACILITY EXPANSION OPPORTUNITIES FOR GROWTH OF RAVE'S DEVELOPMENTAL DISABILITIES SERVICES</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Determine pre-grant application requirements, i.e. Architectural plans, layout, and other requirements <input checked="" type="checkbox"/> Monitor request for services and determine viability of facility expansion <input checked="" type="checkbox"/> Research cost effective architect options including internship requirements through colleges of architecture, and pre built plan options <input checked="" type="checkbox"/> Monitor additional funding and community partnership opportunities 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Complete all steps for pre-grant requirements by end of Year 5 <input checked="" type="checkbox"/> Identify cost-effective opportunities for architectural requirements by end of Year 5 <input checked="" type="checkbox"/> Identify at least 2 community partners to provide significant and/or in-kind support of the project by end of Year 5

PLAN IMPLEMENTATION & ACCOUNTABILITY

INCA Community Services 2017 – 2022 Strategic Plan will be implemented by key staff teams with guidance and input from leadership and oversight from the Executive Director.

Teams will align program plans and budgets with the organization-wide strategic plan. Teams will include existing staff that already work together and new teams that will be established expressly to address new priorities, objectives, and strategies. Other teams will include those that call upon different partners and stakeholders for direction.

Senior leadership will devote time each month to review implementation progress and INCA's Executive Director will monitor on a monthly basis all progress made regarding INCA's Strategic Plan. This report shall be shared quarterly at board meetings utilizing a progress dashboard and logic models.

At the Board of Directors Annual Meeting a detailed progress report will be presented to monitor progress and challenges. After board review the report will be shared with all staff to promote awareness and transparency.

CONCLUSIONS

Each of the goals and objectives presented in the 2017 – 2022 Strategic Plan addresses significant needs within the community and agency. To effectively execute these strategies the need to communicate the process with internal and external key stakeholders is critical in this process. The implementation strategies require focus and attention from senior leadership and all employees involved to ensure the needs are addressed and progress is made.

INCA Community Services, Inc. - ROMA Planning Logic Models

Community Service Block Grant Work Plan for the Year: 2017

Program: **Early Head Start**

5 Year Strategic Planning Goals

IDENTIFIED NEED <i>Problem, need, or situation</i>	SERVICE OR ACTIVITY <i># of clients served. Time frame for project. # of units of service offered.</i>	OUTCOME <i>General statement of result expected</i>	INDICATOR <i>Projected # of clients expected to achieve each outcome divided by the number served; % expected to achieve</i>	ACTUAL RESULTS <i>The Actual # of clients achieving the outcome divided by number served, % achieved outcome</i>	MEASUREMENT TOOL(S) <i>Data source and/or collection procedures, Personnel and frequency of data collection and Reporting.</i>	NPI <i>National Performance Indicator</i>	GOAL <i>Primary National Goal</i>
Planning	Intervention	Benefit	Performance	Performance	Accountability		
Key Needs Assessment Finding: Out of 1,753 Community Members surveyed 31% indicated early childcare (0-3) as a key priority need within the community.							
Our community does not offer ample childcare options for families with children from birth to three years of age.	Short Term: Convert (48) Head Start slots to (16) Early Head Start slots	Families have access to affordable childcare in the counties we serve.	48 out of 48 (100%) Head Start slots converted to 16 Early Head Start slots in 5 year period		Head Start Applications & Enrollment totals in all counties monitored by management staff on monthly basis	2.1F	2
	Intermediate Term: Expand Early Head Start classrooms by 1 additional	Obtain funding for new classroom.	1 of 1 (100%) New Early Head Start classroom obtained by end of Year 5 of strategic plan		Head Start Applications & Enrollment totals in all counties monitored by management staff on monthly basis	2.1F	2
	Long Term: Open four (4) Early Head Start classrooms, one (1) in each county of service area.	Families have access to affordable childcare in the counties we serve.	16 of 30 (53%) of families have accessible safe and affordable child development opportunities within a 24 month period.		Head Start Applications & Enrollment totals in all counties monitored by management staff on monthly basis	2.1F	2

Program: **Transportation**

5 Year Strategic Planning Goals

IDENTIFIED NEED <i>Problem, need, or situation</i>	SERVICE OR ACTIVITY <i># of clients served. Time frame for project. # of units of service offered.</i>	OUTCOME <i>General statement of result expected</i>	INDICATOR <i>Projected # of clients expected to achieve each outcome divided by the number served; % expected to achieve</i>	ACTUAL RESULTS <i>The Actual # of clients achieving the outcome divided by number served, % achieved outcome</i>	MEASUREMENT TOOL(S) <i>Data source and/or collection procedures, Personnel and frequency of data collection and Reporting.</i>	NPI <i>National Performance Indicator</i>	GOAL <i>Primary National Goal</i>
Planning	Intervention	Benefit	Performance	Performance	Accountability		
Key Needs Assessment Finding: Out of 1,753 Community Members surveyed 47% indicated transportation services as a key priority need within the community.							
Our community has a need for expanded public transportation services to support self sufficiency and increase independent living.	Short Term: Educate and promote transportation services to increase public awareness and accessibility	Awareness of transportation services available is increased.	300 out of 1,000 (30%) of community members surveyed indicate increased awareness of transportation services in 5 year period		Extended Hours surveys Community transportation survey Ridership Tracking	2.1H	5
	Intermediate Term: Assess viability of Mobility Management Plan	Community has increased accessibility to mobility linkage with service area.	20 out of 50 (40%) Mobility partners participate in service area mobility management plan.		Transportation survey Partnership Database	2.1H	2
	Long Term: Restructure/expand transportation services to meet needs	Transportation needs are met for the community.	6,000 of 7,500 (80%) additional riders obtain transportation services within 5 year period		Extended Hours surveys Transportation survey Ridership Tracking	2.1H	2

Program: Homeless Shelter

5 Year Strategic Planning Goals

IDENTIFIED NEED <i>Problem, need, or situation</i>	SERVICE OR ACTIVITY <i># of clients served. Time frame for project. # of units of service offered.</i>	OUTCOME <i>General statement of result expected</i>	INDICATOR <i>Projected # of clients expected to achieve each outcome divided by the number served; % expected to achieve</i>	ACTUAL RESULTS <i>The Actual # of clients achieving the outcome divided by number served, % achieved outcome</i>	MEASUREMENT TOOL(S) <i>Data source and/or collection procedures, Personnel and frequency of data collection and Reporting.</i>	NPI <i>National Performance Indicator</i>	GOAL <i>Primary National Goal</i>
Planning	Intervention	Benefit	Performance	Performance	Accountability		
Key Needs Assessment Finding: Out of 1,753 Community Members surveyed 33% indicated emergency or crisis housing as a key priority need within the community.							
Our community has a need to provide temporary assistance for individuals at risk of becoming homeless.	Short Term: Obtain expertise needed to operate shelter	Transitional housing and knowledge for homeless shelter obtained	3 of 5(60%) transitional housing and/or homeless shelters were reviewed within (1) one year period.		Alliance on Homelessness emails, brochures, etc. HUD continuum of Care partners Site visits	6.2E	2
	Intermediate Term: Develop community rapport and financial support for project	Obtained funding and community support for Shelter.	1 of 2(50%) funding resources obtained 85 of 100(85%) community support obtained		Community Forums Sign In Southeastern HUD Continuum of Care Application Oklahoma Finance Agency Application Public Comments	6.2E	2
	Long Term: Establish at least one transitional emergency homeless shelter in our service	Community homeless shelter for at risk homeless population is established.	1 out of 4 (25%) Transitional Housing and/or homeless shelters established.		Progress pictures Inspections	6.2E	2

Program: **Increase Awareness**

5 Year Strategic Planning Goals

IDENTIFIED NEED <i>Problem, need, or situation</i>	SERVICE OR ACTIVITY <i># of clients served. Time frame for project. # of units of service offered.</i>	OUTCOME <i>General statement of result expected</i>	INDICATOR <i>Projected # of clients expected to achieve each outcome divided by the number served; % expected to achieve</i>	ACTUAL RESULTS <i>The Actual # of clients achieving the outcome divided by number served, % achieved outcome</i>	MEASUREMENT TOOL(S) <i>Data source and/or collection procedures, Personnel and frequency of data collection and Reporting.</i>	NPI <i>National Performance Indicator</i>	GOAL <i>Primary National Goal</i>
Planning	Intervention	Benefit	Performance	Performance	Accountability		
Our agency has a need for increased awareness to strengthen the investment in our mission and services both internally and externally.	Short Term: Enhance employee education to increase internal support	Employees obtain increased awareness of programs and services.	150 of 200 (75%) of employees report increased knowledge of agency programs after attending orientation or refresher		Employee Survey	6.2E	5
	Intermediate Term: Develop community promotion/ education to increase external support	Community obtains increased awareness of programs and services. Average website hits increased by 10% Average social media reach increase by 10%	8 of 10 (80%) communication/ promotion practices implemented.		Communication/ Promotion Plan Monthly Website Hit Report Monthly Social Media Impact Report	6.2E	5
	Long Term: Research advocacy policies/ Practices	Knowledge of advocacy practices obtained.	1 out of 4 (25%) advocacy practices implemented		Policy & Procedures Advocacy Best Practices	6.2E	5

Program: **Diversified Funding**

5 Year Strategic Planning Goals

IDENTIFIED NEED <i>Problem, need, or situation</i>	SERVICE OR ACTIVITY <i># of clients served. Time frame for project. # of units of service offered.</i>	OUTCOME <i>General statement of result expected</i>	INDICATOR <i>Projected # of clients expected to achieve each outcome divided by the number served; % expected to achieve</i>	ACTUAL RESULTS <i>The Actual # of clients achieving the outcome divided by number served, % achieved outcome</i>	MEASUREMENT TOOL(S) <i>Data source and/or collection procedures, Personnel and frequency of data collection and Reporting.</i>	NPI <i>National Performance Indicator</i>	GOAL <i>Primary National Goal</i>
Planning	Intervention	Benefit	Performance	Performance	Accountability		
Our agency has a need for additional resources & diversified financial assets to enhance our ability to fight poverty in our community.	Short Term: Research other funding sources that support our mission & services	Additional funding from diversified sources obtained.	3 of 5 (60%) new and additional funding sources pursued.		Grant Submissions Grant Station Guidestar	6.2E	5
	Intermediate Term: Utilize volunteer/ intern support for organizational activities	Increased employee satisfaction achieved through support from interns and volunteers.	5 of 10 (50%) employees report increased support and satisfaction from support provided by interns/volunteers.		Intern tracking Volunteer tracking Employee Satisfaction Survey	6.2E	5
	Long Term: Develop fundraising plan Strengthen community partnerships & collaborations	Additional support gained through effective fundraising support allowing for new/continued services. Additional support gained through community partnerships support allowing for new/continued services.	2 of 4 (50%) fundraising practices implemented. 8 of 10 (80%) presentations to community stakeholders completed.		Fundraising tracking form Partnership list Community Meeting record	6.2E	5

Program: Expand Operational Services

5 Year Strategic Planning Goals

IDENTIFIED NEED <i>Problem, need, or situation</i>	SERVICE OR ACTIVITY <i># of clients served. Time frame for project. # of units of service offered.</i>	OUTCOME <i>General statement of result expected</i>	INDICATOR <i>Projected # of clients expected to achieve each outcome divided by the number served; % expected to achieve</i>	ACTUAL RESULTS <i>The Actual # of clients achieving the outcome divided by number served, % achieved outcome</i>	MEASUREMENT TOOL(S) <i>Data source and/or collection procedures, Personnel and frequency of data collection and Reporting.</i>	NPI <i>National Performance Indicator</i>	GOAL <i>Primary National Goal</i>
Planning	Intervention	Benefit	Performance	Performance	Accountability		
Our agency has a need to research expansion of supportive operational activities to ensure sustainable growth for our programs and services.	Prepare full service maintenance facility documentation to build and maintain the facility including a work study on staff, salaries, and time.	Full-service maintenance facility documentation ready to be implemented once funding becomes available	4 out of 5 (80%) facility documentation steps completed when funding opportunity becomes available		Progress pictures Feasibility Survey Work Study	6.2E	5
	Implement facility expansion opportunities by preparing documentation to build a new facility for the growth of the RAVE program.	Facility preparedness complete and awaiting funding opportunities or Fully documented facility structure and instructions awaiting funding opportunities.	4 out of 5 (80%) facility documentation steps completed when funding opportunity becomes available		Progress Pictures Feasibility Survey	6.2E	5