

## UCAN STRATEGIC PLAN

**INTRODUCTION AND METHODOLOGY:** Strategic Plans are an essential tool for providing direction to an organization. It establishes priorities and helps in making decisions on how to focus and use limited resources, both financial and human resources. It is also part of an effort to establish in UCAN a culture of quality and excellence throughout the agency and in everything it does. UCAN has pockets of excellence and quality but they need to be nurtured, expanded and infused everywhere in the agency.

The last time the Umpqua Community Action Network (UCAN) created a Strategic Plan was in 1994. This plan is outdated and no longer useful for guiding the agency. Therefore since January of 2000 UCAN has been engaged in a variety of activities to develop a new Strategic Plan for the Agency that can provide guidance and direction for the agency and assist it in prioritizing its time and resources over the next several years. The activities undertaken as part of the Strategic Planning Process have included:

- Input from the UCAN staff during agency “All Staff” meetings identifying core agency values,
- Input from staff regarding agency and program needs. This was done during program staff meetings,
- A series of two all day and one half day Management Team Planning Retreats,
- Discussion at regular weekly management team meetings about agency needs and directions,
- Discussions by the Executive Director with community leaders, and partner agencies regarding the role of UCAN in the community and their perceptions of UCAN,
- Input from the Head Start Policy Council,
- An all day Board Planning Retreat,
- A Strategic Planning Survey sent to clients in all the programs, to agency partners, and to the business community through the Chamber of Commerce newsletter,
- Review of statistical information on trends and direction of the community,
- Finally a combined all day Board/Management Team Planning Retreat in December of 2000.

During this process numerous agency issues were identified. Some of these issues were critical or small enough that they have already been dealt with. Others however have not been fully addressed and make up the context for this plan. Among the critical issues already addressed is a new Mission Statement for the Agency. Core Values for the Agency have been identified and established, and general strategic directions defined. This Plan is the next step in the process and is intended to document some of the things accomplished to date and to build on what has occurred by further developing the strategic directions into a more detailed strategic plan.

**NEW MISSION STATEMENT:** As a result of the activities over the past year a new mission statement for the agency was established in January of 2001. It is:  
**UCAN...working together to improve the lives of people in our communities!** This

new mission statement is a departure from the previous statement whose focus was to “alleviate poverty and the causes of poverty”. It also stated that UCAN focused services toward “low and moderate income people”. It was the unanimous opinion of the Board and Management Team that the agency had already out grown this more limited mission statement and that it limited the agency as it looked toward future growth. This was evident by the fact that the agency is already providing services to the general public without concern to income levels (i.e. Child Care Resource and Referral, the Warmline, the Confidence Clinic, and the over income children in Head Start.) It was felt that this new Mission Statement is more reflective of our current situation and provides a better foundation for building UCAN’s future.

**CORE VALUES:** In addition to the new Mission Statement this process also led to the establishment of a set of Core Values for the Agency. There had been an attempt to identify these values during the 1994 planning process, however they were never clearly defined and never became a working part of the organization. The Core Values established from the current process for UCAN are:

- **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 to the people using our services. 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 they all have the ability to grow, improve and change. UCAN makes a positive difference in our communities by providing needed, meaningful and 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 its services, other agencies, and the community. UCAN’s partnering relationships are characterized by integrity, honesty, and mutual respect.

These values are to be considered a part of the foundation on which the agency is built and should be reflected in all of its daily operations, dealings with the community, and all policies and procedures.

**AGENCY ISSUES IDENTIFIED:** Several common themes emerged from this process that identified issues for UCAN to address. They are as follows:

- That the agency needs to increase its financial strength and base
- That most people are not aware of the full array of services that UCAN provides. This is true both in and out side of the agency.
- That the physical facilities are less than adequate, and impact the quality of services UCAN provides, limits the agency's ability to grow, and are detrimental to its image
- That UCAN has an unprofessional image among some members of the community
- That the Community values the services that UCAN provides, but that UCAN is not able to fully meet the current needs of its clientele
- That UCAN needs to grow to better address these community needs and to make the agency stronger
- That internal operations of the agency need updating and standardizing
- That attracting and maintaining quality staff is difficult under the current wage and benefit system.
- That internal communications need to be improved

**STRATEGIC DIRECTIONS:** Based on these general themes and out of this process numerous directions and tasks were identified that need to be addressed. These fall into several main categories. They are: Agency Financial Development Issues, Program Growth and Improvement Issues, Administrative and Governance Issues, Overall Organizational Operational Issues, Infrastructure Issues, Staff Development Issues, and Public Relations/Marketing Issues.

#### **AGENCY FINANCIAL DEVELOPMENT**

The need to increase the agency's financial strength and base is of high importance. This is to be accomplished by a two-prong strategy. The first part of this strategy is to expand or grow the agency service base, either by expanding our current programs or by adding new services to the agency. This is addressed in the next section. The second part of the strategy is to improve the agency's ability to generate new unrestricted funds. To this end there are several tasks that need to be completed.

Tasks:

1. Create and Implement an Agency Development Strategy. This could include
  - a. Development of a Planned Giving Program
  - b. Development of a Foundation
  - c. Fundraising Events
  - d. General Solicitations
  - e. Other
2. Develop a good grant writing team and process
3. Have a Resource Developer/Grant Writer on Staff
4. Establish for profit ventures.
5. Expand and coordinate volunteer opportunities
6. Expand fee for service and earned revenue opportunities

## 7. Develop a standardized in-kind tracking system

**PROGRAM GROWTH AND IMPROVEMENTS:** Expansion of program services can occur in two ways. First by adding new services to the Agency's mix. The advantage of doing this is three fold. First it increases the services the agency can provide, this addresses another of the identified areas of need. Secondly it spreads out the overhead costs, reducing these costs to individual programs and increasing service dollars. Thirdly it provides a buffer to the agency if other funding is lost. The second way expansion can occur is by simply expanding current services. In order to do this effectively quality programs need to exist on which to build. Therefore program improvements are a critical component to this approach if it is to be successful.

### Tasks:

1. Implement new services and programs adding to the financial foundation of the agency. These are to be pursued as opportunities present themselves and as they are deemed viable. Potential new service and program areas are:
  - Early Head Start
  - Full Day/Full Year Head Start Program
  - Employer based/supported Day Care
  - Family Resource Center
  - Development of Special Need Housing
  - Weatherization
  - More and Expanded Casemanagement
  - Family Confidence Clinic
  - Confidence Clinic for Men
  - For Profit Property Management Service with Social Service Component
  - Family Shelter Services
  - Transportation Services
  - Development of a Volunteer Services Program
  - Americorp Program
  - Expanded Homeless Programs
  - Development of a low cost grocery store for low income people
  - Parenting Programs
  - Home Ownership Program
  - Housing Rehab
  - Self Help Housing
  - Individual Development Accounts (IDA)
  - 211 Information and Referral Services
2. Specific program improvements to be made in the areas of public relations, public image, program administration, program infrastructure, program operations, quality, staff development, marketing, and funding are:
  - a. Head Start
    - i. Fully Implement Child Plus Software in Program

- ii. Perform internal review of program organizational structure and make changes as needed
- iii. Expand services to include full day/full year option
- iv. Improve physical looks of Deer Creek facility
  - v. Purchase, if possible, the Deer Creek facility
- vi. Explore the possibility of using modular units to meet class room space needs.
- vii. Expand training options for staff
- viii. Exceed the program goals for staff education credentialing requirements
  - ix. Assess current curriculum and modify as needed
  - x. Define specific outcome measures
- xi. Review current transportation system costs and look at alternative options.
- xii. Develop a technology plan for the program and upgrade the technological capacity of the program.
- xiii. Enhance public relations for the program through an upgrade of brochures, public presentations, newspaper and TV articles or ads, etc.
- xiv. Maintain a strong working relationship with the UCAN Board of Directors
- xv. Maintain a strong parent involvement program.
- xvi. Define at least two quality indicators for each program area and begin tracking them.

b. CHESS

- i. Public Relations/Public Image/Marketing:
  - Expand the number of interagency agreements and collaborative efforts
  - Increase media participation in program events
  - Increase the number of staff informational exchanges between partnering agencies
  - Design professional brochures for each program element
  - Move into a more professional building
  - Increased training for staff in public relations skills
  - Design a new eye catching professional looking sign
- ii. Program Administration:
  - Hold regular program management staff meetings
  - Provide ongoing training and education for program management staff
  - Develop a Program Assistant position and hire a full time person for that position
- iii. Program Infrastructure:
  - Network all CHESS staff and have internet access available for all
  - Purchase 3 new vehicles for staff use

- iv. Program Operations/Quality/Staff Development:
  - Provide ongoing training and skill development for all program staff
  - Expand outreach sites into the rural communities
  - Hire highly skilled staff to fill all vacated and new positions
  - Expand cross training between program components
  - Improve professional image of program staff
  - Expand our Property Management capabilities
- v. Funding:
  - Secure funding for additional housing development projects
  - Secure funding for Program Assistant position
  - Secure funding for vehicle purchase
  - Develop a “For Profit Business” with training component
  - Expand Property Management component of the program to do management on more properties not owned by UCAN

c. Family Connections

- i. Change name to incorporate all services.
- ii. Move to comprehensive family friendly services to include:
  - 1. work-life practices
  - 2. family resource center
  - 3. child care/mental health component
- iii. Maintain and grow current services to reach financial stability.
- iv. Create additional fee for service opportunities through training, consulting and work-life practices to employers.
- v. Expand child care provider training that is based on standardized curriculum that will lead to higher compensation for child care community.

d. Food Shares

- i. Tasks: Public Relations, Public Image and Marketing  
Market and continue to build a positive image and good public relations within Douglas County.
  - 1. Encourage and assist Local Member Agencies in publicizing their own individual programs through the local media.
  - 2. Give presentations that will enhance knowledge and image of not only UCAN Food Shares, but also of UCAN and its other programs.
- ii. Tasks: Program Infrastructure:
  - 1. Maintain existing infrastructure.
- iii. Tasks: Program Operations
  - 1. Move Warehouse Coordinator to fulltime
  - 2. Enhance and increase the use of volunteers.
  - 3. Continue to expand service delivery to the supplementals
- iv. Tasks: Quality

1. Develop and administer a Local Member Agency Service Survey
  2. Continue to increase quality of service to agencies with emphasis on the kitchens and supplementals
  - v. Tasks: Staff Development
    1. Continue cross-training of Food Shares Staff
    2. Set up suitable presentations for Food Shares Coordinator
    3. At least one RCA visitation for staff
    4. Food Shares Coordinator to assist with OFB onsite at other RCA
  - vi. Tasks: Fundraising
    1. 10% increase in Local Food Industry donations
    2. 10% increase in Food Drive Food
    3. 5% increase in Department 7 revenue
- e. Transitions Programs
- i. The name “Transitions Program” will be as widely recognized in the community as the name “Confidence Clinic”
  - ii. To have a computerized data collection system
  - iii. “Directions” will be active year round, possibly functioning in Yoncolla, Drain, and Glide as well as in Canyonville.
  - iv. The Active Support Program will be well established and expanded to include Night Clinic participants and also one-on-one support activities for women who have never been to the Confidence Clinic.
  - v. All Transitions Programs will be flexible enough to respond to partners’ needs, both within and without the agency.
  - vi. Program volunteers will be effectively trained and evaluated, with each volunteer working towards specific personal training goals as well as having well defined responsibilities. Volunteers will have regularly scheduled volunteer staff meetings.
  - vii. Increase the number of fee-for-service contracts with community partners.
  - viii. Expand our private foundation funding base, either by increasing the amounts received from present grantors, or by finding new foundation resources.
  - ix. Have either state displaced homemaker/single parent (transitions) programs, or will be in the process of working to achieve state funding through Oregon Women Work!
  - x. Have at least one annual fundraising activity designed to promote the Confidence Clinic as well as to raise funds.
- f. Fiscal/Administration
- i. Budgets, Budget Revisions & Budgeting Guidelines & Procedures
    1. Budgets are completed and approved before beginning of new fiscal year.

2. Guidelines & procedures for budget revisions.
  - a. Criteria for when revised budgets are necessary.
  - b. How and when to submit to fiscal staff.
3. Set up systems, methods or worksheets as needed by Program Directors for establishing budgets, allocating expenses and tracking actual totals to date.
- ii. Allocation of Agency Administration Costs
  1. Develop system or method that would be easier to administer than current system
  2. Research and apply for an indirect cost rate.
- iii. Technology-Updating, Upgrading & Training
  1. Accounting software & other software packages used by fiscal staff should be updated as needed to meet all of UCAN's needs.
  2. Computer hardware components should be upgraded as needed to allow software to run at maximum efficiency.
  3. Fiscal staff should receive training on effective & efficient use of software packages.
- iv. Improve Agency Communications
  1. Standardize the forms and practices used by all UCAN Programs.
  2. Use e-mail for more efficient communications between staff and community partners.
  3. Use Internet for electronic transfer of payments to vendors.
3. Maintain current programs and have them at self-sustaining levels of funding.
4. Evaluate current relevant programs that are not self-sustaining and develop a strategy to make them self-sustaining.
5. Look for and pursue strategic mergers and partnerships, as opportunities present themselves, that are beneficial to the agency and the services it provides

ADMINISTRATIVE AND GOVERNANCE: Part of the foundation of any organization is maintaining strong governance and administrative structures. In an effort to build on what we currently have there are several tasks that need to be undertaken.

Tasks:

1. Expand the Board to 12 people
2. Hold regular Board Retreats
3. Provide regular Board Training and Education Opportunities
4. Expand agency reserve fund and determine its upper limit
5. Maintain good working relations between the staff and Board.
6. Expand Administrative Assistant to full time
7. Establish a full time Human Resource Position
8. Upgrade agency by-laws and articles of incorporation

**OVERALL ORGANIZATIONAL OPERATIONS:** Another aspect of a quality organization is having a strong positive organizational culture and internal systems and operations that add value to the organization. In order to accomplish this several tasks need to be undertaken.

Tasks:

1. Implement a high quality MIS system across the whole agency (OMNI)
2. Have a fiscal system that can readily incorporate new funding streams and revenue/expense changes with minimal effort and impact, and addresses administrative costs in a easy and equitable manner.
3. Establish safety as an important aspect of everyone's job
4. Improve internal agency communications and referrals and create a seamless system of service delivery
5. Expand services to out lying communities—Out reach offices in Reedsport, North County and South County
6. Create an Agency wide commitment to Quality Concepts and Continuous Quality Improvement and create a flexible organization that deals with change readily.
7. Develop an Agency Technology Plan that identifies what technology is important to quality agency operations and then upgrade technology to meet these and provide necessary training.
8. Establish a clear definition of quality for each program area
9. Develop measurable performance indicators that define quality for each program
10. Maintain All Staff meetings twice a year
11. Fully integrate the new Mission Statement and Core Values into the agency
12. Develop a Vision Statement for the agency

**INFRASTRUCTURE:** As was identified earlier another major theme that emerged from the strategic planning process was that the agency's facilities are less than adequate and are also a barrier to improving and expanding services. In addition several other infrastructure needs were identified. To this end several tasks need to be completed

Tasks:

1. Establish a new facility that consolidates all programs outside of Head Start
2. Purchase all of Head Start's facilities
3. Have all staff interconnected by e-mail
4. Obtain new agency vehicles that adequately meet the needs of the agency staff and client services.

**STAFF DEVELOPMENT, RECRUITMENT AND RETENTION:** The ability to attract and retain quality employees is a critical issue if UCAN is to thrive and grow. To this end several tasks need to be undertaken:

Tasks:

1. Identify and establish minimum skills for all agency staff (i.e. Computer skills, keyboarding, customer relations, etc.) and provide training opportunities to develop those skills.

2. Upgrade the Agency Wage Scale and have wages at a level that they are competitive in the marketplace.
3. Develop a benefit package that is competitive in the market place. This could include a cafeteria plan
4. Rewrite the Personnel Policy Manual so that it reflects best practice in the area of personnel management and aids in the recruitment and retention of quality staff.
5. Redo personnel evaluation system so it ties to quality goals and job descriptions
6. Establish an “Esprit de Corp” committee to enhance staff morale
7. Expand the Cultural Competency of the Agency Staff

COMMUNITY RELATIONS/MARKETING: Another theme that emerged from the Strategic Planning Process was that many people are not aware of all the programs that UCAN offered. In addition UCAN has an image that it is less than professional. This is due in part to the facilities, but also has to do in part to the staff presentation. To address these issues several tasks need to be addressed.

Tasks:

1. Improve agency professional image
2. Maintain a regular presence in the media
3. Maintain good partnership relations with other agencies.
4. Develop UCAN’s image as an innovative problem solver in the community
5. Provide regular community presentations
6. Develop an Annual Report for the agency
7. Develop and hold an annual meeting/dinner that involves the community and volunteers
8. Improve peoples knowledge of all the programs the agency provides
9. Expand and Improve the Agency Newsletter
10. Upgrade and make better use of Agency website
11. Establish a Community Relations position within the agency
12. Upgrade all agency brochures
13. Upgrade the looks and style of all documents that are seen by the public

LOW INCOME ADVOCACY: Providing advocacy for low-income people and low-income issues is a fundamental function of UCAN. To this end several tasks have been identified.

1. Develop and provide training to low-income people on how to become involved with public meetings, boards, and effectively advocate for themselves, other low-income people, and low-income issues.
2. Maintain effective low-income representation on the UCAN Board of Directors
3. Educate UCAN staff on allowable limits of lobbying
4. Maintain active membership in statewide low-income associations such as CADO, Oregon Food Bank Network, Oregon Energy Coalition Association, etc. and support their low-income advocacy activities.
5. Monitor both state and local legislative issues and educate local elected officials on any impacts they may have on low-income people.

6. Maintain strong collegial relationships with other non-profit organizations in the community and with other important community groups and leaders and advocate for low-income issues.
7. Inform and educate low-income people about important issues and events through mailings, flyers, handouts, and other appropriate means.
8. Work toward an integrated service delivery system for clients on both an organizational and direct service level in order to enhance coordination and collaboration of services between various agencies, and to advocate for these services being client centered and strength based.

**PRIORITY ITEMS:** Through the Strategic Planning process several items rose to the surface as priority items to be addressed. These are items that were deemed as critical and/or time sensitive that needed to be addressed before other tasks. These priority items are listed below.

1. Establish a new facility that consolidates all programs outside of Head Start
2. Create and Implement an Agency Resource Development Strategy
3. Upgrade agency by-laws and articles of incorporation
4. Expand the Board to 12 people
5. Address the Agency's immediate Human Resource issues and develop a long-term strategy for handling the growing future Human Resource needs of the Agency. Immediate HR needs include:
  - a. Upgrade the Agency Wage Scale and have wages at a level where they are competitive in the marketplace
  - b. Develop a benefit package that is competitive in the market place. This could include a cafeteria plan
  - c. Rewrite the Personnel Policy Manual so that it reflects best practice in the area of personnel management and aids in the recruitment and retention of quality staff
  - d. Review and revamp, as needed, the personnel evaluation system
6. Develop an Annual Report for the agency
7. Develop an Agency Technology Plan that identifies what technology is important to quality agency operations and then upgrade technology to meet these and provide necessary training
8. Maintain and grow current programs and services with the priority for growth in programs being in the following areas:
  - a. Additional affordable housing developed
  - b. Implementation of a locally managed weatherization program for all of Douglas County
  - c. Expansion of Head Start services to include a full year/full day option
  - d. Implementation of an Early Head Start program
  - e. Expand services to outlying areas including Satellite offices as appropriate.
  - f. Implement an Individual Development Account (IDA) program
  - g. Work towards implementation of a 211 Information and Referral Service
  - h. Expand the availability and variety of food distributed through the Food Shares program

- i. Maintain and expand the availability of fuel assistance and make it a year round service
- j. Work to improve the availability, affordability and quality of child care throughout Douglas County
- k. Develop additional resources for individuals and families requiring support to meet emergent basic needs for both short term family stabilization and for immediate family crisis situations. These needs can be such things as emergency housing, transportation, rent, medicine, gas, utility assistance to avoid shut off, blankets, heaters, etc.