



2020 - 2025

Strategic Plan

Orange County Community and Family Services Department
Community Action Division



Helping People. Changing Lives.



Authorization

CSBG Eligible Entity: Orange County Community Action

Executive Director: Lonnie C. Bell, Jr.

Title: Department Director

Primary Agency Contact Information:

Contact Name: Lavon B. Williams

Title: Manager

Phone: 407-836-6514

Email: Lavon B. Williams

Secondary Agency Contact Information:

Contact Name: Trellany Williams

Title: Administrator

Phone: 407-836-9342

Email: Trellany.White@ocfl.net

Orange County Community Action's Strategic Plan has been approved by the Community Action Board, the governing body of this organization.

Approval Date: 11/11/2020

Table of Contents

Section	Page
Table of Contents	3
I. Executive Summary	4
II. Strategic Planning Process	5
III. Organizational Mandates and Accountability	6
IV. Assessment Summary	7
V. Strategic Issues & Priorities	11
VI. Strategic Goals, Objectives, Strategies and Indicators	12
VII. Strategic Plan Implementation	17
VIII. Acknowledgements	18
IX. APPENDICES	19
Community Action Organizational Structure	19
Logic Model	19
2020-2023 Community Needs Assessment	19
2020-2022 Cares Needs Assessment	19
Community Needs Customer Responses	19
SWOT Analysis Survey Responses	19

I. Executive Summary

Community Action Agencies (CAA) are required to complete a community needs assessment to gather information for a community action plan as a condition to receipt of Community Services Block Grant (CSBG) funding.



In this 2020-2025 Strategic Plan (hereafter referred to as The Plan), Orange County Community Action Agency (OCCAA) outlines critical community characteristics and needs based on a Community Needs Assessment which guides the development and innovation of the agency's anti-poverty programming over the next three to five years. The overall purpose of this strategic plan is to identify resources which will improve the quality of lives for the citizens in Orange County served by the Community Action Agency. The goals, objectives and strategies presented in the plan focus on improving the agency's overall effectiveness and efficiency toward serving Orange County and its low-income individuals and families.

The OCCAA strategic planning process included; community needs assessment review, committee/management team meetings; board member/client surveys, and staff input. In addition, community stakeholders were engaged for their perspective on the agency's strategic approach, implementation, and community impact results in light of its stated mission. The process was intentional about gathering information from a variety of sources to help provide insight into outlining Orange County Community Action's future direction.

From this input emerged a strategy to move Orange County Community Action Agency toward having a greater family and community impact and the ability to sustain high performance in an ever-changing economic and social climate.

Lavon B. Williams, Esq., AICP
Manager, Orange County Community Action Division

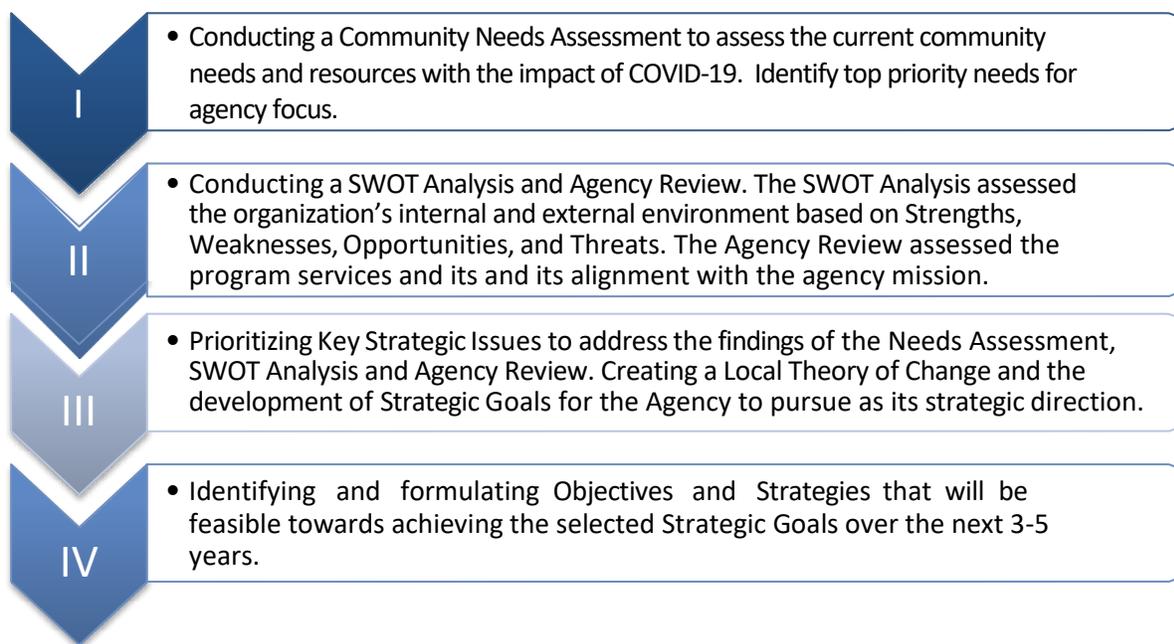
II. Strategic Planning Process

The essential tasks of coordination, facilitation, research, analysis and developing the Plan were completed amongst the staff with active participation of the board members. The Strategic Plan's needs assessment analysis provided qualitative and quantitative data. Survey responses received from the survey tools were analyzed and several other reports and documents were utilized.

The primary instruments included:

- 2020-2023 Community Needs Assessment
- 2020-2022 CARES Act Funding Needs Assessment Plan
- SWOT Analysis Survey
- Agency Review Survey
- Local Theory of Change Brainstorm Exercise
- Board Assessment

The process in the development of the Plan for implementation included four phases:



Phase I initiated the assessment phase by identifying our service area and poverty population; assessing customer and community needs, and analyzing both quantitative and qualitative data to determine priority needs that should drive the agency work.

Phase II continued the assessment phase by identifying the agency's internal strengths and weaknesses and external opportunities and threats, while the Board reviewed the Mission and explored a Local Theory of Change exercise for an in-depth agency review. The management staff conducted discussions of the SWOT Analysis responses to brainstorm on strategic issues and actions for the agency. Board members, agency staff and stakeholders were surveyed during this phase.

Phase III involved identifying critical issues facing the agency after review of the findings from the Needs Assessment Report, SWOT Analysis, Agency Review and Local Theory of Change Brainstorm Exercise. Representation from the Community Action Board, staff and stakeholders framed strategic issues to address what potentially may affect the Agency’s community impact in effective delivery of its programs and services.

Phase IV involved the Management Team drafting the Strategies and Objectives based on all feedback as the final component of the Strategic Plan and presented the recommendations to the Board for approval to complete the planning process.

III. Organizational Mandates and Accountability

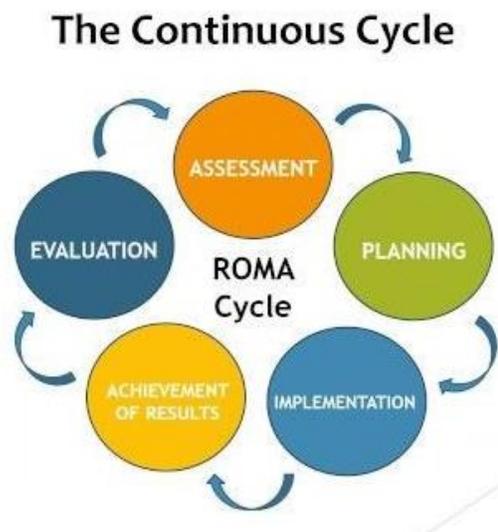
This Strategic Plan recognizes and utilizes the elements from Results Oriented Management and Accountability (ROMA) to preserve the anti-poverty focus of Community Action Agencies. Strategic Planning is the second phase of ROMA and each phase of the ROMA cycle will be explored at various times during its lifecycle.

Performance Based Management System:

In 1998, the Community Services Block Grant Act was amended and Community Action was mandated to implement a comprehensive performance-based management system, across the entire community action network identified as “Results-Oriented Management and Accountability,” or ROMA.

Organizational Standards:

The Department of Health and Human Services Administration for Children and Families Office of Community Services released Information Memorandum (IM) 138 which established Organizational Standards for CSBG eligible entities. Under Section 678B of the CSBG Act, State Lead Agencies are to establish “performance goals, administrative standards, financial management requirements and other requirements” that ensure an appropriate level of accountability and quality among the State’s eligible entities.



National Performance Indicators: Community Action agencies are required to utilize National Performance Indicators to evaluate attainment of National Goals across three key areas: Family, Community, and Agency.

IV. Assessment Summary

A. Community Profile

Orange County has a population of 1.38 million people with a median age 35.3 and a median household income of \$58,588. Between 2018 and 2020 the population grew from 1,321,194 to 1,380,645, a 4.3% increase.

Total Population

Report Area	Total Population	Total Land Area	Population Density per sq. mile	Total Households in Poverty
Orange County	1,380,645	902	1,268	458,613
Florida	21,299,325	53,638	350	7,621,760
United States	327,167,343	3,532,068	87	119,730,128

Orange County consists of 49.08% male and 50.92% female. Non-Hispanic Whites make up 40.82% of the population; Hispanic or Latino make up 30.91%; African American's make up 19.91% and mixed races make up 8.36%. Orange County is slightly more racially and ethnically diverse than the State of Florida and the United States.

Population Demographics

Population by Age Groups)	Total	Percent %
Age 0 to 17	297,074	22.49 %
Age 18 to 64	873,856	66.14 %
Age 65 and Up	150,264	11.37 %
Population by Gender	Total	Percent %
Male	648,446	49.08 %
Female	672,748	50.92 %
Population by Race/Ethnicity	Total	Percent %
Non-Hispanic White	539,349	40.82 %
Black or African American	262,987	19.91 %
Asian	66,884	5.06 %
Native American / Alaska Native	1,471	0.11 %
Native Hawaiian / Pacific Islander	696	0.05 %
Some Other Race	10,823	0.82 %
Multiple Race	30,660	2.32%
Hispanic or Latino	408,324	30.91 %

Data Source: Community Action Partnership Report; US Census Bureau, *American Community Survey*. 2014-18.

Poverty

The vulnerable population footprint reflects there are a total of 484,192 people 37.6% of the total population are below 200% of the FPL and 11.51% or 101,305 individuals have not attained a high school diploma. Of the households in poverty, female headed households represent 50.3% of all households in poverty, compared to 39.1% and 10.7% of households headed by males and married couples, respectively.

Poverty Demographics

Below 200% of Poverty Level			Educational Attainment		
	Total	Percent %		Total	Percent %
Total Population in Poverty	484,192	37.6 %	Population With No High School Diploma	101,305	11.51%
Total Children in Poverty 0-17	140,260	47.9 %			

B. Community Needs Assessment of Poverty Needs and Conditions

Community Assessment Response

Priority Needs Based on Community Needs Survey Responses - The survey responses align with the statistical data in supporting the priority of need for employment in Orange County. Due to the high unemployment rate, loss of jobs and wages, families are struggling to meet their basic needs. The low-income community and those households living in poverty are experiencing the hardest impact. Those daily challenges to sustain their household supports the need to also prioritize Housing and Utilities as an identified need among families. The coronavirus pandemic raises health concerns all across the country. Health and Safety is a community priority need to slow down the spread of the virus.

Considering the overwhelming number of job losses in Orange County (200,000 plus jobs) and the 208,224 re-employment/unemployment claims filed, there is an emergent need to get individuals employed and/or re-employed in an industry that can withstand COVID-19. The need will require retraining in target high demand industries along with job placement.

Top Community Needs Identified:

- Employment - affordable wages in COVID-19 sustainable industries
- Housing – ability to meet basic housing needs
- Job Training/Retraining – high demand industry certifications
- Health Services – access to health services due to pandemic
- Food Insecurities – ability to meet basic household needs

Review of complete Community Action Needs Assessment – See Appendices

C. Agency Review - Vision and Mission Statement

The Board adopted its revised vision statement and mission statement in October 2018 that guides the agency's work. During the strategic planning process, an Agency Review was conducted to re-examine the mission and vision to assess the alignment and performance of agency programs and services. This process helped the agency determine that its overall anti-poverty approach is on track and the program and services align with the current mission.

Why Do We Exist?

“We exist to empower economically disadvantaged individuals and families to meet their basic needs while providing opportunities to become self-sufficient.”

VISION

Helping individuals and families achieve economic self-sufficiency by leveraging partnerships that produce a range of culturally-competent, accessible, high-quality services to meet the needs of a diverse community.

MISSION

Enhancing quality of life, promoting self-sufficiency, and eliminating the causes and consequences of poverty by mobilizing and directing socioeconomic resources, collaboration and partnership, and by providing high quality, easily accessible programs and services.

D. Organizational and Environmental Scan

The strategic planning process includes a key component which is designed to give recognition to the organization’s strengths and weaknesses and its opportunities and threats. The **SWOT Analysis** (*Strengths, Weaknesses, Opportunities, and Threats*) assessed the environment of the organization for its health, vitality and sustainability. The data was synthesized into key themes needing to be addressed in the development of the goals and objectives. The key themes included; Community Awareness about Community Action services, Service Delivery, Building Organizational Capacity, Leveraging Partnerships and Funding Capability.

SWOT Analysis Summary

Strengths	Weaknesses
Strong program and Community Action Network	Maintaining service center facilities
Ability to meet Performance Management Mandates	Balance staff and community need
Sufficiency impact on low-income families/community	Consistent messaging across all staff levels
Provides services that support low and very low income families	Maintaining staff morale
Community Centers - one stop service centers for families across the county	Reflecting community diversity among staff
Senior resources and assistance	Technology lag
Youth programs	Making citizens aware of programs and services
Tripartite Community Action Board	Collecting customer service satisfaction survey responses
Quality Community Partnerships	Tripartite Board maximum feasible participation
	Partnership reporting
Opportunities	Threats
Staff Development Training	Policy changes at all levels of government
Build Staff Culture and Morale	Entrenched organizational behaviors
Additional centers/budget increases	Aging facilities & technology
Incorporate "Whole Family Approach" in Service Delivery	Congressional funding for services is not guaranteed
Increase services under Senior Climate Efficiency Program (SCEP) for seniors	Increased demand for services with limited funding
Improve community outreach & awareness	Maintain public health while delivering individuals services
Explore program innovation & technology enhancements	Policy changes at all levels of government
Strengthen Collaboration w/ Family Services Partners	Entrenched organizational behaviors
Leverage funding & services with Career Source	Aging facilities & technology
Increase intentional partnerships specific to plan	Duplication of services
Increased Funding Opportunities	

V. Strategic Issues & Priorities

The community assessment findings, agency review, and organizational and environmental scans through stakeholder surveys were analyzed to determine the Strategic Issues the agency is facing. The agency-wide SWOT Analysis revealed key strengths and the external environmental changes impacting the agency's ability to sustain high performance and measurable community impact. As a result, the **Strategic Priorities** that the agency will address over the next five years are outlined below:

Top 5 Strategic Priorities
1. Program Initiatives to meet Basic Needs and Promote Self-Sufficiency
2. Community Awareness and Engagement
3. Partnerships and Collaborations to Leverage Resources
4. Funding Opportunities
5. Organizational Capacity to Achieve Results

*"There is no power for change greater than
A community discovering what it cares about."*

– Margaret J. Wheatley

VI. Strategic Goals, Objectives, Strategies and Indicators

The Strategic Goals outlined in the Plan are consistent with the Community Services Block Grant (CSBG) Act and the six national ROMA goals and align with the ROMA Next Generation (ROMA NG) three broad anti-poverty goals developed by the Community Action Network.

The ROMA goals provide a framework for continuous growth and improvement for community action agencies across the nation, touching on all levels of need: **Family, Agency and Community**.

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

The ROMA Next Generation goals is a system for continuous quality improvement to enable the network to measure, analyze and communicate the three National Community Action Goals:

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

Three **Strategic Goals** were developed to strategically move the agency towards achieving its vision and mission. Provided below are the three Strategic Goals with Objectives and Strategies that align with the Strategic Priorities and the related ROMA Goal(s):

2020-2025 STRATEGIC GOALS

GOAL 1: Position agency as a high performing agency lifting people from poverty and empowering self-sufficiency through targeted program initiatives.

GOAL 2: Strengthen Community Awareness and Engagement.

GOAL 3: Enhance Organizational Capacity to Achieve Results.

STRATEGIC GOAL 1:

Position agency as a high performing agency lifting people from poverty and empowering self-sufficiency through targeted program initiatives.

STRATEGIC PRIORITY #1

Implement Program Initiatives to Meet Basic Needs and Promote Self-Sufficiency

NATIONAL GOAL (ROMA NEXT GENERATION)

GOAL 1: Individuals and families with low incomes are stable and achieve economic security.

ROMA GOAL 1,6

Objectives	Strategies
<p>1. Provide holistic and intentional services to low-income families that provide stability and promote self-sufficiency based on a “Whole Family Approach.”</p> <p><i>A whole family approach to human services is one that focuses on the needs of parents and other adult family members and the needs of children together, and considers the challenges and resources of family members outside of the assistance unit, all out of recognition that children do better when their parents are healthy and stable, and that parents do better when their children are healthy and stable.</i></p>	<ul style="list-style-type: none"> • Strategically align service delivery to Whole Family best practices to maximize agency effectiveness in serving low-income families. • Provide opportunities to obtain earned income or increase employment income through job training programs. • Provide opportunities to expand educational aptitude and cognitive development. • Provide services to vulnerable households that reduce barriers to stability and meet basic needs. • Document bundled services

Indicators:

Employment

- Obtain employment to gain skills or income.
- Obtain employment up to a living wage.
- Obtain and maintain employment for at least 90 days.
- Increase income and/or benefits.

Education and Cognitive Development

- Improve positive approaches towards learning.
- Demonstrate improved basic education.
- Obtain high school diploma and/or GED.
- Obtain recognized credential, certificate or degree relating to educational/vocational skills.

Income and Asset Building

- Increase ability to meet basic needs.
- Improve financial well-being.

Housing

- Avoid evictions for households.
- Improve energy efficiency and/or energy burden reduction in homes.

Health and Social Development

- Maintain independent living.

Outcomes Across Multiple Domains

- Achieve one or more outcomes in various domains.

STRATEGIC GOAL 2:	
Strengthen Community Awareness and Engagement	
STRATEGIC PRIORITY #2	
Community Awareness and Engagement	
<i>NATIONAL GOAL (ROMA NEXT GENERATION)</i>	
<i>GOAL 3: People with low incomes are engaged and active in building opportunities in community.</i>	
ROMA GOALS 5, 6	
Objectives	Strategies
1. Build, communicate, and promote an agency Brand that is vibrant and inspires hope.	<ul style="list-style-type: none"> • Explore the possibility of leveraging resources for marketing strategist. • Design a social media and internet media strategy that will target individuals. • Create a PSA video to showcase programs and services. • Design and develop marketing tools and collateral (brochures, posters) for distribution/media kits. • Implement communications plan.
2. Raise and improve community awareness of community needs and agency services that promote community involvement.	<ul style="list-style-type: none"> • Increase visibility/marketing of agency to a broader population and outreach events. • Communicate externally through marketing outreach campaigns with "Impact Stories" and Annual Report to illustrate services and results. • Continue presence in low-income communities through direct services in service centers throughout the County. • Provide opportunities for families to voice their needs to advise agency planning, increase involvement and knowledge to improve their community.
Indicators:	
<ul style="list-style-type: none"> • Communicate activities and results to the community. • Board member hours in capacity building activities. • Volunteer hours donated to the agency. • Participants increased skills and knowledge to work with agency to improve conditions in the community. 	

STRATEGIC GOAL 3:

Expand Organizational Capacity to Achieve Results

STRATEGIC PRIORITY #3,4,5

Partnerships and Collaborations to Leverage Resources

Funding Opportunities

Organizational Capacity

NATIONAL GOAL (ROMA NEXT GENERATION)

GOAL 2: Communities where people with low incomes live are healthy and offer economic opportunity.

ROMA GOALS 2,3,4,5,6

Objectives	Strategies
1. Build and leverage a network of targeted partners that align with the mission to address the needs of low-income families and promote self-sufficiency.	<ul style="list-style-type: none">• Assess current programming to determine new or expanded program opportunities or partnerships with a “Whole Family” focus.• Leverage funding resources with Career Source Workforce Development to increase employment opportunities.• Address unmet or underserved needs in the community through committed resources and strategic partnerships (<i>e.g. housing, employment, finance, food, transportation, health, education, and childcare</i>).• Strengthen existing partnerships to maximize the continuum of services and illustrate impact on families.
2. Secure additional revenue from non-government funding sources to expand service delivery opportunities to support families.	<ul style="list-style-type: none">• Apply for and secure non-government grants and create a funding mix that increases revenue to meet unmet needs by agency.• Solicit support for resources from businesses, municipalities, government agencies, organizations and individuals to achieve CAA mission.

<p>3. Develop organizational culture and build agency capacity with a central focus on achieving results for families.</p>	<ul style="list-style-type: none"> • Retain, attract, and develop a highly involved Board. • Build in regular/on-going Board training opportunities on board governance, strategic leadership, and ROMA during board meetings. • Develop interactive staff development training guide and activities. • Develop an internal communication plan that promotes organizational culture and engages all staff levels in daily operations of serving families and achieving results. • Explore technology tools to help better track all agency activities.
<p>Indicators:</p> <ul style="list-style-type: none"> • Expand resources and opportunities in order to achieve family outcomes. • Local and private-sector resources allocated. • Hours of Agency Capacity (Board and Staff) • Provide board training on duties and responsibilities. • Conduct staff development/training on an ongoing basis. 	

***Our goals can only be reached
through the vehicle of a plan.
There is no other route to success.***

-Pablo Picasso

VII. Strategic Plan Implementation

The Strategic Plan will be a roadmap for the agency's operations to deliver high quality services and advocate for families in vulnerable populations. Agency staff and partner stakeholders will be responsible for implementing the activities of the plan. The implementation stage lasts throughout the cycle of the Strategic Plan. Upon Board approval of the Plan, an implementation plan will be created to focus on three main deliverables: action plans, a monitoring plan and a reporting plan.

The CAA's annual Board Training will be the designated time to reflect and assess the agency's Strategic Plan and core strategies. At this time, The Board and staff will meet and discuss if any external and/or internal contributing factors have contributed to the need for a shift or change in priorities, long-term goal(s), objective(s) and/or core strategies. The annual Board Training will also serve as the time to discuss the operational action plan items and provide the Board with progress status updates with particular attention to outcome and output measures. During the strategic cycle, the agency will promote board strategic leadership during monthly meetings while evaluating monthly progress of agency programs.

The Strategic Plan is a working document intended to reflect current needs and conditions of the Agency and community. Revisions to the plan will be made as needed to reflect environmental changes and incorporated directly into the Plan. The Agency will evaluate, update and record progress made toward implementation of the Plan for relevancy as follows:

Quarterly: Agency Outcome Report –*Management Team/Staff*

Bi-annually: Operational Action Plan Reviews & Progress Reports – *Board and Management Staff*

Annually: Strategic Plan Evaluation - *Board and Management Staff*

Year 1: October 1, 2020 – September 30, 2021

Quarter 2 – April – Bi-Annual Plan Review

Quarter 4 – October - Annual Plan Evaluation

Year 2: October 1, 2021 – September 30, 2022

Quarter 2 – April – Bi-Annual Plan Review

Quarter 4 – October - Annual Plan Review

Year 3: October 1, 2022 – September 30, 2023

Quarter 2 – April – Bi-Annual Plan Review

Quarter 4 – October - Annual Plan Evaluation

Year 4: October 1, 2023 – September 30, 2024

Evaluation & Needs Assessment

Strategic Planning Process Kick-off

VIII. Acknowledgements

Completion of the Orange County Community Action *2020-2025 Strategic Plan* would not have been possible without the input of our board members, key stakeholders, participants/clients, partners, and dedicated staff. Staff members were integrally involved in the plan development and participating in strategic planning sessions that developed the plan’s objectives and strategies.

Community Action Board Members

The Orange County Community Action Board, which includes one-third representation from the low-income community, one-third representation from the private sector, and one-third representation from the public sector.

Low-Income

Hezekiah Bradford

(Monique Morris)

Abigail Crocket

(Julie Yetter)

Sabrina Persaud

(N/A)

Evangeline Richardson

(N/A)

Barbara Hoosier

(N/A)

Private Sector

Vivian Tindal

(N/A)

Debi Meli

(N/A)

Clifford Marvin

(Karl Allen)

Jerika Mobley

Maritza Vasquez

(Leah Ackerman)

Dexter Nelson

Yesenia Baron

(N/A)

Sylvester Robinson

(N/A)

Public Sector

Commissioner Victoria P. Siplin

(Rose-Nancy Joseph)

Commissioner Mayra Uribe

(Cortez Whatley)

Commissioner Maribel Gomez Cordero

(Mariely Velez)

School Board Member Melissa Byrd

Councilman Elias Chotas

(Mayor John Dowless)

Commissioner Susanne Nielsen

State Representative Bruce Antone

(Hudie Stone)

Councilman Tarus C. Mack

(Diali Coll-Marcado)

* Membership Unit: Member (Alternate)

The Promise of Community Action

Community Action changes people’s lives, embodies the spirit of hope, improves communities and makes America a better place to live. We care about the entire county and we are dedicated to helping people help themselves and each other.

IX. APPENDICES

Community Action Organizational Structure

Logic Model

2020-2023 Community Needs Assessment

2020-2022 Cares Needs Assessment

Community Needs Customer Responses

SWOT Analysis Survey Responses

Agency Review Survey Responses