Tioga Opportunities, Inc.

HELPING PEOPLE...CHANGING LIVES

2019-2021 Strategic Plan

Tioga Opportunities, Inc.

9 Sheldon Guile Blvd.

Owego, New York 13827

Strategic Planning Process

In its 2017 **Community Needs Assessment** Tioga Opportunities, Inc. compiled secondary data from a variety of sources and primary data from stakeholder surveys distributed to customers and non-customer community stakeholders. The Community Needs Assessment identified the following top considerations for the agency's and community's attention:

- **Access to services**, including the available scope of services and barriers to accessing them.
- **Skill-building and support** to facilitate career pathways for people with barriers to employment.
- **Family strengthening and support services** targeted to the unique needs of grandparents raising grandchildren, families with an incarcerated or re-integrating family member, and single mothers.
- **Services to reduce food insecurity and improve access to nutritional foods.**

A consultant from Pro Action of Steuben & Yates facilitated **seven focus groups** in 2018 among staff, customers, community partners, management and board members to gain further insight into the causes and conditions of poverty, as well as conditions affecting mission advancement. Questions were designed to generate thinking and conversation about the topics listed below for each group.

Customer Groups

1. Community strengths and problems;
2. Landscape of economic opportunity in the community;
3. Types of opportunities needing expansion;
4. Impact of TOI programs in participants' lives; and
5. Ways TOI could better support participants in achieving their goals

Staff Groups

1. Factors that support or detract from mission success;
2. The rationale for how the agency's programs and services lead to the outcomes specified in the mission statement;
3. The role of "opportunity," in addressing complex social problems, and
4. Conditions under which the odds could change for people served by TOI (or, "game-changing" ideas).

Partner Group

1. Factors that support or detract from mission success;
2. Ways the agency can improve services or results;
3. Community perceptions of the agency;
4. The role of "opportunity," in addressing complex social problems, and
5. Conditions under which the odds could change for people served by TOI (or, "game-changing" ideas).

Management Group

1. The agency's brand strength
2. Service gaps in the community
3. Routes to addressing complex problems
    a. Benefits cliff
    b. Lack of transportation
    c. Promoting careers in the trades

Board of Directors Group

1. Mission statement concepts
2. Theory of change

The consultant summarized the focus group conversation and the themes emerging from them. Two additional **strategic planning sessions** with management used this summarized focus group data to generate the foundational elements of the plan as well as the strategic priorities, while the consultant organized these concepts into this strategic plan format.

Situation Analysis

The seven focus groups conducted as part of Tioga Opportunities' strategic planning process produced a great breadth and depth of insight into the external and internal conditions affecting mission success. In addition, groups provided input on strategic priorities by discussing "game-changing" ideas for addressing complex problems in the community. A summary of this insight follows in the form of a situation analysis.

Community Assets and Organizational Strengths
Customer stakeholders identify external, community assets that support the advancement of Tioga Opportunities current mission, *"To advance the self-sufficiency, well-being and growth of individuals, families and communities through human services, education advocacy and resources."* These assets include familiarity, sense of community, aspects of small-town, rural living, and safety (as compared with more urban areas in the region). In addition, staff stakeholders point to partnerships among community programs that facilitate service to customers when individual programs lack capacity. Internal, organizational strengths supporting mission effectiveness include dedicated, empathetic staff, strong leadership, the agency's "no-wrong-door" innovation to facilitate a service continuum, and a track record of results.

External Constraints and Internal Areas for Improvement
Community stakeholders also recognize key constraints in the external environment limiting mission advancement. These constraints include *practical barriers* to accessing services, such as geographic isolation, lack of transportation, lack of knowledge about services, and limited program capacity in terms of both funding and staffing. Limited program capacity is compounded by the fact that associated long waiting lists may deter would-be customers from applying for help. Other constraints are believed to be *systemic* such as the "benefits cliff," that results in jobs netting less income for people than public benefits, inadequate year-round access to fresh, healthy foods in rural areas, and a complex regulatory

environment. Some stakeholders speculate that pride and the *cultural* framework of "rugged individualism" inhibits people from accessing services. Meanwhile, customer stakeholders describe a broader set of *adversities* facing families and communities, such as drugs, crime, under-employment and disconnected youth. Internally, Tioga Opportunities is limited by its service scope and its capacity to strengthen and communicate brand value.

Opportunities and Priorities

Even within the context of deep conversations about complex problems facing the community and their own families, TOI customers see a role for themselves in helping to address such problems. They have skills and ideas to contribute, primarily their general benevolence and desire to be helpful, and their interest in volunteering. This insight represents an *opportunity* to connect low income people with volunteer leadership opportunities and for TOI to benefit from their expertise in designing solutions to the community's most pressing problems. Recurrent themes in a number of focus groups suggest the community is ready to *prioritize for new or adapted services* transportation, intergenerational programming and the promotion of trades as a valued career pathway. In addition, TOI employees fully embrace the *opportunity* represented by the no-wrong-door internal referral process to simplify access to programs for customers. They also support other *opportunities* to deepen the agency's impact, such as undertaking a brand strengthening and communication effort, and participating in community partnerships and advocacy efforts to address the constraints to mission advancement identified above.

As an ***early step*** toward a brand strengthening effort, management and board members accepted the *opportunity* presented by the strategic planning process to ***update the agency mission statement, vision statement, values statements and theory of change***, resulting in the "Foundational Elements" section of the plan that follows.

FOUNDATIONAL ELEMENTS

Mission Statement

Tioga Opportunities, Inc. creates partnerships that strengthen communities while empowering individuals and families to achieve independence and enrich their quality of life.

Vision Statement

An innovative, evolving organization that promotes strong, inclusive communities and successful, thriving people.

Values Statement:

At Tioga Opportunities, we value:
- Equity, diversity and inclusion
- The strengths and potential of all people to become actively engaged in improving their quality of life
- Economic security as a means to the well-being of individuals and families
- Effective services delivered by caring staff who treat everyone with dignity and respect
- Innovation in response to changing community needs
- Partnerships that expand our impact
- Excellence in data-driven planning and goal-setting

Theory of Change

As a Community Action Agency, Tioga Opportunities exists to address the causes and conditions of poverty using strategies that respond to the community's unique characteristics. The agency anchors this anti-poverty work in the National Community Action goals. Its menu of services implies the agency's rationale that certain activities will lead to the achievement of the goals: (1) Individuals and families with low incomes are stable and achieve economic security; (2) People with low incomes are engaged and active in building opportunities in communities, and (3) Communities where people with low incomes live are healthy and offer economic opportunity.

The graphic on the following page depicts TOI's rationale for how its activities lead to mission effectiveness, that is, its theory of change.

MISSION: Tioga Opportunities, Inc. creates partnerships that strengthen communities while empowering individuals and families to achieve independence and enrich their quality of life.

Goal 1: Individuals & families with low incomes are stable and achieve economic stability.

OBJECTIVE

To increase the self-sufficiency, independence, health & well-being, & economic stability of individuals & families.

STRATEGIES

Asset Building

Family Development

Financial Literacy

Comprehensive Housing Options & Energy Efficiencies

Health & Wellness

Life Skills Education

Supportive Services

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

OBJECTIVE

To advance & strengthen the capacity & comprehensiveneas of local services in the community through partnerships.

STRATEGIES

Formal Strategic Partnerships

Transportation

Future Community & Economic Development

Non-traditional Career Paths - Employment Services

Mental & Behavioral Health

Education - GED

Preschool/Child Care

Neighborhood Revitalization

Goal 3: People with low incomes are engaged and active in building opportunities in communities.

OBJECTIVE

Strengthen communities by promoting civic engagement and community involvement.

STRATEGIES

Leadership Skill Building

Volunteer Opportunities

Civic Engagement Opportunities

Community Involvement

Learned Experience

Peer Engagement

Performance Management: Employ innovative strategies & approaches to build/strengthen agency capacity & sustainability.

Holistic/Integrated Service Approach – Data Collection & Management – Results Oriented Management - Unrestricted Income – Technology – Professional Development- Sustainability

Strategic Priorities and Plan

The strategic plan is an opportunity to learn about and respond to the environment in which the agency works. Accordingly, the plan highlights the agency's vision and direction to expand upon, add to, augment or optimize its current programming, community partnerships and advocacy. Therefore, the objectives and strategies defined in the following sections of the plan do not specify the everyday program operations overseen by the agency. Details about service-level assessment, planning, implementation and achievement of results can be found in the agency's work plan.

Objectives and Strategies in the Community Goal Area

Community Action Goals: Communities where people with low incomes live are healthy and offer economic opportunity; People with low incomes are engaged and active in building opportunities in communities; ROMA Goals 2 & 3: The conditions in which low income people live are improved; Low-income people own a stake in their community.

[Possible] Metrics: # community initiatives on which TOI is represented; increase in transportation assets or services in the service area; increase in educational assets in the community, decreased unemployment rate in the service area; Percent increase of donated resources to support delivery of services and/or implementation of strategies to address conditions of poverty in the identified community; The number of Community Action program participants who increased skills, knowledge, and abilities to enable them to work with Community Action to improve conditions in the community

Objective 1: : TOI will work to develop a pathway to economic stability for people with low incomes.

- Integrate financial social work and budget counseling into the overall service flow in all departments.
- Work with county Economic Development on a comprehensive housing plan, based on the results of the 2017 study.
- Identify and partner with entities that offer workforce supports, including vocational learning opportunities.
- Develop a pathway to obtain and/or maintain assets, including homeownership.
- Continue to work in partnerships to reduce barriers and explore long-term solutions to transportation challenges

Objective 2: TOI will honor the desire among service recipients to work actively on community-level solutions by building their skills and offering them roles in bringing about community change (economic stability, asset acquisition, homeownership).

- Research best practices and adopt a leadership development curriculum
- Offer incentives for participation and completion of curriculum
- Ensure the inclusion of the voice of the lived experience in decision making and advocacy on these issues.
- Assist participants in securing a role in local coalitions, committees, or Boards

Community Action Network Excellence: Organizational Standards, state and federal accountability measures and ROMA; ROMA Agency Goal #5: Agencies increase their capacity to achieve results.

[Possible] Metrics: Growth in revenue; Percent increase of donated resources to support delivery of services and/or implementation of strategies to address conditions of poverty in the identified community; documentation of the achievement of selected National Performance Indicators; 100% of National Organizational Standards Met; service usage

<u>**Objective 1:**</u> **TOI will strengthen its brand positioning within the community resulting in increased use of services and increased community support for the agency.**

- Identify a branding consultant and initiate a contract to articulate a brand value proposition, update the brand identity if appropriate, and craft a strategic communications plan.
  - *Assure the inclusion of an agency-wide program directory*
- Allocate staff and financial resources to implement the strategic communications plan.
- Document service usage changes and changes in agency support.

<u>**Objective 2:**</u> **TOI will position itself for growth and expansion and long-term sustainability.**

- Identify unrestricted revenue streams that will bring revenue to the agency that will support new initiatives and growth.
- Update and revise agency emergency response plan.
- Develop an agency training plan that will include training on trauma-informed care, financial social work, family development for all levels of staff.
- Track & measure customer progress through the development of matrices in major life domains.
- Become a data-centered agency that uses data as the basis for obtaining resources, decision-making, planning and partnering.

Objectives and Strategies in the Family Goal Area

Community Action Goals: Individuals and families with low incomes are stable and achieve economic security; ROMA Goal 6: Low-income people, especially vulnerable populations, achieve their potential by strengthening family and other supportive systems.

[Possible] Metrics: Tie to National performance indicators for stability, support and development, (e.g.) The number of individuals who achieved and maintained capacity to meet basic needs for 180 days; the number of individuals engaged with the Community Action Agency who report improved financial well-being.; the number of individuals who obtained a recognized credential, certificate, or degree relating to the achievement of educational or vocational skills; the number of unemployed adults who obtained employment (up to a living wage; with a living wage or higher); the number of employed participants in a career-advancement related program who entered or transitioned into a position that provided increased income and/or benefits; The number of children and youth who demonstrated improved positive approaches toward learning, including improved attention skills; The number of parents/caregivers who improved their home environments; The number of Community Action program participants who increased skills, knowledge, and abilities to enable them to work with Community Action to improve conditions in the community.

Objective 1: **TOI will explore adding services to support customers along the full ROMA scale from crisis to thriving**

- Research best practices, acquire resources and add programs as able in the following areas
  - Asset Development
  - Intergenerational mentoring / learning
  - Positive Youth Development
  - Family Development
  - Post Treatment Support (coming out of rehab)
  - Transitional and Supportive Housing
  - First time Home Buyers
  - Financial Literacy

Objective 2: **TOI will address social determinants of health and develop services that will strengthen outcomes for individuals and families.**

- Build relationships with medical and health related service providers; identify areas for partnerships.
- Work collectively in identifying which SDH effect individual and family health & well-being.
- Identify strategies to address the determinants and implement.

Procedures to Assess Performance Toward Goals

Performance toward the goals defined in this strategic plan will be routinely assessed via regularly scheduled director's meetings. Directors will add progress notes to a tracking document. Using this status information and relevant customer satisfaction data, the committee will recommend modifications to the strategic plan as needed and at least annually. The Executive Director will present an update bi-annually to the Tripartite Board of Directors. Versions of the tracking document created throughout the year will serve as documentation of routine assessment of performance toward goals.

Strategic Plan Progress Updates to the Tripartite Board of Directors

The Evaluation Committee comprised of department directors will provide annual strategic plan progress updates to the leadership team and the Tripartite Board of Directors. At least annually, the goals contained in this plan will be reviewed and modified as needed. Director meeting and board meeting minutes will serve as documentation of these updates and reviews.