



2023-2028 Strategic Plan



“We must open the doors of opportunity. But we must also equip our people to walk through those doors.”

President Lyndon B. Johnson

Table of Contents:

<u>Section</u>	<u>Page Number</u>
I. Overview of Strategic Planning Process	2
II. Executive Summary	2
III. History	3
IV. Board of Directors	3
V. Methodology and Process	4
VI. Mission, Vision, Values	5
VII. Definitions	6
VIII. SWOT Analysis	7
IX. Goals, Objectives, Strategies Outline	8
X. Strategic Business Plan	11
XI. Theory of Action	18

Overview of the Strategic Planning Process:

Strategic planning is a systematic, participatory process to manage long-term organizational change and growth. The process is proactive, not reactive – anticipating change while simultaneously stimulating it. The process is designed to assess an organization’s capacities and environment, clarify its mission, build a shared vision of the future, determine its priorities, set common goals for the entire organization, create action plans, focus energy and resources, measure results and evaluate and adjust the organization’s direction in response to evolving customer and community needs and a changing environment. The process is about developing and implementing a strategic plan and then tracking its progress and evaluating its results.

The strategic plan itself is a road map to achieving a shared vision of the organization and/or community over the next five years. The plan’s implementation guides our organization in fulfilling its mission, making decisions, and allocating resources. The strategic plan acts as a blueprint for implementing changes that incrementally realize the organization’s vision. By planning for change, an organization can strategically chart its own growth and revitalization in a manner that improves its effectiveness, capacity and relevance.

Executive Summary:

Gateway Community Service Organization, Inc. dba Gateway Community Action, is in the midst of a challenging time of reflection, refinement and repurposing. The strategic planning process challenged us to consider where the Agency has been and where we want to go in the future.

We developed a five-year strategic plan with adaptive strategies to better position the agency to reduce poverty. The planning process utilized information from the 2022-2025 Community Needs Assessment and other data-driven sources to determine how to best meet the needs of our clients and our communities.

The plan utilizes the Results Oriented Management and Accountability (ROMA) approach to track goal attainment on related agency-wide overarching strategies. Each strategy unifies the Agency with a focus on achieving organizational capacity, and individual and family success for low-income people and communities.

The 2023-2028 Strategic Plan represents the next cycle of growth for the agency, moving to a more adaptive organization. The implementation phase will support a culture where all levels of the agency understand its mission, strive to create positive impact, and illustrate results through cross-matrixed agency collaboration, streamlined operations, and data-driven decision making led by highly trained staff.

The mission of Gateway Community Action is rooted in the principles of the Community Action Network and a commitment to the Promise of Community Action. We work closely with community partners, empowering individuals and families in overcoming the causes of poverty through a range of human service programs.

History:

Gateway Community Action is a private non-profit community action agency, block granted under the Community Services Block Grant (CSBG) and part of a poverty-fighting network of more than 1,000 community action agencies nationwide. We opened our doors in 1974 and began serving the five-county jurisdiction of Bath, Menifee, Montgomery, Morgan and Rowan counties in Kentucky.

Gateway programs meet an array of needs by offering a menu of services that range from emergency to long-term self-sufficiency. Every person is unique and our staff works with each individual to develop and customize a plan that is responsive to their particular situation. We know that building relationships and individualization are two factors in the keys to success.

We embrace a climate of working together for the good of our citizens and each of the communities we serve. Our staff are well-trained, highly skilled, compassionate individuals that work collectively in the accomplishment of our mission.

Board of Directors:

Gateway is governed by a 30 member tripartite board of directors composed of public officials, private industry, and consumers that are democratically selected representatives of low-income individuals and families who reside in the geographic area being served by the agency. Members represent each of Gateway's five-county jurisdiction and work in concert with staff to reduce poverty, revitalize low-income communities, and empower low-income families and individuals in rural and urban areas to become fully self-sufficient.

Methodology and Process:

ROMA Cycle	ROMA Action Item
Assessment	Reviewed the current Mission statement.
	Reviewed the last community NEEDS assessment to determine priority needs.
	Evaluated current program resources and services to determine effectiveness in meeting needs (based on recent program performance, customer satisfaction surveys, staff surveys, risk assessment, etc.)
Planning	Aggregated quantitative and qualitative data to identify needs to plan measurable OUTCOMES to be achieved that will meet the needs linked to the 6 National Goals.
	Identified TRENDS and developed strategies to achieve outcome(s) and determined outcome indicators.
	Developed a system to track services and outcomes, what documentation will be collected to measure each outcome, and staff responsible. (MEASUREMENT TOOL, DATA PROCESSES, and FREQUENCY).
	Built and Implemented a plan with input from leadership, board committees, and board of directors.
Implementation	Determined frequency to monitor implementation of plan on monthly basis.
	Determine the frequency for evaluating progress and report results to the board on a biannual basis.
	Determined system for documenting actual RESULTS for each outcome through Google Drive.
Achievement of Results	Submit CSBG report data to the State Office, assuring accuracy and timeliness of submission.
	Analyze data and review results on a monthly basis during director meetings, during regularly scheduled staff meetings throughout the agency, and during bimonthly board meetings.
Evaluation	Make recommendations to the Board regarding action to be taken based on analysis.
	Adjust performance goals as needed as evidenced by actual performance. Continue strategies that achieve desired performance goals. Revise or

	discontinue strategies that do not achieve desired performance.
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Mission, Vision, Values

The Promise of Community Action

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 community, and are dedicated to helping people help themselves and each other.

Considering the community action promise, Gateway Community Action reviewed our existing mission statement to determine if it captured the desired spirit of the agency and community action movement. We also envisioned what the future impact would be on our communities if the agency and our stakeholders were to achieve what they set out to do and achieve our mission, goals and objectives.

The Mission of Gateway Community Action

Gateway Community Action works closely with community partners, empowering individuals and families in overcoming the causes of poverty through a range of human service programs.

The Vision of Gateway Community Action

~~Gateway Community Action envisions an organization of excellence where all staff engage and support community collaboration by providing a comprehensive high quality system of services. Through partnerships, people with low-income find resources, support, relations and opportunities that aid them in overcoming economic and cultural barriers to establishing and maintaining self-sufficient lives. Gateway Community Action envisions a future where opportunity creates positive change.~~

The Values of Gateway Community Action

At the essence of **compassion**, Gateway Community Action promotes human dignity and concern for the well-being of others. We promote respect by validating those of lowest status as much as those of high status in order to create healthy individuals in a supportive community.

We believe in being **optimistic** with each and every individual, helping them feel a sense of purpose and giving them hope that they can face the challenges ahead.

We also embrace the challenge of **credibility**. We are confident in our capabilities and understand the importance of establishing our business as a solid foundation that provides lasting stability.

Definitions:

- **Theory of Change (ToC) Statement** – Articulates the change you want to see occur over a period of time
- **Objective** – Provides a specific directive of the plans being implemented to achieve the ToC
- **Action Steps/Activities** – Specific things the agency will do in working toward the anticipated change
- **Key Performance Indicator (KPI)/Measurement Tools** – The data used to evaluate the success of action steps/activities
- **Responsible Person(s)** – The employee that will drive the overall process by working in collaboration with internal employees and external partners, documenting combined efforts of all parties involved
- **Outcomes Achieved** – ongoing written notes of progress achieved

SWOT ANALYSIS:

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- Board of Directors demonstrate commitment and participation
- Long term, invested, and experienced leadership
- Quality partnerships with public and private providers
- Established programs receive high praise and recognition
- Affordable health insurance and fringe benefits
- Efficient systems of technology
- Quality programs and safe environments

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- Underutilization of data systems
- Limited capacity of workforce participation
- Lack of childcare and affordable housing
- Scarcity of unrestricted funding
- Case management for participating clients
- Outreach/marketing throughout the community

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- Increased partnerships and expansion of services to better serve communities
- Enhance systems to ensure efficient and effective program operations, including HR
- Increased marketing and sales tactics
- Increased unrestricted funding to better meet agency needs
- Opportunities for internal and external grant writing





- Economic issues and trends including inflation
- Public Health emergencies
- Competition between all businesses
- Declining workforce and population
- Regulatory changes
- Data breach and policy implementation



Goals, Objectives, Strategies Outline:

Goal #1

People with low income become more self sufficient (Family)

Objective:

Continue to contract/partner with providers to offer exemplary existing and new outcome based programming

Strategies:

Continue to support programs who build relationships with employers and establish links to program participants seeking employment

Create better systems for intra-agency coordination of intake and services

Explore ways to better connect program participants to mainstream resource through referrals and partnerships specifically with Social Security Administration and TENCO

Explore the possibility of expanding public transportation in the coverage area

Be an organization that stays informed and integrates best practices as it pertains to supporting people to stabilize and move out of poverty

Goal #2

The conditions in which people with low income live are improved (Community)

Objective:

Nurture community involvement through volunteer opportunities

Strategies:

Keep community engagement work at the agency's core and integrated across all programs

Encourage more participants to volunteer in community action programs and services and in community engagement activities

Streamline volunteer orientation across all programs

Establish protocol for recognition of volunteer services

Goal #3

People with low income own a stake in their community (Community)

Objective:

Increase training opportunities for individuals serving low income populations

Support participation on advisory committees

Strategies:

Provide support, encouragement, and trainings for other organizations

Increase the number of people with limited incomes and resources represented on committees

Actively recruit partnerships to support work of community action and become work ready community

Expand or re-engage access to partnerships

Increase credentials trainers and serve as training agent for other organizations

Goal #4

Partnerships among supporters and providers of services to low-income people are achieved (Agency)

Objective:

Promote and advocate to reduce poverty

Strategies:

Revise job descriptions to streamline responsibilities across all programs and services

Capitalize on coaching and leadership related to economic privilege to motivate others toward actions that will promote professional growth

Explore the opportunity to investing in personnel to achieve retention and highly trained workforce

Explore Pathways to Excellence intentional process of assessment, planning, and capacity building to institutionalize known best-in-class practices from the Community Action network

Goal #5

Agencies increase their capacity to achieve results (Agency)

Objective:

Increase capacity to become the local leaders to affect the causes and conditions of poverty

Strategies:

Increase sustainability with expanded work to grow donor base and fundraising

Develop a stronger, more engaged agency through understanding of the history and development of community action

Restructure agency to align programs with similarities

Increase marketing strategies that will promote transparency between providers, community, and staff

Enhance systems to ensure consistency across agency operations

Enhance health and safety practices that promote emergency preparedness

Goal #6

Low income people, especially vulnerable populations, achieve their potential by strengthening family and other supportive environments (Family)

Objective:

Continue to successfully work with community partners to increase the level and types of support we provide to low income families

Strategies:

Develop system for tracking internal/external referrals

Identify potential agencies and leaders for developing partnerships

Strategic Business Plan:

Theory of Change Statement: Improve support for at risk populations

Goal 1	Action Steps/Outputs	KPI/Measure Tools	Responsible Person(s)	Outcome(s) Achieved
Objective 1: Increase training opportunities for individuals serving low income populations	Develop system for tracking internal/ external referrals	100% of employees utilizing client information systemCastinet can enter referrals	CSBG	Training provided on April 11, 2023 with CAK to discuss a new system implemented via client information systemCastinet to track internal referrals.
		100% of internal referrals show follow up	CSBG	Training was provided to staff on September 6, 2023
Objective 2: Support participation on advisory committees	Connect applicants with WIOA support	100% of applicants receive WIOA referrals	WIOA/CCO	Kristy Murphy will add to the email
	Explore partnership with SSA and TENCO	Increase partnerships by 2%	CEO/WIOA/CSBG	SSA declined partnership via CAK Angie will get partnership agreement
	Conduct public transportation analysis	50% of surveys will be completed	DOCI/WX	Transportation analysis was conducted, surveys were not distributed due to lack of support form city government
	Engage board of directors	100% of BOD will have information needed to make informed decisions	CEO	Board packets are sent 2-3 weeks in advance; presentations/trainings are conducted at each meeting, directors are present for Q&A;
	Engage local city/county government officials	75% of local officials will be involved in discussion	CEO/WX. DOCI	Group formed to implement outreach to the Montgomery County Hispanic Community - this includes the mayor, the judge executive, and the school superintendent (DOCI, DOEC) Oct-Dec 2023 Interagency Meetings will focus on benefits and support for Veterans. Local government officials will be invited to attend. Transit discussions with Morgan Co officials October/November 2023

Aligns with Community Assessment Key Findings:

- 22% of staff surveys illustrated a lack of recommendation to serve and support at risk populations
- 3% of customer satisfaction surveys illustrated a lack of support from agency
- Community Assessment data illustrates individuals living in poverty in GCA service area are 6% higher than state average
- Consumer forums illustrated a need for public transportation
- Community Assessment data illustrates the median household income is lower than the state average by 19%
- Community Assessment data illustrates that children living in poverty rates are 7% higher than the state average

Theory of Change Statement: Increase self-efficacy, self-esteem, and confidence in individuals that will create a better quality of life and a stronger sense of purpose

Goal 2	Action Steps/Outputs	KPI/Measure Tools	Responsible Person(s)	Outcome(s) Achieved
Objective 1: Nurture community involvement through volunteer opportunities	Market volunteer opportunities	Increase Volunteer activity by 10%	DOCI	<p>Contacted SCSEP (Senior Community Service Employment Program) to inquire about volunteers on February 1, 2023.</p> <p>Met with SCSEP Program Manager on February 10, 2023 to discuss services.</p> <p>Enrolled SCSEP participant as Volunteer at CSBG office Rowan.</p> <p>Inquired about partnership with Americorp in relations to broadband connector in March. Held multiple meetings to discuss service. Unable to obtain partnership due to funding contribution.</p> <p>Worked with MCTC in April to inquire about the Ready to Work program. Successfully entered into agreement with MCTC.</p> <p>Received interest from a person to volunteer in Bath County at the Veterans Day of Valao 9/13/23. Forwarded info to Angie.</p>
	Revise volunteer orientation process	100% of volunteers will receive onboarding through HR	CCO	Created a Volunteer Handbook in April 2023.
	Develop system for volunteer recognition	100% of Volunteers will receive recognition	CCO/DOEC	

Aligns with Community Assessment Key Findings:

- 50% of low income governance volunteers indicate that they are not knowledgeable about or can describe agency programs or services
- Only 84% of low income governance volunteers share information about the agency's mission and program services
- 20% of community partners indicate the community is unaware of agency related services

- 10% of families indicate that are unaware of agency events/activities

Theory of Change Statement: Improve knowledge and skills for those serving low income populations to improve economic and social situations

Goal 3	Action Steps/Outputs	KPI/Measure Tools	Responsible Person(s)	Outcome(s) Achieved
Objective 1: Increase training opportunities for individuals serving low income populations	Invite other organizations to trainings	5% of trainings will involve outside agencies	DOEC	
	Include WIOA information on applicant emails	100% of applicant responses will include WIOA resources	WIOA/CCO	
	Track applicants who apply for WIOA services	2% of applicants will retrieve WIOA services	WIOA/CCO	
Objective 2: Support participation on advisory committees	Increase credentialed trainers	Increase trainer credentials by 10%	DOEC	<p>Enrolled 4 participants in Fundamental of Effective Training course May 2023</p> <p>Inquired about RIM (Ripple Effects Mapping) credential June 2023.</p> <p>Explore Active Shooter Trainer Course</p> <p>4 participants received KY Trainers Credential</p>
	Identify potential agencies and leaders for developing partnerships	Increase new partnership agreements by 5%	CSBG/WIOA/DOCI	<p>New partner agreements:</p> <ul style="list-style-type: none"> • Montgomery County Ministerial Association • Montgomery County Homeless Coalition • WellCare (all counties) • Commonwealth Center for Fathers and Families (all counties)
	Collect data through partnership agreements	Increase new partnership agreements by 5%	CSBG	
	Revise committee member list to	Increase committee members from outside	DOCI	From 1/1/23 to 9/15/23: added 10 new agencies to county interagency meetings.

	be more inclusive	agencies by 10%		
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Aligns with Community Assessment Key Findings:

- 12% of staff surveys indicate a lack of training opportunities to enhance growth and development
- 100% of partner surveys indicate satisfactory working relationships, illustrating a need to increase partners
- 20% of community partners indicate a lack of knowledge and cooperation between agencies

Theory of Change Statement: Increase continuity and support for those experiencing poverty

Goal 4	Action Steps/Outputs	KPI/Measure Tools	Responsible Person(s)	Outcome(s) Achieved
Objective 1: Promote and advocate to end poverty	Revise job descriptions	100% of all job descriptions will be updated	Directors/ CCO	<u>Completed November 2023</u>
	Re-establish leadership academy	3% of staff will participate in Leadership Academy	CEO/CCO/ DOCI	Target to restart fall 2024.
	Revise salary schedule	Approved salary schedule	CEO	Created a new salary schedule in April 2023. Separated agency from Head Start. Provided to directors at April 6, 2023 directors meeting to review and determine if budgets could support proposed salaries. Board approved salary schedule May 11, 2023
	Implement annual training on ROMA, Mission, Organization Standards	100% of staff will receive training	CEO/CSBG	<u>Completed on September 1, 2023 and delivered via paycom to new employees</u>
	Explore Pathways to Excellence	Participation in program	Admin/ Directors	Initial meeting with Pathways to Excellence on January 12th Staff assigned to complete Community Action Academy eCourses Entering into Bronze Level as a Agency Shared drive created to host Organizational Files

Aligns with Community Assessment Key Findings:

- 18% of staff surveys illustrated a lack of opportunities for professional advancement in the workplace
- 15% of employee surveys indicate that pay increases will help promote retention
- 25% of employee surveys indicated a lack of longevity with the agency
- 16% of employee surveys indicate insurance and benefits are primary reason for employment
- 12% of employee surveys indicate a need to provide additional training

Theory of Change Statement: Identify, define, and address issues leading to staff retention

Goal 5	Action Steps/Outputs	KPI/Measure Tools	Responsible Person(s)	Outcome(s) Achieved
Objective 1: Increase capacity to become the local leaders to affect the causes and conditions of poverty	Explore fundraising opportunities	Increase donor sponsors by 1%	CEO/CCO	<u>Commercial Bank, Traditional Bank</u>
	Implement training history of community action	100% of staff will receive training	CEO	<u>Delivered via paycom</u>
	Restructure programs under new leadership	Increase staff salaries by 5%	CEO	Restructured Economic Development programs in March 2023. Revised organization chart in April 2023. Restructured Community Initiatives program August 2023.
	Develop process for updating marketing materials	5% of applicants will illustrate knowledge of agency by social media	CCO/ DOCI	Created Informational Flyer, Brochure, and CAA Promise March/April 2023. New marketing/recruitment supplies ordered June 2023. Increased social media activity. Planning GCA Open House Event (TBD)
	Increase presence at community events	Increase presence at community events by 5%	Directors	CCFF Fatherhood Summit October 2022 Participated in Gateway ADD Spring Fling March 31 ,2023 Participated in KEDC reverse transition fair on March 31, 2023 Rowan Chamber Job Fair July 2, 2023 Veterans Day of Valor Sept. 13, 2023 <u>Chamber Meetings</u>
	Align Electronic Reporting Database	100% of electronics records will be consistent across agency	CTO	<u>IQ processes explained to program staff and new system implemented to organize more efficiently</u>

	Enhance HR processes and streamline across agency	HR depart will oversee 100% of HR related services	CCO	Developed employee handbook in April 2023
	Expand cloud services	Increase cloud services by 5%	CTO	<u>Directory services, IP address management, file sharing moved to cloud; increased by 60%</u>
	Create electronic forms	50% of forms will be in electronic format <u>Per diem will be included in Paycom</u>	CTO CCO	<u>100% of Liheap forms are electronic</u> <u>Head Start applications have been converted</u> <u>ALL HR forms are electronic</u>
	Explore options for scheduling of services	Increase CSBG funding availability by 5%	CSBG	Revised system of scheduling- canceling subscription to CDS with savings of \$9600

Aligns with Community Assessment Key Findings:

- 10% of employee surveys indicated a lack of comfort with health and safety practices in the workplace
- 2022 Financial Audit illustrated a shortfall of financial resources in unrestricted funding
- 16% of low income governance volunteers do not share information about the agency's mission and program services
- Only 80% of community partners are aware of agency related services and can share information accurately
- Only 78% of staff surveys illustrated a recommendation to serve and support at risk populations

Theory of Change Statement: Identify, define, and address issues leading to poverty

Goal 6	Action Steps/Outputs	KPI/Measure Tools	Responsible Person(s)	Outcome(s) Achieved
Continue to successfully work with community partners to increase the level and types of support we provide to low income	Develop system for tracking internal/ external referrals	100% of employees utilizing <u>client information systemCastin</u> et can enter referrals	CSBG	Training provided on April 11, 2023 with CAK to discuss a new system implemented via <u>client information systemCastin</u> to track internal referrals.

families	Identify potential agencies and leaders for developing partnerships	Increase new partnership agreements by 5%	CSBG/WIOA/ CEO	
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Aligns with Community Assessment Key Findings:

- Only 80% of community partners are aware of the array of services provided by the agency
- Only 80% of community partners indicate the community is aware of the array of services provided by the agency
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An Equal Opportunity Employer "M/F/D/V"

Gateway Community Action Theory of Action

Our Mission	Our Goals	Success Measures
<p>Gateway Community Action works closely with community partners, empowering individuals and families in overcoming the causes of poverty through a range of human service programs. Gateway Community Action is a private non-profit community action agency, block granted under the Community Services Block Grant (CSBG) and part of a poverty-fighting network of more than 1,000 community action agencies nationwide. We opened our doors in 1974 and began serving the five-county jurisdiction of Bath, Menifee, Montgomery, Morgan and Rowan counties in Kentucky.</p> <p>Gateway programs meet an array of needs by offering a menu of services that range from emergency to long-term self-sufficiency. Every person is unique and our staff works with each individual to develop and customize a plan that is responsive to their particular situation. We know that building relationships and individualization are two factors in the keys to success.</p> <p>We embrace a climate of working together for the good of our citizens and each of the communities we serve. Our staff are well-trained, highly skilled, compassionate individuals that work collectively in the accomplishment of our mission.</p>	<p><u>Our Values for Working as a CAA</u> Compassion Optimism Credibility</p>	
	<p><u>Overarching Strategies</u></p> <p>People with low income become more self sufficient <i>Continue to contract/partner with providers to offer exemplary existing and new outcome based programming</i></p> <p>The conditions in which people with low income live are improved <i>Nurture community involvement through volunteer opportunities</i></p> <p>People with low income own a stake in their community <i>Increase training opportunities for individuals serving low income populations</i> <i>Support participation on advisory committees</i></p> <p>Partnerships among supporters and providers of services to low-income people are achieved <i>Promote and advocate to reduce poverty</i></p> <p>Agencies increase their capacity to achieve results <i>Increase capacity to become the local leaders to affect the causes and conditions of poverty</i></p> <p>Low income people, especially vulnerable populations, achieve their potential by strengthening family and other supportive environments <i>Continue to successfully work with community partners to increase the level and types of support we provide to low income families</i></p>	<p><u>Success Measures by 2028</u></p> <ul style="list-style-type: none"> ● By 2024, Gateway Community Action will increase marketing strategies to inform constituents of agency programs and services ● By 2025, Gateway Community Action will incorporate additional health and safety practices to ensure emergency preparedness ● By 2026, Gateway Community Action will enhance systems to ensure efficient programs operations ● By 2026, Gateway Community Action will streamline all Human Resource systems throughout the agency ● By 2028, Gateway Community Action will have a process in place to increase agency capacity and staff productivity ● By 2028, Gateway Community Action will serve as a training agent for other organizations

