



### **Agency Profile**

Lewis County Opportunities is a Community Action Agency established in 1965. The agency provides a variety of programs; most of which are holistic in nature and serve as a level of interdependence between consumer and agency. Operational success is made possible through the interaction of our dedicated Board Members, employees, and volunteers. Our consumers are men, women, and children who are experiencing financial hardship or those who have been victims of domestic violence, sexual assault, or stalking. Being able to assist these families is an honor and a heavy responsibility.

### **Methodology**

In late 2009 the agency began a Strategic Planning process. The previous plan had reached the extent of useful life and was in need of replacement. The Center for Community Studies at Jefferson Community College was selected to facilitate the early and mid development stages. A Steering Committee was created to be reflective of board, administration, supervisory, and frontline workforces. The process was conducted between November 2009 and May 2010, and included structured meetings, mission statement review and revision, SWOT analysis, creation of goals, development of SMART objectives, and ultimately creation of the final document for implementation.

### **Mission Statement**

Lewis County Opportunities, Inc. is a Community Action Agency dedicated to working together with those in need. Our employees, Board members, and volunteers use a compassionate and respectful approach to promote a higher quality of life in our community.

### **Major Themes**

Many goals were established during the Strategic Planning process. These goals were centered on three main themes: Workforce Enhancement, Branding/Marketing, and Facilities Management.

Whereas the objectives developed are critical and the primary focus of the ensuing directives, there are inherent commitments of which the agency must never lose sight. The following are current practices that must be continued, but are not in themselves outcome-based objectives:

- Protect the reserve; using sparingly for essential costs or emergency situations;
- Seek funding that is prudent, mission-focused, and fiscally sound;
- Promote wise spending of agency funds and resources;
- Continue professional development efforts of the entire workforce.

## Objective Matrix

Theme 1: Workforce Enhancement					
Objective	Strategies	POC	Indicators	Timeframe	Outcomes
1.1 Complete a workplace climate assessment.	1.11 Research and develop questions for the workplace climate survey.	Management Team	Questions are researched and identified.  Corresponding data measures to all questions are identified	By 8/31/2010 and annually thereafter	The survey tool is created/revise on an annual basis to effectively measure the current workplace climate.
	1.12 Administer the annual workplace climate survey.	HR/Benefits Admin.	Surveys are completed and complied, and presented to the Management Team and Personnel Committee for assessment.	By 10/31/2010 and annually thereafter	The created/revise survey tool is consistently administered and completed on an annual basis.
	1.13 Assess the annual workplace climate survey	Management Team, Personnel Committee	Data from the annual survey is analyzed and interpreted.	By 11/30/2010 and annually thereafter	Workforce climate strengths and weaknesses are identified on an annual basis as a prerequisite to improvement efforts.
1.2 Develop and implement a workforce appreciation plan.	1.21 Identify existing informal and formal recognition efforts.	Management Team	Current efforts are identified and assessed for effectiveness.	By 3/1/2011	The effectiveness of current recognition efforts is ascertained.
	1.22 Review workforce climate assessment and identify at least two new methods for workforce appreciation.	Management Team	Results from the workforce climate assessment are interpreted. New methods for workforce appreciation are identified and analyzed.	By 6/1/2011	At least two new methods of workforce appreciation are developed.
	1.23 Create a written plan for workforce appreciation and implement immediately.	Management Team	Written plan is developed.	By 9/1/2011	The Workforce Appreciation Plan is finalized and implemented.
	1.24 Review and update the Workforce Appreciation Plan on an annual basis.	Management Team	Workforce appreciation methods/efforts in the plan are analyzed to gauge effectiveness.	By 6/1/2012 and annually thereafter	The revised Workforce Appreciation Plan is finalized and implemented.
1.3 Develop and implement a continuous workforce comment process.	1.31 Research and develop questions for the workforce comment card.	Management Team	Questions are researched and identified.	By 8/31/2010	The workforce input tool is created to effectively allow the workforce to voice suggestions.
	1.32 Activate the workforce comment card.	HR Benefits Admin.	Personnel introduced to the process; forms are made available.	By 10/31/2010	All employees have an avenue to provide comments and input.

	<b>1.33</b> Assess the workforce comment cards.	Management Team	Data from the workforce comment cards is analyzed and interpreted.	By 11/30/2010 and monthly thereafter	The workforce input tool is consistently reviewed for comments and suggestions.
<b>1.4</b> Hold two employee training days (retreats) in 2011 to further morale and training efforts.	<b>1.41</b> Formalize the request to allow two separate full day retreats in 2011.	CEO	Request is presented to Board of Directors for resolution.	By 11/30/2010	The resolution is obtained to allow a second retreat day in 2011.
	<b>1.42</b> Identify quality training topics, secure speakers, and conduct one Spring retreat and one Fall retreat.	Retreat Committee	Employee professional development needs are researched and identified, and both retreats are planned and conducted.	By 12/31/2011	The retreats are conducted to effectively build morale and provide professional training.
<b>1.5</b> Establish/enhance at least four formal partnerships with either public or private agencies that will strengthen cooperative efforts to improve services to consumers. At least two of the partnerships will be new, while at least two existing partnerships will be enhanced.	<b>1.51</b> Identify public/private agencies mutually accessed by our consumers and prioritize those which need inter-agency development or strengthening.	Management Team	The strengths and weaknesses of partner agencies (both prospective and existing) are identified and evaluated as to the relevancy of our mission.	By 12/31/2010	The public/private agencies for which the agency will seek/enhance formal partnerships are selected.
	<b>1.52</b> Develop at least two formalized agreements with new partners.	CEO, Contract Compliance Director, and affected Program Manager	Negotiations are conducted with prospective partner agencies, with agreements developed.	By 6/30/2011	At least two new agreements with public/private agencies are executed that strengthen cooperative efforts to improve services to consumers.
	<b>1.53</b> Revise at least two formalized agreements with existing partners.	CEO, Contract Compliance Director and affected Program Manager	Current agreements are reviewed, with revisions identified. Negotiations are conducted with existing partner agencies, with revised agreements developed.	By 6/30/2011	At least two revised agreements with public/private agencies are executed that strengthen cooperative efforts to improve services to consumers.
<b>1.6</b> Complete "job pricing" analysis for all positions.	<b>1.61</b> Develop list of agencies to query and identify parameters of job pricing.	CEO, HR Benefits Admin.	Distribution list is created and data request template is designed.	By 7/1/2010 and once again by 7/1/2013	The job pricing data collection tool is created to effectively measure market-based compensation.
	<b>1.62</b> Gather job pricing data.	HR Benefits Admin.	Returned data requests are collected and compiled.	By 9/1/2010 and once again by 9/1/2013	The created job pricing tool is consistently administered.
	<b>1.63</b> Compile data and present comparison result to the Personnel Committee.	CEO, HR Benefits, Admin.	Analysis recorded as a Compare/Contrast document.	9/15/2010 and once again by 9/15/2013	Provide a systematic contrast/comparison of market-based compensation as a prerequisite to employee pay and benefit structures.

<p><b>1.7</b> Review and revise existing employee and volunteer evaluation process.</p>	<p><b>1.71</b> Review current evaluation process, associated documents, employee/volunteer input methods, and actual usage.</p>	<p>Management Team</p>	<p>Current process is reviewed and revisions are proposed.</p>	<p>By 11/1/2010</p>	<p>The supervisor's input measures employee/volunteer performance and serves as a prerequisite for document and process revision.</p>
	<p><b>1.72</b> Revise template documents for immediate implementation upon training of all employees and volunteers.</p>	<p>CEO, HR Benefits Admin.</p>	<p>Creation of new template documents and procedure.</p>	<p>By 12/31/2010</p>	<p>The created/revised evaluation process is finalized.</p>
	<p><b>1.73</b> Complete training on the evaluation process to all supervisors.</p>	<p>CEO, HR Benefits Admin.</p>	<p>Training logs indicate 100% supervisor education on evaluation process.</p>	<p>By 1/15/2011</p>	<p>Workforce performance strengths and weaknesses are identified by supervisors for professional development and to correct deficiencies.</p>
	<p><b>1.74</b> Complete training on the evaluation process to all frontline employees and volunteers.</p>	<p>CEO, HR Benefits Admin.</p>	<p>Training logs indicate 100% employee education on evaluation process.</p>	<p>By 1/31/2011</p>	<p>Workforce development is enhanced by consistently receiving feedback of both positive and supportive nature.</p>
<p><b>1.8</b> Re-establish employee feedback session (absent CEO) at each annual retreat.</p>	<p><b>1.81</b> Provide inclusion of the employee feedback session into retreat agenda.</p>	<p>Retreat Committee</p>	<p>Retreat agenda.</p>	<p>By 12/1/2010 and annually thereafter.</p>	<p>The employee feedback session is re-established to effectively allow all employees an avenue to voice suggestions and provide input.</p>
	<p><b>1.82</b> Facilitator explains purpose to employees, moderates each session, and presents sterilized synopsis to the CEO.</p>	<p>HR Benefits Admin.</p>	<p>Sterilized employee feedback session synopsis.</p>	<p>By 12/31/2010 and annually thereafter.</p>	<p>The sterilized synopsis is consistently reviewed for comments and suggestions.</p>
<p><b>1.9</b> Review and revise the new person orientation process.</p>	<p><b>1.91</b> Review current orientation process, associated documents, and actual usage. (include sample employee analysis of strengths and weaknesses of their orientation experience)</p>	<p>HR Benefits Admin.</p>	<p>Current process is reviewed and revisions are proposed.</p>	<p>By 6/1/2011</p>	<p>The efficiency of current orientation process is measured and serves as a prerequisite for document and process revision.</p>
	<p><b>1.92</b> Revise orientation checklist and process for immediate implementation upon training of supervisors.</p>	<p>HR Benefits Admin.</p>	<p>Creation of new orientation checklist and procedure.</p>	<p>By 9/1/2011</p>	<p>The revised orientation process is finalized.</p>
	<p><b>1.93</b> Complete training on the evaluation process to all employees.</p>	<p>HR Benefits Admin.</p>	<p>Training logs indicate 100% employee education on orientation process.</p>	<p>By 11/1/2011</p>	<p>Orientation of new employees is enhanced to build a strong foundation for incoming employees.</p>

**Theme 2: Branding/Marketing**

Objective	Strategies	POC	Indicators	Timeframe	Outcomes
<p><b>2.1</b> Revise agency brochure into a simplified insert.</p>	<p><b>2.11</b> Review current agency brochure strengths and weaknesses.</p> <p><b>2.12</b> Revise agency brochure for maximum efficiency and impact.</p> <p><b>2.13</b> Immediately implement use of new brochure; replacing existing agency brochure internally and externally, and saturating the service area with the new document.</p>	<p>Management Team</p> <p>Management Team</p> <p>Management Team</p>	<p>Current agency brochure is reviewed and revisions are proposed.</p> <p>Creation of new agency brochure.</p> <p>Distribution log indicate 100% supervisor education on orientation process.</p>	<p>By 11/1/2010</p> <p>By 12/1/2010</p> <p>By 1/1/2011</p>	<p>The effectiveness of the current agency brochure is measured and serves as a prerequisite for document revision.</p> <p>The revised agency brochure is finalized.</p> <p>Consumers receive a clear and concise overview of agency services.</p>
<p><b>2.2</b> Offer and host at least one in-service activity each quarter.</p>	<p><b>2.21</b> Conduct internal trainings for all employees on current and new agency programs at least once each quarter.</p> <p><b>2.22</b> Identify public/private agencies mutually accessed by our consumers and prioritize those which could benefit from inter-agency scope of service training.</p> <p><b>2.23</b> Contact and invite one agency to provide an in-service training to our workforce.</p> <p><b>2.24</b> Contact an outside agency and offer to provide an in-service about our programs and services.</p>	<p>Management Team</p> <p>Management Team</p> <p>Management Team</p> <p>Management Team</p>	<p>Training logs indicate education of topic to relevant employees.</p> <p>Local public and private agencies are identified for inter-agency training.</p> <p>Contact is made with prospective agencies, with training date/time scheduled.</p> <p>Offer is accepted with outside agencies, with training date/time scheduled.</p>	<p>By 10/1/2010 and quarterly thereafter</p> <p>By 1/1/2011</p> <p>By 4/1/2011 and quarterly thereafter</p> <p>By 4/1/2011 and quarterly thereafter</p>	<p>Consumers receive more comprehensive services from well-informed employees.</p> <p>The local agency review serves as a prerequisite for establishing training opportunities.</p> <p>Agency workforce is enhanced by consistently receiving knowledge of community programs that are resources for our consumers.</p> <p>Public and private agencies are enhanced by consistently receiving information about Opportunities programs as resources to prospective consumers</p>
<p><b>2.3</b> Create a marketing plan.</p>	<p><b>2.31</b> Review the strengths and weaknesses of current agency logo(s), outreach materials, and informal marketing techniques.</p> <p><b>2.32</b> Explore the intended audience and identify potential marketing opportunities.</p>	<p>Management Team</p> <p>Management Team</p>	<p>Current efforts are identified and assessed for effectiveness.</p> <p>New methods for reaching our audience are proposed.</p>	<p>By 1/1/2011</p> <p>By 2/1/2011</p>	<p>The effectiveness of current marketing efforts, materials, and presence in the community is ascertained.</p> <p>The targets of our efforts are determined</p>

	<p><b>2.33</b> Formalize the agency logo and identify parameters to provide consistent delivery techniques.</p> <p><b>2.34</b> Develop a marketing plan to deliver a systematic and consistent dissemination of agency outreach materials and information, and implement immediately.</p> <p><b>2.35</b> Create and display a digital agency marketing presentation.</p> <p><b>2.36</b> Review and update the Marketing Plan on a bi-annual basis</p>	<p>Management Team</p> <p>Management Team</p> <p>Management Team</p> <p>Management Team</p>	<p>Brand is established.</p> <p>Creation of new Marketing Plan.</p> <p>Agency digital presentation created and used at outreach events and in consumer waiting rooms.</p> <p>Marketing efforts are analyzed to gauge effectiveness.</p>	<p>By 3/1/2011</p> <p>By 6/1/2011</p> <p>By 7/1/2011</p> <p>By 6/1/2013 and bi-annually thereafter</p>	<p>A brand is formalized for inclusion into marketing strategy.</p> <p>The Marketing Plan is finalized and implemented.</p> <p>The digital presentation provides a secondary source of agency programs and services to consumers and partner agencies.</p> <p>The revised Marketing Plan is finalized and implemented.</p>
<p><b>2.4</b> Review and refine as necessary the consumer comment card process.</p>	<p><b>2.41</b> Review consumer comment card and process for strengths and weaknesses.</p> <p><b>2.42</b> Revise consumer comment card and process for maximum consumer input.</p> <p><b>2.43</b> Implement use of new consumer comment card; replacing existing form.</p>	<p>Management Team</p> <p>Management Team</p> <p>Management Team</p>	<p>Current consumer comment process is reviewed and revisions are proposed.</p> <p>Revision of consumer comment process.</p> <p>Distribution log indicate 100% supervisor education on orientation process.</p>	<p>By 1/1/2012 and again by 1/1/2014</p> <p>By 2/1/2012 and again by 2/1/2014</p> <p>By 3/1/2012 and again by 3/1/2014</p>	<p>The effectiveness of the current consumer comment card is measured and serves as a prerequisite for document revision.</p> <p>The revised consumer comment process is finalized.</p> <p>Consumers receive a clear and concise overview of agency services.</p>
<p><b>2.5</b> Complete at least one community awareness event.</p>	<p><b>2.51</b> Identify and prioritize simulation or high-publicity events which could benefit awareness of consumer issues.</p> <p><b>2.52</b> Develop and implement event.</p> <p><b>2.53</b> Promote and preserve event with multiple media efforts.</p>	<p>Management Team</p> <p>Management Team</p> <p>Management Team</p>	<p>Awareness events are identified.</p> <p>Awareness event is conducted.</p> <p>Various media exposure with inclusion into existing agency news media archive.</p>	<p>By 1/1/2013</p> <p>By 9/1/2013</p> <p>By 10/1/2013</p>	<p>An awareness event is selected.</p> <p>Local community is made aware of consumer issue by receiving simulated experience.</p> <p>Results are maintained for future reference and possible continuation of similar awareness activities based upon overall effectiveness.</p>

**Theme 3: Facilities Management**

Objective	Strategies	POC	Indicators	Timeframe	Outcomes
<b>3.1</b> Re-establish a building and grounds committee process.	<b>3.11</b> Review and identify short-term needs of agency facilities.	Management Team	Creation of Building and Grounds priority list.	By 3/1/2011 and annually thereafter.	The Building and Grounds priority list is re-established to effectively identify facility needs of the agency.
	<b>3.12</b> Building and Ground priority list reviewed by Board of Directors.	Building and Grounds Committee	Synopsis and resolution forwarded to Board of Directors for action.	By 6/1/2011 and annually thereafter.	The Building and Grounds information is consistently reviewed for consideration and addressed by the Board of Directors.
<b>3.2</b> Create a comprehensive Building and Grounds manual.	<b>3.21</b> Review the current informal Building and Ground techniques and practices.	Building and Grounds Group	Current efforts are identified and assessed for effectiveness.	By 3/1/2011	The effectiveness of current techniques, procedures is ascertained.
	<b>3.22</b> Identify what information to be included into the manual.	Building and Grounds Group	Essential content for the manual proposed.	By 4/1/2011	The parameters of our efforts are established.
	<b>3.23</b> Develop a Building and Grounds manual to deliver a systematic and consistent approach to facility management.	Building and Grounds Group	Creation and implementation of new Building and Grounds manual.	By 9/1/2011	The Building and Grounds manual is finalized and implemented.
<b>3.3</b> Conduct a comprehensive facilities assessment.	<b>3.31</b> Assess the current state of all agency facilities.	Building and Grounds Group	Current facilities are identified and assessed for maintenance needs and workplace effectiveness.	By 5/1/2012	The effectiveness and health of current facilities is ascertained.
	<b>3.32</b> Identify and prioritize short-term and long-term operational needs of existing facilities.	Building and Grounds Group	Creation of facility health report.	By 7/1/2012	The strengths and weaknesses of existing structures are established.
	<b>3.33</b> Develop a response plan to address the building and grounds needs of the agency.	Building and Grounds Committee	Creation and of an action plan forwarded to the Board of Directors for action.	By 10/1/2012	The result of the comprehensive facilities assessment is explored and response commences.

## **Recognition of Development**

The agency acknowledges the input and active participation of the following developers of the 2010-2015 Strategic Plan:

Glen Gagnier, Board Chairperson  
Scott Mathys, Chief Executive Officer  
Rae Brown, Finance Director  
Jolynne Brinkley, Weatherization Program Manager  
Mary Interiano, DV-RC Program Manager  
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