



STRATEGIC PLAN
2023-2025
Celebrating 56 Years of Services

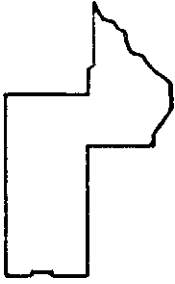
**LAKE
COMMUNITY
ACTION AGENCY**

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Local, State & Federally Funded
An Equal Opportunity Employer

James H. Lowe, CCAP
Executive Director

LAKE COMMUNITY ACTION AGENCY, INC,
"Helping People, Help Themselves" 501

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Message from the Executive Director
Mr. James H. Lowe, CCAP

Greetings:

It is indeed again my pleasure to bring you greetings and express my sincere gratitude to each of you, our board, staff, and community partners for the continued hard work you are doing and have done for the children and families in Lake County, especially during this pandemic.

In spite of these challenging two year, we have continued to establish an impeccable track record of successfully implementing for Fifty-six years programs that have help change the lives of many economic disadvantaged children and families in Lake County. No one, however, could have foreseen the far-reaching impact of the COVID-19 pandemic which impacted our families, our communities. The LCAA adjusted as needed to support our staff, and to ensure continued services and support to the community, our partners, and constituents.

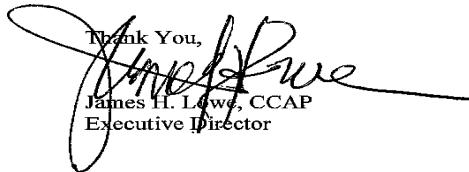
Moving forward, although dire and uncertain economic stability still looms, we will still not falter, nor will these factors impede us in any way. We are determined more now than ever to use our expertise, strengths, assets, and willingness of each individual partner to mobilize all the available local state and national resources to assist in reaching the strategic goals and objectives during the next three years.

To that end, on behalf of the Board of Directors and staff at Lake Community Action Agency, Inc., we are once again proud and privileged to present our 2023-2025 strategic plan. This plan encompasses a three-year outlook with an emphasis on growing our partnerships with others, generating new lines of revenue, and continuing to grow and advance our mission of Helping People, Changing Lives.

This plan also reflects our adherence to the mandated national performance indicators and ROMA which must be implemented and executed throughout our daily business operations, policies, and practices. This is also applicable to the CSBG Organizational Standards.

As we begin the successful implementation of this strategic plan, I want again to thank the Board of Directors, staff and community partners for their commitment and support that was extended throughout this strategic planning process.

We can make it work by continuing to work together! We care about the entire community, and we are dedicated to helping people help themselves and each other.

Thank You,

James H. Lowe, CCAP
Executive Director

Programs:

Community Services Block Grant (CSBG) - Weatherization - Summer Food Program - Family Resource Program (FFSP) - Home Repairs - Low Income Housing Energy Assistance Program (LIHEAP) - Northeast Community Redevelopment Agency (NECRA) - Emergency Solutions Grant (ESG) - Temporary Assistance for Needy Families (TANF) - School Readiness - Voluntary Pre-Kindergarten (VPK)

Lake Community Action Agency Board of Directors 2022

John Christian, President

City of Leesburg

Public

Louis Ward, Vice President

West Leesburg Community Development Corporation

Low Income

Catherine Lynum, Treasurer

NAACP

Private

Vershurn Ford

City of Mount Dora

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June Love, Secretary *Southern*

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Donna Bonifacino

City of Tavares

Public

Robert Ragin, Member At-Large

Southside Umatilla Area

Low-Income

Bryan Broadway

Find, Feed & Restore Ministries, Poor

Kimberly Garry

Eustis Black Heritage Committee

Poor

Tony Fields

Yalaha/Okahumpka

Parliamentarian Low Income

Mollie Cunningham

Lake County School Board

Public

Charles Brown

Masonic Lodge

Private

Willie Hawkins

City of Eustis

Public

Walter McGriff

Black Achievers

Southlake Low-Income

Cathy McKenzie

Life Stream

Public

Lake Community Action Agency Overview and History

Lake Community Action Agency, Inc. established in February 1966, as a private non-profit corporation, celebrates over fifty years of existence. It has been an effective resource serving the Lake County community as a voice for change and an advocate for the poor, elderly and disadvantaged. The Lake Community Action Agency has been a catalyst to mobilize available local, State, Federal, and private sector resources to advance the organization's mission and vision.

Through its innovative approaches, and effective delivery of its services, the agency has inspired and enabled low-income families, senior citizens, and other individuals in rural and urban areas, to obtain the skills, knowledge, and motivation to secure the opportunities needed for them to become self-sufficient.

We have grown from a staff of 5 people at the start of the most recent past strategic plan to a current staff of 15 people. Amid significant changes in our program funding allocations and revenue, the agency has embarked on a transformative approach to ensure the organization's continued growth and sustainability.

Mission Statement

We Promote self-sufficiency by reducing and eliminating barriers that contribute to the instances of poverty through a variety of programs to improve the standards of living.

Vision Statement

Lake Community Action Agency is the premier agency that builds strong partnerships and provides professional services to children, families, and communities at large.

Core Values

Excellent moral character

Fiscal Accountability

Professionalism

Quality service delivery

Good work ethics

Program accountability

Strong partnerships

Honesty and integrity

Our Strategic Planning Approach

The Lake Community Action Agency's Board of Directors held its annual retreat on Saturday, June 25, 2022, at the Mount Dora Lakeside Inn, Florida. The Board recognized the many accomplishments of the agency and the significant impact the agency has made in the community and in improving the lives of the underserved populations. This strategic plan has been developed based on the board's input and identifying strategic priorities for the agency over the next three-year period. Additional input is informed by demographic indicators, Client satisfaction survey data, community partners, and the staff's input to define strategic approaches and metrics to achieve identified priorities.

The four highest strategic priorities defined by the Board of Directors are as follow:

1. To develop a plan of action to ensure the economic sustainability and viability of the organization including creating new revenue streams, securing viable grant funding, exploring philanthropic mechanisms, and opportunities for non-federal funding.
2. Expand the work of creating public-private partnerships to maximize funding and establish pipelines for career opportunities for agency clients, and helping clients become self-sufficient.
3. Develop and implement strategic approaches that will raise the brand of the organization in the community it serves and beyond.
4. To develop and implement a plan to expand the organization's capacity to serve a wider community, being able to support the demographic and economic changes within the region and expand its constituent and stakeholder base to address the top three needs as identified in the current Community Needs Assessment. They include:
 - Mortgage and rental assistance
 - Wages, and
 - Affordable Housing.

Federal and State Priorities

In addition to strategic priorities identified by the Board, the Lake Community Action Agency is a Results Oriented Management and Accountability (ROMA) organization. Based upon principles contained in the Government Performance and Results Act (GPRA) of 1993, ROMA provides a framework for continuous growth and improvement among local community action agencies (CAAs) and a basis for state leadership and assistance.

In 1998, the CSBG Reauthorization Act, Section 678E(a)(1), 42 U.S.C. § 9917(a)(1), made ROMA implementation a requirement for receiving federal CSBG funds, and established October 1, 2001 as the start date for reporting CSBG Network outcomes in the context of ROMA performance-based management principles.

Throughout the fabric of this Strategic Plan is the foundation of the three National Goals that provides a framework and serves as a guide for continuous growth and effectiveness in abating the effects of poverty.

Three National Goals

The 1994 Amendment to the CSBG Act, in response to GPRA, specifically mentioned a requirement for CSBG eligible entities to provide outcome measures to monitor success in three areas: promoting self-sufficiency, family stability, and community revitalization.

The CSBG Monitoring and Assessment Task Force (MATF) supported by the Administration for Children and Families, Office of Community Services (OCS), and the U.S. Department of Health and Human Services produced a National Strategic Plan in 1996. This plan identified national goals for community action that specifically addressed these three areas, identifying them as “family” and “community” goals. MATF added “agency” goals to complete the plan.

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

This strategic plan is organized utilizing the ROMA methodology clearly articulating the various components and mechanisms for achievement including **Goals, Objectives, Strategies and Metrics or Outcomes Measures (GOSM)**. The plan’s methodology includes the following:

Goals - set forth the desired outcomes and are qualitative results. Our strategic goals define what we seek to fulfill as a community action agency and reflect the unique challenges with which we are confronted.

Strategic Priorities - referred to as **Objectives** (outcomes) are statements that describe what the activity will achieve. This plan utilizes the concept of S.M.A.R.T. objectives, meaning that each stated objective is Specific, Measurable, Achievable, Realistic, and Timebound. Objectives must meet the limits of time, budget, and quality.

Strategies – signify specific actions that will be set forth to realize the stated objectives,

Outcomes Measures - A qualitative or quantitative evaluation to determine overall effectiveness of achieved results.

The Lake Community Action Agency 2023-2025 Strategic Plan

Focus Area: 1. Organizational Development

Goal A. To develop a plan of action to ensure the economic sustainability and viability of the organization including creating new revenue streams, securing viable grant funding, and exploring philanthropic mechanisms.

Objective A1: Identify and develop new funding streams through foundations, philanthropy, and public sources that increases budget by 20%.

Strategies:

- Engage a Prospect Researcher to identify specific foundations and philanthropic individuals and/or organizations that are clearly aligned with the mission and vision the of LCAA.
- Submit grant proposals to Foundations and individuals seeking to provide charitable support to the LCAA.

Outcomes Measures:

- Identity a minimum of 5 prospects annually including Foundations, organizations, and individuals.
- Engage with a minimum of 5 percent where they are actively supporting the organization philanthropically through grants or charitable contributions.
- Submit a minimum of 2 proposals annually to seek support for unrestricted funding or major programs (not only new programs).

Objective A2: Identify and develop at least 2 new funding streams that will bring revenue into the organization and use it as unrestricted funding. An increase in unrestricted funding can provide opportunities to expand staff and increase the budget for general and administrative costs to the organization.

Strategies:

- Evaluate and implement new streams of income revenue generating ventures that will increase financial income by 20% in year one and grow by 20% in successive years.

Outcomes Measures:

- Evaluate at least 1 new funding stream in year 1 that will show at least a 20% growth margin by year 3.
- Implement at least one new funding stream by year 2 and evaluate its growth projections and longevity in year 3 for long term viability.

Goal B. Promote and expand Partnerships with public and private entities.

Objective B1: Establish new and maintain existing Public/Private Partnerships to leverage funding and maximize LCAA abilities to help families become self-reliant including but not limited to workforce training and development, job placement, home ownership, money management, continuing education, and financial partners with the LCAA.

Strategies:

- Maintain partnership with Career Source of Central Florida and seek new ways to expand partnership.
- Conduct a feasibility study of the long-term viability of a partnership with the Excellence Academy and explore opportunities to secure grant funding.
- Attend networking events to identify new partners.
- Develop a case for support of the benefits for partnerships and demonstrated successes of past and current partnerships.
- Gain commitment from current partners to advocate the benefits of partnerships and encourage others to become partners.

Outcomes Measures:

- Retain 80 % of current partners.
- Gain MOU agreements from at least 2 new partners per year with agreement to target partnership goals specific to each partner, e.g., employment goals, financial participation, Student enrollment, training and development support, in-kind support and/or intervention initiatives with at least a 10% increase in current participants.

Objective B2: Identify and develop a targeted approach to partnering with local governments that are stakeholder organizations.

Strategies:

- Work with board members who are elected officials or affiliates with local governmental entities to develop a strategic approach for engagement.
- Assess grant funding programs and opportunities for each unit of government to be approached.
- Develop innovative approaches to engage governmental units.

Outcomes Measures:

- Identify at least 1 constituent per unit of government to engage as champions.
- Identify prior precedents to leverage.
- Secure funding or resources to build capacity within the LCAA.

Goal C. Organizational Operations

Objective C1: Retain, Grow, and Develop a team that identifies with and exemplifies the organization's mission, vision, and values.

Strategies:

- Identify the most significant ways to infuse new talent into the organization consistent with budgets and fiscal management.
- Continue to foster employee development by identifying leadership training and development programs, and job-related skills development.
- Evaluate effectiveness of cross-functional teams and identify opportunities for improvement.
- Ensure that agency and employee work plans are aligned with the strategic plan and reporting tactical actions and results on a regular basis

Outcomes Measures:

- Retained 80% of current organization.
- Identified a training and development plan for 100% of staff with 100% completion.
- Quarterly reports reflect actions and activities that are aligned with the agency's current strategic plan.
- All new employees are provided the tools, resources, and orientation to ensure an effective understanding of all elements of the organization with a checklist and documentation of completion.

Objective C2: Develop an intentional organizational culture that reflects the organization's mission, vision, core values and its strategic direction.

Strategies:

- Ensure that all staff understands and uses the strategic plan as its roadmap, focusing resources and actions to realize strategic goals and objectives.
- Incorporate new messages to transform historical practices to a culture of philanthropy where fundraising is a key focus and critical priority.
- Continue to develop systematic controls for routine business functions including communications and effective use of technology to improve workflow, processes, and operations.
- Demonstrate value in each employee and the importance of the role they serve through recognitions and rewards.

Outcomes Measures:

- The strategic plan is reviewed and discussed at regularly held staff meetings with updates provided by staff in addition to written quarterly reports.
- Provide internal training to 100% of staff on their roles and responsibilities.
- Document controls put in place to provide tools, technologies, and systems for improved performance.
- Document rewards and recognitions to staff and demonstrate accountability for the initiatives and accomplishments achieved.

Objective C3: Expand and Grow the LCAA

Strategies:

- Conduct an evaluation and assessment of the LCAA's current programs
 - Determine longevity and sustainability of grant funded programs
 - Identify staff bench strength and opportunities for professional growth

Outcomes Measures:

- Report the findings of the evaluation and assessment of the current LCAA programs, including gap analysis and capacity building approaches.

Focus Area 2: The Voluntary Prekindergarten Education Program (VPK)/ School Readiness Program (SR)

VPK/SR are free prekindergarten programs for children ages 1 to 4-year-olds that promote early learning and literacy skills. The VPK/SR program gives each child an opportunity to perform better in school and throughout life with programs that include age-appropriate curricula with a strong emphasis on early literacy skills and accountability. The VPK/SR programs stress the importance of manageable class sizes and qualified instructors.

Goal A. Evaluate the long-term viability of the VPK/SR as an LCAA revenue stream and determine its future for the organization.

Objective A1: Make a fiscal assessment about the VPK/SR as a viable revenue stream for the LCAA.

Strategies:

- Look at historical revenue from the VPK/SR and net income to the LCAA.
- Identify ways to improve fiscal performance of the VPK/SR and its impact on the LCAA operations budget.
- Identify cost sharing mechanisms and other ways to reduce the financial impact on the LCAA budget.
- Explore other options for addressing the social impact of dissolving the VPK/SR through vouchers, partnerships, or other mechanisms.
- Develop a long-term plan and approach for providing needed service within the community.

Outcomes Measures:

- Report results of the fiscal analysis and impact study to the board and staff regarding the long-term viability of the VPK/SR.
- Identify and report on possible partnerships with other businesses in the community that could reduce the burden.
- Submit at least three grant proposals to foundations or organizations that support early childhood education initiatives like VPK/SR, e.g., Denny's corporation.

Objective A2: Prepare children for school readiness and for academic success in the following domains: physical development and health; approaches to learning; social and emotional development; language and literacy; cognition and general knowledge.

Strategies:

- Gain commitment from parents regarding students' attendance.
- Identify ways to engage parents in school programs and students' activities.
- Evaluate screenings and assessments to identify student strengths and areas for improvement.
- Develop individualized goals for each child and an implementation plan.
- On-going monitoring of students' progress.

- A minimum of quarterly communication with each child's parent to provide information pertaining to process, interpretation, strengths, challenges, and opportunities.
- Provide on-going kindergarten transition activities and information addressing social-emotional and behavioral expectations for students upon entering kindergarten.

Outcomes Measures:

- Student progress is measured by satisfactory attainment of goals on their individualized plan.
- Increase parent participation by 20% over prior participation rates.
- 90% of children will sustain development and learning gains through third grade by reviewing the Florida Standard Assessment results (FSA) of former students.

Focus Area 3: Community Service Block Grant

The Family Self-Sufficiency Program (FSSP) represents a multi-faceted approach to the organization and service delivery of locally available social services to help eligible economically challenged families become self-sufficient and independent of all forms of public assistance. The program is designed to identify the needs of the participating families through a rigorous and robust case management approach and to deliver a comprehensive and coordinated set of services to facilitate their efforts to achieve and maintain economic self-sufficiency. The framework of the activities that take place in this program are derived from the six National goals of the OCS' Monitoring and Assessment Task Force.

Goal: Individuals and families with low incomes are stable and achieve economic security (Goal 1 - Self Sufficiency of the 3 national goals); and People with low-incomes are engaged and active in building opportunities in communities (Goal 3 - Family Stability).

Objective A1: Connect families with locally available social services aligned with their need to help families become more self-sufficient, while decreasing the dependency on all forms of public assistance.

Strategies:

- Develop, implement, and document aggressive outreach activities to eligible participants, supporting agencies, and the community at large.
- Develop an individual or family service plan for each participant.
- Conduct monitoring sessions to review incremental progress or changes that occur through case management.
- Assign case manager lead for each client/family.
- Develop individual service plans to assist clients with identifying solutions to the top three identified community needs.
 - Mortgage/rental assistance,
 - Affordable Housing,
 - Wages.

Outcomes Measures:

- 100% of participating families will complete a family matrix along with short and long-term family goal setting.
- 50% of unemployed or underemployed adults will enroll in and complete career-oriented education programs with job placement assistance.
- 50% of unemployed or underemployed adults will secure employment-related training.
- 100% of FSSP families with children ages 1-5 will receive referral for enrollment into the School Readiness / Voluntary Pre-Kindergarten program.
- 100% of FSSP families with children ages 11 – 18 will receive referral for enrollment into The Excellence Academy.
- 50% of FSSP households will enroll in one or more of the following:
 - a. Lake Community Action Agency (LCAA) Energy Services.
 - b. Asset Building.
 - c. Financial / Literacy and Education.

Focus Area 4: Energy Services/Home Energy Assistance

To provide a unique range of energy solutions to Residential customers while promoting financial independence through sound energy saving, technologies, energy efficiency processes and conservation programs.

Weatherization provides insulation, weather-stripping, and repair of cracks, windows, and doors for income-eligible households. Improvements reduce loss of warm or cold air, increase comfort and protect the health of occupants, while lowering utility and fuel costs. Community Services Specialists evaluate the need for assistance and eligibility. Certified Energy Auditors visit the home by appointment to assess needed repairs. If the home is eligible, the work is completed by a certified WAP contractor at no cost to the applicant.

Goal: Grow the home energy assistance to eligible applicants and maximize available funding.

Objective 4A: Maintain cutting-edge methods of energy efficiency through adaptations and partnerships with local utilities and energy programs such as Energy Star that will maximize the client’s savings through innovative approaches with installation of the latest energy technology available.

Strategies:

- Implement and maintain “fee for service” and ancillary programs through offerings of energy audits and energy education to municipalities and community development organizations throughout Lake County.
- Provide training to others to become certified and thereby increase the organization’s capacity to expand its energy audit services, including “fee for service.”

- Promote services and results in marketing, website, newsletters, and social media to publicize certified energy audit services and home improvement programs to low-income residents.

Outcomes Measures:

- Decrease the energy burden of homes weatherized by an average of two percentage points annually.
- Reach 10% more new eligible clients annually through community outreach, marketing, social media, and strategic partnerships.
- Develop partnerships with regional/state housing programs as evidenced by Memorandum of Understanding to increase leveraging opportunities.
- Increase referrals by 15% monthly, adding to the overall number of completed units.

Objective 4B. Continue to reduce the number of repeat LIHEAP/LIHWAP applicants.

Strategies:

- Provide LIHEAP/LIHWAP customers with home energy-efficiency education to reduce utility bills.
- Provide program guidelines and eligibility at the beginning of the client evaluation process and ensure understanding regarding available services.

Outcomes Measures:

- Reduce the number of repeat LIHEAP/LIHWAP customers with three or more services in an 18-month period by 20% annually through energy education, referrals, and the establishment of a priority list.

Objective 4C. Create and develop a Social Enterprise Business in housing, energy efficiency, energy auditing and renewable energy to service the Central Florida region.

Strategies:

- Develop alliances with non-federal funding sources to secure non-restrictive funding for agency.
- Collaborate with local financial institutions, realtors, and energy utilities to leverage funding and maximize resources.

Outcomes Measures:

- Generating an increase in revenue from Social Enterprise by 10% over prior year.
- Expand agency's financial capacity to increase human capital by one person per year over the next three years.

Focus Area 5: Branding, Marketing, and Strategic Communications

To carry out many of the strategic initiatives described within this strategic plan, an increased emphasis and focus is needed in the areas of branding, marketing, and communications including public/private partnerships, increased awareness of various programs and available services for the low-income community, job seekers, and other constituents, fundraising, and supporters.

Goal: Increase Brand awareness of the LCAA

Objective 5A: Tell our story.

- Continue to publish our annual booklet to continue to build a compelling Case for Support illustrating the LCAA's history of accomplishments and community economic impact, purpose for funding, how funds will be used, the benefit to the recipient and donor recognition.
- Maintain a list of prospects to market, engage and ultimately solicit support or submit a grant proposal for philanthropic support.
- Engage board members to advocate on behalf of LCAA and engage others in their scope of influence.

Objective 5B: Market the LCAA in the region

- Develop and implement a marketing and branding campaign plan including the development of marketing collaterals, website enhancements, social media, and networks.
- Develop compelling narrative content about the agency, the economic value and social impact of its work within the community through factoids, spotlights, highlights, success stories, and national trends.
- Engage the community through volunteerism
- Collaborate with the community in other community events by having a booth or presence in some way.
- Provide giveaways at community events with the LCAA Logo and a slogan that people will remember and appreciate.

Outcomes Measures:

- Greater name recognition within the community.
- At least 2 marketing collaterals printed and electronically available.
- Database of new constituents with email and/or mailing address and phone numbers.
- Updated website and active social media accounts.



S.W.O.T Analysis for Lake Community Action Agency

Saturday, June 25, 2022

Strengths

1. Well-known throughout the community it serves
2. Long-term employment
3. Partnerships
4. Strong communication within organization
5. Having a pulse on the communication
6. Structural system
7. Strong leadership
8. Service & Deliver
9. Longevity
10. Well-trained staff
11. Technology & Automation
12. Welcoming

Weaknesses

1. Funding
2. Publicity & Marketing
3. Communication
4. Awareness
5. Resources (Non-financial)
6. Services Constraints
 - a. Transportation
 - b. Childcare
 - c. Grants
7. Accessibility
 - a. COVID
8. Salary
9. Grants Restrictions (administrative costs)
10. Seeking creative ways to gain other funding.
11. Unrestrictive funding
12. Technology & Automation
 - a. Leesburg campus
 - b. Phones & Wifi
 - c. Smartboard
13. 6th-12th grade education level of priority
 - a. Level of resources
14. Phone Service at Eustis
15. Weatherization
 - a. Salary
16. Board Member (Training)

