



Strategic Plan April 2016 – April 2019

- Procedure:** Plans align with YVEDDI Fiscal Year and goals are presented to Board for input each February. Final approvals of plan by Board at the Annual Meeting in April. Add timelines to annual work plans and report progress at Planning and Evaluation Committee Meetings.
- Purpose:** To unify goals and guide organization into action with focused energy toward desired outcomes

VISION STATEMENT

YVEDDI is the best Community Action Agency in North Carolina. Our caring professionals and Board members work in harmony as a team to make a positive difference, promote wholesome living and connect individuals and families to tools and resources that foster success and self-sufficiency.

MISSION STATEMENT

Dedicated to improving the lives of individuals and families in Davie, Stokes, Surry, and Yadkin Counties through a variety of programs and partnerships to build stronger communities.

VALUES

Honesty/Integrity; Respect; Teamwork; Fairness; Service to Others

I. Where We Are

2015 Self-Assessment Findings

- Board votes to accept the community assessment
- Perform an agency-wide risk assessment
- Customer satisfaction data collected and included in the strategic planning process
- Ongoing staff development that includes ROMA Training

2015 Comprehensive Community Assessment Highlights

- Poverty rates:
 - Davie 12.8%
 - Stokes 17.8%
 - Surry 18.68%
 - Yadkin 19.3%
- Barriers – transportation, lack of jobs, lack of education, training and skills
- Affordable child care
- Affordable housing
- Child poverty rate remains higher (24.5%) than the national average (22%)
- Growth of baby-boomers outweigh funding resources

II. What's most important going forward?

Goals (*adopted by board 2-25-16*)

- 1. Build Reserves**
- 2. Increase Sustainability (ongoing administration policy and systems development to minimize risks and improve efficiencies).**
- 3. Develop a County Collaborative Community Assessment**
- 4. Develop a County Collaborative Community Resource Directory**
- 5. Enhance Community Outreach (to include awareness, utilization of senior centers and publications)**

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Strategic Issue #1: Build Reserves		
Build Reserves: Develop strategies that will lead to agency financial health and sustainability, i.e. three months of expenses or \$3,000,000. Reserves are necessary to avoid service interruption at fiscal year beginning.		
Action Steps: What is to be done?	Who will do it?	When will it be done?
Identify unrestricted funds: FYE 16-17: <ul style="list-style-type: none"> Transportation \$200,000 IDC \$100,000 Weatherization \$50,000 Head Start \$25,000 	Finance Director and Program Directors	Completed 12-2015
Budget less (programs with unrestricted funds)	Program Directors	At fiscal year beginning
Expense tracking and monitoring	Accounting Staff and Directors	Monthly
Identify sources of replenishment: <ul style="list-style-type: none"> • Weatherization for-profit program <ul style="list-style-type: none"> ○ Develop implementation plan ○ Seek technical assistance from Lynn Banks with the Weatherization State Office 	Executive Director Finance Director	December 2016
Closely monitor and carry out agency fundraising plan : <ul style="list-style-type: none"> • Winston Salem Foundation • Various grants available for YVEDDI service counties as well as domestic violence victims. • Identify other local foundations that might partner with YVEDDI. • Progress reported to finance committee bi-monthly 	Board and Staff	Propose plan to Finance Committee in June and report progress to the committee bi-monthly

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Strategic Issue #2: Increase Sustainability		
Sustainability: Develop systems and strategies of continuous improvements that minimize risks and will lead to financial health and viability.		
Action Steps: What is to be done?	Who will do it?	When will it be done?
Regularly review and update of major policies to include new laws and reflect agency needs. Major policies include: Board By-Laws, Personnel, and Financial Policies and Procedures	Relevant committee with final Board approval in consultation with Executive Director	Every 3 years minimum (2018)
Conduct Agency Assessments: <ul style="list-style-type: none"> • Agency Risk-Assessment • Agency Self-Assessment • Board Self-Assessment • Review Community Assessment Results Use results to develop annual improvement plans and to inform Strategic Planning.	Executive Director Finance Director Management Staff Board input and approval	Assessments - Annually May – June Strategic Plan – every 3 years - 2016
Ongoing Monitoring: share all program monitoring results with Planning and Evaluation Committee. Review improvement plans and any responses to grantors.	Executive Director, Program Directors	Ongoing
Share Strategic Plan progress updates with Planning and Evaluation Committee	Executive Director	Bi-monthly Planning & Evaluation meetings.
Develop and publish Annual Report to examine mission impact and create public awareness.	Executive Director, Program Directors, with Board input and approval	Annually in March

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Strategic Issue #3: County Collaborative Community Assessment		
Community Assessment: To provide data for decision-making; to promote awareness and action leading to change; to satisfy a mandate		
Action Steps: What is to be done?	Who will do it?	When will it be done?
Perform a four county Community Assessment to identify needs and resources. Use results to inform service delivery needs, goals, and program design. Include customer service satisfaction data, and Board input and approval	Agency staff with input from the Board	Comprehensive Assessment completed in 2015. Next comprehensive will be in 2018. Updates in subsequent years with any new trends or significant changes.
Identify potential partners and form a committee of stakeholders for planning a future collaborative assessment. (<i>Health Department, Smart Start, Head Start, County Gov., Children's Center, PTRC</i>)	Executive Director	September 2016
Host planning meetings: <ul style="list-style-type: none"> • Identify financial resources and consider hiring a technical consultant • Address issues that stakeholders believe are important • Decide on data collection methods • Decide what we need to know • Decide who we need to ask for information 	Executive Director	Schedule to be determined by stakeholders Quarterly meetings in 2017
After data is collected: <ul style="list-style-type: none"> • Form statements about problems identified • Generate solutions and a plan of action • Share results via community websites and meetings 	Committee designee with input from all the members.	February 2018

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Strategic Issue #4: County Collaborative Community Resource Directory

County Collaborative Resource Directory: In conjunction with the community assessment which identifies needs and resources, develop a resource directory that all community agencies can use and share with clients.

Action Steps: What is to be done?	Who will do it?	When will it be done?
Identify potential partners and form a committee of stakeholders for planning and development of a directory. (<i>Health Department, Smart Start, Head Start, County Gov., Children's Center, PTRC</i>)	Executive Director	September 2016
Host planning meetings	Executive Director	Schedule to be determined by partners Quarterly meetings in 2017
Develop a template for information collection	Committee of community partners	Quarterly meetings in 2017
Determine agencies to be included	Committee of community partners	Quarterly meetings in 2017
Identify existing directories that we could build upon	Committee of community partners	Quarterly meetings in 2017
Decide who will collect and organize information	Committee of community partners	Quarterly meetings in 2017
Identify distribution methods	Committee of community partners	February 2018

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Strategic Issue #5: Enhance Community Outreach (to include awareness, utilization of senior centers and publications)		
<u>GOAL NAME:</u> Bring about a greater awareness and support of YVEDDI programs and services		
Action Steps: What is to be done?	Who will do it?	When will it be done?
Share Annual Report with County Boards and Municipalities; publish on website.	Executive Director	Annually after audit is completed
Share news and events with stakeholders and the public. Use social media – Agency Website, Facebook, flyers, etc.	All management staff; Secretary/Receptionist	Ongoing
Participate on local boards and committees that are familiar with community resources and services	Executive Director Program Directors	Ongoing
Provide links to community resources for clientele on agency website	Communications Specialist	Ongoing
Keep agency website updated with news and current information about service opportunities	Communications Specialist with input from staff and Board	Ongoing