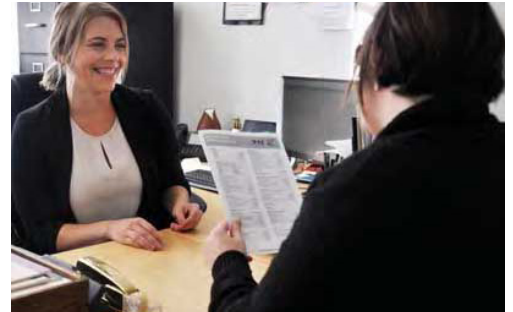




Utah Community Action 5-Year Strategic Plan



August 2019 - August 2024

Mission and Values

Our Mission

The mission of Utah Community Action is to empower individuals, strengthen families and build communities through self-reliance and education programs.

Our Agency Values

APPRECIATION – We recognize and enjoy the positive contributions of others.

COMPASSION – We demonstrate genuine concern for the well-being of all.

INTEGRITY – We exemplify the highest standards of honesty and accountability.

RESPECT – We have admiration for each individual's unique strengths and perspectives.

TRUST – We have confidence that the agency and staff will consistently act with the best of intentions.

Our History

Since 1964, we have been at the forefront of tackling the many facets of poverty to help our clients find their path to self-sufficiency. Formerly known as Salt Lake Community Action, in 2015 we changed our name to Utah Community Action to more accurately reflect our brand and the breadth of our services, which now include Salt Lake County, Tooele County, Tri-County (Davis, Morgan and Weber), and Washington County.

Community Action comes out of President Lyndon B. Johnson's War on Poverty and from the advocacy of Dr. Martin Luther King, Jr. The Economic Opportunity Act of 1964 created the Community Action Network of national and locally-focused organizations that connect millions of children and families to greater opportunity. Since its founding, the Community Action Approach emphasizes local priorities and maximum feasible participation—a requirement that individuals from communities served be represented in the decision-making body of the agency. In short, the Community Action Approach empowers struggling individuals by including them in their community's problem-solving process and ensuring a collaboration of local stakeholders in determining priorities and actions. Community Action Agencies serve 99 percent of counties in the United States.

Over the past few years, UCA has faced a difficult transition period with significant leadership changes and difficult decisions to create financial sustainability. With that transition largely behind us, we felt it was an excellent time to take a longer term look at what role our agency can play in meeting the growing needs in Utah. What follows is the product of that long-range strategic planning process. By building a strategic plan that is mindful of the clients we serve, our wonderful staff, and the community at large, we are confident that UCA will be prepared to meet evolving public needs and continue to positively impact the communities we serve.



The Planning Process

UCA engaged Tanner LLC to assist in the strategic planning process. As a first step in this process, UCA solicited feedback from staff and various stakeholders to identify opportunities and to inform strategic priorities.

Methodologies utilized include:

- Staff dialogue sessions
- Planning meetings with management
- Staff surveys
- Meetings with the Board
- Interviews with key partners, donors, and other stakeholders

In all, over 200 employees responded through the survey, and over 150 staff and managers participated in facilitated dialogue sessions. Participants in the process were open in sharing challenges they see, as well as opportunities for improvement that they feel would benefit UCA if implemented.

After digesting feedback from the survey and dialogue sessions, a two-day strategic planning offsite was conducted. The first day included over 20 program managers and leaders, and the second day included the executive team. After the offsite meetings, a strategic planning document was developed and further refined through additional meetings with the Board and leadership. The document that follows was presented to the Board for final approval and adoption in August 2019.

This plan is intended to provide focus to allow each member of the team to see how they can impact UCA's most important priorities. UCA fully expects that this will become a living document with periodic revisions as the environment changes. Detailed implementation plans have been developed that align with the priorities articulated in this plan and are not included here.



Themes that Emerged

Throughout our stakeholder outreach process, certain themes emerged that impacted the content and prioritization of the strategic plan. This section outlines key external trends UCA must prepare for, challenges faced, and strengths that can be leveraged.

Key Trends Impacting Our Strategy

- 1. Growing National and Regional Economic Disparity** – With growing income inequality, stagnant wages, and high rates of intergenerational poverty (poverty that is transmitted from one generation to another, with children, born into poverty more likely to become disadvantaged adults themselves), the number of individuals needing services aligned with UCA's offering is increasing and appears likely to steadily increase over the next decade.
- 2. Emerging Skills Gap in General Public** – The sweeping technological changes that enable automation of large segments of the economy previously performed by humans have important implications for workforce skills. For example, the number one occupation worldwide is driving. Many predict that autonomous driving technologies will displace significant numbers of workers and create a need for reskilling. Adult education will likely play a key role in helping workers displaced by automation to develop the skills needed to perform future jobs.
- 3. Massive Projected Population Growth and Urbanization in Utah** – With the state's population anticipated to double by 2050, and the increase in urbanization that will accompany this growth, the number of at-risk families will only increase. Current organizational infrastructure must be prepared to grow in order to effectively anticipate this significant growth in public needs.
- 4. Increased Competition from Public Schools** – To address the growing needs of at-risk families in Utah, many public school districts in the area are beginning to offer limited pre-k daycare service. If Public schools continue this expansion into pre-k, this would directly compete with UCA's Headstart program.
- 5. Recurring Difficulties Associated with Intergenerational Poverty** – As previously stated, high rates of intergenerational poverty prevent clients from reaching a level of self-reliance that is needed for the agency to expand services to new clients. UCA must continue to focus efforts on building self-reliance among families that seek assistance.
- 6. Growing Multi-Generational Needs** – As the median age in Utah increases, the number of middle-aged and elderly in need of services also increases. UCA must be aware of emerging needs for those in more advanced age groups.
- 7. Need for More Integrated Approach to Services** – To address trends with intergenerational poverty, service providers must develop a family system approach, where holistic needs are evaluated and addressed. Services need to be integrated in a way that assist the entire family, and not just the individual. By looking at holistic rather than narrow needs, services providers can address the several issues facing at-risk clients simultaneously and build greater self-reliance.
- 8. Technological Capabilities that Enable Lower Costs of Integrated Service Approach** – As IT capabilities continue to improve, the cost of an integrated service approach will steadily decrease, and the ability to data share, automate processes, and better communicate with clients and other agencies becomes more feasible.
- 9. Continued Need to Collaborate with Other Organizations** – As growth continues and demand for services increases, collaboration with other organizations will become increasingly important. To prepare for the evolving needs of clients, UCA must cultivate strong relationships and communication channels with other service providers, governmental entities, and private sector supporters.
- 10. Donor Expectations for Outcome Data** – With the number of nonprofits seeking funding today, donors are increasing expectations that their support will lead to quantifiable outcomes. Service providers must build the capabilities to track and report outcome-focused data, rather than simply reporting activities and qualitative efforts.

Challenges

Staff Retention – Based on current funding mechanisms which seem unlikely to change in the foreseeable future, UCA pay scales and benefit packages will continue to lag behind school districts and other potential employers. In addition to wages, organizational culture and a sense of purpose are becoming more important to staff, and the need to engage every employee in finding meaning in their work and seeing the impact of that work is imperative to staff retention. This is especially true as public schools expand pre-K services, offering almost identical positions to many staff at UCA. Lastly, serving clients facing extreme hardships often exposes employees to secondary trauma, causing burnout and many employees to leave the childcare industry altogether. The market for individuals with skills in early childhood education will only continue to become more competitive, and UCA's long-term strategy must address these challenges.

Limited Resources – As community needs continue to grow, UCA recognizes that it cannot meet every need. With limited resources, this raises the importance of partnering with other agencies in addressing client needs. However, with the high growth rate in the Greater Salt Lake Area, this collaboration is likely to become increasingly more complex.

Many Multi-Generational Needs Fall Outside of UCA's Expertise – As intergenerational poverty and multigenerational needs remains a long-term impediment to building self-reliance in UCA's clients, many of these needs fall outside of UCA's direct experience. For example, as demand for a skilled workforce and adult education grows, UCA will likely face a steep learning curve in developing offerings to meet these emerging needs. Because of the need to diversify service offerings, the challenge of finding and building effective collaborations and partnerships continues to impact the agency's ability to address holistic needs of its clients.

Increased Growth and Urbanization Along the Wasatch Front – In line with projected growth trends for Utah, the rate of Urbanization along the Wasatch Front means a geographic shift in the proximity of at-risk families to existing UCA facilities. This can impact UCA's ability to effectively address the needs of the populations it serves.

Current IT Infrastructure – While donors and funders are steadily demanding more outcome-based reporting, UCA's workflows and information systems need to be updated in order to cost-effectively meet these demands. Recruiting and retaining the talent for this task is a constant challenge due to more lucrative opportunities in the private sector for individuals with these skillsets.

Strengths

Public Awareness and Reputation – UCA has served the public for over 55 years and has established a strong presence and reputation in the community at-large. Organizations throughout the state recognize UCA as a leader in early childhood education and services to the most vulnerable members of our communities. More important than simply being recognized for the services it provides, UCA is trusted by the families it serves as a source of assistance, and the community associates UCA with a standard of excellence matched by few non-profits.

Extensive Network of Locations – UCA currently operates out of over 40 locations in the Greater Salt Lake Area and is uniquely positioned to accommodate lower socioeconomic communities throughout this region. This positioning gives UCA access to these communities, helping build trust and public awareness in the areas where services are needed most.

Size and Scale – With the sheer number of locations, the organization has created a network effect that is earned through scale. This impacts UCA's ability to maintain a recruiting pipeline, effectively advocate collaboration between public agencies, and impacts a large number of families with its services. UCA's scale also has forced the agency to adopt formalized routines to effectively process families and the documentation required by the government and other stakeholders, including its IT infrastructure. Additionally, UCA's financing structure has become consistent allowing the organization to use a longer-range planning horizon.

Purpose-Driven Staff – During meetings with staff, it was clear that employees feel a sincere desire to assist clients and care deeply about the work they do. This level of commitment is unique to UCA compared to other nonprofits. While many nonprofits aim to serve people in need, UCA staff directly interact with these individuals daily, creating a tangible purpose and meaning. With this purpose-driven mindset, UCA has an opportunity to develop a strong and unified culture where employees feel like they are a part of a bigger team, doing work that makes a meaningful difference for those in need.

5-Year Strategic Plan

Our Mission:

The mission of Utah Community Action is to empower individuals, strengthen families and build communities through self-reliance and education programs.

Aligned Strategic Initiatives

- Community awareness
- Partnership engagement
- Expanded volunteer base
- Advocacy

How will we measure success?

- In-kind hours (or new volunteers and volunteer retention)
- Annual assessment with key partners (partner survey)



Aligned Strategic Initiatives

- Trauma-informed culture
- Staff development
- Facility improvements
- Agency-wide awareness of our services

How will we measure success?

- Staff engagement (ENPS)
- Regrettable T/O rate
- Safe and Secure Facilities

Aligned Strategic Initiatives

- Streamlined, coordinated intake process
- Service hubs
- Multi-generational approach

How will we measure success?

- Mystery shop / client satisfaction survey (NPS)
- Program-specific referral metrics (TBD)

Measuring Impact

Invest in development of tools to enhance our ability to evaluate the impact of the services that we provide.

Strategic Imperative 1

Client Experience

“Improve coordination of services across our agency to deliver a seamless experience to our clients.”

UCA cares deeply for its clients and considers effectively serving them as a key imperative in its strategic plan. To better serve these families, UCA will streamline and coordinate its intake process, allowing the agency to better serve those with multiple needs in a tailored and unified way. This coordinated approach will ensure that each client receives the help that they need without having to hunt across the agency to find services. To further improve the client experience, UCA will evaluate the creation of service hubs. These hubs will serve as local “one-stop shops” for clients to meet with staff in addressing a wide array of desired services, eliminating the need to visit multiple locations. Lastly, UCA will work to address the long-standing challenge of inter-generational poverty by addressing the unique needs of each generation of the families it serves. Through these efforts, UCA anticipates an increase in client satisfaction, and referrals for its various programs.

Aligned Strategic Initiatives

- Streamlined, coordinated intake process
- Service Hubs
- Multi-generational Approach

How will we measure success?

- Mystery Shops / Client Satisfaction Survey (NPS)
- Program-specific referral metrics (TBD)



Strategic Imperative 2

Staff Experience

“Develop our staff to build a trauma-informed culture, improve retention, and create growth opportunities for everyone.”

The biggest asset in achieving long-term success for UCA is its staff. Employees are on the front-lines, directly assisting the families UCA serves every day. UCA must develop staff to prepare them to best address client needs. This development will include a significant focus on building a trauma-informed culture, which will inform how staff address the trauma that clients experience and how staff handle these client experiences in a way that prevents secondary trauma. In addition to increased skills, UCA desires to foster an environment where employees enjoy the uniquely impactful work that they do and feel a direct connection to the mission. Lastly, UCA will focus on improving facilities to enhance safety for staff and provide an environment where they can do their very best work.

Aligned Strategic Initiatives

- Trauma-informed culture
- Staff Development
- Facility improvements
- Agency-wide awareness of our services

How will we measure success?

- Increased Staff Engagement (ENPS)
- Lower Turnover Rate



Strategic Imperative 3

Community Experience

“Strengthen and build key relationships that drive greater awareness of the work we do and the people we serve.”

As one of the largest agencies in the state serving the low-income community, and as demand for services continues to grow, UCA will increasingly find itself in a position to lead. In this leadership role, UCA will continue to improve communication with key partners, and leverage relationships to create the most impact possible in the community at-large. To extend that impact, it is also critically important to expand UCA's volunteer base by enlisting more community members who share a passion for helping families in need. Not only does this multiply the impact, it increases awareness in the community. Lastly, UCA will leverage its status in the community to advocate causes that align with its mission. This includes creating awareness among vulnerable populations about available services. It will also include creating awareness among the more affluent about the very real challenges faced by marginalized segments of the community. UCA must share its story with decision-makers in various public-sector organizations and inspire others to support its mission.

Aligned Strategic Initiatives

- Community Awareness
- Increase Partnership Engagement
- Expanded Volunteer Base
- Advocacy

How will we measure success?

- In-kind hours (or new volunteers and volunteer retention)
- Annual assessment with key partners (partner survey)



Strategic Imperative 4

Measuring Impact

“Invest in development of tools to enhance our ability to evaluate the impact of the services that we provide.”

UCA must focus on increasing its capabilities to evaluate the impact of services. Funders will increasingly demand it. With limited resources and growing needs, UCA must find ways to best focus efforts on those things that will have the biggest positive impact on the trajectory of the lives of those served. This will represent an ongoing area of focus for each program as UCA evaluates what data to collect and how to use that data to inform the approach. By building these internal capabilities, UCA will be able to leverage outcome data to attract additional impact-oriented donors.

Aligned Strategic Initiatives

- Impact metric development
- Data warehouse / lake

How will we measure success?

- Do we have outcome measures in place for all services?
- Funding growth and diversification to include more impact-oriented donors



Implementation of the Plan

Simply having a plan does not ensure its implementation. UCA is committed to taking specific measures to implement this strategic plan and measure progress toward its realization. Specifically, UCA will:

- Create and implement an Operating Plan that outlines key milestones, specific action items, individuals responsible for the completion of action items, and timelines for the various tasks that will help drive success for each strategic initiative.
- Communicate the Strategic Plan to stakeholders and distribute a one-page condensed strategic plan to each employee.
- Utilize the strategic plan as the basis for annual strategic planning and goal setting.
- Refer to Strategic Plan in Board meetings, leveraging the strategic plan as context for important conversations, including the setting of future goals for strategic imperatives and the development of new key initiatives.
- Annually establish and review outcome measures associated with strategic imperatives. Make adjustments as necessary to ensure close correlation between outcome measures and plan directives.
- Annually provide the Board with an update on progress of key initiatives and measures of success for each strategic imperative.

While actively measuring several important metrics, UCA is working on attaining the capabilities to track additionally needed metrics for future growth and success. Building these tracking capabilities will help UCA commence in baseline data gathering beginning in 2020. From there, UCA will create specific quantitative milestones for various imperatives and initiatives.