

Waldo Community Action Partners



*we care about people*

# STRATEGIC PLAN

## 2023 - 2028

*Photo: Future site of our new  
building in Belfast.*



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## **Diversity and Inclusion**

Waldo Community Action Partners is committed to engaging a full range of perspectives, ideas and experiences to help us achieve our collective goals. We strive to make sure we can all live healthy, engaged, and secure lives as we work, live, and age in our homes and communities. As a social services organization, we commit to being agents of equity and inclusion for the individuals and families we serve in our state. We view our role as a catalyst and advocate for change. We commit to deepening our understanding of equity, hosting uncomfortable conversations, and joining others in reimagining equitable systems of care and community.

# ABOUT THIS STRATEGIC PLAN

This Strategic Plan furthers the work of our previous plan by investing in our organization and our staff so we can be better positioned to respond to current and emergent needs. The economic uncertainty that the global pandemic has brought continues to affect all our lives. It has left no one untouched and Waldo Community Action Partners (WCAP) will continue to support the resilient nature of our staff and community as we shift to a recovery phase.

We have shown that WCAP can rise to the occasion to meet unforeseen needs and the dedication and commitment of our staff and organization has been something to be proud of. WCAP is well positioned to continue with core services, expand to meet needs, and respond in partnership and collaboration with others so that our community thrives.

This strategic plan, and the measures and goals it outlines, are necessary and bold. It reflects our efforts to meet the identified needs of our community, as noted both in our 2021 Comprehensive Community Assessment and our vision for the future. It is the driver of the mission and vision to our daily work with the consumers who utilize our services and community partners who work collaboratively to meet community needs.

Within our process we identified goals to address the critical shortage of available and skilled labor, magnified by the pandemic and further impacted by the lack of affordable housing and childcare options. We will focus on our infrastructure including developing a facility for our staff and community, enhancing data collection systems and processes, and offering additional stability to the clients we serve through a coordinated agency wide implementation of Whole Family Approach and Universal Access.

Our everyday successes in assisting individuals and families, as well as our broader impacts in the community with our partners, collaborators, and funders, demonstrates our continued traditions of investment and planning for a better future for our community. The ability to reach our milestones will be a direct result of the efforts of our volunteers, who dedicate many hours to meet community needs, the work of our Board to support the organization and its future, and the skilled, dedicated, and committed staff we have here at WCAP who show up every day to make a difference in the lives of others.

# HISTORY AND STRUCTURE

## History

Waldo Community Action Partners (WCAP) is a charitable, educational, private 501(c)(3) non-profit organization located in Belfast, Maine. WCAP has been a cornerstone in Waldo County since it was incorporated in 1965 under the name Waldo County Committee for Social Action (WCCSA), with Head Start as the original Federal program.

Soon after its incorporation, a family planning program, senior citizen program, surplus foods program, transportation program, and community alcohol services program were added and housed in offices throughout Waldo and Knox counties. In the early 1990s, all offices were moved into one building in Belfast to centralize administrative functions. Several programs were phased out as funding streams decreased and more energy and finance related programming, like fuel assistance and loan services, were instituted.

By 1996, programming and services looked a lot like they do today, with Energy, Housing, Early Childhood Education, and Transportation being the four primary areas of focus. In 2004, the agency formally changed its name to Waldo Community Action Partners to clarify its strong support for community partnerships and integration.

## Structure

Waldo Community Action Partners belongs to a national network of similar Community Action Agencies (CAAs). CAAs are local private and public non-profit organizations that carry out the Community Action Program, which was founded by the 1964 Economic Opportunity Act to fight poverty by empowering the poor as part of the War on Poverty.

A CAA receives designation either from the local government under the provisions of the Economic Opportunity Act, or from the state under the Community Services Block Grant (CSBG) Act of 1981 to combat poverty in geographically designated areas.

Agencies also operate a variety of grants that come from Federal, State and local sources. These grants vary widely among agencies, although most CAAs operate Head Start programs, which focus on early child development. Other programs frequently administered by CAAs include Low-Income Home Energy Assistance utility grants and the Weatherization Assistance Program funded through the U.S. Department of Energy.

CAAs are intended to promote self-sufficiency, and they depend heavily on volunteer work, especially from the low-income community. The requirement to involve the community in its processes results in a unique governing board structure.

# GOVERNANCE AND LEADERSHIP

Since 1968, local Community Action Agencies (CAAs) have been required to have tripartite governing boards to gain and retain designation as eligible entities and to receive CSBG funding. Effective tripartite boards reflect and promote the unique anti-poverty leadership, action, and mobilization responsibilities assigned by law to CAAs. Boards are responsible for assuring that agencies continue to assess and respond to the causes and conditions of poverty in their community, achieve anticipated family and community outcomes, and remain administratively and fiscally sound.

WCAP has a tripartite board comprised of one third each:

- Low-income representatives elected by Waldo County's low-income people
- Local public officials or their designees
- Representatives of business, industry, labor, religious, social welfare, and other private groups

## **Board Members at the time of the Strategic Plan approval in August 2022:**

### **Officers**

Kimberley Mitchell, *Chair*

Jason Moody, *Vice Chair*

Wesley Neff, *Secretary*

Joanne Pease, *Treasurer*

### **Private Sector**

Kimberley Mitchell, *Finance*

Sarah Martin, *Business*

Linda Stec, *Education*

Art Fairbrother, *Religion*

Lt Matthew Curtis, *Law Enforcement*

Syrena Gatewood, *Social Services*

### **Low Income Sector**

Joyce Fenner, *Representative 1*

Karen Gorris-Hicock, *Representative 2*

Gary Moore, *Representative 3*

Jason Moody, *Representative 4*

Heather Ross, *Representative 5*

Melissa Harding, *Head Start Policy Council*

### **Public Sector**

Joanne Pease, *Liberty*

Wesley Neff, *Winterport*

Daniel Horton, *Swanville*

Walter Ash Jr., *Belfast*

Patricia Clark, *Unity*

Senator Chip Curry, *Belfast*

## **Organizational Leadership at the time of the Strategic Plan approval in August 2022:**

Donna Kelley, *President and CEO*

LeeAnn Horowitz, *Chief Financial Officer*

Katie Bagley, *Human Resources Director*

Michael Hallundbaek, *Transit Systems Director*

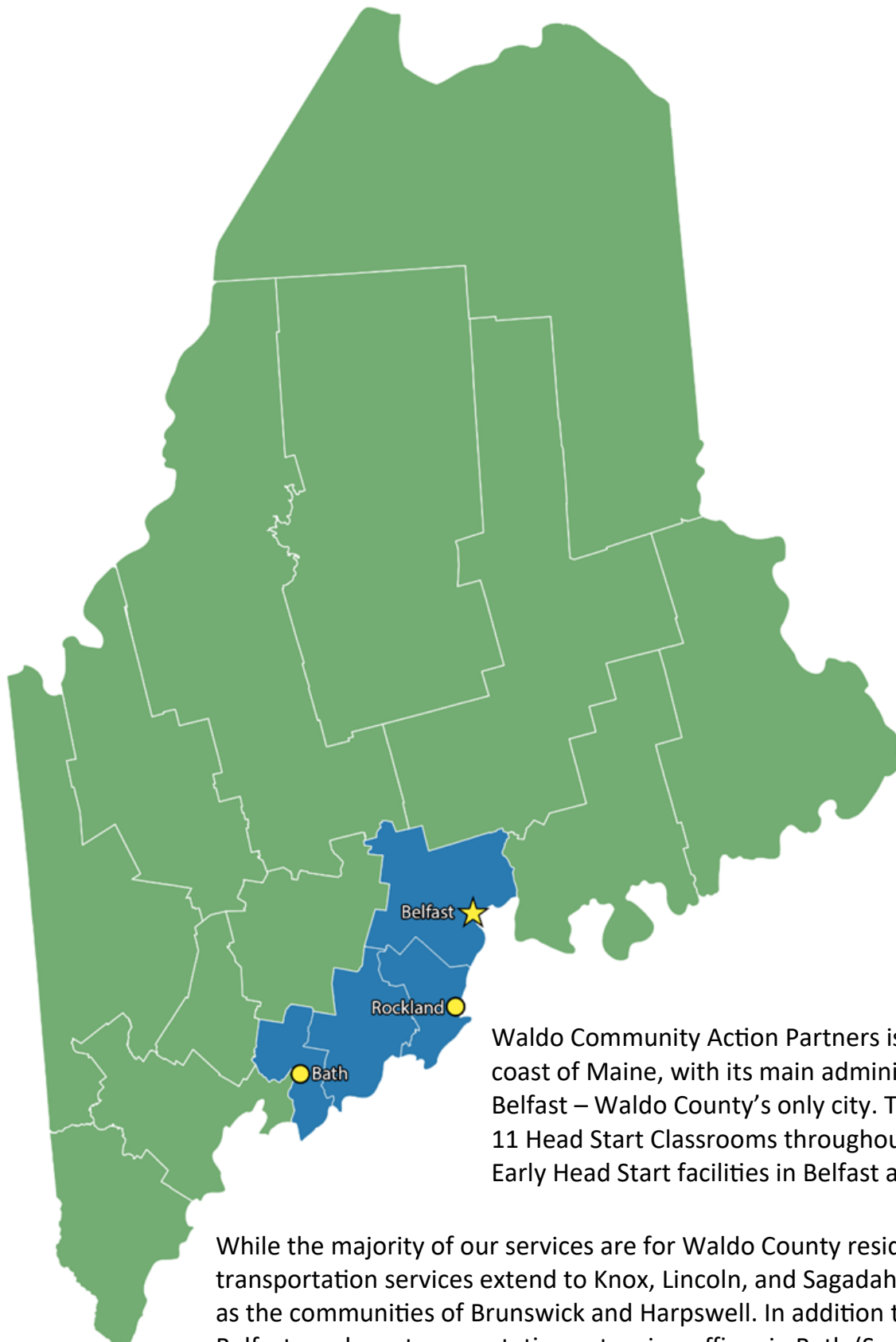
Mary Lynn Hersey, *Early Childhood Director*

Marina Kinney, *Development Director*

Patricia Kelleher, *Community Services Director*

Jeff Amann, *Housing Director*

# SERVICE AREA



Waldo Community Action Partners is situated on the coast of Maine, with its main administrative offices in Belfast – Waldo County’s only city. The agency also has 11 Head Start Classrooms throughout the county and 2 Early Head Start facilities in Belfast and Searsport.

While the majority of our services are for Waldo County residents, our transportation services extend to Knox, Lincoln, and Sagadahoc counties as well as the communities of Brunswick and Harpswell. In addition to an office in Belfast, we have transportation extension offices in Bath (Sagadahoc County) and Rockland (Knox County).

# PROGRAMS & SERVICES

For 57 years, Waldo Community Action Partners (WCAP) has been a committed service provider seeking to improve our community and the lives of individuals and families. Annually, WCAP serves more than 5,800 people living in Waldo County and an additional 2,000 individuals through transportation services in the Midcoast area.

The majority of our clients fall under the 200% Federal Poverty Limit and 28% have a disabling condition. Of those reporting, 60% are insured by Medicaid. We serve the most vulnerable among us by utilizing local, State, and Federal funds. However, we depend on support from our community to do so.

We work side-by-side with our clients and valued partners to care for everyone who needs our help. We support expectant parents and our youngest residents through Head Start, Early Head Start, and Pre-K services. We assist individuals with meeting basic needs such as food and housing assistance. We help plan for greater financial security by providing supports and laying plans for earning degrees and securing a job. We ensure people are warm and safe in their homes through our Heating Assistance, Weatherization, and Home Repair programs. We also provide transportation services to help clients get to the pharmacy, grocery store, and critical medical appointments.

We strive to meet the changing needs of those we serve and pivot to address the most pressing situations. In response to the pandemic, we used emergency response funds to provide additional food and rental assistance to meet the growing housing and food insecurities in our community.

**The value of all of these services is estimated to be over \$17 million annually.**

For more information about the impact of our programs, [please read our 2021 Annual Report](#).





# METHODOLOGY

Community Action Agencies across the United States must comply with 58 Organizational Standards that ensure they have appropriate capacity to provide services to low-income members of the community. These standards are organized into nine categories that focus on Maximum Feasible Participation, Agency Vision and Direction, and Operations and Accountability (Reference IM 138, State Establishment of Organizational Standards for CSBG Eligible Entities).

Category 6 of the Organizational Standards specifically looks at agency Strategic Planning.

*Standard 6.1:* The organization has an agency-wide Strategic Plan in place that has been approved by the governing board within the past 5 years.

*Standard 6.2:* The approved Strategic Plan addresses reduction of poverty, revitalization of low-income communities, and/or empowerment of people with low incomes to become more self-sufficient.

*Standard 6.3:* The approved Strategic Plan contains family, agency, and/or community goals.

*Standard 6.4:* Customer satisfaction data and customer input, collected as part of the community assessment, is included in the Strategic Planning process.

*Standard 6.5:* The governing board has received an update(s) on progress meeting the goals of the Strategic Plan within the past 12 months.

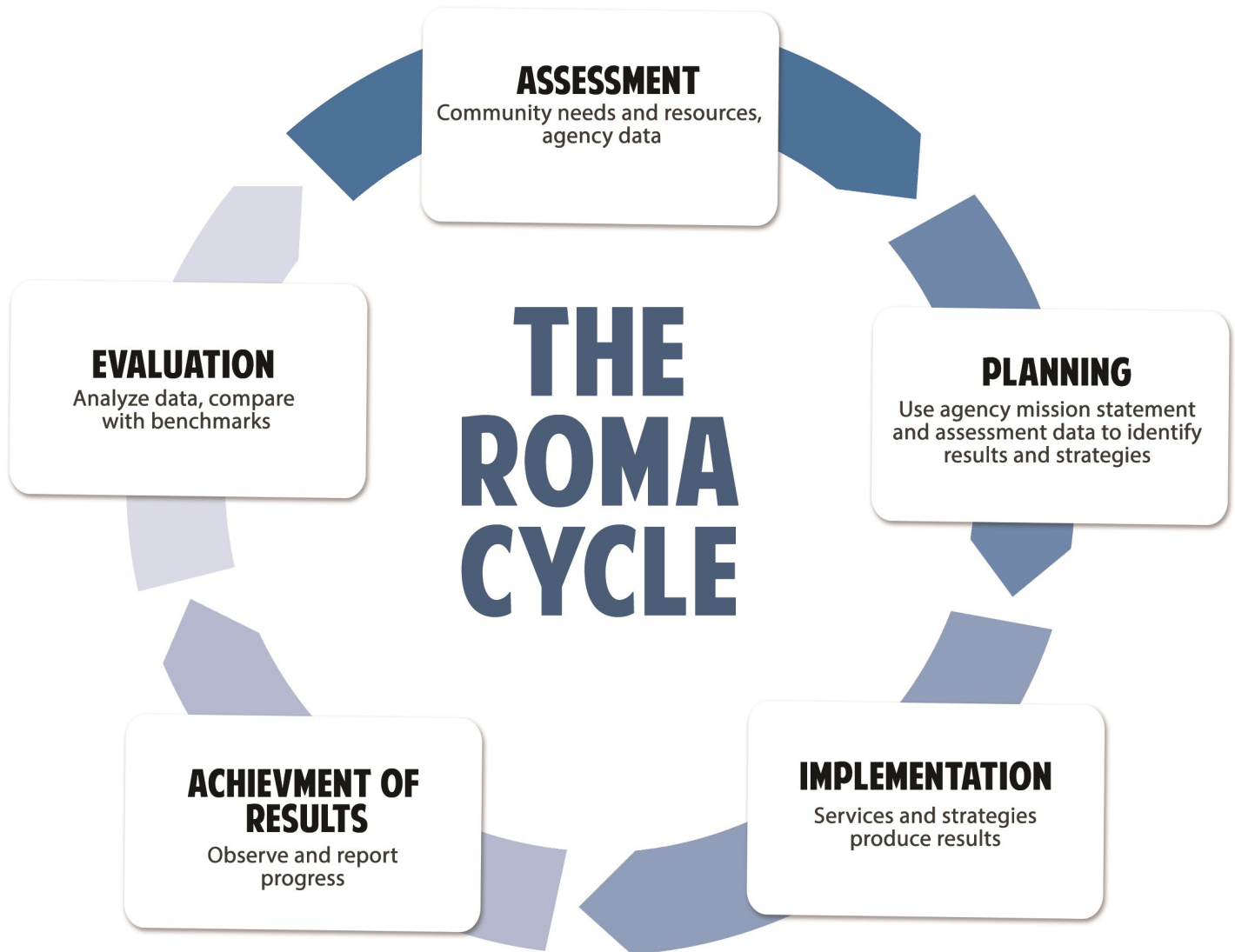
WCAP included this category of Organizational Standards and others in the Strategic Planning process. In accordance with the Community Action Performance Management Framework, WCAP follows the Results Oriented Management and Accountability (ROMA) Cycle in all aspects of its operation to ensure that we are addressing the current needs of our community to our full capacity. As such, it guided the development of our Strategic Plan.

## What is the ROMA Cycle?

The Results Oriented Management and Accountability (ROMA) Cycle is a performance-based management system that was created for Community Action Agencies, such as WCAP, to use in order to achieve continuous program improvement and accountability. There are five basic principles at the core of ROMA that work as a cycle to ensure agencies stay focused on outcomes.



# METHODOLOGY



## The ROMA Cycle and strategic planning...

Following the ROMA cycle, WCAP first had to complete its Community Needs **Assessment** in 2020. The feedback from our community identified needs that our agency had to create strategies to address. This was done during the **planning** phase of the ROMA Cycle and the creation of our new Strategic Plan.

Once the plan was finalized, Leadership Staff created a detailed work plan with yearly goals. Each year, our agency will **implement** strategies to reach these goals, providing quarterly **progress reports** to the Board of Directors. We will continually **evaluate** our successes and our opportunities for improvement before beginning the next year's work plan goals. Towards the end of our five-year strategic plan, we will begin another Community Needs Assessment, starting the ROMA Cycle again.

# COMMUNITY NEEDS ASSESSMENT

In the fall of 2020, all 10 State of Maine Community Action Agencies (CAAs), along with MeCAP, the State Association, partnered together to conduct a statewide Community Needs Assessment (CNA). This began our Strategic Planning process, as mentioned in the previous section regarding the ROMA Cycle. In addition, we incorporated information from the recently completed Bridging Plan we conducted in 2020 and the [COVID Needs Assessment](#).

The statewide CNA was the first of its kind in Maine and assessed community needs at both the state level and regionally based on agency coverage areas. After a Request for Proposals was released, the contract to assist the CAAs and MeCAP in this process was awarded to Crescendo Consulting Group (Crescendo). Crescendo worked collaboratively with MeCAP to gather and analyze data using established methods, matching causes and conditions of poverty and assessing community services gaps.

The CNA methodology includes research methods designed to evaluate perspectives and opinions of area stakeholders and community members – especially those from underserved populations and agency clients. The methodology used helped prioritize the needs and establish a basis for continued community engagement – in addition to simply developing a broad, community-based list of needs.

The major sections of the methodology included the following:

- **Strategic Secondary Research:** This type of research includes a thorough analysis of previously published materials that provides insight regarding the community profile and health-related measures.
- **Qualitative Interviews and Discussion Groups:** This primary research includes discussion groups and interviews with CAA leadership and staff, other community service providers, and community members across the state of Maine. 150 one-on-one interviews that lasted approximately 20-30 minutes in length were conducted. This provided the opportunity to have in-depth discussions about community-wide strengths, barriers to health equity, and action-steps. In addition, 25 virtual or in-person focus group discussions allowed Maine residents to reach a consensus as to what they see as the biggest needs facing the community. In total, over 300 individuals provided input from the following segments: community service organizations, executive leadership, faith based organizations, governmental organizations, and MeCAP clients and stakeholders by region.
- **Community Survey:** Crescendo conducted an online and paper-based survey in eight languages with over 7,000 community members across the state. Results were analyzed for Waldo County, and data tables / graphs were created to illuminate the results, which can be found in the [WCAP Community Needs Assessment](#) report on our website.

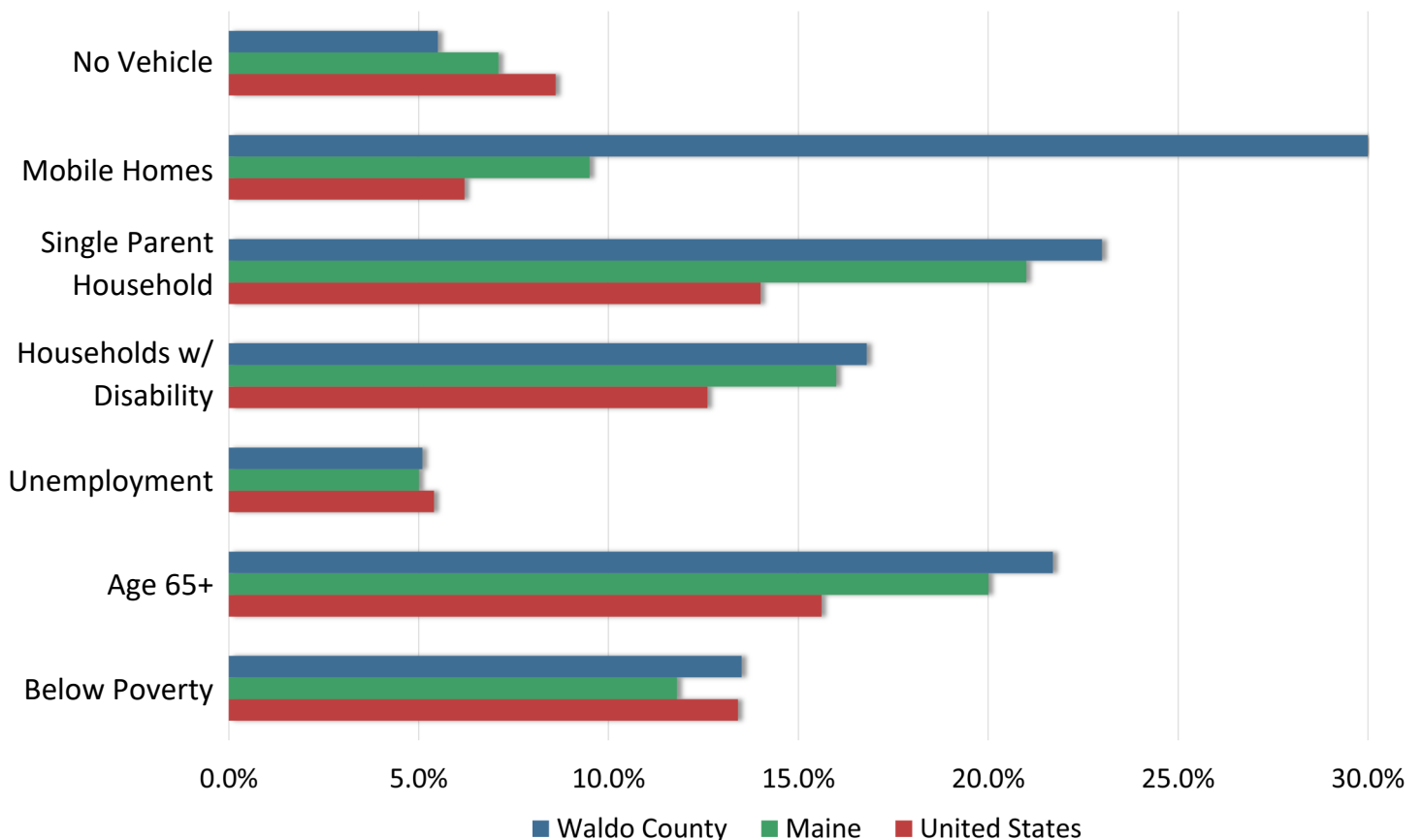
Through this methodology, a list of 35 community needs was generated, which were later used in the development of our Strategic Plan.

# COMMUNITY NEEDS ASSESSMENT

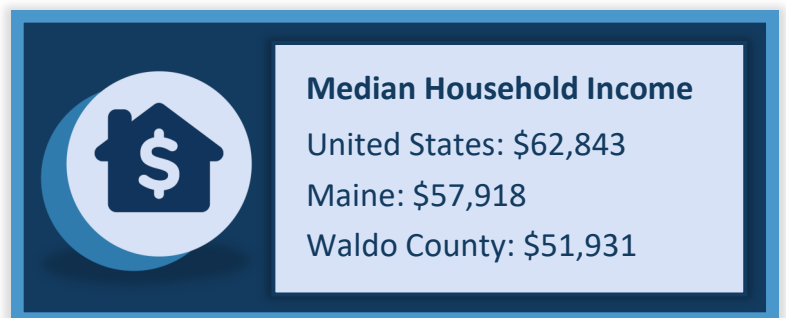
The Waldo County CNA report was finalized in October of 2021. The results were presented to the WCAP Board and approved on December 9, 2021. MeCAP released the statewide CNA on January 26, 2022, with a press conference held at the State House in Augusta, as well as a coordinated statewide media release.

Below is a snapshot of some key information from the [Waldo County Community Needs Assessment](#):

## Social Vulnerability Index\* of Waldo County Community



***\*Social vulnerability** refers to the potential negative effects on communities caused by external stresses such as natural disasters or disease outbreaks. Reducing social vulnerability can decrease both human suffering and economic loss.*





# THE STRATEGIC PLAN

The Leadership Team started discussing the timeline and process for the Strategic Plan in January of 2022, mapping priorities and planning for next steps. The Strategic Planning Committee was created, which included all members of the Leadership Team and selected Board members. This ensured that all areas of the organization had representation and input through their program director. The Committee hired Laura Mitchell from LM Strategy LLC to help steer the process and provide professional expertise.

Due to staff changes, some team members participated in only the prioritization process or parts of the planning process, but all are represented here:

<b>Strategic Planning Committee</b>	
WCAP Board of Directors	
Jason Moody	Syrena Gatewood
Dan Horton	Melissa Harding
WCAP Staff	
Donna Kelley	LeeAnn Horowitz
Katie Bagley	Marina Kinney
Michael Hallundbaek	Patricia Kelleher
Jeff Amann	Mary Lynn Hersey
Jordanne Doyon	Jamie Williams

## **Timeline Overview of Strategic Planning Process**

January 2022—Strategic Planning Committee formed

March 2022—Formal review of Mission Statement

June 2022—Board Strategic Planning retreat

August 2022—Approval of new Mission and Vision Statements

August 2022—Approval of Five-Year Strategic Plan

October 2022—Formal Adoption of Mission and Vision Statements into By-Laws

November 2022—Creation of Leadership Team’s workplan

January-March 2023—Rollout of Strategic Plan

# MISSION AND VISION STATEMENTS

To help give structure to the Strategic Planning process, the Committee met in March of 2022 to engage in the process of a formal review and approval of the agency's Mission Statement. This was done to ensure it still resonated and aligned with the programs and services offered at WCAP.

The Strategic Planning Committee met with the support of our consultant monthly and then biweekly from March to August. During this process, they decided that we also needed a Vision Statement.

Our Vision Statement is the long-term dream for our community—it's the beacon on the hill. The Mission Statement is how we get there.

In June, the entire Board and key staff members had a retreat to finalize a draft of the mission and vision statements. On August 24, 2022, final drafts of our new Mission and Vision Statements were presented to the entire Board and the following were formally adopted in October of that year:

## Mission

*"Empowering families, individuals and communities by removing barriers, promoting economic stability, and improving quality of life."*

## Vision

*"Thriving communities; one individual and one family at a time."*

Along with these statements, the Committee believed the organization needed a sound set of articulated principles and values to guide our work in the future. The Guiding Principles were drafted in conjunction with the new Mission and Vision Statements at the Board Strategic Planning Retreat in June 2022.

# GUIDING PRINCIPLES

**At WCAP we are committed to the following values that drive our approach to ending poverty in our community.**

## **Empowering People**

Supporting people is at the core of all that we do. We improve the quality of life of individuals and families. We provide responsive and impactful programs to meet a variety of needs that build strong communities.

## **Healthy Workplace**

Our greatest asset is our people. We value providing a vibrant, inclusive, and inspiring work environment. We strive to be a local employer of choice that brings together a diverse team. WCAP staff are energized by the mission, and everyone is committed to delivering high quality programs that help people during challenging times. We honor our team members by providing comprehensive training and development opportunities, competitive compensation, and access to professional growth.

## **Equity**

We welcome and respect everyone. We foster equity and inclusion in our community.

## **Opportunity**

We believe everyone should have opportunity and access to help when they need it.

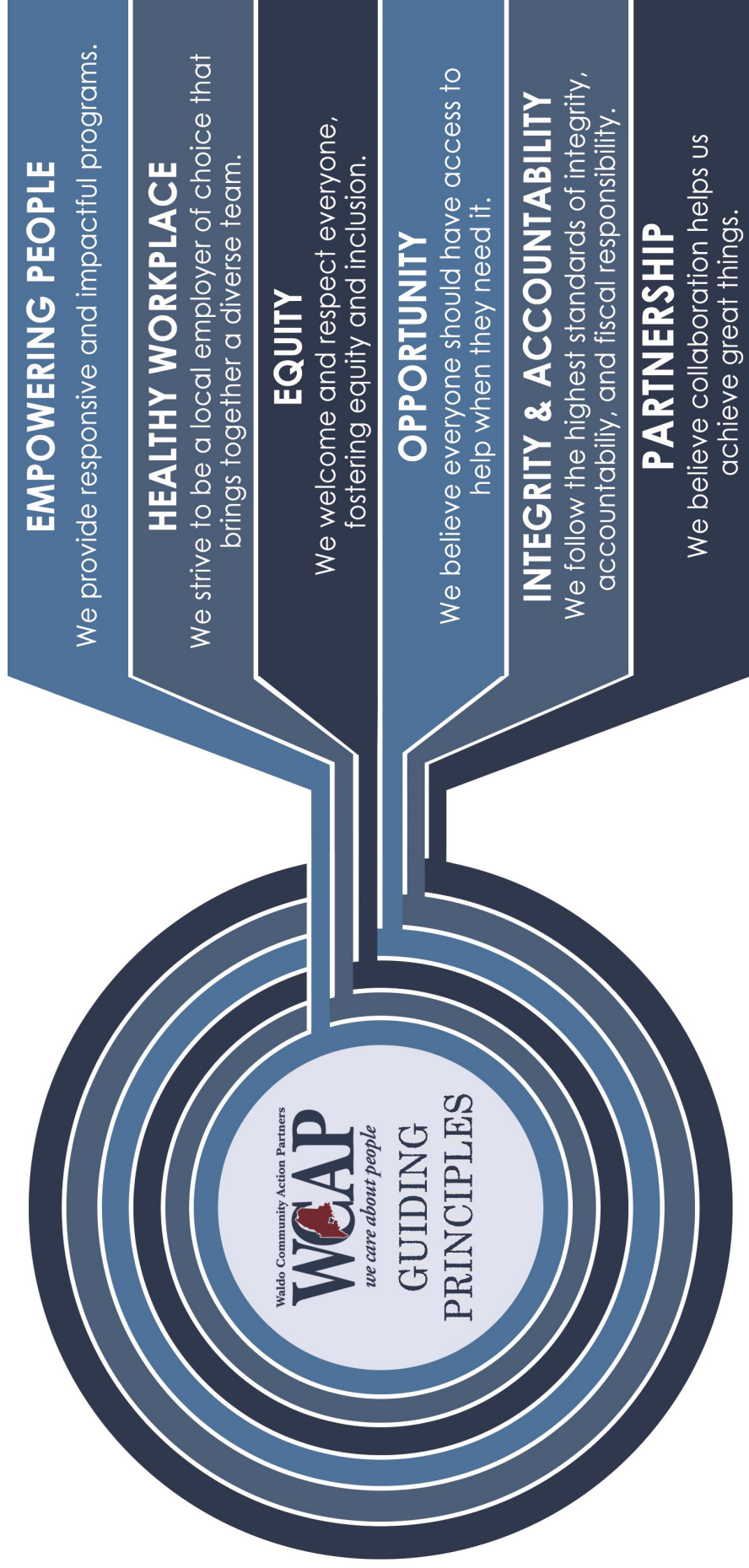
## **Integrity and Accountability**

The trust we build with people and communities we serve is a responsibility and an honor. We follow the highest standards of integrity, accountability, and fiscal responsibility in meeting the needs of our communities. We strive to deliver positive outcomes that our donors, grantors and communities expect.

## **Partnership**

Whether its leading or following, WCAP believes in the power of teamwork, shared goals, and supporting one another to achieve great things. Collaboration with people in need, other organizations, funders, and communities is what makes removing barriers possible. No one can do this work alone.





# ADDRESSING THE NEEDS

With the Mission and Vision Statements drafted, the Strategic Planning Committee then focused on identifying top needs in our community to guide the creation of the Strategic Plan.

The 2021 Community Needs Assessment (CNA) identified 35 community needs. The Leadership Team members went through this list and chose five needs that they believe are top priorities for their clientele. During this process, they took into consideration some of the interview quotes from key stakeholders and survey comments in certain categories, such as housing and transportation. For the full table and quotes, [see pages 7—9 in the 2021 CNA](#).

The Committee, along with our consultant, also conducted a survey of WCAP staff and key stakeholders with a few forward-thinking questions and a ranking of priorities. (see Appendix)

## Key Focus Group Quotes:

<b>Top Challenges Mention</b>	<ul style="list-style-type: none"><li>• Internet access</li><li>• Affordable housing</li></ul>
<b>Housing</b>	<ul style="list-style-type: none"><li>• As a landlord it's easy to rent. And I would love to buy/build more, but that industry is out of control. I own one property, I posted it for rent, and I had 200 applications, people offering to pay the entire rent up front.</li><li>• I feel I've experienced housing discrimination when people find out I am a single parent family. I know others who have as well.</li></ul>
<b>Childcare</b>	<ul style="list-style-type: none"><li>• Childcare is not affordable, and unfortunately for the childcare provider it's not an affordable lifestyle. Semi-skilled employees don't make enough to afford the services themselves.</li><li>• And when we're able to provide 0-3 help, then what happens before they are school aged? There's nothing for that gap after the age of 3.</li></ul>
<b>Transportation</b>	<ul style="list-style-type: none"><li>• When it comes to low income people, the wages do not support the cost of owning, maintaining, and insuring a vehicle. They are a breakdown away from financial disaster.</li><li>• In areas where public transit is common or good, there is great investment via taxation, etc. We simply do not have the support for that, so it falls to us, a CAP agency to figure out how to finance the cost.</li></ul>
<b>Employment</b>	<ul style="list-style-type: none"><li>• All businesses (manufacturing, retail, clerical, services) are desperate for workers. There are Waldo Counties – the rural interior with farming, and unskilled jobs and the coastal with sea building, hospital, nursing home, skilled work jobs. It's made it hard for people in interior Waldo County to stay in the area and we're losing the young working population.</li></ul>
<b>Basic Needs</b>	<ul style="list-style-type: none"><li>• Food insecurity</li><li>• Utility and heating assistance</li></ul>

# ADDRESSING THE NEEDS

Once the Leadership Team members created their list of top five needs for their clientele, they met as a group to discuss their choices. They reached a consensus and generated a final list of prioritized needs for the community, identifying if each need was something to be addressed at a community, agency, or partner level. The WCAP Board followed a similar process and results were used to arrive at five key priority areas for our clientele.

Waldo Community Action Partners is dedicated to addressing needs in our community. As such, the Strategic Planning Committee looked at the final list of priorities provided by the entire Leadership Team and Board and discussed how our agency could do our part in addressing them.

For example, more livable-wage opportunities was listed as a top priority. WCAP can do its part to address this need by improving our own wage structure and benefits as well as offering job search assistance and financial coaching through our Resource Advocates.

**The following are the top five identified needs for our community:**



**Affordable  
housing.**



**Quality  
affordable childcare.**



**Access to  
public transportation.**



**Awareness of  
WCAP's services.**



**Livable-wage  
career opportunities.**



# GOALS AND STRATEGIES

The identified needs helped steer the creation of four main agency goals for the next five years. The Strategic Planning Committee created two to three main strategies for each goal, producing a final draft of the plan.

2023 – 2028 Goals and Strategies
<p><b>1. Remove barriers to economic stability and address poverty, one individual, and one family at a time.</b></p> <p>Strategy A: Sustain the delivery of high-quality programs</p> <p>Strategy B: Develop and expand programs that meet community needs</p>
<p><b>2. Enhance our impact, improve the client experience, and address changing client needs.</b></p> <p>Strategy A: Open a new consolidated facility for all programs as a part of a campus masterplan</p> <p>Strategy B: Provide universal access to all programs using a shared digital intake, case management, and reporting tool</p>
<p><b>3. Develop a workplace culture that provides careers with meaning and growth and attracts and retains an engaged workforce.</b></p> <p>Strategy A: Improve wage structure and benefits</p> <p>Strategy B: Increase and enhance training and growth opportunities</p> <p>Strategy C: Improve employee wellness and engagement</p>
<p><b>4. Develop organizational capacity, sustainability, and resiliency.</b></p> <p>Strategy A: Document all administrative and program processes</p> <p>Strategy B: Improve efficiency and effectiveness of processes</p> <p>Strategy C: Increase organizational resources to support programs, build a new facility, and plan for a campus</p>

# NEXT STEPS

**On August 24, 2022, the WCAP Board of Directors approved the new Five-Year Strategic Plan, which will take effect in January 2023.**

## **Next Steps**

Using the strategies outlined for each main goal, the Leadership Team created a detailed workplan, which was finalized in November of 2022. This workplan identifies yearly milestones to better help us achieve our goals.

For the next five years, members of the WCAP Leadership Team and key management staff will continually assess progress on milestones detailed in the workplan. Priority tasks include providing universal access to all programs, empowOR implementation, a Whole Family Approach delivery model, enhancements to organizational processes, and the building of a new facility.

The following page provides an overview of the long-term strategies outlined in the workplan. Each year, WCAP will issue an overview of that year's strategies so that our community can be better aware of how we are striving to address their needs.



*This picture is of land purchased in Belfast in 2021. It will be the home of our new building, improving services to our community.*

# Strategic Plan 2023 - 2028

**Mission:** Empowering families, individuals and communities by removing barriers, promoting economic stability, and improving quality of life.

**Vision:** Thriving communities ; one individual and one family at a time.

