Community Action Agency Strategic Plan

FY27 – FY30

Community Action Agency

Promoting Self-Sufficiency since 1965

Narrative Summary

Board Approved: August 27, 2026

Plan Summary

Community Action Agency (CAA) developed this Strategic Plan for the period FY27 – FY30 in a structured, sequential process from February through June, 2026. This Plan development immediately and intentionally followed the development of a new Community Needs Assessment (CNA) which occurred from July, 2025 through January, 2026. A framework diagram that summarizes all the key elements of this Strategic Plan appears on the next page of this document. When reviewing the diagram, follow the flow of the arrows from left to right. This flow reflects both the sequential way in which the plan was developed as well as how to think about the plan from the most encompassing to the most detailed levels. In this way, the plan begins with items on the left, which provide "input" into the organization Vision and Goals. The Vision and Goals represent the desired future state of the organization. In turn, the Vision and Goals in the center of the page dictate the specific tactics designed to achieve the goals.

This single page represents a concise summary of the substantial data collection and analysis involved in creating the new Strategic Plan. All key components of the new Strategic Plan as well as some key findings and insights, were presented to the CAA Board at their August 27, 2026, meeting for review and approval. The one-page summary was designed to provide an overview of the plan. The development process and the resulting key components are described in the remainder of this document. There are also detailed meeting notes and materials, as well as PowerPoint file "archives" documenting both the process and findings.

Mission

We partner with people in our communities to achieve self-sufficiency.

Industry Assessment

- Workforce Shortage / Workforce Competency
- Funding Diversification
- Cybersecurity
- Goal-related Advocacy & Community Awareness
- Emergency Services AND Prevention
- Collaboration & Partnerships
- Whole Family / 2 Gen Models

Market Assessment

- ☐ Tier 1 Priorities (CNA)
  - Housing & Homelessness
  - Early Education
  - Employment / Living Wage Job
- ☐ Tier 2 Priorities (CNA)
  - Mental health
  - Transportation
  - Food Insecurity
- ☐ Small Area Variation

Vision 2030

We are a trusted partner providing equitable local solutions that support self-sufficiency.

Goals for FY27 – FY30

1. CAA is positioned for success with an effective, mission-motivated team supported by administration with a solid succession plan.
2. CAA partners with individuals and families to provide immediate and preventative assistance to meet their full potential.
3. CAA initiates innovative and effective approaches to move people toward self-sufficiency.
4. CAA's funding base is larger, more diverse, and less restricted.

Gap Analysis

Organizational Assessment

Strengths: Current Portfolio; Adaptability; Leadership Focus, Community Reputation, Inclusive Culture and Equitable Opportunity

Weaknesses: Program "Silos"; Work Instructions; Succession Planning; Staff Understanding of Outcomes

Opportunities: Growing Interest in Social Determinant Strategies; Community Partnerships;

Threats: Federal / State Funding; Cyber Security / Scams, AI Misuse; Measurable Results Expectations of Funders

Community Action Agency

Promoting Self-Sufficiency since 1965

FY27 – FY30 Strategic Planning & Improvement Framework

Values

- Integrity
- Collaboration
- Results Oriented
- Learning
- Inclusion, Diversity, Equity, and Anti-Racism (IDEA)
- Person-Centered
- Advocacy
- Responsiveness

FY27 – FY30 Strategies

(Tactics Groupings)

A. Community Collaboration
B. Diversify Funding
C. Promote Self Sufficiency
D. Standard Operating Procedures
E. Professional Development
F. Wrap-Around Service / Support
G. Voice of Customer
H. Technology for Efficiency
I. Succession Planning

Background

Following a Request for Proposals and selection of a consultant, CAA initiated work on the development of a new Community Needs Assessment (CNA) and a FY27 – FY30 Strategic Plan in the summer of 2025. Jeff Schilling, Principal Consultant at Schilling Consulting Services, Inc., a Grand Rapids area consultant specializing in information analysis, strategic planning, and performance improvement for health and human service organizations was selected for this project. The engagement included preparation of draft and final versions of the CNA Report and a Narrative Summary (this document) and all support materials for a new Strategic Plan.

Work on the CNA occurred from July, 2025 through January of 2026, including four Leadership Team Work Sessions. CNA Board approval took place on February 26, 2026. Work on the new Strategic Plan began with a Leadership Work Session on January 28, 2026 and continued through June of 2026, with the last Strategic Plan related work sessions occurring on June 15, 2026. The limited overlap of CNA and Strategic Plan development was intentional, as some initial work on the new Strategic Plan could be undertaken before final CNA approval. The entire combined project timeline for both CNA and Strategic Plan development is shown on page 21.

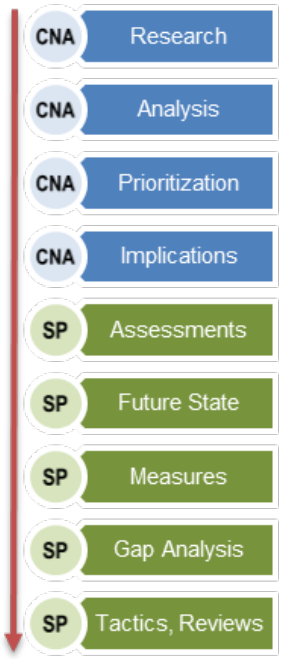
The CNA Findings and Report became major, critical sources of information fueling the development of the Strategic Plan. Leveraging the information obtained in a thorough and comprehensive CNA as direct input into the development of a Strategic Plan follows the progression of key activity embodied in the Results Oriented and Management Advancement (ROMA) Cycle. Refer to the diagram below. When Assessments fuel planning in this way, it sets up the subsequent steps of implementation and achievement of results, leading to evaluation and completion of the initial cycle. At that point, the foundation and pattern have been set for subsequent “cycles” of improvement.

Plan Development Methodology

During the development of the FY27-FY30 Strategic Plan, the following individuals participated in the Strategic Plan Development Work Sessions:

- Toby Berry, Chief Executive Officer
- Katrina Duling, Assistant to the CEO
- Clint Brugger, Director of Training & Outreach
- Lora Higgins, Human Resource Director
- Laura Reaume, Director of Community Programs
- Codi Benjamin, Children's Program Director
- Steve York, Communications Manager
- Scott Parker, Community Development Director
- Tony Samon, Chief Financial Officer

Development of the FY27 – FY30 Strategic Plan leveraged a "Vision-Centered" process that begins with gathering a wide range of information. That information is analyzed and used to "set the table" for a discussion of the *desired future* state of the organization, usually expressed in the form of Goals, a Vision Statement, or both. Additional information is then assembled, providing a context for assessing the *current* state of the organization, expressed in the form of a SWOT (Strengths, Weaknesses, Opportunities, and Threats) Analysis. With the future state (Goals) and the current state (SWOT) both identified, they are then compared and contrasted in a "Gap Analysis" which fuels the identification of Tactics – the "work" that will enable the organization to move from present state to a future state in which the Goals have been achieved. These Tactics are grouped in cohesive Strategies (themes of work).



The current Values are then reviewed, and in some cases modified, to ensure harmony with the new Goals and Tactics. Lastly, the establishment and regular updating of a Tactics Implementation Plan and an ongoing Plan Review process help ensure successful Plan implementation.

This methodical, sequential approach can be seen as an extension of the methodical, sequential phased approach that was used to develop the CNA (see diagram at right). The four major phases of the CNA development were followed by five major phases of the Strategic Plan (SP) development. The remaining portion of this document provides additional detail regarding each major phase of the Strategic Plan Development Process and the Plan components (refer again to the one-page summary diagram on page 2) that were produced as the work progressed.

Industry Assessment

Great strategy is fed by the synthesis of a variety of information. And so the development of a Vision-Centered Plan begins with two of three assessments that will be used, the first of which is the Industry Assessment.

The Industry Assessment represents an effort to look "outward" beyond CAA at the world of Community Action Agencies and Human Services non-profits in general. Done well, it results in

a digest of the issues, trends, and emerging best practices among the "Industry" in which the organization operates, in this case, the over 900 Community Action Agencies across the United States. And it includes insight into a glimpse of what the future might entail for participating agencies, their Associations, and the broader non-profit human services "industry." For this Strategic Plan, key information was obtained and summarized from the following sources:

- National Council of Non-Profits
- BDO USA (Accounting & Professional Services Firm)
- Urban Institute (Non-profit Research Organization)
- RSM US (Audit, Tax, and Consulting Firm)
- National Community Action Partnership (NCAP)
- Michigan Community Action

The Leadership Team reviewed information from all of these sources at their March 26, 2026 Work Session in which they focused on the development of a Desired Future State as expressed in terms of Goals and a Vision Statement. They identified a number of recurring themes and core issues which are documented in the notes for that meeting, including the following Table which organized the key points into Issues, Trends, and Emerging Best Practices:

Issues	**Trends**	**Emerging Best Practices**
1. Tax Policy & Budget Issues; funding cuts 2. Workforce Shortage 3. Rising Demand 4. Cyber Security 5. Burnout (increasing demand, anxiety funding, short staffed) 6. Workforce "Quality" (Competency, motivation, reliability, etc.)	1. Advocacy & Community Awareness 2. Expand beyond emergency services to prevention 3. Collaboration & Partnerships 4. Diversified Funding 5. Leveraging AI – used wisely?	Whole Family / Two-Generation Models 1. Emphasis on addressing the needs of both parents and children simultaneously. Holistic, integrated support to foster long-term self-sufficiency. Expanding to include Longer Term Solutions 2. Prioritizing root-cause interventions over short-term fixes. Focus on education, employment, financial empowerment, and mental well-being. 3. Greater flexibility and cross-sector collaboration. 4. *In recent interviews, Community Stakeholders share specific examples related to the following needs:* ➢ Housing ➢ Mental Health ➢ Funding ➢ Living Wage Employment

Market Assessment

While the Industry Assessment results from efforts to "look outward," the Market Assessment is one of two assessments where the Planning Work Group "looks inward," in this case, at the market and clients served. For CAA, this focusses on those struggling with, or at risk of, poverty in the three counties served by CAA. This Assessment relies on direct input (Primary Research) from clients of these services. It also includes additional insights from other "stakeholders," including CAA employees who provide the services, and in doing so, have direct, frequent contact with clients. Perception on needs are also gathered from CAA Board

Members and representatives of any other community organizations currently in partnership with CAA or with the potential to collaborate in meeting needs. Lastly, Market Assessments usually include collecting and analyzing information from a variety of other sources (Secondary Research), information that provides additional understanding of known or potential contributing factors to poverty or the risk of poverty in the service area. Typical examples include data on population, employment, education, social services use, and health care services use.

As described previously, CAA had a very significant head start in collecting this kind of input and information by virtue of conducting the 2025 Community Needs Assessment. This assessment included the use of a variety of "Listening Posts" (e.g., surveys, forums, interviews) to gather insights. It combined those primary research findings with data from a wide range of sources (secondary research) enabling the Leadership Team to consider a broad range of information and develop a deeper level of understanding regarding current and emerging "Market" needs.

In conducting the 2025 CNA, the Leadership Team reviewed the results of Secondary Research first, so that the findings could be used to inform the focus and design of primary research efforts. Multiple measures and data elements were assembled from 16 sources. The data were then analyzed and considered in the following groupings:

- General Demographics
- Unemployment and Education
- Early Education and Child Care
- Health (Medical and Mental)
- Broadband Access
- Poverty and ALICE* Rates
- Housing and Homelessness
- Food Insecurity
- Transportation

* **A**sset **L**imited, **I**ncome **C**onstrained, **E**mployed

The Leadership Team reviewed and refined analysis of data in each of these groupings separately as well as engaging in a Meta-Analysis. All information, individual grouping analysis, and the meta-analysis of secondary data are included in the 2025 CNA Report, and the secondary data meta-analysis is included in Appendix A of this document.

These secondary research findings were considered in finalizing seven Primary Research efforts, two of which were existing CAA listening posts, and five of which were newly designed listening posts. When complete, the findings from these primary research efforts were compiled and considered in a second Meta-Analysis highlighting recurrent themes in different social determinants as had been done with the secondary research meta-analysis. These seven primary research efforts are described in detail along with the related findings and the meta-analysis in the 2025 CNA Report and the primary data meta-analysis is included in Appendix B of this document.

Lastly, the Leadership Team engaged in two additional efforts to evaluate community need and potential response using a Prioritization Index and a Partnership Interest Crosswalk, both of which are described fully in the 2025 CNA Report. After considering the results of these two tools and both the Secondary and Primary Research Meta-Analyses, the Leadership Team proposed (and the CAA Board Approved) the following list of Prioritized Community needs:

1st Tier Priorities	**2nd Tier Priorities**	**Limited Role Unless Opportunities Materialize**
1) Housing & Homelessness 2) Early Education 3) Employment / Living Wage Job	A. Mental Health B. Transportation C. Food Insecurity	• Safety / Safe neighborhoods • Medical Health

While the 2025 CNA and resulting list of prioritized needs constituted a major portion of the Market Assessment for Strategic Plan Development, one additional source of information was also considered: Structured Interviews with Community Stakeholders. Eight of the 12 invited stakeholder participated in the interviews; a full report of findings is available in a sperate document.

The Interview Guide used was designed based in part on the results of a survey of Stakeholders that was one of the seven Primary Research efforts in the 2025 CNA. The survey enabled a "deeper dive" into several topics and resulted in some important findings. These "topic" questions and a few key findings are summarized below.

Q. Are Housing needs, Behavioral health care needs, and Transportation needs the top three needs of those facing or at risk of poverty?
A. 7 completely agreed, 1 partially agreed

Q. What are other social determinants where current need outweighs current resources?
A. Child Care (6), Health Care (3), Living Wages (3), Employment (1)

Q. In your work, have you learned of any effective process or approach for addressing any of these priority needs?
A. 17 ideas were shared, some of which were specific community initiatives.

> Interview participants also shared ideas regarding barriers and enablers to addressing availability and affordability of housing.

> Lastly, interviewees had a number of specific ideas on how their organization and CAA might collaborate.

SOAR Analysis

Following review and consideration of both the Industry and Market Analysis, the Leadership Team then prepared a SOAR (Strengths, Opportunities, Aspirations, and Results) Analysis. Similar in format to a SWOT analysis which is commonly used to describe a current state of an organization, the SOAR analysis is a powerful summary of information that can fuel thinking about a desired future state. As with a SWOT analysis, it includes identification of Strengths and Opportunities, but then proceeds to Aspirations and Results (desired results), which can in turn inspire thinking about Goals and associated Goal Measures.

The resulting SOAR Analysis developed by the Leadership Team in their March 26 Work Session appears on the next page.

Strengths	Aspirations
1. Current programming / portfolio works! 2. Training platform 3. Admin Team responds to change, adapting, responding quickly. 4. Admin level stays the course…focused. 5. Don't over-react / panic. 6. Well-known and respected 7. Willing to do the work! 8. Have people on the team that have lived experience 9. Strong Policies and Procedures 10. Have served as fiduciary in some efforts 11. Invested well in IT resources and training 12. Ability to learn and apply success factors from our leading programs to other programs	1. Able to be flexible in anticipation of changes. 2. Creating affordable housing (builder / developer); self-sustaining 3. Good Succession Plan for Admin Team 4. Funding more diversified (esp. in housing); actively seeking and securing grants and donations 5. Shifting to prevention continues to grow; beyond urgent needs 6. "Wrap-Around approach" is more prominent and in practice with clients; more outcomes focus (vs. output) 7. Employee wellness and retention focused
Opportunities	**Results**
1. Community partners are willing to work with us…trusted. 2. Other NPs face similar issues and are willing to partner. 3. Building strong relationships with local municipalities. 4. Opportunity for people of color to work here and advance.	1. Succession Plan is working (days positions stay open is decreasing) 2. Qualitative measures RE Client feedback about help they received 3. Fewer people living in poverty 4. Fewer people coming to same services 5. More / new funding sources 6. Lower turnover increasing longevity 7. Employee survey: Belonging score...would recommend as a place to work

Goals and Rationale

Goals are a critical component of a Strategic Plan in that, together with the Vision, they identify the desired future state of the organization. The Goals can be thought of as critical elements of the Vision statement, and it is crucial that everyone in the organization direct their efforts toward one Vision and one set of Goals. Without this focus, the organization will not change in the ways that have been identified…perhaps, not much at all.

Four Goals were identified for the FY27-FY30 Strategic Plan. Specific measures have been identified for each Goal, though some need additional work in order for them to become operational (routinely measured and reported against a target value). The CAA Leadership Team is prepared to continue and complete the work on the Goal Measures and to implement routine reporting. The Goals are also listed in the center area of the one-page framework on page 2 and are described in more detail on the next few pages of this Plan Summary.

Taken together and with the Vision, these Goals and accompanying descriptions should provide a more vivid picture of the desired future state. Ongoing discussion of the Goals should be

encouraged, not discouraged, because of the potential to add more depth and meaning to description of the future that is desired.

Goal 1: CAA is positioned for success with an effective, mission-motivated team supported by administration with a solid succession plan. The ongoing workforce shortage confronting almost every economic sector, including human services and non-profits, has resulted in it being a part of the strategic focus of almost every organization. The goals of most organizations today include one related to the work force. Only the strategies being pursued seem to differ, and there are even some common themes there as well, including recruitment, professional development, compensation & benefit packages, and retention.

CAA has targeted several key areas of importance related to employee satisfaction and retention, including prioritizing stable, highly capable leadership through enhanced succession planning. This effort is critical, as the relationship with immediate supervisor has continued to be (for decades now) the single most important element of employee job satisfaction. But the work envisioned to achieve this goal does not stop with succession planning. Other strategies focus on developing and deploying multiple learning opportunities (Professional Development) related to other Goals, streamlining work (Technology for Efficiency), and readily accessible learner-centric Standard Operating Procedures to elevate workforce capability and versatility.

Goal 2: CAA partners with individuals and families to provide immediate and preventative assistance to meet their full potential. This Goal is both individual client and family focused, reflecting the evolving understanding of poverty and how to help those in need. Emerging concepts include multi-generational influences, the importance of community, the need for a whole family approach. Emerging practices include trauma informed care, case management, and “warm” handoffs among collaborating organizations. All of these concepts and practices highlight the importance of identifying and coordinating a wider diversity of services and support in an accessible, easy format. And at the center of all these concepts, practices, and collaboration is the individual client and their family.

Strategies to achieve this Goal focus on achieving true Wrap-around Service / Support, Community Collaboration, and at the center, promoting client self-sufficiency, recognizing their vital partnership in improving their own well-being

Goal 3: CAA initiates innovative and effective approaches to move people toward self-sufficiency. This Goal recognizes the need for new and innovative approaches in meeting some pervasive priority client needs. Indeed, some of the priority needs identified in the previous CNA remain a high priority need in the 2025 CNA. In some cases, such as safe, affordable housing, there has been progress, however demographic and economic shifts have prolonged and even exacerbated shortages at lower income levels. Increased effort, and progress, are needed requiring innovative solutions that have a track record of success. There is less and less margin for error in selecting potential solutions.

However, given the widespread nature of the housing challenge in Michigan and the US, many diverse experiments are underway, some of which are succeeding. This is true with some other priority areas of need as well. CAA can play a critical role in “next level” client support by leading innovative efforts in housing, early education, and employment solutions. These innovative efforts will likely include solutions proven elsewhere that CAA studied and “adapted” to succeed in the context of local community circumstances.

This Goal is closely aligned in multiple ways with Goal 2 through the common leveraging of strategies. The “innovative and effective approaches” pursued as part of realizing this Goal will, by design, focus on Wrap-around Service / Support, Community Collaboration, and promoting client self-sufficiency.

Goal 4: CAA's funding base is larger, more diverse, and less restricted. Challenging economic times and national and state budget constraints are leading to more uncertainty regarding public funding. In order to help compensate, identifying and increasing private funding is becoming a more critical priority. And, as more human service organizations embrace more "holistic" concepts and practices (e.g., case management, wrap around service, whole family approach, behavioral health integration, etc.), the need to secure less restrictive funding is an imperative to impactful solutions. However, the support needed for long term CAA sustainability extends beyond funding. Community support in the form of volunteerism and advocacy requires additional Tactics of broader community engagement, and the efforts to achieve that support will need to be innovative and community-facing.

Goal Comparison

In some cases, a new Plan Goal can be understood as an extension of a previous Plan Goal, while others are fundamentally different. There are also instances where a previous Goal can be seen as a subcomponent of a new Goal, or visa-versa. This relationship is sometimes more apparent when considering the various Objectives or Strategies associated with each Goal. The following table lists previous and new Plan Goals side by side in an effort to highlight some of these relationships. Questions and comments are encouraged as they contribute to further understanding of the relationships between the previous and new Strategic Plans.

Previous 2023-2026 Goals & Objectives	New FY27-FY30 Goals & Strategies
4. Operational Excellence • Strengthen communication systems • Staff improvement tools • Staff self-sufficiency • Strategic Partnerships	1. CAA is positioned for success with an effective, mission-motivated team supported by administration with a solid succession plan. • Standard Operation procedures (SOPs) • Professional Development • Technology for Efficiency • Succession Planning
1. Advancing Equity • Intentional Equity focus • Awareness & acceptance • Building resilience • Strategic Partnerships	2. CAA partners with individuals and families to provide immediate and preventative assistance to meet their full potential. • Community Collaboration • Promote Self-sufficiency • Wrap-around Service / Support
3. Community Impact • Education on reaching potential • SDOH Terminology • External programming communication • Strategic Partnerships	3. CAA initiates innovative and effective approaches to move people toward self-sufficiency. • Community Collaboration • Promote Self-Sufficiency • Wrap-around Service / Support
2. Advocacy and Engagement • SDOP Education • Build local awareness of Poverty • Support resident advocacy • Build Capacity & Impact through Partnerships	4. CAA's funding base is larger, more diverse, and less restricted. • Diversify Funding

Goal Measures

Without workable measures, Goals are often neglected or not pursued at all. Conversely, Goal Measures provide a way to more objectively evaluate progress toward achieving critical elements of the desired future state. They can also be used to assess the effectiveness of various strategies and tactics (the work) needed to achieve the Goals. In their Work Session on March 26 and a subsequent session on April 9, the Leadership Team identified and refined a list of measures for each Goal, focusing on characteristics included in the SMART Goal concept (Specific, Measurable, Achievable, Relevant, and Time Bound). The following table lists the Goal Measures recommended by the Leadership Team. With the Strategic Plan finalized and approved by the CAA Board, the Leadership Team takes steps to implement the measures, including the development of operational definitions where needed and target setting.

FY27-FY30 Strategic Goals	Proposed Goal Measures
1. CAA is positioned for success with an effective, mission-motivated team supported by administration with a solid succession plan.	1. A comprehensive, long-term Admin Succession Plan has been created and in place. 2. Lower turnover / increasing longevity rates 3. Employee survey key questions scores improving (*Belonging* score, *Would recommend as a place to work* score)
2. CAA partners with individuals and families to provide immediate and preventative assistance to meet their full potential.	1. Client survey questions rating "help they received" improving 2. Fewer people living in poverty as measured by Federal Poverty Guidelines
3. CAA initiates innovative and effective approaches to move people toward self-sufficiency.	1. Fewer people coming to CAA looking for same services / help. 2. Outcome / performance indicators have been achieved (Project-specific). 3. Turna-around time for service fulfillment is shorter.
4. CAA's funding base is larger, more diverse, and less restricted.	1. Funding coming from more sources 2. More funding has fewer restrictions

Vision Statement

Both Vision Statements and Goals relate to the *desired future state* of an organization. While Goals describe critical, measurable components of that future state, the Vision Statement conveys a more complete concept if all the Goals were achieved. Both the Vision and Goals are highly influenced by what is, and what is projected will be, occurring in the industry and market in which the organization exists. Since client / customer needs, and the industry and market forces that influence them, are often evolving, the Vision Statement and Goals usually change with each Strategic Plan.

In the course of developing the four new goals for the FY27 – FY30 Plan, the Leadership Team also re-examined the current Vision Statement. Both Goals and Vision are different expressions of the desired future state of an organization, so continuity is important. In discussion, the Planning Work Group felt that while the current Vision Statement aligned well with the Goals and Mission of CAA, and included clear, descriptive wording, it was lengthy. By contrast, both

Vision and Mission Statements have evolved to a much more succinct and shorter wording format over recent years. In addition, the current statement reads as a state that CAA is trying (…aim…support in reaching…) to achieve (future tense), whereas the more current popular format favors expressing the Vision as though it has been achieved (present tense).

With these types of wording improvements in mind, the Work Group developed the following new proposed Vision Statement listed at right in the table below along with the current vision statement, listed on the left.

Current Vision Statement	**2027-30 Vision Statement**
We aim to provide equitable and inclusive opportunities and community partnership to address the causes and conditions of poverty to support individuals, families, and communities in reaching their full potential.	We are a trusted partner providing equitable local solutions that support self-sufficiency.

Mission Statement

In the course of developing new Goals and a Vision Statement for the Plan, the Leadership Team also reviewed the Mission Statement. Top of mind for the Team was one of the same considerations related to the Vision Statement. How could the wording be shortened, more concise? Brevity has added importance for a Mision Statement because it makes it easy to remember. When an employee encounters a situation for which there is no established policy or procedure, they are most likely to revert to the Mision and Values of the organization to guide their actions.

While Vision and Mission statements have both experienced a trend toward brevity in format, they also differ in their focus. While Vision Statements describe the desired future state of an organization at a point in time (the end of current plan horizon, in this case 2030), Mision statements articulate the core purpose of an organization…"why are we here?...to accomplish what?" As a result, they are not tied to a specific point in time. Instead, the purpose of the organization is more lasting, and tends to evolve much more slowly. In fact, it is the part of a Strategic Plan that changes the least often; 10 to 15 years between changes / revisions is fairly common.

With these similarities and differences in mind, the Leadership Team members and the CAAC Board agreed that the general description of purpose in the current Mission Statement was still highly appropriate. Simpler wording, if it could be found, would help make it more memorable for employees and stakeholders and more relatable for clients and general public.

Several iterations were developed and considered with the final new mission statement wording approved by the Board at their September 24, 2026 meeting. The new Mission Statement appears on the right in the table below next to the previous Mission Statement.

Previous Mission Statement	**New Mission Statement** (Board approved: 09/24/26)
We provide an equitable and inclusive local approach to support individuals, families, and communities in reaching their full potential through impactful collaboration, education, programs, advocacy, and leadership.	We partner with people in our communities to achieve self-sufficiency.

Organizational Assessment

With the desired future state of CAA now defined in terms of Goals, Goal Measures, and a new Vision Statement, the Leadership Team could now compare that future state to the current state of CAA. This comparison enables a "Gap Analysis" in which changes can be more easily identified that will enable CAA to evolve from current to future state. In the same way that the Industry and Market Assessments "set the table" for determining a desired future state, the third and last Assessment, the Organization Assessment, set the table for evaluating the current state of CAA.

The Organization Assessment included primary research results from:

1. **CAA clients,** in the form of the Annual CNA Survey and Service-specific Satisfaction Surveys
2. **CAA Board Members,** in the form of the 2025 Survey
3. **CAA Employees,** in the form of the 2025 Employee Survey, the 2024/25 Trauma Informed Survey, and an Employee Feedback Survey
4. **Community Stakeholders,** in the form of the 2025 Stakeholder Survey

The following table provides key observations made by the Leadership Team as they reviewed these sources of feedback in their April 30, 2026 Work Session:

Source	Key Observation(s)
1. CAA Clients	• Satisfaction is pretty high. Most clients feel they get what they need. • Client familiarity with other programs could be higher. "Wrap around support." • More study is warranted on whether or not there are need differences between inside / outside city residents.
2. CAA Board Survey	• Could provide Board Members with support on how to respond to what they sometimes hear from community members.
3. CAA Employees	• Employees don't always know about all available services. • Trauma Informed Assessment – Improvement is noteworthy (less stressed, more connected, reduction in "unsure") • Overall satisfaction is high…feedback survey used mostly for complaints.
4. Stakeholders Survey	• High interest in collaboration…some types more than other. Mostly current partners answering the survey.

With the insights provided from these primary research efforts, the Leadership Team used a SWOT Analysis (Strengths, Weaknesses, Opportunities, Threats) to discuss and capture key observations regarding the current state of CAA. Because both SOAR and SWOT Analyses include Strengths and Opportunities, the related work from the SOAR Analysis previously completed by the Leadership Team could be "imported" directly into the SWOT Analysis. This saved time and yet the Team was encouraged to also give additional consideration to Strengths and Opportunities and add or modify that content as they prepared the SWOT Analysis. The resulting SWOT Analysis appears below:

Strengths	Weaknesses
1. Current programming / portfolio works! 2. Training platform 3. Admin Team responds to change, adapting, responding quickly. 4. Admin level stays the course…focused. 5. Don't over-react / panic. 6. Well known and respected 7. Willing to do the work! 8. Have people on the team that have a lived experience 9. Strong Policies and Procedures 10. Have served as fiduciary in some efforts 11. Invested well in IT resources and training 12. Ability to learn and apply success factors from our leading programs to other programs	1. Succession Planning (improvement) 2. Need detailed process manuals for employee transitions / orientation - SOPs, better file system, document history 3. More funding needed to increase staffing 4. Staff burnout 5. Programmatic "Siloing" 6. Frontline staff needed better understanding of outcomes (ROMA, Goal of Program, Self Sufficiency). How Client Management System data input is so important.
Opportunities	**Threats**
1. Community partners are willing to work with us…trusted. 2. Other NPs facing similar issues and are willing to partner. 3. Building strong relationships with local municipalities. 4. Opportunity for people of color to work here and advance.	1. Federal Funding 2. Loss of staff due to economic uncertainty 3. Staff burnout 4. Our current efforts to connect results to our services may not be adequate to make case for continued funding 5. Cyber security / scams / AI 6. Our organization's relevance and ability to Pivot (will have to make shifts at some point…sometimes program-specific)

Strategies and Tactics

The Leadership Team continued their April 30, 2026 Work Session by comparing the Goals and Goal Measures (future state) to the new SWOT Analysis (current state). The objective was to identify the "work" needed to bridge the gap between those two states. The Team was helped in this work by engaging in a facilitated two-part group exercise consisting of a specific form of brainstorming (nominal group technique) and determining the "affinity" among the brainstormed ideas. The two exercises produced a large number of potential Tactic ideas (individual tasks or work streams) grouped into Strategic Themes due to their interdependencies and / or common end result(s).

The Strategies and Tactics that were identified, and subsequently refined in an additional work session, are summarized in the table below page and available in full detail in the form of an Excel Tactics Workbook. The main sheet of this Tactics Workbook appears on page 22. The full Workbook, which includes several other sheets, is a key companion piece to the other Strategic Plan documents (this Narrative Summary, the single page plan Summary, and the PowerPoint Archive).

Strategy	# of Tactics	Areas of Focus
A. Community Collaboration	2	Identifying gaps in service; creating collaborative cross-organizational work groups
B. Diversify Funding	6	Hire Fund Development director, Fund Development Plan; Help build Advocacy & Awareness; Build relationships & donor cultivation; Obtain grants
C. Promote Self Sufficiency	6	Leverage CNA & other information to identify self-sufficiency barriers; seek unrestricted funds; Pursue Housing innovation; Additional education
D. Standard Operating Procedures	5	Create, archive, and utilize Standard Operating Procedures (SOPs); Leverage SOPs in cross-training and onboarding
E. Professional Development	8	Assess Professional Development needs of all staff; Introduce new learning (Empowerment/Autonomy, Cross Training, ROMA, Restorative Conferencing / Conflict Resolution; Expand EAP awareness and wellness support
F: Wrap-Around Service / Support	3	Improve "Wrap-Around" Service implementation; Enhance effective Case Management practices and train staff
G. Voice of Customer	3	Capture and utilize Client Success Stories; Implement client satisfaction across portfolio and achieve higher client participation
H. Technology for Efficiency	2	Identify new ways to use technology to streamline work / digitize work
I. Succession Planning	6	Charter Team to create new framework; gather data related to key positions; Begin structured Mentoring of possible, interested successors; Seek funding to underwrite select new Manager positions

The Leadership Team also used another tool, a Goals and Tactics Alignment Matrix, to determine if there was an adequate number of Tactics to achieve each Goal and also to identify any Tactics of higher priority because of their significant probable impact on the ability to achieve multiple Goals. The Leadership Team also continued to refine and condense the list of Tactics and assign time periods and leaders for their completion. All of this information is included in the previously mentioned Tactics Workbook, which features a single-page Tactics Table for easy review and reporting.

Values

Values represent the last component of a Strategic Plan. They were intentionally considered last in the progression of work to better assess how well they aligned with both the desired future state (Goals and Vision) as well as the work required to achieve that state (Strategies). Values are a succinct, accessible expression of the organization's culture. And, as mentioned previously, they are, along with the Mission Statement, what employees tend to rely on to guide their decisions and actions when they encounter a situation for which there is no established policy or procedure.

In their May 6 Work Session, Leadership Team members reviewed the current CAA Values and compared them with the new Plan Goals, Vision Statement, Strategies, and Mission Statement. Each Value should be seen as enabling or supporting the Goals and the work envisioned to achieve them. This "alignment" will be a key contributor to Plan success.

Leadership Team members reviewed the current values and affirmed all six of them. They then elected to add two new Values that were considered also very important to the work of the new Plan. Current and proposed new values are listed in the table below.

Proposed FY27-FY30 Values, Statements	
Integrity – we build trust with our stakeholders, both internally and externally, by upholding strong ethical values, ensuring quality, accountability, and transparency in all areas of our work	➲ Continue
Collaboration – we believe in the power of working together in service excellence to significantly enhance individual, team, and community capacity.	➲ Continue
Learning – we value knowledge, education, and mutual creativity through dialogue and curiosity in order to grow in benefit to our communities	➲ Continue
Inclusion, Diversity, Equity, and Anti-Racism (IDEA) – we respect the knowledge, abilities, and experience of all individuals in a nondiscriminatory manner, and actively work to dismantle disparities within our organization and with residents and community members, especially those whose voices have traditionally been marginalized.	➲ Continue
Results-Oriented – we are driven to make a difference, being proactive with how we think about our services and clients, adaptable to emergent needs, and capable to provide effective results in periods of change	➲ Continue
Person-Centered – we see our clients as ambassadors of their own change and respectfully partner with them to provide services that help them live a life they choose to live.	➲ Continue
Advocacy – we advocate on behalf of those we serve in our communities, clarifying needs and sharing success and impact.	✦ New
Responsiveness – we listen and then partner with stakeholders and other community partners to provide immediate help and long-term solutions.	✦ New

One of the new values added to the plan is **Advocacy**. As CAA seeks to broaden both awareness and support, the role of advocacy takes on greater importance and will need increased involvement from employees and Board Members. This includes planned initiatives but also readiness to advocate on behalf of those served in impromptu opportunities when they emerge, like informal conversations with neighbors and friends. Compelling information and "real life" experiences of clients, both their struggles and successes, can inspire broader support. These advocacy efforts sometimes lead to others offering to help through volunteering, resource contributions, or even philanthropy.

The other new value is **Responsiveness**, and it relates to both the urgency of needs for those in poverty but also the frustration and diminishing hope that can build as those experiencing, or at risk of, poverty wait for help. Those who embrace the value of responsiveness listen carefully, confirm what they heard, and then quickly begin the work for resolution. They

inherently persist and by nature don’t feel “closure” until they are sure need has been met or the client is comfortable with other help by virtue of a warm hand-off.

Community Action Standards Related to Strategic Planning

The Operating Standards relevant to Strategic Planning for Community Services Block Grant recipients, including Community Action Agencies, were reviewed and used in the design of the planning process. These include:

- ▶ Category 6: Strategic Planning – Standards 6.1, 6.2., 6.3., 6.4, & 6.5.
- ▶ Category 2: Community Engagement – Standard 2.2
- ▶ Category 1: Consumer Input & Involvement – Standard 1.1
- ▶ Category 4: Organizational Leadership – Standards 4.1 and 4.2

The following Table includes details of each of relevant Standard, and how this Strategic Planning process was deemed compliant.

CATEGORY SIX: 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.	☑ Board Approval of FY27-FY30 Strategic Plan
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.	☑ Mission ☑ Goals 1 – 4 address high priority community needs, delivery of services, and organization sustainability.
Standard 6.3	The approved strategic plan contains family, agency, and/or community goals.	☑ Family: Mission, Goals 2 & 3 ☑ Agency: Mission, Goals 1 & 4 ☑ Community: Mission, Goals 2 & 3
Standard 6.4	Customer satisfaction data and customer input, collected as part of the community assessment, is included in the strategic planning process.	☑ Review and discussion of 2025 CNA Results, including: ▪ 2023 – 2025 Client CNA Survey ▪ 2025 CAA Client Community Forums ▪ HS / EHS Family Assessment Tool ☑ Review and discussion of FY27-FY30 Strategic Plan data collection, including: ▪ Service-specific Client Satisfaction Surveys
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.	☐ Proposed BOD Updates

CATEGORY ONE: Consumer Input and Involvement		
Standard 1.1	The organization demonstrates low-income individuals' participation in its activities.	☑ CAA clients participated in the 2023 EE Family and CAA Client Surveys.

CATEGORY TWO: Community Engagement		
Standard 2.2	The organization utilizes information gathered from key sectors of the community in assessing needs and resources, during the community assessment process or other times. These sectors would include at minimum: community-based organizations, faith-based organizations, private sector, public sector, and educational institutions.	☑ Refer to list of primary research conducted as part of the 2025 Community Needs Assessments and the Market and Organizational Assessments in this FY27-FY30 Strategic Plan Development.

CATEGORY FOUR: Organizational Leadership		
Standard 4.1	The governing board has reviewed the organization's mission statement within the past 5 years and assured that: 1. The mission addresses poverty; and 2. The organization's programs and services are in alignment with the mission.	☑ Mission reviewed as part of FY27-FY30 Strategic Plan development process and revision approved by the Board in their September 24, 2026 Meeting.
Standard 4.3	The organization's Community Action plan and strategic plan document the continuous use of the full Results Oriented Management and Accountability (ROMA) cycle or comparable system (assessment, planning, implementation, achievement of results, and evaluation). In addition, the organization documents having used the services of a ROMA-certified trainer (or equivalent) to assist in implementation.	☑ FY27-FY30 Strategic Plan development included: • Industry, Market, and Organizational Assessments • Overall Plan Development, including Vision Statement, Goals, and Goal Measures • Tactical Plan • Recommended Plan Review Process and Schedule

Plan Review Process

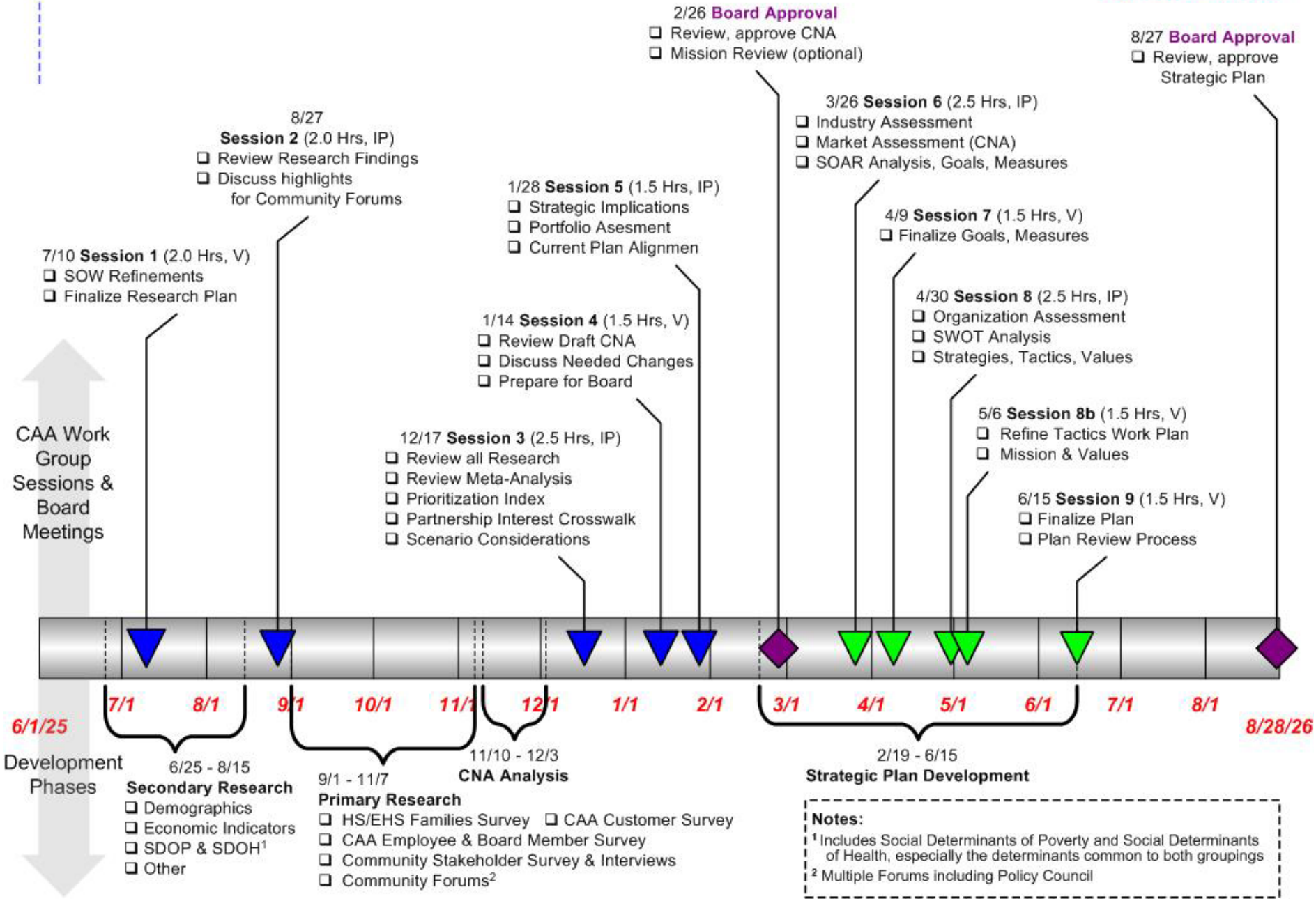
In their final Planning Work Session on June 15, the Leadership Team reviewed and identified final changes to this Strategic Plan narrative document. They also discussed basic characteristics of effective Strategic Plan Reviews and the current process used for these reviews. They agreed on the value of fostering a climate of collaboration and engaging in both shared ownership and problem solving when Tactics are not achieving anticipated results as well as celebration and recognition when success is achieved. They also agreed about the importance of giving Tactic owners adequate time to prepare progress updates and reports and continuing to find ways to bring Tactic owners into all reviews or relevant work.

The Leadership Team recommends that Strategic Plan reviews be conducted by the CAA Board on a quarterly basis. Useful documents could include:

- The single-page Strategic Planning and Improvement Framework (see page 2).
- An updated version of the Tactics Workbook – Gantt Chart page
- An update on Goal Measures
- Other materials related to specific topics of discussion, often related to any Tactics that are not proceeding as planned, as well as reviews conducted related to successfully completed Tactics

CAA 2025/26 Community Needs Assessment & Strategic Plan Development Process - **Timeline**

Updated May, 2026



Notes:

[1] Includes Social Determinants of Poverty and Social Determinants of Health, especially the determinants common to both groupings

[2] Multiple Forums including Policy Council

CAA 2027-2030 Strategic Plan

Tactics Implementation Plan

Impact Key: 3 = Critical Success Factor, 1 = Some contribution toward Vision
Urgency Key: 3 = Serious Financial implications within 6 mos, 1 = Could be undertaken any time in 3 yr plan period
Readiness Key: 3 = Could initiate next week, 1 = Optimal timing is 1 or more years away

Strategy	Tactic #	Tactic Name	High Goal Allignment	Multiple Strategy	Project Leader	Sponsor	Tactic Plan Drafted	Impact Rating	Urgency Rating	Readiness Rating	Total Priority Score	In Progress	# Quarters	Financial Resources	FY 2026/27												FY 2027/28												FY 2028/29											
															Month 1 (October)	Month 2 (November)	Month 3 (December)	Month 4 (January)	Month 5 (February)	Month 6 (March)	Month 7 (April)	Month 8 (May)	Month 9 (June)	Month 10 (July)	Month 11 (August)	Month 12 (September)	Month 1 (October)	Month 2 (November)	Month 3 (December)	Month 4 (January)	Month 5 (February)	Month 6 (March)	Month 7 (April)	Month 8 (May)	Month 9 (June)	Month 10 (July)	Month 11 (August)	Month 12 (September)	Month 1 (October)	Month 2 (November)	Month 3 (December)	Month 4 (January)	Month 5 (February)	Month 6 (March)	Month 7 (April)	Month 8 (May)	Month 9 (June)	Month 10 (July)	Month 11 (August)	Month 12 (September)
A. Community Collaboration	1	Identify and target gaps in service delivery (New CNA)	I					2	1	2	5																																			
	2	Create workgroups with area nonprofits / Service Providers						2	1	2	5																																			
B. Diversify Funding	1	Identify Funding to support Development Director Position						3	2	1	6																																			
	2	Hire Development Director / Grant Writer						3	2	1	6																																			
	3	Prepare Fund Development Plan	I				☑	3	2	1	6																																			
	4	Build relationships with banks, foundation, employers						3	2	2	7																																			
	5	Advocate locally for funding resources & develop partnerships with philanthropic organizations						3	3	2	8																																			
	6	Expand funding to provide additional level of Managers - decrease burden on Directors		A				2	1	1	4																																			
C. Promote Self Sufficiency	1	Identify / prioritize Gaps (CNA & Other Info)						2	2	1	5																																			
	2	Identify barriers to self sufficiency in current programs	I					2	2	2	6																																			
	3	Find unrestricted funding to address barriers	I				☑	2	2	2	6																																			
	4	Grow the capacity of the CD Department to increase housing development / rehab in all three counties	I					2	2	2	6																																			
	5	Increase classes related to current economic trends						2	1	2	5																																			
	6	New housing development (-Single family, -Multi family) with housing counseling supports	I				☑	3	3	1	7																																			
D. Standard Operationg Procedures	1	Create SOP Template						3	2	3	8																																			
	2	Create SharePoint Folder to house all SOPs						3	2	3	8																																			
	3	Give Mngt staff small goal: 1 program / grant SOP / month						3	2	2	7																																			
	4	Create a document for employees that gives a description what staff do						3	2	2	7																																			
	5	Have staff / managers outside of the program review for understanding						3	2	2	7																																			
E. Professional Development	1	Assess how to offer needed professional development for all staff						2	2	2	6																																			
	2	Provide Mid-Manager Training on Empowerment & Autonomy and measure results					☑	2	3	3	8																																			
	3	Develop & implement Staff Cross-Training Curriculum	I				☑	1	1	1	3																																			
	4	Regular program updates / education for staff - to understand all that we do (Preventing Silos)	I					3	2	3	8																																			
	5	Train all staff in ROMA principals and engage supervision in the creation of outcome measures						3	2	3	8																																			
	6	Develop Peer-to-Pear Program to support wellness						2	1	1	4																																			
	7	Increase awareness of EAP through training						2	2	3	7																																			
	8	Provide education on Restorative Conferencing / Conflict Resolution Circles						3	1	2	6																																			
F: Wrap-Around Svc / Support	1	Staff training for Case Management / self sufficiency-focused service provision						3	2	1	6																																			
	2	Assess how to offer wrap around services to incorporate multiple departments / programs					☑	3	2	1	6																																			
	3	Provide Case Management that moves people to self sufficiency. (Not just checking a box)						3	2	2	7																																			
G. Voice of Customer	1	Capture more client success stories (relevancy)						3	2	3	8																																			
	2	Educating the public about CAA					☑	3	2	3	8																																			
	3	Implement client satisfaction for all programs and try to get clients to complete them for all service delivery						3	2	3	8																																			
H. Technology for Efficiency	1	Determine how to utilize technology to structure programs for all levels of staff (Sharepoint structure / organization)					☑	3	3	2	8																																			
	2	Digitizing filing / documentation						3	3	2	8																																			
I. Succession Planning	1	Succession plan team to create framework						3	2	2	7																																			
	2	Gather data from upper level managers on planned leave dates						3	2	2	7																																			
	3	Identify leadership positions that need specific succession plans and create a timeline						3	2	2	7																																			
	4	Identify potential internal staff that could fill those roles						2	1	1	4																																			
	5	Mentor internal succession candidates						2	1	1	4																																			
	6	Expand funding to provide additional level of Managers - decrease burden on Directors		A				2	1	1	4																																			

APPENDIX A: Secondary Data Meta-Analysis, 2025 CAA Community Needs Assessment

The CAA Leadership Team members met on August 22, 2024 in *Leadership Session 2* to review the secondary research findings (advanced to them) and discuss both individual measure/source findings as well as a draft Meta-Analysis. A matrix framework provided a workable format for this draft Meta-Analysis. It featured a structure for comparing findings related to specific social determinants of poverty (row headers) and related to populations in each County (column headers).

In this matrix, exclamation points are used to indicate if a particular County had one of the least desirable / most noteworthy scores for a given measure within a social determinant category. For example, Jackson County shows five exclamation marks for Housing & Homelessness because of a very large housing gap (estimated 1,028 owned and rental units), rapidly declining housing vacancy rate, lowest home ownership rate, high-cost burden rate for renters, and the large homeless population. A color code system was then applied based on the number of exclamation points in each cell (yellow for one, orange for two, and red for three or more).

As they reviewed the findings for each social determinant category, several key observations were made, exclamation points confirmed or adjusted. Part of the matrix was then complete. The observations regarding each category of social determinant secondary research can be found in the full 2025 Community Needs Assessment Report. After reviewing and discussing findings in this manner for all nine social determinant categories, the CAA Leadership Team discussed and agreed on several additional overall observations and a final version to the complete Meta-Analysis matrix, both of which appear below.

Key Observations

- Social Determinants with higher numbers of multiple indicator concerns: Housing & Homelessness and Health Status, as well as the prevalence of Poverty & ALICE.
- Jackson and Hillsdale Counties appear to have a slightly high prevalence of negative / concerning findings, though the difference from Lenawee County is not markedly higher.

	Hillsdale	Jackson	Lenawee
1. Demographics	!!	!	
2. Poverty & ALICE	!!!	!!!!!	!!!
3. Employment & Education	!		!
4. Housing & Homelessness	!!!	!!!!!	!!!!!
5. Early Education & Child Care	!!!!	!!!	!!
6. Food Insecurity	!!!	!!!	!!
7. Health Status	!!!!!	!!!!	!!!!!
8. Transportation			!
9. Broadband Access	!!		!

APPENDIX B: Primary Data Meta-Analysis, 2025 CAA Community Needs Assessment

Unlike secondary research, the various *Primary* research efforts, either by way of design (e.g., employee survey) or participant volume (e.g., Community Forums) were more limited in any ability to stratify findings geographically. Still, individual Primary Research results could be stratified by specific dimensions of social determinants and related issues.

At the beginning of ***Leadership Session 3*** held on December 17th, 2025, the team reviewed the findings from each *Primary* Research effort. As in ***Leadership Session 2***, they then used a matrix framework to summarize the occurrence of noteworthy findings related to specific Social Determinants in each of those efforts. They also considered and agreed to add several more needs or related issues that surfaced in at least one Primary Research effort and continue inventorying where else they surfaced. By the end of the discussion, consensus was reached regarding a completed version of this matrix, which appears below.

! indicates strong indication of need + indicates favorable performance finding	CAA Client CNA Survey	Community Forums	Family Assessment Tool	CAA Employee Survey	CAA Board Survey	Child Care Provider Survey	Stakeholder Survey
2. Poverty & ALICE		!	!				
3. Employment / LW Jobs	!!!	!!!		!!	!!		!!
4. Housing & Homelessness	!!!	!!!		!!	!!	!!	!!
5. Early Education & Child Care	+	!!	!!		!!		
6. Food Insecurity		!!					
7. Health Status / Health Care	!		!				
8. Transportation	!	!!				!!	!!
9. Broadband Access							
10. Utility Costs	!						
11. Safety / Safe Neighborhoods	!						
12. Mental Health Needs				!!	!!	!!	!!
13. Budgeting / Financial Skills					!!		

As with the Meta-Analysis of Secondary Research, a color code system was used (yellow for moderate, orange for medium, and red for high) to designate the degree to which each need or issue surfaced in each primary research effort. It should be noted that the specific questions included in each research effort could influence whether or not certain need or issues surfaced in each effort. This was especially true of the Community Forums, and the Stakeholder Survey, which were more narrowly focused by design.