EXECUTIVE SUMMARY

In 1968, three separate Community Action Agencies in Choctaw, McCurtain and Pushmataha Counties merged to better meet the needs of residents in Southeast Oklahoma. LIFT Community Action Agency, Inc. was incorporated as a Non-Profit Organization on April 4, 1968. The agency’s purpose, as stated in its original Articles of Incorporation was “To assist in developing, executing and coordinating plans and the programs authorized under the Economic Opportunity Act of 1964. Throughout it’s history, LIFT has progressively grown, adding new programs and services to meet the needs of the area, especially its most vulnerable populations.

On October 24, 2019, LIFT Community Action Agency, Inc. enlisted the assistance of Strategic Planning Consultant and Nationally Certified ROMA Trainer – Julia Teska, PhD. to conduct a Strategic Planning Meeting which was critical to determining priorities, establishing goals, and creating objectives.

A multi-faceted analysis was completed with Executive Leadership Staff, Board of Directors and other key staff prior to the planning session, including an analysis of the agency's mission, vision and values, review of agency’s programs and their alignment to the agency, and a Strengths Weaknesses Opportunities and Threats (SWOT) analysis. All activities were completed in individual and group activities to ensure maximum participation amongst the staff and board members during the strategic planning process.

The goal of this plan is to outline and provide direction on how LIFT Community Action Agency, Inc. will address the needs of residents as identified in our most recent Community Needs Assessment (2019). Primarily, LIFT Community Action Agency, Inc. will focus on program development rather than on client outcomes to ultimately meet the needs of the community and not just the agency which is critical to fighting the war on poverty.

PLANNING PROCESS

Development of the planning process included the following two major phases with multiple steps and analysis in each phase. The report that follows is organized in these two phases as well.

ASSessment

Understanding the current state of agency activities, mission, vision, values and community needs as well as strengths, weaknesses, opportunities and threats that exist within the agency and community environment.


GOALS & OBJECTIVES

Setting goals and determining objectives to establish the results to be achieved, determining specific outcome measures, and deciding on a means to achieve the results. Based on strategic needs determined by information gathered in the assessment phase.

Assessment - Input from community, internal and external stakeholders.
Needs - Identified based on input from assessment phase.
Goals & Objectives - Strategies used to meet the determined needs.
ASSESSMENT

The assessment phase included a review of the agency's environment, programs, activities, mission, vision and value statement.

Agency Review

SWOT Analysis

Org Standards & ROMA

Community Needs Assessment

Mission & Vision Statement

Strengths, Weaknesses, Opportunities and Threats

Provide Guidance for Community Action Agencies

Identified Top Needs in the Community

AGENCY REVIEW

On January 14, 2020 LIFT Board of Directors completed a Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis in order to obtain a clear picture of both resources and deficiencies confronting the organization. Members of Board of Directors also provided input on the mission, vision and values statement and their respective alignment with the agency's current programs and services. LIFT's key leadership staff met Thursday, January 16, 2020 to provide input on the mission, vision and values statement and their respective alignment with the agency's current programs and services.

Mission: "To improve the lives of low-income individuals and families through service and collaboration leading to self-sufficiency."

Vision: "To free generations of people from poverty."

Values Statement: "CHOICES" Compassion; Honesty; Optimism; Integrity; Community; Empowerment; and Stewardship

Both LIFT's Board of Directors and Key Leadership Staff identified our population as everyone we serve and that we are committed to serving each customer. Additionally, each group felt our mission aligned with the programs and services we are known for and stated the goals we want to achieve for the individual and families we serve.

Both LIFT's Board of Directors and Key Leadership Staff identified our vision statement as effective, brief and easy to communicate. Both groups also felt strongly that our vision statement is shared by members of the community. Additional recommendations to potentially revise the vision statement were addressed and will be reviewed further.

Both LIFT's Board of Directors and Key Leadership Staff felt our values statement aligned with our agency's beliefs, core values and uniqueness. Additionally, both groups felt the values statement accurately represented how we want to be treated as an agency and how we treat our clients.
SWOT ANALYSIS

Board of Director Members and key leadership staff, on separate occasions, participated in a facilitated discussion to provide feedback regarding the agency's strengths, weaknesses, opportunities and threats. Internally, key leadership staff reviewed input collected from both meetings and determined the most prevalent responses in each category. Participants were provided agency documents for reference including the mission, vision and values statements, Community Needs Assessment, Customer Satisfaction Survey Results and financial information. Below are the results of this analysis.

**Strengths:**
- Board & Leadership
- Employees
- Public Relationship
- Great Programs

**Weaknesses:**
- Staff Turnover
- Low Pay Scale
- Too Large of Service Area
- Service Duplication with other entities.

**Opportunities:**
- Marketing
- Re-branding
- Partnerships
- Offering Positive Assistance to Change Lives

**Threats:**
- Competition for Funding
- Government Changes
- Name Change
- Continuing Programs
### Internal Factors:

<table>
<thead>
<tr>
<th>Strengths:</th>
<th>Weaknesses:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Board &amp; Leadership</strong></td>
<td><strong>Staff Turnover</strong></td>
</tr>
<tr>
<td>Board Members &amp; Policy Council</td>
<td>Retirement and/or illness and turnover of key leadership staff</td>
</tr>
<tr>
<td><strong>Employees</strong></td>
<td><strong>Low Pay Scale</strong></td>
</tr>
<tr>
<td>Executive Director and Staff Members</td>
<td>Pay too low</td>
</tr>
<tr>
<td><strong>Public Relationship</strong></td>
<td><strong>Service Area Too Large</strong></td>
</tr>
<tr>
<td>Highly respected in our communities; supported locally</td>
<td>Too large of area to cover with limited resources (funding/staff etc.)</td>
</tr>
<tr>
<td><strong>Great Programs</strong></td>
<td><strong>Services Duplication</strong></td>
</tr>
<tr>
<td>Programs are successful in promoting self-sufficiency</td>
<td>Offer same services as other entities in our area</td>
</tr>
</tbody>
</table>

### External Factors:

<table>
<thead>
<tr>
<th>Opportunities:</th>
<th>Threats:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Marketing</strong></td>
<td><strong>Competition for funding</strong></td>
</tr>
<tr>
<td>Seek resources to help tell our story, utilize strategy with new name</td>
<td>Research and seek more diverse grants, tap into local funding sources</td>
</tr>
<tr>
<td><strong>Rebranding</strong></td>
<td><strong>Government Changes</strong></td>
</tr>
<tr>
<td>Develop/Implement Agency Name Change</td>
<td>Unknown leaderships, lack of knowledge/support</td>
</tr>
<tr>
<td><strong>Partnerships</strong></td>
<td><strong>Name Change</strong></td>
</tr>
<tr>
<td>Attend more community activities, expand/improve on current partnerships</td>
<td>Fear of rejection from community/stakeholders</td>
</tr>
<tr>
<td><strong>funding</strong></td>
<td><strong>Competitive Wages</strong></td>
</tr>
<tr>
<td>Research and seek more diverse grants, tap into local funding sources</td>
<td>Retention and recruitment difficult because of other entities wages</td>
</tr>
</tbody>
</table>
ORGANIZATIONAL STANDARDS

Organizational Standards 4.3, 6.1, 6.2, 6.3, 6.4 and 6.5, set forth under the Community Services Block Grant Act, mandates the required components of the strategic planning process and reinforces the need to assess internal functioning as well as the needs of the communities we serve. The goals and objectives, within this Strategic Plan, are reflective of the agency's future in conjunction with the requirements of the Organizational Standards.

OS 4.3 - The organization’s Strategic Plan documents the continuous use of the full ROMA cycle.

OS 6.1 - The organization has an agency-wide Strategic Plan in place that has been approved by the governing board in the last 5 years.

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

OS 6.3 - The approved Strategic Plan contains Family, Agency, and/or Community Goals.

OS 6.4 - Customer Satisfaction and customer input, collected as part of the Community Assessment, is included in the strategic planning process.

OS 6.5 - The governing board has received an update(s) on meeting the goals of the Strategic Plan within the past 12 months.

RESULTS ORIENTED MANAGEMENT & ACCOUNTABILITY (ROMA)

In relation to ROMA, strategic planning is a key component and embodiment of Results Oriented Management and Accountability. As a component of ROMA, strategic planning constitutes the second phase of the ROMA cycle, planning. However, the strategic planning process itself moves through all five ROMA phases, hence embodying the entire cycle.

NATIONAL COMMUNITY ACTION NETWORK GOALS

The National Community Action Network Goals reflect what Community Action Agencies hope to achieve over a long-term period for individual, families and communities of low-income. Goals incorporated into LIFT's Strategic Plan are reflective of the National Community Action Network Goals listed below.

Goal One:
Individuals and families with low incomes are stable and achieve economic security.

Goal Two:
Communities where people with low incomes live are healthy and offer economic opportunity.

Goal Three:
People with low incomes are engaged and active in building opportunities in communities.
COMMUNITY NEEDS ASSESSMENT

As part of the planning process key leadership staff reviewed key findings and results from the 2019 Community Needs Assessment. LIFT’s Community Needs Assessment identifies and prioritizes the needs and resources of individuals and families in our service area. Key leadership staff use this data to design effective, outcome-based programs that strive to alleviate poverty. The analyzed data is summarized below.

Top 3 Prioritized Needs Identified

- Housing
- Substance Abuse
- Economic Development

62 community sector
200 low-income individuals
71 educational sector
32 faith-based sector
17 government sector
12 private sector
126 public sector
285 agency clients
25 board members
5 agency volunteers

Poverty Statistics

- 24.71% Service Area
- 16.52% State of Oklahoma
- 15.11% United States

Top 10 Needs Identified

- Housing
- Early Childhood Services
- Emergency Services
- Health Services
- Transportation
- Youth Services
- Senior Services
- Substance Abuse Services
- Nutrition
- Asset Development

845 Surveys Completed
CUSTOMER SATISFACTION & INPUT

As part of the planning process, the committee reviewed the customer satisfaction data from 2019. Customer Satisfaction data and input is a critical piece to the overall Strategic Plan. The ongoing collection and analysis of customer satisfaction surveys will remain central to LIFT’s plan being representative of the full ROMA cycle. Customer Satisfaction surveys are collected on an ongoing basis including paper and online surveys. All surveys are directed to the ROMA Coordinators attention and transferred to an agency database. LIFT’s Board of Directors is provided with quarterly updates regarding the number of surveys collected for the reporting period, program and/or programs for which customers completed surveys, responses and percentage of each and analysis of internal and external factors and their actual or potential impact on the survey responses. Results of the 221 Customer Satisfaction Surveys, collected in 2019, were reviewed and analyzed in comparison to the input gathered in the previous phases of the planning process.

**County Breakdown**

<table>
<thead>
<tr>
<th>County</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Atoka County</td>
<td>1.4%</td>
</tr>
<tr>
<td>Bryan County</td>
<td>6.8%</td>
</tr>
<tr>
<td>Choctaw County</td>
<td>51.1%</td>
</tr>
<tr>
<td>Pushmataha County</td>
<td>33.9%</td>
</tr>
<tr>
<td>McCurtain County</td>
<td>6.8%</td>
</tr>
</tbody>
</table>

**Method of Awareness**

<table>
<thead>
<tr>
<th>Method</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Billboard</td>
<td>60.2%</td>
</tr>
<tr>
<td>Friend</td>
<td>27.1%</td>
</tr>
<tr>
<td>Internet</td>
<td>6.3%</td>
</tr>
<tr>
<td>Other</td>
<td>1.4%</td>
</tr>
<tr>
<td>Radio</td>
<td>1.4%</td>
</tr>
</tbody>
</table>

**Program Breakdown**

<table>
<thead>
<tr>
<th>Program</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Healthy Start</td>
<td>36%</td>
</tr>
<tr>
<td>Housing</td>
<td>8%</td>
</tr>
<tr>
<td>Supportive</td>
<td>7%</td>
</tr>
<tr>
<td>Services</td>
<td>7%</td>
</tr>
<tr>
<td>Navigator</td>
<td>7%</td>
</tr>
<tr>
<td>Self-Help</td>
<td>3%</td>
</tr>
<tr>
<td>Housing Transit</td>
<td>37%</td>
</tr>
<tr>
<td>VITA WX</td>
<td>2%</td>
</tr>
</tbody>
</table>

Program Breakdown:

- Healthy Start: 36%
- Housing Supportive Services: 8%
- Navigator: 7%
- Self-Help Housing: 7%
- Transit: 3%
- VITA: 37%
- WX: 2%

LIFT CAA STRATEGIC PLAN 2020 - 2023

HELPING PEOPLE. CHANGING LIVES.
GOALS & OBJECTIVES

On Thursday, October 24, 2019 key leadership staff enlisted the assistance of Strategic Planning Consultant and Nationally Certified ROMA Trainer - Julia Teska, PhD to determine priorities and establish goals. Collectively the group discussed the conclusions from the 2019 Community Needs Assessment (CNA), Customer Service/Input, Agency Review and SWOT Analysis. The group was asked to provide insight pertaining to the key findings within the 2019 CNA and their correlation to the weaknesses in the SWOT Analysis. Ultimately, the group developed specific measurable, achievable, relevant and time bound (SMART) goals and objectives which the agency will focus its efforts during the time frame of this Strategic Plan in order to address the needs of the communities served. The goals reflect input from the Board of Directors and key agency staff and represent all community sectors.

PRIORITY NEEDS

Four priority needs were identified by the planning committee as strategic issues that should be addressed with the Strategic Plan. Two needs were identified as agency level needs, one family level need and one community level need. The focus of this Strategic Plan will be on program development and it’s direct relation to improving the lives of low-income individuals.

Need One: Our community has a need for access to safe, decent and affordable housing.

Need Two: Our community has a need for additional substance abuse treatment resources and supportive services.

Need Three: Our agency has a need to expand materials in the construction classroom to intensify the students capacity to achieve self-sufficiency.

Need Four: Our agency has a need to restructure and rebrand ourselves to enhance our ability to fight poverty and promote self-sufficiency.

Goal 1:
Develop/Implement a Community Development Financial Institution (CDFI) to provide mortgages to low-income families.

Goal 2:
Establish partnerships with area agencies to increase access and awareness to community supportive services.

Goal 3:
Restructure/Expand the construction classroom to enhance participant capacity to achieve self-sufficiency.

Goal 4:
Establish/Implement a new name and logo for the agency in an effort to better convey our mission and services to the public.
STRATEGIC PLAN SUMMARY

1 Family Level Goal, 2 Community Level Goals and 1 Agency Level Goal to be addressed with the following goals and objectives.

**Family Level Goal**

### #1 Housing

Our community has a need for access to safe, decent and affordable housing.

**GOAL:**
- Develop/Implement a Community Development Financial Institution (CDFI) to provide mortgages to low-income families.
- Obtain expertise needed to operate CDFI effectively.
- Formulate preliminary steps to create business model for CDFI.
- Develop community promotion and education to increase external support.

**Community Level Goal**

### #2 Substance Abuse

Our community has a need for additional substance abuse treatment resources and supportive services.

**GOAL:**
- Establish partnerships with area agencies to increase access and awareness to community supportive services.
- Research and develop a strategic plan to address substance abuse issues.
- Establish and strengthen partnerships and collaborations in the community.
- Promote social services to educate and increase the likelihood of self-sufficiency.

### #3 Economic Development

Our agency has a need to expand materials in the construction classroom to intensify the students capacity to achieve self-sufficiency.

**GOAL:**
- Restructure the construction classroom to enhance participants capacity to achieve self-sufficiency.
- Research other funding sources that support expansion of classroom.
- Strengthen employee credentials in construction areas to increase capacity.
- Expand the quality and quantity of materials in the classroom.

**Community Level Goal**

### #4 Rebranding

Our agency has a need to restructure and rebrand ourselves to enhance our ability to fight poverty.

**GOAL:**
- Establish and implement new name and logo for the agency in an effort to better convey our mission and services.
- Research other viable options to name the agency.
- Research funding opportunities to offset the cost of rebranding.
- Promote and educate public on new found agency name and services.
#1 **Housing**

Our families have a lack of safe, decent and affordable housing structures in our community.

**Goal**

Develop/Implement a Community Development Financial Institution (CDFI) to provide mortgages to low-income families.

### Objective A

Obtain expertise needed to operate Community Development Financial Institution (CDFI) effectively.

- Research Certification Process
- Determine applicable staff/key leadership to be involved and obtain necessary training.
- Submit CDFI Application

### Objective B

Formulate preliminary steps to create a business model for Community Development Financial Institution (CDFI).

- Determine Customer Qualifications
- Convert LDCAA commercial and housing loans to Southeast Oklahoma Development Corporation (SEODC).
- Research & Secure Angel Investors

### Objective C

Develop community promotion and education to increase internal support.

- Utilize social media to reach an increasing number of clients.
- Research effective marketing practices/techniques.
- Develop effective marketing tools & strategy.

### Strategies

- Obtain expertise needed to operate Community Development Financial Institution (CDFI) effectively.
- Formulate preliminary steps to create a business model for CDFI.
- Develop community promotion and education to increase internal support.

### Measures & Benchmarks

- Complete needed preliminary research needed by end of Year 1.
- Attend training needed by end of Year 1.
- Submit CDFI Pre-Application by end of Year 1 and full application by end of Year 2.
- Develop/Implement CDFI Procedure Manual by end of Year 1.
- Secure Angel Investor Funding by end of Year 2.
- Secure mortgages to qualified clients in our service area by the end of Year 3.
- Increased promotion of events/services (continuous)
- Attend necessary marketing training by end of Year 1.
- Increase community communication/participation by end of Year 2.
- Implement marketing strategy by end of Year 3.
#2 Substance Abuse

Our community has a need for additional substance abuse treatment resources and supportive services.

**Goal**

Establish partnerships with area agencies to increase access and awareness to community supportive services.

<table>
<thead>
<tr>
<th>Objective A</th>
<th>Objective B</th>
<th>Objective C</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research and develop strategic plan to address substance abuse issues in our service area.</td>
<td>Establish and strengthen partnerships and collaborations in the community.</td>
<td>Promote social services to educate and increase the likelihood of self-sufficiency after substance abuse.</td>
</tr>
</tbody>
</table>

## Strategies

<table>
<thead>
<tr>
<th>Research and develop strategic plan to address substance abuse issues in our service area.</th>
<th>Establish and strengthen partnerships and collaborations in the community.</th>
<th>Promote social services to educate and increase the likelihood of self-sufficiency after substance abuse.</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔ Research Strategic Plan Guidelines and best practices</td>
<td>✔ Attend various community organizations meetings and explain purpose</td>
<td>✔ Encourage partners to share our information and activities</td>
</tr>
<tr>
<td>✔ Establish committee and sub-groups</td>
<td>✔ Provide education of services and programs to organizations to promote awareness</td>
<td>✔ Distribute program flyers to heavily trafficked areas</td>
</tr>
<tr>
<td>✔ Survey sectors within the community for feedback and support</td>
<td>✔ Increase community participation</td>
<td>✔ Increase social media presence internally and externally with partners</td>
</tr>
</tbody>
</table>

## Measures & Benchmarks

| ✔ Identify Plan of Action by end of Year 1. | ✔ Establish new partnerships by end of Year 1. | ✔ Maintain newsletter, program spotlight and annual reporting. |
| ✔ Distribute/Collect/Analyze Surveys by end of Year 1. | ✔ Attend community meetings and events by end of Year 1. | ✔ Increase promotion of events in local papers, social media and radio by end of Year 1. |
| ✔ Write/Submit Strategic Plan by end of Year 2. | ✔ Educate public and see an increase in participation by end of Year 3. | ✔ Increase traffic to agency social media platforms by end of Year 2. |
| ✔ Implement strategies identified in Strategic Plan by end of Year 3. | ✔ Maintain unified branding and implement to all programs. | |
#3 Economic Development

**Goal**
Restructure the construction classroom to enhance participants capacity to achieve self-sufficiency.

**Objective A**
Research other funding sources that support the expansion of the construction classroom.

**Objective B**
Strengthen employee credentials in construction areas to increase staff capacity.

**Objective C**
Expand the quality and quantity of materials in the construction classroom.

### Strategies

<table>
<thead>
<tr>
<th>Strategies</th>
<th>Measures &amp; Benchmarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research grant opportunities that support the expansion of the construction classroom.</td>
<td>✅ Complete needed preliminary research needed by end of Year 1.</td>
</tr>
<tr>
<td>✅ Research grant opportunities.</td>
<td>✅ Submit grant applications by the end of Year 1.</td>
</tr>
<tr>
<td>✅ Write/Submit grant applications.</td>
<td>✅ Develop list of materials needed by end of Year 1.</td>
</tr>
<tr>
<td>✅ Determine materials based on need, cost and other key factors.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Strategies</th>
<th>Measures &amp; Benchmarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strengthen employee credentials in construction areas to increase staff capacity.</td>
<td>✅ Complete research for applicable training by end of Year 1.</td>
</tr>
<tr>
<td>✅ Determine applicable training to increase staff capacity.</td>
<td>✅ Attend training by end of Year 1.</td>
</tr>
<tr>
<td>✅ Provide training opportunities to applicable staff.</td>
<td>✅ Secure training credentials by end of Year 2.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Strategies</th>
<th>Measures &amp; Benchmarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expand the quality and quantity of materials in the construction classroom.</td>
<td>✅ Receive funding for expansion of classroom.</td>
</tr>
<tr>
<td>✅ Begin preparations to designated construction classroom.</td>
<td>✅ Purchase materials for the updated construction classroom by end of Year 2.</td>
</tr>
</tbody>
</table>
#4 Rebranding

Our agency has a need to restructure and rebrand ourselves to better enhance our ability to fight poverty and promote self-sufficiency.

**Goal**
Establish and implement a new name and logo for the agency in an effort to better convey our mission and services to the public.

<table>
<thead>
<tr>
<th>Objective A</th>
<th>Objective B</th>
<th>Objective C</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research other viable options to name the agency.</td>
<td>Research funding opportunities to offset the cost of rebranding all agency related matters.</td>
<td>Promote and educate the public on new found agency name and services provided.</td>
</tr>
</tbody>
</table>

### Strategies

<table>
<thead>
<tr>
<th>Research other viable options to name the agency.</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Research options for agency name change.</td>
</tr>
<tr>
<td>✓ Research companies specializing in re-branding process.</td>
</tr>
<tr>
<td>✓ Determine new agency name and logo.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Research funding opportunities to offset the cost of rebranding all agency related matters.</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Research grant opportunities.</td>
</tr>
<tr>
<td>✓ Write/Submit grant applications.</td>
</tr>
<tr>
<td>✓ Research additional opportunities to finance re-branding.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Promote and educate the public on new found agency name and services provided.</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Encourage public to participate in re-branding meetings and discussions.</td>
</tr>
<tr>
<td>✓ Increase Social media presence, newspaper articles and radio sessions with new agency name.</td>
</tr>
<tr>
<td>✓ Distribute flyers, annual reports, merchandise and other marketing tools to promote awareness.</td>
</tr>
</tbody>
</table>

### Measures & Benchmarks

| ✓ Determine new agency name and logo by end of Year 1. |
| ✓ Implement re-branding company to work with re-branding committee. Introduce public to new agency name and logo by end of Year 2. |
| ✓ Implement agency name and all supporting documentation by end of Year 3. |

| ✓ Complete preliminary grant research by end of Year 1. |
| ✓ Submit grant applications by end of Year 2. |
| ✓ Complete preliminary alternate funding research by end of Year 3. |

| ✓ Hold public re-branding meetings throughout Year 1 to develop new agency name. Increase traffic to social media platforms and increase number of articles in local newspapers by end of Year 2. |
| ✓ Distribute flyers, annual reports and other agency marketing tools to the public throughout Year 2 and 3. |
PLAN IMPLEMENTATION & ACCOUNTABILITY

LIFT Community Action Agency, Inc.’s 2020 - 2023 Strategic Plan will be implemented by key staff teams with guidance and input from leadership and oversight from the Executive Director.

Leadership staff, led by LIFT CAA’s Executive Director, will align program plans and budgets with the organization-wide strategic plan and will devote time each quarter to review implementation progress and progress made toward achieving the goals outlined in this plan. LIFT’s Board of Directors will be provided, at minimum annually, a detailed progress report to monitor progress and express challenges. After board review, the report will be shared with all staff to promote awareness and transparency.

CONCLUSIONS

The goals and objectives identified in LIFT CAA’s 2020 - 2023 Strategic Plan address the significant needs identified within the agency and the communities served. As a living document, this strategic plan requires a strong commitment by agencies to act on the goals, monitor the implementation and evaluate effectiveness. Internal and external communication is critical to effectively execute the strategies identified. The implementation strategies require focus and attention from senior leadership and all employees involved to ensure the needs are addressed and progress is made.
LIFT's PROGRAMS & SERVICES

AmeriCorps
Business Lending
Child & Adult Care Food Program (CACFP)
Court Appointed Special Advocates (CASA)
Drug Free Communities (DFC)
Early Head Start (EHS)
Early Head Start - Child Care (EHS-CC)
Early Learning Centers (ELC)
Early Childhood Comprehensive Systems (ECCS)
Emergency Services
Financial Capability
Head Start (HS)
Healthy Start
Homebuyer Education
Housing/Credit Counseling
Multi-Family Housing
New Freedom Transportation
Non-Emergency Medical Transportation
Public Transportation
Retired Senior Volunteer Program (RSVP)
Rx for Oklahoma
Safe Place Healing Hearts Program (SPHH)
Self-Help Housing (SHH)
Senior Supportive Housing (HUD 202)
Senior Transportation
Sooner Ride Transportation
State Park Operations
Technical & Management Assistance Program (T&MA)
Victim Advocacy Services (VA)
Volunteer Income Tax Preparation (VITA)
Weatherization (WX)
YouthBuild
YouthFirst
This LIFT Community Action Agency, Inc. Strategic Plan, having been originally presented to and approved by the LIFT CAA Board of Directors on the 11th day of February, 2020.

William Smith
Board Chairman
LIFT Community Action Agency, Inc.
### ROMA Logic Model

**Organization:** LIFT Community Action Agency, Inc.  
**Program:** Housing

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<th>Need</th>
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<th>Results*</th>
<th>Measurement Tool</th>
<th>Data Source, Data Collection Procedures, Personnel (Where, How, Who)</th>
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<td></td>
<td>Short Term: Obtain expertise needed to operate Community Development Financial Institution (CDFI).</td>
<td></td>
<td>Obtain funding for CDFI.</td>
<td>2 of 2 (100%) applications submitted for CDFI will be awarded.</td>
<td>CDFI Applications submitted by LIFT Housing Director and Loan Officer</td>
<td>Data Collection Procedures: LIFT CAA Housing Director and Loan Officer will submit applications to the Department of Treasury - CDFI.</td>
<td>Data Collection will occur continuously as LIFT CAA staff prepare and submit CDFI Pre-Application and CDFI Full Application.</td>
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<td>Intermediate Term: Formulate preliminary steps to create a business model for Community Development Financial Institution (CDFI).</td>
<td></td>
<td>Families have access to an additional resource when purchasing or constructing a home.</td>
<td>1 of 3 (33%) applications to Angel Investors will be awarded.</td>
<td>Angel Investor Applications submitted by LIFT Housing Director and Loan Officer</td>
<td>Data Collection Procedures: LIFT CAA Housing Director and Loan Officer will submit applications to potential angel investors.</td>
<td>Data Collection will occur continuously as LIFT CAA staff prepare and submit applications to potential angel investors.</td>
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<td>Long Term: Develop community promotion and education to increase internal support.</td>
<td></td>
<td>Families have access to an additional resource when purchasing or constructing a home.</td>
<td>5 of 30 (17%) new families reached will obtain home ownership within a 36 month period.</td>
<td>Approved Loan Applications monitored by LIFT Loan Officer</td>
<td>Data Collection Procedures: LDCAA Loan Officer will enter participant information into CAPTAIN by the 15th of each month.</td>
<td>Data collection will occur monthly and be reported in CAPTAIN monthly. Outcomes will be reported annually via the annual report to ODOC and biannually to the Board of Directors.</td>
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**Proxy Outcome:**

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<td>Short Term:</td>
<td>Research and develop strategic plan to address substance abuse issues in our service area.</td>
<td>Knowledge of substance abuse resources and strategies to combat obtained.</td>
<td>10 of 22 (45%) of community partners will agree to promote awareness of strategic plan in their agencies.</td>
<td>Tri-County Opioid Program Director will work with area partners to identify strategies and develop a strategic plan to combat substance abuse.</td>
<td>Tri-County Opioid Program Director will document work with community partners to seek to raise community awareness about existing resources and to identify strategies to include in the strategic plan.</td>
<td>Tri-County Opioid Program Director will provide a report to the board and leadership to be shared with stakeholders no less than annually.</td>
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<td>Intermediate Term: Establish and strengthen partnerships and collaborations in the community.</td>
<td>Additional support gained through community partnerships support allowing for increase in new/continued services.</td>
<td>12 of 22 (100%) partnerships will agree and sign Memorandum of Understanding with Tri-County Opioid Response Project.</td>
<td>Memorandum of Understanding Agreement Documents, Agency Tracking Spreadsheets and CAPTAIN Reports</td>
<td>Tri-County Opioid Program Director will document work with community partners to seek to raise community awareness about existing resources. # of Community Partners will be tracked in CAPTAIN.</td>
<td>Data collection will occur monthly and be reported in CAPTAIN monthly. Outcomes will be reported annually via the annual report to ODOC and biannually to the Board of Directors.</td>
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<td>Long Term: Promote social services to educate and increase the likelihood of self-sufficiency after substance abuse.</td>
<td>Public is engaged and aware of resources pertaining to overcoming substance abuse issues.</td>
<td>18 of 22 (80%) of partnerships will actively inform and refer clients to the strategies identified within the strategic plan.</td>
<td>Memorandum of Understanding Agreement Documents, Agency Tracking Spreadsheets and CAPTAIN Reports</td>
<td>Tri-County Opioid Program Director will work with community partners to ensure referrals to available social services are occurring. # of referrals will be tracked in CAPTAIN.</td>
<td>Data will be collected no less than quarterly and outcomes will be reported annually to ODOC and the Board via the Annual report and/or Final Logic Models with Results. Tri-County Opioid Program Director will provide a report to the Board and leadership to be shared with stakeholders no less than annually.</td>
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<td><strong>Short Term:</strong> Research other funding sources that support the expansion of the construction classroom.</td>
<td>Obtain funding for expansion of construction classroom.</td>
<td>1 of 2 (50%) applications submitted for expansion of construction classroom.</td>
<td>Construction Classroom expansion funding applications submitted by LIFT staff.</td>
<td>Data Collection Procedures: LIFT CAA staff will submit applications.</td>
<td>Data Collection will occur continuously as LIFT CAA staff prepare and submit construction expansion applications.</td>
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<td><strong>Intermediate Term:</strong> Strengthen employee credentials in construction areas to increase staff capacity.</td>
<td>Staff have access to additional resources and capacity increased.</td>
<td>3 of 4 (75%) Youth Build Staff that have direct contact with students will receive training.</td>
<td>YouthBuild staff attending trainings and receiving certifications.</td>
<td>Data Collection Procedures: LIFT CAA YouthBuild staff will submit training hours monthly to CAPTAIN Administrator.</td>
<td>Data Collection will occur continuously as LIFT CAA YouthBuild staff attend and submit training hours and credentials.</td>
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<td><strong>Long Term:</strong> Expand the quality and quantity of materials in the construction classroom.</td>
<td>Students obtain necessary equipment to further skills and promote self-sufficiency.</td>
<td>4 of 22 (18%) of students will improve their scores when obtaining Home Builders Institute Pact Certification.</td>
<td>HBI Pact Scores</td>
<td>Data Collection Procedures: LIFT CAA YouthBuild Construction Supervisor will report HBI Pact Scores.</td>
<td>Data collection will occur and be reported in CAPTAIN monthly. Outcomes will be reported annually via the annual report to ODOC and biannually to the Board of Directors.</td>
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<td>Short Term: Research other viable options to name the agency.</td>
<td>Obtain new agency name and logo.</td>
<td>4 of 4 (100%) of name change steps completed by the time additional funding sources become available.</td>
<td>Executive Director will work with internal staff and re-branding agency to obtain new agency name and logo.</td>
<td>Executive Director will hold meetings with key leadership staff and board of directors to determine new name of agency and logo.</td>
<td>Executive Director will report no less than quarterly to the board on progress on the agency’s name change.</td>
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<td>Intermediate Term: Research funding opportunities to offset the cost of rebranding all agency related matters.</td>
<td>Obtain funding to offset the cost of rebranding all agency related matters.</td>
<td>2 of 5 (40%) new and additional funding sources pursued.</td>
<td>LIFT CAA Staff will research and submit grant applications.</td>
<td>LIFT CAA Planning Staff will submit grant applications to funding sources as opportunities arise. Grants will be submitted to the board for approval before submission.</td>
<td>LIFT CAA Planning Staff submit grant applications on an ongoing basis. As each grant is finalized, the board of directors will approve the submission.</td>
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<td>Long Term: Promote and educate the public on new found agency name and services provided.</td>
<td>Public is engaged and aware of agency name change and rationale.</td>
<td>65 of 327 (20%) of community partners attend public meetings and engage in agency name change.</td>
<td>Executive Director and leadership staff will hold public meetings and distribute marketing items to promote new agency name.</td>
<td>Executive Director and leadership staff will host public meetings in each county within 12 months to promote and engage community in the agency’s name change.</td>
<td>Executive Director will collect data on agency’s marketing efforts on an ongoing basis and will report on results at each county meeting.</td>
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