



THE  
*HEARTBEAT*

OF

**Cornerstone**  
Community Action Agency

2023 - 2026  
STRATEGIC PLAN

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Director of Development

Presented By: Hanna Adams  
Executive Director CCAA

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## EXECUTIVE SUMMARY

Central Texas Opportunities, Incorporated DBA Cornerstone Community Action Agency (CCAA) was established in 1965 as a 501(c)3 non-profit corporation, and has a long history and extensive experience in successfully managing large programs with diverse services.

CCAA provides services in North and Central Texas counties and successfully manages over 20 programs including:

- Community Services Block Grant
- Comprehensive Energy Assistance Program
- Community Gardens
- Hunters for the Hungry
- HOME program
- Texas Veterans Program
- Tenant Based Rental Assistance
- Retired Senior Volunteer Program
- Volunteer Income Tax Assistance Program
- Head Start / Early Head Start
- Child and Adult Nutrition Program
- Housing Assistance Fund
- Payee program
- Low-Income Household Water Assistance Program

All these programs support families and communities dealing with the stressors of poverty.



**03****EXECUTIVE SUMMARY CONT.**

In the previous five-years, CCAA has had no significant audit findings, demonstrating the ability to manage federal funds with competence and integrity. Accounting procedures are monitored quarterly by management staff in addition to the single audit. During the same time frame, CCAA has achieved over 90% compliance with the required 58 Organizational Standards, and include competencies to ensure effective Board oversight of all programs.

CCAA utilizes the ROMA management system. The Executive Director is a Master Certified ROMA Trainer and Mentor, and the organization has 2 Nationally Certified ROMA Implementers on staff. The purpose of this strategic plan is to ensure that CCAA continues to discover new ways to create real & continual improvement in the years ahead to low-income families, communities, and our agency. It will outline CCAA's plan for operational excellence and effectively capture growth opportunities to serve the needs of our organization, communities, and people we serve.



# INTRODUCTION

*The strategic plan of Cornerstone Community Action Agency is intended to provide a*

three-year roadmap to provide a programming, agency development, governance and operations, and data use. The plan was developed by the Strategic Planning Committees, which was comprised of Board Members, Executive Director, Leadership Team, front line employee, and community members. An outside facilitator that is a Master Certified ROMA Trainer assisted in the Strategic Planning Retreat.

**Timeline**

June	Board Retreat - Strategic Plan
August	Board Evaluate Process of 2023 Strategic Plan
Oct-Dec	Strategic Planning Committee Meetings
February	Board Approve Strategic Plan 2023-2026



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## INTRODUCTION CONT.

The committee reviewed the previous Strategic Plan's progress, Agency's vision, mission, and values to set the baseline of the process. Data from Community Assessment, customer satisfaction survey input, and SWOT analysis of the organization, programs, and services were accessed to establish goals and objectives

To begin addressing the need, we began our Cornerstone Community Development (CCD) program. With the funding from a generous foundation, we are able to buy old homes, rehabilitate them and sell them at affordable prices to low and moderately low-income families and/or individuals. We also perform home rehabilitations for low-income Veterans, Dependents, and Surviving Spouses through funding from the Texas Veterans Commission.

A partnership with local City Manager's office was established after sharing our findings with them. They have agreed to send us listings of homes in their possession that may fit our program. After careful analysis, we have researched similar programs to ours and based on our experience, have generated our goals and objectives.



## INTRODUCTION CONT.

The Community Needs Assessment has been generated based on material compiled of feedback from *key informants from our communities, focus groups, and our Customer Satisfaction survey.* Leadership, Family Advocates, and other front-line staff members reviewed the data from these resources, as well as historical statistics from CCAA. Final analysis of this information identified our **Top 5 Needs** establishing our goals and objectives.

The Results Oriented Management and Accountability (ROMA) Cycle was employed as a guide for developing the Strategic Plan. The ROMA implementation checklist was utilized to track action items of Assessment, Planning, Implementation, Achievement of past results, and Evaluation of past performance.

During the Assessment Phase, a review of our Mission, Vision, and Values took place to ensure it is still compatible to our goals. A review and evaluation of available resources was conducted, and updated as necessary.



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## INTRODUCTION CONT.

Available resources have been identified to address the **Top 5 Needs** in the CNA. A review of our current data / programs as well as historical data to identify trends, effectiveness, or ineffectiveness in programs.

In the Planning Phase, we identified services and strategies needed to achieve outcomes, identified our outcome indicators, and established a projected success rate. Services and conclusions will be tracked by the Program Director and Family Advocates using intake applications and case management software.

During the Implementation Phase, daily collection and monthly reporting will be used as tools for evaluation. Findings will be discussed at the monthly Case Manager meetings to monitor implementation.

In the Achievement of Results phase, actual results will be measured and reported using the CSBG IS report.

During the Evaluation Phase, a review of the data to measure success rates, plan revision and/or creation of new strategies, and adjust performance goals if needed. Results will be reported to the Board, along with recommendations and/or changes to program.



## INTRODUCTION CONT.

The Strategic Planning Committees were broken down into several sub-committees of Board members, Leadership, Management, and front-line staff. The sub-committees were Human Resources, Fund Development, Marketing & Public Relations, and Program & Services. Each sub-committee established an outline for goals, objectives, and outputs for the Strategic Plan.

Goals within the Strategic Plan will be reviewed annually and progress updates will be provided to the Board of Directors at least annually.





## VISION, MISSION, & VALUES

### Vision Statement

To build thriving and self-sufficient communities by creating equal opportunities for all individuals and families.

### Mission Statement

A Community in Action, Empowering People, Changing Lives, and Offering Hope To Achieve Self-Sufficiency.

### Values (Guiding Principles)

- **Integrity.** We conduct all business lawfully and with integrity.
- **Compliance.** We strive for 100% compliance.
- **Honesty.** We expect honesty among staff, governing boards, families, and the communities we serve.
- **Respect.** We treat others with dignity, respect, honesty, and sensitivity. We appreciate the value of diversity. Encourage and practice teamwork.
- **Pride.** We strive to instill pride in the character of each individual.
- **Change.** We embrace change. Envision what could be, challenge the status quo, and capitalize on growth opportunities.
- **People Focus.** Understand and develop relationships with people to fully understand and satisfy their needs.
- **Knowledge and Education.** We believe knowledge and education are the foundation for a brighter individual.
- **Transparency and Accountability.** We practice transparency and accountability throughout all organizational practices.
- **Fulfillment.** Produce results that create value to realize your full potential and find fulfillment in your work.

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**KEY OBSERVATIONS:**

“*We no longer just serve the Central Texas Region*”

The Leadership Team, Board Members, and Agency staff reviewed the Mission, Vision, and Values on multiple occasions, including board meetings and the retreat. After evaluating what we do, who we serve, and where we serve, it was clear some revisions were needed.

We no longer just serve the Central Texas Region. Some of our services expand beyond that. Our Values are still relevant, but needed updating. After much deliberation we changed “Customer Focus” to become “People Focus”. With the approval of the Board, our revised Mission, Vision, and Values were adopted.



## SWOT ANALYSIS

Strengths	Weaknesses	Opportunities	Threats
Promote from within	Lack of Communication	Foundation Funding	Public Perception
Staff Development	Lack of Teamwork	Partnerships	Funding Sources
Community Partner Involvement	Training of New Staff	Classroom Experiences	Job Market
Care for People and Communities	Compensation	Outreach	Pay Rate
Value Employees	Staff Turnover	Social Media	Shortage of Workforce
Communication	Lack of support for struggling children	Childcare in Communities	Public Policies
Embracing Change	Outdated Equipment	After School Programs	Resources Not Available
Value Driven	Procedures Clearly Defined	Program Expansion	School Districts
Mission Driven	Employees Not Feeling Valued	Housing	Inflation
Teamwork	Conflict Among Staff	Youth Programs	Fraud of Services
Variety of Programs	Growth Management	Training for Staff and Clients	
Facilities		Growth	
Technology			
Positive Employee Attitudes			
Knowledge of Low-income People's Needs			
Not afraid to hit problems face on			
Quality Leadership			

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## SWOT ANALYSIS CONT.

Analysis was developed using an open/brainstorming forum comprised of the leadership team, staff members, board members, and community members. From this session, source documents were generated. Each gave input in reference to the 4 components of SWOT. All data was collected, disaggregated and placed in the corresponding categories of the SWOT matrix. The information below address weaknesses, strengths, objectives, action steps, staff responsible, and target completion date.



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## ADDRESSING WEAKNESSES

**Weakness:** Stretched with numerous duties and deadlines

**Strategy:** Cross training, hiring additional staff as funding allows

**Weakness:** Diversity of funding

**Strategy:** Solicit funds from numerous funding streams to include local as well as national foundations

**Weakness:** Limited Programs and Services

**Strategy:** Research and grant writing to solicit funds for starting new programs

**Weakness:** All locations not easy for clients to find

**Strategy:** Add additional signage to locations, leave posters/brochures with partnering organizations

**Weakness:** Lack of funding for everyone that applies

**Strategy:** Create new funding streams, use partners when funding is expended

**Weakness:** Public Awareness/Community Education

**Strategy:** Attend outreach events, conduct Public Service Announcements



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## ADDRESSING THREATS

Some threats are also a weakness and have been addressed above.

**Threat:** Abuse from other CAAs

**Strategy:** Maintaining a positive image even when other CAAs seen in a negative light

**Threat:** Generational poverty mentality

**Strategy:** Advocate for our clients and holistically support in pursuit of transitioning out of poverty

**Threat:** Community involvement

**Strategy:** Creating opportunities for community involvement

**Threat:** Resources available in communities

**Strategy:** Network, research, and create new partnerships in community

**Threat:** Skilled labor force for construction

**Strategy:** Create partnerships with local construction companies, refer clients for possible employment

**Threat:** Expanding services

**Strategy:** Research other services used to address top 5 needs, find funding streams

**Threat:** Child care for families

**Strategy:** Refer to TWC for child care subsidies programs

**Weakness:** Growth opportunities

**Strategy:** Research and grant writing to solicit funds for starting new programs



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## GOALS, OBJECTIVES, & STRATEGIES

### MARKETING AND PUBLIC RELATIONS

#### COMMUNITY ENGAGEMENT AND ADVOCACY

##### BRAND AWARENESS

- COMMUNITY INVOLVEMENT CONSISTENTLY
- CULTIVATING QUALITY PUBLIC INFORMATION
- PUBLIC RELATIONS TRAINING FOR OUR AGENCY

##### DEVELOP POSITIVE RELATIONSHIPS

- REGULAR MEETING WITH COMMUNITIES (CHAMBERS, PARTNERS, EVENTS, ETC.)
- PUBLICIZE SUCCESS STORIES



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## GOALS, OBJECTIVES, & STRATEGIES CONT.

### FUND DEVELOPMENT

#### STRENGTHEN FUNDING AND FUND MANAGEMENT

##### INCREASE AGENCY FUNDING

- RESEARCH GRANT OPPORTUNITIES
- FUNDRAISERS
- BUILDING RELATIONSHIPS WITH POTENTIAL DONORS

##### STRENGTHEN FUND MANAGEMENT

- TRAINING OF STAFF, BOARD, POLICY COUNCIL, AND ALL AGENCY COMMITTEES
- FISCAL SYSTEM IN PLACE AND ACCESSIBLE TO ALL STAFF





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## GOALS, OBJECTIVES, & STRATEGIES CONT.

### HUMAN RESOURCES

#### STRENGTHENING STAFF APPRECIATION THROUGH HUMAN RELATIONS

##### MAINTAIN COMPETITIVE COMPENSATION

- TOTAL COMPENSATION NOTICES
- CAREER DEVELOPMENT

##### ENHANCE EMPLOYEE ENGAGEMENT

- PLATFORMS FOR ENCOURAGEMENT AND APPRECIATION
- STAFF RECOGNITION PROGRAMS
- STAY INTERVIEW PROCESS



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## GOALS, OBJECTIVES, & STRATEGIES CONT.

### PROGRAMS AND SERVICES

#### STRATEGIC AND DATA DRIVEN DECISION MAKING

##### DOCUMENT COMPREHENSIVE PROCEDURES

- CREATE WRITTEN AGENCY SYSTEMS FOR EACH DEPARTMENT
- CREATE SUB-COMMITTEES CONSISTING OF DEPARTMENT DIRECTORS, MID-MANAGEMENT STAFF, AND FRONT-LINE STAFF
- CREATE SHARED FOLDER IN CLOUD STORAGE TO SHARE INFORMATION WITH ALL STAFF AND ONBOARDING STAFF
- USE PERIODIC PULSE QUIZ TO EVALUATE STAFF KNOWLEDGE RETENTION
- AGGREGATE QUIZ RESULTS AND DETERMINE IF CHANGES OR FURTHER TRAINING IS NEEDED

##### DOCUMENT COMPREHENSIVE TRAININGS

- CREATE WRITTEN AGENCY TRAININGS FOR EACH DEPARTMENT
- CREATE A TRAINING SCHEDULE FOR EACH DEPARTMENT AND AGGREGATE INTO ONE DOCUMENT
- USE PERIODIC PULSE QUIZ TO EVALUATE STAFF KNOWLEDGE RETENTION
- AGGREGATE QUIZ RESULTS AND DETERMINE IF CHANGES OR FURTHER TRAINING IS NEEDED



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## GOALS, OBJECTIVES, & STRATEGIES CONT.

### PROGRAMS AND SERVICES CONT.

#### STRATEGIC AND DATA DRIVEN DECISION MAKING

##### CAPITALIZING AGENCY GROWTH

- CREATE, WRITE PROCESS, AND TRAIN ON GRANT MANAGEMENT TRACKING WORKSHEET
- SHARE THE GRANT MANAGEMENT TRACKING WORKSHEET WITH LEADERSHIP TEAM
- CREATE INTERNAL MONITORING PROCESS AND TOOL BASED ON ROMA PRINCIPLES FOR EACH DEPARTMENT
- REPORT INTERNAL MONITORING DATA LEADERSHIP TEAM AND BOARD OF DIRECTORS



## ANNUAL UPDATE

“*Choosing how to turn weaknesses into strengths*”

Input from the board was solicited and documented. The board assisted in SWOT analysis by actively participating in the choosing of strengths, weaknesses, opportunities, and threats. Additionally, they were part of the process of choosing how to turn weaknesses into strengths.

On the Annual Update presented by the Executive Director, this was a culmination of work from all stakeholders including Board members. Additional input was solicited and approval was granted..



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## AUTHORIZATION

AS OF THIS DAY, 28TH OF FEBRUARY, WE THE BOARD OF DIRECTORS FOR CENTRAL TEXAS OPPORTUNITIES, INC. DO HEREBY ADOPT THIS DOCUMENT AS A STRATEGIC PLAN FOR THE TIME PERIOD OF 2023-2026

### CCAA BOARD OF DIRECTORS

#### MEMBERS:

- Mike Corley, Chair
- Connie Sue Carroll, Vice Chair
- Dayna Prochaska, Secretary / Treasure
- Stacy Mendoza,
- Tom Bailey
- Ken Slimp
- Drew Barker
- Kerri Bill
- Sharlene Taylor-Hetzel



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**CCAA - LEADERSHIP TEAM**

- Hanna Adams, Executive Director
- Sierra Keeney, Executive Assistant
- Brandy Crowder, Chief Financial Officer
- Tammy Smith, Comptroller
- Shenika Arredondo, Community Services Director
- Samantha Boyer, RSVP Director
- Melissa Nunez, Housing Director
- Rebecca Connell, HR Director
- LaVerne Davis, Child and Family Services Director
- Wayne Kauffman, Director of Infrastructure
- Todd Leibham, Director of Development
- Pearl, Director of Goodwill



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## STRATEGIC PLANNING COMMITTEE

### HUMAN RESOURCES

- Rebecca Connell, Committee Chair
- Sierra Keeney
- Tammy Smith
- Connie Sue Carroll
- Drew Barker
- LaVerne Davis

### PUBLIC RELATIONS

- Amanda Sanchez, Committee Chair
- Sierra Keeney
- Samantha Brown
- Mike Corley
- Dawni Seymore
- Todd Leibham



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## STRATEGIC PLANNING COMMITTEE

### FUND DEVELOPMENT

- Brandy Crowder, Committee Chair
- Sierra Keeney
- Kourtney Guerrero
- Amanda Sanchez
- LaVerne Davis
- Wayne Kauffman
- Tom Bailey
- Shenika Arredondo

### PROGRAM & SERVICES

- Wayne Kaffman, Committee Chair
- Sierra Keeney
- Kathleen Burton
- Shenika Arredondo
- Brandy Crowder
- Tammy Smith
- Melissa Nunez
- LaVerne Davis
- Kourtney Guerrero
- Dawni Seymore
- Todd Leibham





## OFFICE LOCATIONS

### Coleman

114 Needham  
Coleman, Texas 76834  
325-625-4167

### Weatherford

548 Santa Fe  
Weatherford, TX 76086  
682-253-4230



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