



**Fostering opportunities for thriving
individuals, families & communities**

Strategic Plan 2018-22

Approved by

The Community Concepts Board of Directors

February 21, 2018

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About Community Concepts

Community Concepts was incorporated in 1965 by local community members seeking to reduce poverty in western and central Maine. Community Concepts is a Community Action Agency for Oxford and Franklin counties and a Maine 501(c) 3 organization that has helped thousands of low to middle income level residents receive the support they need.

Community Concepts supports residents in Androscoggin, Oxford and Franklin counties with a dynamic range of programs: children and family services, transportation, heating and utility assistance, affordable housing and home improvement services, home ownership support and financing for housing and businesses.

To begin, Community Concepts provides services and programs to support the well-being of children, teens and families. These include Head Start and child care, parenting support, school-based counseling for teens, child abuse and neglect prevention, childcare home nutritious food program and the family supports program.

Services and programs to foster home ownership across the community and affordable living options for low income residents include the following: home building and renovation, affordable rental housing, and home ownership services. The latter category includes home loans, home buyer education, credit and foreclosure counseling, home energy evaluation, lead testing and abatement, and home maintenance.

Additionally, Community Concepts has services and programs to provide income eligible residents with energy assistance as well as safe and energy-efficient housing. These programs include home heating and electricity assistance, central heating improvement program, and home improvements such as furnace repair or replacement.

Transportation services at Community Concepts include rides to income-eligible residents for MaineCare appointments, child welfare rides, veteran's medical appointments, the needs of the elderly and cancer patients.

Along with our subsidiary, Community Concepts Finance Corporation (CCFC), Community Concepts provides a variety of economic development services, including loans to businesses and commercial properties, technical assistance, property management and maintenance, and real estate mortgages.

Both organizations are governed by an all-volunteer board of directors relying on over 200 staff and steward millions of dollars into the local community each year.

Board of Directors

Community Concepts is governed by an all-volunteer Board of Directors comprised of Maine residents from Androscoggin, Oxford and Franklin counties. As a Community Action Agency, we are required to have a tri-partite board structure, drawing members from among elected officials, community members and the economically disadvantaged. Community Concepts also strives to ensure that board is diverse, inclusive and capable of representing the many voices and communities that we serve. Some board members satisfy certain positional requirements. Economically disadvantaged members may be disadvantaged themselves or may be nominated by organizations representing economically disadvantaged citizens. To ensure a democratic process, Community Concepts solicits nominations from economically disadvantaged individuals to serve on its board. Community Concepts' board also includes a representative from the Head Start Policy Council.

Members

Private Sector

Mary DeLano, *President*

Jennifer Corbett

Neil J. Kiley

Steven Davis

Abdulkerim Said

Low Income Sector Reps

Melissa Burnham, *Secretary*

Tara Jean Davis, *Vice President*

Erin Reed

Archie Bradeen

Victoria Larson

Public Elected Sector

Richard Colpitts, *Treasurer*

Donna Karno

N. Paul Gauvreau

Christopher Paradis

Jim Douglass

Executive Team

Shawn Yardley, Chief Executive Officer

Mary-Rita Reinhard, Chief Operating Officer

Kevin Mahoney, Chief Financial Officer

Candace Sanborn, Chief Marketing Officer

Executive Summary

The Promise of Community Action

*Community Action changes people's lives,
embodies the spirit of hope,
improves communities,
and makes America a better place to live.
We care about the entire community,
and we are dedicated to helping people
help themselves and each other.*

The driving force of the Community Concepts, Inc. strategic plan are the factors that contribute to people having opportunities for a high quality of life in our community. While we provide answers in the form of five-year imperatives and strategies, we know the most effective community organizations will continuously refine their strategies as the external landscape evolves and new lessons are learned. Our strategic plan is intended to be a dynamic road map, defining a clear destination of where we want to be in 2022 and encouraging flexibility and creativity throughout the journey.

This plan is intended to initiate positive change within Community Concepts, Inc. and the community while embracing continuity and diversity. The plan provides a sharper focus to our work in the form of five imperatives, driven by the community's needs and priorities. It requires us to rethink how we organize our time and talent, and where we invest dollars. At the same time, the plan strongly reaffirms the organizations historical commitment to ending poverty.

The strategic direction and goals included in this plan are Community Concepts Inc. response to its understanding of what the community values most about the organization, and the opportunities and challenges for offering a Whole Family Approach system of support in the community for people living in poverty.

Despite the efforts of many organizations over the last 53 years since President Lyndon B. Johnson declared a War on Poverty, poverty continues to rise. Community Concepts Inc. leadership is committed to changing the social service delivery model from one of delivering services in silos, with limited results; to one that takes a holistic approach to serving families, moving the dial so that more people can realistically move out of poverty. To do this, we are moving to a Whole Family Approach model. This means that instead of helping people in silos, solving only their presenting issue then sending them out the door with brochures or phone numbers for other agency services, we will fully surround them with the supports they need. This is done by implementing a whole-family approach, which provides services to both the child and family, and connecting them with internal and/or external services through our strategic partners to create full systems of support.

Community Concepts Inc. is the Community Action Agency in Oxford and Androscoggin counties and we recognize the need to increase healthy, safe and affordable housing in the regions we serve, and are committed to partnering strategically with like-minded organizations. This improves and increases the housing stock. This will require a strategic investment of resources to develop long term plans for our existing stock, including the assessment of our Limited Partner exposure, combining of properties, and expansions of Self Help Housing and Lead Paint remediation work. In tandem with this work, we

will advance our community focus and build internal supports to work with area residents and civic agencies. These would include organizations that serve the Maine immigrant community who focus on developing relationships with New Mainers and ensure that our efforts are well coordinated. Improving the safety of housing in the Tree Street region requires strong community partnerships, relationships and cultural awareness and sensitivity. We will introduce cultural awareness training for staff and embed this in the culture of the organization.

Transitioning to a data driven organization will result in positioning the organization to function in a more effective and efficient manner. We will train the organization on process improvement techniques and create systems that will provide operational, programmatic and financial dashboards to guide our work and predict agency performance and inform our decision making. We will embrace the Results Oriented Management and Accounting (ROMA) practices and rebuild the infrastructure to support the Community Action Organization Standards to ensure we are focused on results as a result of our activities.

In order to achieve our plan results it is imperative that we diversify our funding streams and broaden our base to enhance our financial stability. We will explore numerous for profit and fee for service type programming to complement our existing efforts while providing needed undesignated funding to support the organization. A robust fund-raising plan will be developed and executed with milestones and targets to ensure the advancement of the organization and forward moving initiatives.

Support at the local, state and federal level are paramount to ensuring our overall success. We will build a strong advocacy component into our work and ensure that we are present and leading at the appropriate tables to influence outcomes.

Our staff is the most important resource to the organization and to this end; we will invest in multiple initiatives to invest in staff development. We will support our staff in developing the required skills and competencies to assist with the execution of the Strategic Plan.

The five-year period of this strategic plan will be a time of assessing and deepening the Community Concepts. Inc. approaches to its work. Concurrently, Community Concepts. Inc. will take more of a leadership role in working with a broader array of community resources, and it will explore actively more diversified funding sources.

With a fresh perspective on its mission, understanding what it does well, and the environment in which it operates, Community Concepts. Inc. will pursue the following strategic direction:

- 1. We will maximize our organizational strengths to meet the identified needs of people in our region.*
- 2. We will diversify funding streams and broaden our base to enhance financial stability to meet opportunities and community challenges.*
- 3. We will transform to a solution-oriented organization that meets our customer's immediate needs while addressing root cause.*
- 4. We will align our structures, policies and practices to support staff in achieving our mission.*

5. We will advance our leadership role at all levels of government and with community stakeholders to drive comprehensive and innovative solutions to our community's needs.

As we implement this strategic plan, Community Concepts, Inc. looks forward to continuing our work to end poverty and growing our connections with our community members, donors, and leaders who help us achieve our community-impact imperatives.

Introduction

The purpose of this strategic plan is to articulate the long-range direction priorities for Community Concepts. The objectives and strategies described in this document have been approved by our board of director's and will guide the organizations efforts and priorities over the next three years.

In this plan, we present five compelling imperatives to be achieved by 2022. Reaching these imperatives is Community Concepts commitment to focus on serving those who are most vulnerable. These individuals and families are who suffer most in our community and live in poverty.

The five-year time horizon reflects our belief that the complex and interrelated socio-economic issues facing our customers can only be addressed through long-range effort and sustained commitment. At the same time, we recognize the need to pursue the objectives with alertness and adaptability to new challenges and opportunities as they emerge. This plan aims to strike a balance. Sometimes addressing today's problems can prevent them from becoming larger problems in the future.

This plan is a product of an 18-month process led by an outside consultant, the executive team, directors, and the board of directors.

Core Ideology: Our Mission, Vision, and Values

Community Concepts core ideology consists of our mission, vision, and core values. Our mission describes why we exist. Our vision describes our aspiration for what our community will become when we succeed in carrying out our mission, and our core values articulate the enduring principles that guide our decisions and actions at entry level of the organization.

Our Mission

To strengthen individuals, families and communities in Western Maine by providing diverse programs, by engaging in strategic partnerships, and through advocacy that addresses the barriers to promote economic opportunities for all.

Our Vision

All residents in Western Maine have an opportunity to achieve personal and financial fulfillment.

Tagline

Fostering opportunities for thriving individuals, families and communities.

Our Core Values

These values guide our interactions with each other, our work to further the CCI mission, our stewardship of agency and program resources and our collaborations and partnerships with other organizations and funders.

Respect - We show respect by conducting ourselves in a way that acknowledge the esteem and regard we hold for each other.

Communication - We expect communication to be an open exchange of ideas and knowledge to foster a shared understanding.

Integrity - We act with integrity through consistency of action and being true to ourselves, trustworthy, ethical, honest, and responsible.

Compassion - We demonstrate compassion by seeking greater understanding and by acting with empathy.

Empowerment - We foster empowerment in individuals and communities by building on strengths to encourage growth and development.

Resourcefulness - We demonstrate resourcefulness by being well informed and meeting situations as they arise in a creative and effective way.

Diversity - We honor diversity through recognition and acceptance of the individuality of people.

People and relationships, both internally and externally, drive our work and are impacted by it. These values ensure that people remain at the forefront of all our decisions and actions.

Strategic Planning Process

Strategic Planning Process Model



The strategic context for this plan was derived from examining both the internal and external landscape in which Community Concepts services customers in. To understand the strategic landscape Community Concepts conducted extensive research among residents regarding community needs, aspirations, community trends, and organizational strengths and vulnerabilities. The thinking that went into this strategic plan was significantly shaped by what we learned through this research.

SWOT analysis is a fundamental analysis tool to assist in the discovery and evaluation phase of strategic planning. SWOT analysis help identify and qualify strategic goals by making judgment calls about where the company currently stands internally, regarding its development and, externally, regarding its market and competition.



Within our strategic planning process, we strive to meet the Standards of Excellence.

A Framework for Achieving excellence in Community Action the Community Action Standards of Excellence are distributed among seven Categories of Excellence creating a management framework.



Categories 1-3: These categories focus on Organizational Drivers that determine the purpose and direction of an organization.

Category 4: This category supports all others. It is the “Brain Center” of an organization, as it focuses on how data and information are aggregated, analyzed, distributed, and used to determine progress and inform all aspects of agency operations.

Categories 5-6: These categories focus on the efficiency and effectiveness of an organization’s People and Processes.

Category 7: This category focuses on the “Bottom Line”, how you use ROMA, and whether the organization is progressing toward its mission and achieving its intended outcomes and results.

Community Concepts Strategy Map



Strategic Plan

Strategic Imperative 1 <i>Community Concepts will maximize our organizational strengths to meet the identified needs of people in our region.</i>
Objective: Increase healthy, safe, and affordable housing in Maine.
Goal
Partner and align CCI resources to drive safe housing in our catchment area resulting in increased housing units.
Partner with CDC, State, and local regions to eliminate lead in existing housing units.
Develop infrastructure required to drive community leadership around supporting consumers. i.e: Family Advocate, Healthy Neighborhoods
Objective: Implement a housing services model that results in supportive resident services.
Goal
Implement a housing services model that results in support resident services.
Objective: Transition the agency to a Whole Family Service Model.
Goal
Implement a 2-generation/ Whole Family Services model across the organization.
Create skills based workforce development arm to support 2-generation/ Whole Family Services.
Embed financial skill building in the process
Objective: Utilize CCFC's capacity to build assets for residents, businesses and communities.
Goal
Provide affordable mortgage financing in conjunction with financial coaching up to 85% of affordable residential lending capital secure.
Provide affordable mortgage financing packaging through partnerships with Rural Development and Merrimack Mortgage to better serve our clients.
Provide capital and technical assistance to businesses that are unable to access traditional sources of capital.

Strategic Imperative 2 <i>Community Concepts will diversify funding streams and broaden our base to enhance financial stability to meet opportunities and community challenges.</i>
Objective: Establish one or more for-profit lines of business that complement our existing business and/or support achievement of our mission.
Goal
Expand for profit model for Lead Paint Inspection Services.
Complete Fee For Service abatement construction management services for 150 units.
Explore funding and feasibility of developing a Net Zero housing construction FFS model
Expand FFS for lead paint inspection services
Expand Fee for Service Transportation Rides program.
Provide modeling options for programs that are looking to pursue alternative funding operations that includes net present value (NPV) that then can be measured by reviewing actual results compared to the NPV.
Develop an internal vetting process to explore new programs or service options in partnership with the grant group
Launch a loan underwriting fee for service side of business.
Open a child care center in Lewiston and Oxford.

Objective: Increase the number of pre-school children in our region who are enrolled in early childhood education.
Goal
Identify additional school Pre-K partnerships in communities we serve.

Objective: Package our existing services to create a fee for service revenue stream.
Goal
Investigate providing HR Services to other non-profits for a fee. Services may include benefits administration; recruitment; wellness; legal postings and payroll.
Investigate the opportunities to provide IT trainings to individuals and outsized organizations either at CCI or at customer's site.
Expand the current foreclosure mitigation services to other financial institutions.

Objective: Have in place a social impact and investment vehicle that successfully attracts investors.
Goal
Successfully implement the private social investment capital program and infrastructure to raise \$500,000.

Objective: Grow all components of our donor base and advance fundraising and event strategies that result in increasing our annual support.
Goal
Create investment partnerships for area businesses that employ people at low wage levels - helping their employees be at work.

Partner with CCFC to help get into towns that currently do not support CCI and submit a case for support.
Create two new public events- one located in Oxford County- to enhance community visibility.
Nurture existing donor base by communicating CCI's impact in a monthly e-newsletter and quarterly printed newsletter.
Obtain monthly media coverage in our region.
Develop partnerships with banks to invest in CCI while receiving visibility.
Build the video library to better communicate our impact externally and internally.
Develop partnerships with banks to invest in CCI while receiving visibility.
Develop a robust fund-raising plan.
Grow the annual appeal.
Create a Development Committee to expand opportunities.
Grow the signature event.
Sustain funding resources for long term initiatives currently grant funded.

Objective: Determine long term plan for properties.
Goal
Assess limited partner exposure and options for the low-income housing tax credit properties.
Assess CCI standalone land and/or properties for long term viability and develop recommendation.
Conduct a feasibility study and develop a recommendation for the best use of the Farmington lots.

Objective: Proactively assess opportunities for mergers, acquisitions, divestitures, alliances, partnerships and collaborations.
Goal
Develop model/checklist to work with CCFC and Director of Strategic Initiatives to include due diligence, NPV, banking, etc.
Proactively, promote conversations that support collaboration, coordination and efficiencies across community with other agencies and organizations and competition when the situations warrant encouraging mergers, acquisitions when appropriate to mission.

Strategic Imperative 3 <i>Community Concepts will transform to a solution-oriented organization that meets our customer's immediate needs while addressing root cause.</i>
Objective: A whole family approach to service will be implemented across the organization with robust interfaces and community partners utilizing a two-generational approach.
Goal
Partner with Universal Intake to define roles, responsibilities and structures to develop position specifications.
Reorganize the agency to support a whole family approach to service
Identify key external stakeholders to support children and families with 2-generation services
Identify and action co-location of services with community partners.

Objective: Streamline internal processes around the voice of the customer and eliminate redundancies and non-value work.
Goal
Develop an internal process improvement committee.
Process map internal program and operational processes. Including: Children’s Services, Transportation, Housing & Community Services, Family Services, Property Management, Finance, Human Resources
Introduce imaging/scanning solution to eliminate paper files and drive efficient document recovery.
Identify systems that will allow employees to work more efficiently regardless of location.
Consolidate and redesign agency websites.
Assess and streamline the agency new hire orientation.
Have the capacity in place to successfully explore and respond to foundation funding opportunities

Objective: Transform to data driven organization.
Goal
Deploy empowOR software.
Develop metric of net new revenue per marketing dollar. Goal is to measure success of marketing efforts.
Implement ROMA practices into the organization.
Embed CAP agency organizational standards throughout the organization.
Implement a robust dashboard to drive expectations and decision making including program, financial, and operational.

Objective: Build a culture of a shared commitment to an “intolerance of intolerance.”
Goal
Develop onboarding to include agency mission, values, and “intolerance to intolerance” as part of the experience and as part of the agency’s culture.
Create a culture of shared views and values within our communities.

Objective: Implement essential strategies to successfully serve our clients.
Goal
CCFC will continue to implement the NeighborWorks America SHOP model which is a customer centric business approach.
Utilize resident service coordinator role to raise awareness of CCI & CCFC programming and Universal Intake opportunities through site picnics etc.

Strategic Imperative 4 <i>Community Concepts will align our structures, policies and practices to support staff in achieving our mission.</i>
Objective: Develop and implement a merit/performance based evaluation process.
Goal
Evaluate performance management system (ADP) and identify next steps toward merit based performance.
Maximize the use of our performance management system (ADP) and migrate the organization to merit based performance.
Identify best process for creating professional development plans.
Create succession planning compliance with ROMA guidelines.
Complete all three stages of compensation analysis work.
Create a process of ongoing review of compensation review.

Objective: Create individualized training and development plans for all departments and staff.
Goal
Create an employee skills assessment to complete a skills and gap analysis of current employees to determine
Create and implement a succession plan.
Identify agency and department goals to forecast current and future talent.
Centralize and streamline volunteer/intern/temporary resources through a coordinator role.
Implement centralized oversight and coordination of training and determining staff need and/or requirement.
Partner and lend expertise toward implementation of organizational training solutions.
Identify components and reintroduce Leadership Institute training.

Objective: Implement compliance activities across the organization, including bringing policy and procedure language current and developing centralized contract compliance and administration.
Goal
Centralize and streamline corporate policies and procedure in a central repository while driving content amendments as identified.
Ensure all CSBG data, reporting and allocations are completed accurately and timely.
Determine agency response to compliance and Program Integrity
Build a process of Finance random audits (petty cash, expense reports, etc.) to ensure we are in compliance with Office of Management and Budget.
Complete internal risk assessment.

Strategic Imperative 5 <i>Community Concepts will advance our leadership role at all levels of government and with community stakeholders to drive comprehensive and innovative solutions to our community's needs.</i>
Objective: Position CCI at all community tables that align with our strategies including program and human resources.
Goal
Identify the tables that CCFC senior staff will sit at
Attend career fairs to highlight wellness and program successes.

Objective: Advocacy at all levels with state government to meet community needs.
Goal
Participate at Maine Community Action Association meetings and event including: CEO, COO, Human Resources Group, Resource Development Group and Finance Groups
Transportation will advance our work with the Maine Transit Association.
CCI will foster the relationships with key transportation stakeholders and strive to restore the Department of Transportation funding.
Housing Improvement and Community Services department will continue to have representation at the MCAA Housing and Energy Council statewide collaboration.
CCI representation on state and regional boards/groups will be strategic and those at these seats will be empowered and directed by CEO an executive team to advocate assertively on behalf of CCI and our mission.
Strategically place CCI resources to identify initiatives/ programs to meet client need.
Support 2-generation/Whole Family approach initiatives at the state and federal levels.