

Opportunities for Williamson and Burnet Counties Strategic Plan

OWBC Vision

A healthy, educated community in which all people live independently and with dignity.

OWBC Mission

To empower children, families, and seniors to achieve and maintain independence by partnering with area organizations to provide education, nutrition, and community support.

OWBC 2024 – 2026 Strategic Plan

Goal #1: Mission, Vision, and Communications

To improve the public's and staff's awareness of the organization's goals by integrating programs to improve brand awareness and differentiate OWBC from other community agencies.

Goal #2: Staff Talent Management

Provide professional development and training to staff for engagement, retention, and employee satisfaction.

Goal #3: Revenue Diversification

To develop a plan to increase and diversify revenue through new and existing donors and fee-for-service opportunities.

Goal #4: Board of Directors Onboarding and Training

Improve (to foster) the board's understanding of the organization's business environment to promote a sense of ownership and

Goal 1: Mission, Vision, and Communications <i>To improve the public's and staff's awareness of the organization's goals by integrating programs to improve brand awareness and differentiate OWBC from other community agencies.</i>		
Strategy 1A: <ul style="list-style-type: none"> Place OWBC branding, mission, and vision at all sites 	Key Success Measure: Staff should know and understand the programs, mission, and vision of OWBC	
Tactics	Measures of Success (Metrics)	Responsibility
<ul style="list-style-type: none"> Introduce intranet during the onboarding process 	<ul style="list-style-type: none"> Leadership staff utilize the intranet <ul style="list-style-type: none"> Are people asking for every file they need or are they finding it themselves? Link Paycom to the intranet? 	<ul style="list-style-type: none"> Leadership staff
<ul style="list-style-type: none"> Create an HR onboarding video and an agency video to highlight programs 	<ul style="list-style-type: none"> Video completed and uploaded to the intranet by March 2024 Including information on intranet usage and navigation basics (video) 	<ul style="list-style-type: none"> Marketing Coordinator (create video) HR (push out)
<ul style="list-style-type: none"> Quarterly mandatory directors' meetings to conduct HR training, agency happenings (events and marketing program highlights) communication plan (marketing and brand guide) <ul style="list-style-type: none"> All program directors (including site dir.) meet to understand programs 	<ul style="list-style-type: none"> Conduct first quarterly meeting in Q2 (focus on agency programs) Conduct quarterly meetings 	<ul style="list-style-type: none"> Assigning different cross-department & cross-department people each quarter to lead
<ul style="list-style-type: none"> Verify branding is correct at each site. Bulletin board with program (MOW & CSBG) info. Small workspace info card Knowledge of OWBC programs, mission and vision, and branding is part of performance goals <ul style="list-style-type: none"> Focus on the mission first and then the vision 	<ul style="list-style-type: none"> Materials are updated – business cards, signs, letterhead, print materials, etc. (Year 1) Staff have the correct email signature All sites have correct branding (old branding is discarded) (Year 1) Start meetings by reciting the mission 	<ul style="list-style-type: none"> Marketing Coordinator, Site Directors Office Manager (business cards) Site Directors (correct branding posted)

<ul style="list-style-type: none"> • Including all programs' info during client intake • Having informational postcards to hand out to clients 	<ul style="list-style-type: none"> • Clients are provided information about other programs during intake (ongoing) • Handing out postcards 	<ul style="list-style-type: none"> • Directors
<p>Strategy 1B:</p> <ul style="list-style-type: none"> • Differentiate OWBC from other providers (MOW, CTC, Community Action Inc) 		<p>Key Success Measure:</p> <p>People stop confusing OWBC with others</p>
Tactics	Measures of Success (Metrics)	Responsibility
<ul style="list-style-type: none"> • Distribute more agency materials to public <ul style="list-style-type: none"> ○ Differentiate OWBC MOW from MOW CTX ○ Clarify for public that HS is not a daycare, but school readiness program 	<ul style="list-style-type: none"> • Attending community events and distributing info (each program at least 3 events/month, increasing to 5/month by Year 3) <ul style="list-style-type: none"> ○ Delegating meetings/events to others in the departments • Develop an elevator speech that everyone uses • Ensure staff are aware of and have marketing materials 	<ul style="list-style-type: none"> • Directors & assigned department delegates (attending events) • Senior Leadership (elevator speech) • All staff (able to speak knowledgeably about all programs)
<ul style="list-style-type: none"> • Community partners have the right materials • Using the logo on everything 	<ul style="list-style-type: none"> • Share postcard (agency-wide specific) materials with partners 	<ul style="list-style-type: none"> • Marketing Coordinator
<ul style="list-style-type: none"> • Building Oppi mascot branding and recognition 	<ul style="list-style-type: none"> • Williamson County Sun article about Oppi • Oppi attending public events • By 2025 Oppi is launched internally and externally 	<ul style="list-style-type: none"> • Development Department (ongoing)
<ul style="list-style-type: none"> • Keep media distribution list up to date 	<ul style="list-style-type: none"> • List is updated regularly 	<ul style="list-style-type: none"> • Marketing Coordinator (ongoing)

Goal 2: Staff Talent Management
Provide professional development and training to staff for engagement, retention, and employee satisfaction.

<p>Strategy 2A:</p> <ul style="list-style-type: none"> Refine the hiring and onboarding process 	<p>Key Success Measure:</p> <ul style="list-style-type: none"> Increase retention of staff 3 years and under (5 years prior to 2023, 268 people less than 3 years, 90 people 3+ years) Reducing the hiring process length (avg. now may be 60-90 days from application + time from applying online)
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Tactics	Measures of Success (Metrics)	Responsibility
<ul style="list-style-type: none"> Create hiring and onboarding process map – what is the employee cycle 	<ul style="list-style-type: none"> Funding for a consultant to complete the process map 	<ul style="list-style-type: none"> Senior Leadership
<ul style="list-style-type: none"> Representing the position as it is in the interview and job descriptions 	<ul style="list-style-type: none"> Updating job descriptions 	<ul style="list-style-type: none"> HR & Senior Leadership
<ul style="list-style-type: none"> Define onboarding roles between HR and department/hiring requirements Handoff from HR to departments – each has their own requirements 	<ul style="list-style-type: none"> Reviewed process with each department Further clarification on responsibility & timeline from process mapping 	<ul style="list-style-type: none"> HR & Directors
<ul style="list-style-type: none"> Onboarding starts in the application process – keeping the process moving Moving through the hiring process at a good pace 	<ul style="list-style-type: none"> Moving candidates through X number of days <ul style="list-style-type: none"> Establish current average cycle time & create new target as a target metric (tied to process mapping) 	<ul style="list-style-type: none"> Senior Leadership & HR
<ul style="list-style-type: none"> Outlining expected goals and objectives in first 30-60-90 days of each department in performance management software Create career paths Creating retention opportunities Giving people swag as part of onboarding to promote a sense of belonging 	<ul style="list-style-type: none"> Inputting the notes in the system, meeting with employees Regularly scheduled check-ins minimum of twice in the first month and monthly in 60-90 days Measure staff turnover/retention by program/site Track the number of promotions 	<ul style="list-style-type: none"> Supervisor (check-ins) HR (turnover & retention) HR & Program Directors (track promotions)

<ul style="list-style-type: none"> • Train managers to understand behaviorally based questions and how to speak with employees • Behaviorally based questions 	<ul style="list-style-type: none"> • Review hiring/interview templates and behavior-based questions • Interview skills training 	<ul style="list-style-type: none"> • HR
<ul style="list-style-type: none"> • Increase professional development opportunities 	<ul style="list-style-type: none"> • Implement parent communication training <ul style="list-style-type: none"> ○ Teachers often struggle with classroom management – setting expectations at the beginning of the year • Note: ties to a quarterly meeting in Goal 1 	<ul style="list-style-type: none"> • Program Directors
<p>Strategy 2B:</p> <ul style="list-style-type: none"> • Improve internal communication, inclusion, and equity 		
<p>Key Success Measure: Create an agency DE&I statement – merging 3 different statements</p>		
Tactics	Measures of Success (Metrics)	Responsibility
<ul style="list-style-type: none"> • Increase the number of opportunities for staff input – surveys on staff needs • Culture survey – do you have a sense of belonging? <ul style="list-style-type: none"> ○ Feel valued? Work-life balance? Do you have the resources you need? Trust management? Would you recommend to friends and family? • Act & respond (currently a lack of follow through) 	<ul style="list-style-type: none"> • Quarterly internal newsletter – staff newsletter and key stakeholder newsletter <ul style="list-style-type: none"> ○ Marketing Coordinator • Ensuring positions are accountable for their responsibilities • Communication workshops & training • Compassion Fatigue workshop 	<ul style="list-style-type: none"> • Marketing Coordinator (newsletter) • Senior Leadership & Directors (accountability & workshops)
<ul style="list-style-type: none"> • Utilize the intranet for internal communications & forms • Internal communication to staff will direct how to use intranet 	<ul style="list-style-type: none"> • Make sure intranet pages are up to date 	<ul style="list-style-type: none"> • Senior Leadership & Directors

<ul style="list-style-type: none"> • Improving organizational culture • Many different departments/programs • More staff inclusion activities • Sr. leadership meeting every 2 weeks – dynamic time for us to sit together and work on these strategies 	<ul style="list-style-type: none"> • Supervision and soft skills training • Discussing survey results at a senior leadership meeting and how we can address concerns • Creating plans for action and follow up including accountability 	<ul style="list-style-type: none"> • Senior Leadership & Site Directors
<ul style="list-style-type: none"> • Fair processes and policies, no nights, holidays, shift work, we have student loan forgiveness, and some departments have tuition reimbursement • What employee benefits can be universally applied or not? <ul style="list-style-type: none"> ○ HS staff lunches - not all programs, ○ Free daycare ○ Site directors must be part of the solution • Wellness Committee has representation from each program 	<ul style="list-style-type: none"> • Still people not checking email – told internet access is difficult (this problem has been solved) <ul style="list-style-type: none"> ○ Incentivize reading the email, contest, intranet treasure hunt • 3-4 wellness events/year (increasing to 5/year by Year 3) • Monthly birthday celebrations – encouraging sites to participate 	<ul style="list-style-type: none"> • Site Directors (email access) • Wellness Committee (events) • Development Department (birthdays)
<ul style="list-style-type: none"> • Marco visiting each of the sites to meet with Site Directors to understand their needs/desires 	<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> • Executive Director & Site Directors

Goal 3: Revenue Diversification <i>To develop a plan to increase and diversify revenue through new and existing donors and fee-for-service opportunities.</i>		
Strategy 3A: <ul style="list-style-type: none"> • Create and implement a fee-for-service program throughout programs 	Key Success Measure: The goal is for programs to be self-sustaining	
Tactics	Measures of Success (Metrics)	Responsibility
<ul style="list-style-type: none"> • Fee for service Head Start (Bertram) (everywhere open classroom) • Investigate the feasibility of summer program for HS kids <ul style="list-style-type: none"> ○ Opportunity to work with Y to start after school? 	<ul style="list-style-type: none"> • Hiring a consultant to explore fee-for-service <ul style="list-style-type: none"> ○ Year 1 ○ Program Launch in years 2-3 • Already located 2 places in Burnet • Government & funding sources compliance – determining how we report it & if we need separate accounts <ul style="list-style-type: none"> ○ Year 1 • Following regular program guidelines 	<ul style="list-style-type: none"> • Senior Leadership (procure consultant) • Accounting (funding sources)
<ul style="list-style-type: none"> • Secure partner ISDs • HS/ISD collaboration to accommodate the children • Connecting to the community and getting more partnerships 	<ul style="list-style-type: none"> • Finding funding to build partnerships <ul style="list-style-type: none"> ○ Reaching goal of in-kind funding from partner ISDs & community (20% match) 	<ul style="list-style-type: none"> • Head Start Directors
<ul style="list-style-type: none"> • Explore opportunities MOW center soup kitchen (Marble Falls) • Find locations where fee-for-service is available starting with senior centers • 	<ul style="list-style-type: none"> • Investigating pricing, feasibility, and logistics <ul style="list-style-type: none"> ○ Year 1 • Goal is self-sustaining and presenting viable options 	<ul style="list-style-type: none"> • Marble Falls Site Director • Director of Senior Nutrition
<ul style="list-style-type: none"> • Define \$ objectives for fee-for-service 	<ul style="list-style-type: none"> • First-year break even, then focus on expansion • POS system, policies around checks 	<ul style="list-style-type: none"> • Finance

Strategy 3B: <ul style="list-style-type: none"> Enhance funding through legacy giving 	Key Success Measure: Established legacy program in CY24, launching in 2025	
Tactics	Measures of Success (Metrics)	Responsibility
<ul style="list-style-type: none"> Create a legacy giving program Push for qualified charitable distributions Create monthly donor programs 	<ul style="list-style-type: none"> Publish website, promote through MOW locations Notify financial manager partnerships 	<ul style="list-style-type: none"> Development
Strategy 3C: <ul style="list-style-type: none"> Expand engagement with individual & business donors 	Key Success Measure: >\$2M in funding, grants, special events with goal of 10% growth year-over-year	
Tactics	Measures of Success (Metrics)	Responsibility
<ul style="list-style-type: none"> Continue to maintain relationship with WHO ladies and SDF 	<ul style="list-style-type: none"> Goal \$105k gross annually 	<ul style="list-style-type: none"> Development
<ul style="list-style-type: none"> Securing and growing private and federal grants Veterans Commission – what do grants require? 	<ul style="list-style-type: none"> Can we match our needs to Veterans Commission grants? Track veteran data, and have some info on database 	<ul style="list-style-type: none"> Development
<ul style="list-style-type: none"> Focus on increasing \$ from corporate partners (vs in kind) Donations and grants from local businesses Utilize chamber memberships to increase awareness & open up opportunities to site directors (ties to 1B) 	<ul style="list-style-type: none"> Event sponsorships Wrapping delivery vehicles 2 Sip and shop events Get on corporate/business budgets in prior year <ul style="list-style-type: none"> Campaign to local businesses 60th anniversary corporate luncheon in both counties Marble Falls event for local businesses & MOW publicity 	<ul style="list-style-type: none"> Development Site Directors
<ul style="list-style-type: none"> Increase fundraising through OWBC special events 	<ul style="list-style-type: none"> Goal \$125 gross annually (year 1) <ul style="list-style-type: none"> Target 5-10% growth year over year 2 Sip and shop events 	<ul style="list-style-type: none"> Development

<ul style="list-style-type: none"> Develop and manage end-of-year campaign 	<ul style="list-style-type: none"> Goal \$50k gross annually (year 1) <ul style="list-style-type: none"> Target 5-10% growth year over year 	<ul style="list-style-type: none"> Development
<p>Strategy 3D:</p> <ul style="list-style-type: none"> Conduct due diligence on new CRM (Customer Relations Management) 	<p>Key Success Measure:</p> <ul style="list-style-type: none"> Implement new CRM (Year 1 with launch target in Year 2) 	
Tactics	Measures of Success (Metrics)	Responsibility
<ul style="list-style-type: none"> Examining what is needed for integration with existing finance software Cost and feasibility Georgetown Health Foundation (funding) Planning for migration and integration 	<ul style="list-style-type: none"> Being able to run sufficient reports to help grow fundraising Track growth in # of donors and \$ from donors Reduce time and effort to manipulate data Train board and staff to new CRM 	<ul style="list-style-type: none"> Senior Leadership Development Finance

Goal 4: Board of Directors Onboarding and Training Improve (to foster) the board's understanding of the organization's business environment to promote a sense of ownership and accountability.		
Strategy 4A: <ul style="list-style-type: none"> • Create onboarding and orientation process for new board members 	Key Success Measure: Orientation process that allows board members to catch on quickly and meaningfully engage in OWBS's work	
Tactics	Measures of Success (Metrics)	Responsibility
<ul style="list-style-type: none"> • Stage 1: board members required trainings: background checks, confidentiality, open meeting act, board agreement with expectations, OWBC emails for intranet access, assign board member mentor <ul style="list-style-type: none"> ○ Notes: previous onboarding – spent the day training: visited Baca center, visited HS, reviewed mission and vision, and org chart, once per quarter for new board members, meet the directors ○ Understood MOW but what we learned from Baca center was valuable, knew nothing new about HSSS so it was very valuable, how community action ties into everything 	<ul style="list-style-type: none"> • Governance Committee team will put this packet together • New board members complete before first board meeting • Should board members have a special events participation requirement? <ul style="list-style-type: none"> ○ Attend special events ○ Donate to special events • Utilize retired laptop with all board docs/info for each board member? • Board member intranet portal/login? • Attempt to make Jan 1 start date for new board members • Review PowerPoint and info within 30 days, org charts, sample budgets, board roster • Obligation as a board member to know and understand processes • Board members rolling off are encouraged to find their replacement 	<ul style="list-style-type: none"> • Governance Committee • Board Members • HR (board member login)

<ul style="list-style-type: none"> • Stage 2: orientation materials: org chart, sample budget, sample agenda, board roster, Robert's rules of order overview, HS implementation guide, acronym guide 	<ul style="list-style-type: none"> • Before first board meeting • Create an acronym guide • Add board packet to intranet 	<ul style="list-style-type: none"> • Senior Leadership • HR • Finance • Marketing Coordinator (board packet to intranet)
<ul style="list-style-type: none"> • Stage 3: site visits: board visits to sites – see and work with programs 	<ul style="list-style-type: none"> • Quarterly visit day? Within 6 months? • Visit MOW kitchen, the Cave, HeadStart, invite them to lunch at senior centers (w/partners & sponsors) • See OWBC office in January when utility assistance opens • Executive Director and Senior Leadership to host board members and schedule visit times 	<ul style="list-style-type: none"> • Board Members • Site Directors • Senior Leadership
<p>Strategy 4B:</p> <ul style="list-style-type: none"> • Increase board diversity (grants have questions about board diversity) 	<p>Key Success Measure: Board is diversified in key areas of race, ethnicity, geography, profession</p>	
<p>Tactics</p>	<p>Measures of Success (Metrics)</p>	<p>Responsibility</p>
<ul style="list-style-type: none"> • Geographic diversification 	<ul style="list-style-type: none"> • Areas to seek board members from <ul style="list-style-type: none"> ○ Taylor ○ Burnet County – Granite Shoals ○ Florence • Statutory diversity – elected officials, private business, voted in, policy council parents, financial professionals, lawyer (required for CAA) 	<ul style="list-style-type: none"> • Senior Leadership • Board Members
<ul style="list-style-type: none"> • Sending out letters to donors/businesses asking for interest in board service • Recruit with HS parents – their parents and connections 	<ul style="list-style-type: none"> • Targeting our community partners 	<ul style="list-style-type: none"> • Board Members • Senior Leadership

Strategy 4C: <ul style="list-style-type: none"> Implement information sharing and trainings for board members in board meetings 	Key Success Measure: <ul style="list-style-type: none"> Each board meeting as at least 15 minutes for information/training 100% participation from the board in special events 	
Tactics	Measures of Success (Metrics)	Responsibility
<ul style="list-style-type: none"> Mini-trainings at the beginning of each board meeting Program spotlight from director Fundraising <ul style="list-style-type: none"> Fundraising toolkit for board members – give or get If you have more time than money you give time, if you have more money than time you give money Network/who do you know Cover more budget implications (particularly MOW) – orientation to dashboard seen during board meetings <ul style="list-style-type: none"> Bullet points that are tied to budget dashboard Idea: Saturday retreat – did strategic planning in the morning and then prepared for the budgeting process Idea: March meals – can ride with delivery driver 	<ul style="list-style-type: none"> Happens at every board meeting (board meetings every 2 months) Understanding program cycles & processes <ul style="list-style-type: none"> Example: Utility assistance starts in January (1000s of people walking in the door in Jan.) School start in Aug. City requests in Oct. Client referrals (board understands programs and who to contact at OWBC) Board has an elevator speech 	<ul style="list-style-type: none"> Senior Leadership (organizing the trainings)
<ul style="list-style-type: none"> Twice annual surveys to understand what board members don't understand or want to know more about 	<ul style="list-style-type: none"> Create survey 	<ul style="list-style-type: none"> HR

Strategic Plan Terms

Goal

- The outcome the department (or organization) hopes to achieve in each focus area. This needs to be a single sentence that clearly articulates what the organization is looking to achieve.

Strategy

- Set plans or methods to achieve your Goals.
- Actions that need to be taken to move the Strategy forward towards your Goal.

Key Measure of Success

- For each Goal, what does success look like?
- The metric to let you know how the organization is working towards its Goals but anchored in its Strategies.
- Often defines the outcome or “to what end” the Tactics are driving.
- What would you want to see quantitative or qualitative to know that this Strategy or Tactic has been realized?

Tactics

- More intentional details on how the organization will or needs to execute the Strategy.

Resources/Investment

- What will it take for this Strategy to be accomplished?
- Will there be hard costs, time, additional staff needed?
- Be as specific as possible to help build out work plans and budgeting for the Strategic Plan.

Responsibility (Person, Department, or Team)

- Who is ultimately responsible for ensuring this Strategy is completed?
- Also consider if there are other individuals, departments, or committees that would need to be involved.
- For some organizations, they may also include a percentage of time allocated to a person for each Strategy or Tactic. This is a helpful practice if one person looks to be responsible for multiple Strategies.

Timeframe

- When will this Strategy take place within the Strategic Planning timeline?
- This can be more of a range or a specific date to be completed by.
- Be as specific as possible.

