AEOA
ARROWHEAD ECONOMIC OPPORTUNITY AGENCY

Strategic Plan

2023 - 2025

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Executive Summary

Beginning in November 2022, Arrowhead Economic Opportunity Agency (AEOA) engaged Northspan to conduct a strategic planning process. The process sought to develop a three-year strategic framework including a practical vision, underlying contradictions, strategic directions, and action planning to guide its implementation.

During the process, the AEOA strategy committee reaffirmed the following mission, vision, and core values:

VISION: All people served will make measurable progress toward self-reliance or independence.

MISSION: To strengthen communities by providing opportunities for people experiencing social and economic challenges. This mission is based on the belief that all people should be treated with respect and given the same opportunities to achieve self-sufficiency.

CORE VALUES:
- *Respect.* We value and respect the people we serve. When they succeed, we succeed.
- *Stronger Together.* We believe in local wisdom and build coalitions with partners that move our mission forward.
- *Believe.* We believe in our mission and support each other in our work.

In its strategic planning sessions, the group established six strategic directions to guide its work:

STRATEGIC DIRECTIONS:
1. Recruiting, training, and retaining talent
2. Advancing the mission through outreach and communications
3. Expanding board involvement & recruitment
4. Reformulating technology to meet program needs
5. Engaging rural communities to share needs
6. Seeking & accessing innovative, sustainable funding sources

This document provides an overview of the new strategic plan, which will guide AEOA's work for the next three years. Details on the planning process and supporting documents from that process are available in the appendices.

Overview

Arrowhead Economic Opportunity Agency (AEOA) is a 501c(3) nonprofit Community Action Agency (CAA) serving northeastern Minnesota. AEOA's core service area includes St. Louis, Lake, and Cook Counties, and it serves nine additional counties through agreements with neighboring CAAs. While its services have changed over time, it has never strayed from its fundamental work in supporting low-income residents of the region.

AEOA began in 1965, with the framework for its creation emerging from the Equal Opportunity Act signed by President Lyndon Johnson in 1964 as part of his declaration of a War on Poverty. The Community Action Partnerships that emerged from this legislation have undergone a series of changes over time, but have always sought to facilitate the participation of the poor to determine how they can help themselves through flexibility, immediacy, and coordination. The community action promise explains that the model "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 are dedicated to helping people help themselves and each other."

AEOA is guided by a 27-member board of directors and senior staff across its divisions, who came together to develop the new plan in January and February 2023. The board's large, diverse membership provided a valuable range of perspectives on the issues facing AEOA and the populations it serves. As a CAA, the organization is required to complete regular strategic plans and employs the Results-Oriented Management and Accountability (ROMA) model to keep its work on track. The National Organizational Standards followed by AEOA include the following stipulations:

- 6.1 The organization has an agency-wide strategic plan in place that has been approved by the governing board within the past 5 years

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

- 6.3 The approved strategic plan contains family, agency, and/or community goals.

- 6.4 Customer satisfaction data and customer input, collected as part of the community assessment, is included in the strategic planning process.

This strategic plan fits within the five-year timeframe, directly addresses AEOA's core mission of serving low-income communities, and contains agency goals. Customer satisfaction data and input comes through both an annual survey conducted by AEOA (results available in the Background Information section of this report) and Community Needs Assessments (CNAs) completed every three years. Facilitators shared CNA results with the strategy committee in the context-setting session. The appendix titled "Background Information" provides an overview of many of these resources and how they tie into the creation of this strategic plan.

AEOA began its strategic planning work in November 2022 and completed two full-day workshops in January and February 2023 to build out the plan. The new strategic plan reaffirmed AEOA's existing vision, mission, and core values, with an internal survey generating very strong support. It brings together AEOA's wide-ranging offerings behind a set of strategic directions that provide concrete, measurable steps with which to make the vision a reality. By unifying this new framework with considerable stakeholder input, AEOA was able to build a plan that accurately reflects its current state of affairs and sets the stage for the organization to flourish over the next three years.

Strategic Plan

This strategic plan is the culmination of a planning process conducted from December 2022 to March 2023. The planning reaffirmed the vision, mission, core values of the Arrowhead Economic Opportunity Agency and developed new strategic directions for the organization. It also established action steps and outcomes to advance the strategic directions.

VISION: All people served will make measurable progress toward self-reliance or independence.

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CORE VALUES:
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PRACTICAL VISION:
- Increased, Clear Internal & External Communications
- Improved & Implemented Organizational Technology
- Increased, Retained Quality Workforce
- Expanded, Equitable Services
- Increased, Sustainable Funding
- Engaged, Knowledgeable Board

UNDERLYING CONTRADICTIONS:
- Internal and External Staff Turnover Limits Abilities & Services
- Funding Sources Challenge Expanding and Sustaining Programs
- Outdated Technology Restricts & Challenges Day-to-Day Operations
- Fragmented Communication Confuses Staff and Partners
- Uncommitted, Inconsistent Board Participation Blocks Progress

STRATEGIC DIRECTIONS:
1. Recruiting, Training, and Retaining Talent
2. Advancing the Mission Through Outreach and Communications
3. Expanding Board Involvement & Recruitment
4. Reformulating Technology to Meet Program Needs
5. Engaging Rural Communities to Share Needs
6. Seeking & Accessing Innovative, Sustainable Funding Sources

SD1 Recruiting, Training, and Retaining Talent

DEFINITION: This strategic direction stems from a recognition that talented, experienced professional staff are the foundation of AEOA's ability to serve its clients and advance its mission. It streamlines internal processes, creates new avenues to attract and retain talent, and works to build a more supportive work environment for all employees. If successful, AEOA will have fewer job vacancies, less turnover, and grow its reputation as a rewarding place to work.

ACTION STEPS

1. Consider returnship program
2. Develop cross-training plan in each department
3. Restart all-staff days
4. Explore possibility of more hybrid or remote work
5. Update and analyze exit interview data
6. Formalize management and leadership training with mentorship component
7. Develop internship program and consider AmeriCorps or Vistas to attract talent
8. Review and update compensation packages
9. Create professional development plan process
10. Implement onboarding process that includes who to go to when
11. Develop robust, performance-based employee recognition program

OUTCOMES

• Less staff turnover
• Onboarding process and professional development plans in place
• More jobs are filled or have shorter vacancies
• More diverse applicant pool/workforce
• Competitive compensation & benefits package

SD2 Advancing the Mission through Outreach & Communication

DEFINITION: This strategic direction works to improve AEOA's systems for both internal and external communications. It creates centralized resources and methods of communication staff and builds a plan to conduct stronger outreach to both market AEOA offerings and solicit funding. Success will streamline internal operations, improve job satisfaction, connect people to programs and services, and expand awareness of AEOA's efforts to support communities in need.

ACTION STEPS

1. Update website content regularly
2. Create a cross-functional internal marketing and outreach committee
3. Create multi-channel annual marketing, outreach, and communication plan, including funding appeals
4. Ongoing survey of what staff want for communication
5. Select a method or tool to utilize for communication
6. Create email community newsletter with board and staff highlights
7. Host community events and fairs
8. Rebuild website to make it more user-friendly
9. Create intranet for internal guides, newsletter, calendar, policies, forms, and who-to-contact lists
10. Cross-promote services through program activities and delivery
11. Determine who will update internal communication process

OUTCOMES

• Strong branding guide with templates
• Well-attended community events with strong volunteer pools
• Communications help identify funding streams
• Broader understanding and awareness of variety of services and cross-promotion (all departments included Improved, quicker communications
• Groups automatically updated when staffing changes
• Competitive compensation & benefits package

SD3

Expanding Board Involvement and Recruitment

DEFINITION: This strategic direction recognizes that the AEOA board's size and diversity of representation is an asset to AEOA, but that the board has room for improvement in member engagement. It provides additional resources to board members, strengthens the recruitment process, and better connects board members to AEOA's day-to-day work. It strives to improve board attendance and engagement on behalf of AEOA.

ACTION STEPS

1. Establish board recruitment committee

2. Develop recruitment plan using current board members

3. Market board meetings publicly

4. Develop orientation and onboarding process

5. Create board training

6. Create opportunities for board to hear from staff on what they do

7. Create event for board to meet with staff

OUTCOMES

• Full board

• Strong board attendance

• Increase board volunteers

SD4 Reformulating Technology to Meet Program Needs

DEFINITION: This strategic direction acknowledges that AEOA's technology is currently dated, complex, and does not allow for easy communication across departments. It develops a new technology plan to update infrastructure, adopt automated and more centralized platforms, and streamline referral processes to avoid duplication and barriers to information-sharing. Successful implementation will improve both client and staff experiences, minimize busy work, and prepare AEOA for ongoing technological advances.

ACTION STEPS

1. Develop technology plan
2. Develop funding plan and secure funding
3. Purchase updated and scalable hardware and infrastructure
4. Explore software options for single platform solutions
5. Explore universal intake solutions
6. Create generic department emails for intake referrals
7. Implement business process automation
8. Increase website integration for program needs, including communication and reporting
9. Implement staff training & cross-training

OUTCOMES

• Network infrastructure meets the needs for current and future needs
• Daily tracking service numbers across all departments
• System stability
• Full integration of all shareable resources
• Simple, universal intake application in place
• Community Service Block Grant reporting simplified
• Increased referrals to programs

SD5

Engaging Rural Communities to Share Needs

DEFINITION: This strategic direction acknowledges that AEOA serves a large region with deeply rural areas that have unique needs and may not be adequately served by current offerings. It intentionally identifies these locations for added outreach, tailors services based on their needs, and develops metrics to measure success. Its successful implementation will result in increased participation in the identified communities and expand AEOA's capacity in these areas.

ACTION STEPS

1. Day of connection partnering types of events, including local leaders

2. Pick number of underserved areas to offer services each year

3. Develop baseline and goal metrics

4. Develop listing of what we can offer by area and prioritize

5. Create beta mobile or remote service alternatives, e.g., mailing or "bookmobile"

OUTCOMES

• Increased program participation in rural communities

• Prescheduling of AEOA services and/or local referrals (economies of scale)

• Local partners to work with identified

SD6

Seeking & Accessing Innovative, Sustainable Funding Sources

DEFINITION: This strategic direction centers proactive planning to cultivate new and expanded funding streams for AEOA. It strengthens efforts to define needs and improve internal financial awareness, and coordinates with the marketing plan to support funding requests. If successful, AEOA will be in a stronger financial position with fewer constrained dollars, allowing the organization to better address community needs.

ACTION STEPS

1. Improve program development prior to requesting funding

2. Conduct legislative outreach and education

3. Increase internal fund awareness and utilization

4. Implement a fundraising committee

5. Address Foundation branding in marketing plan

6. Better define AEOA Foundation goals and uses

7. Identify and engage with community partners to collaborate and partner with programs

8. Explore revenue-generating programs that fit AEOA mission

OUTCOMES

• Greater collaborative program funding

• More flexible and unconstrained funding options

• Consistent fundraising plan and schedule

• Funding to meet any identified community needs in place

• Have more revenue-generating programs

Timeline and Priorities

Participants placed strategic plan actions on a timeline, which is available in the appendix titled AEOA Strategic Plan Timeline 02.14.23. Of the first quarter actions identified in the timeline exercise, strategy committee participants identified the following as the most catalytic for the strategic plan, with the rightward actions in the wedge being most pressing and the leftward actions following them:
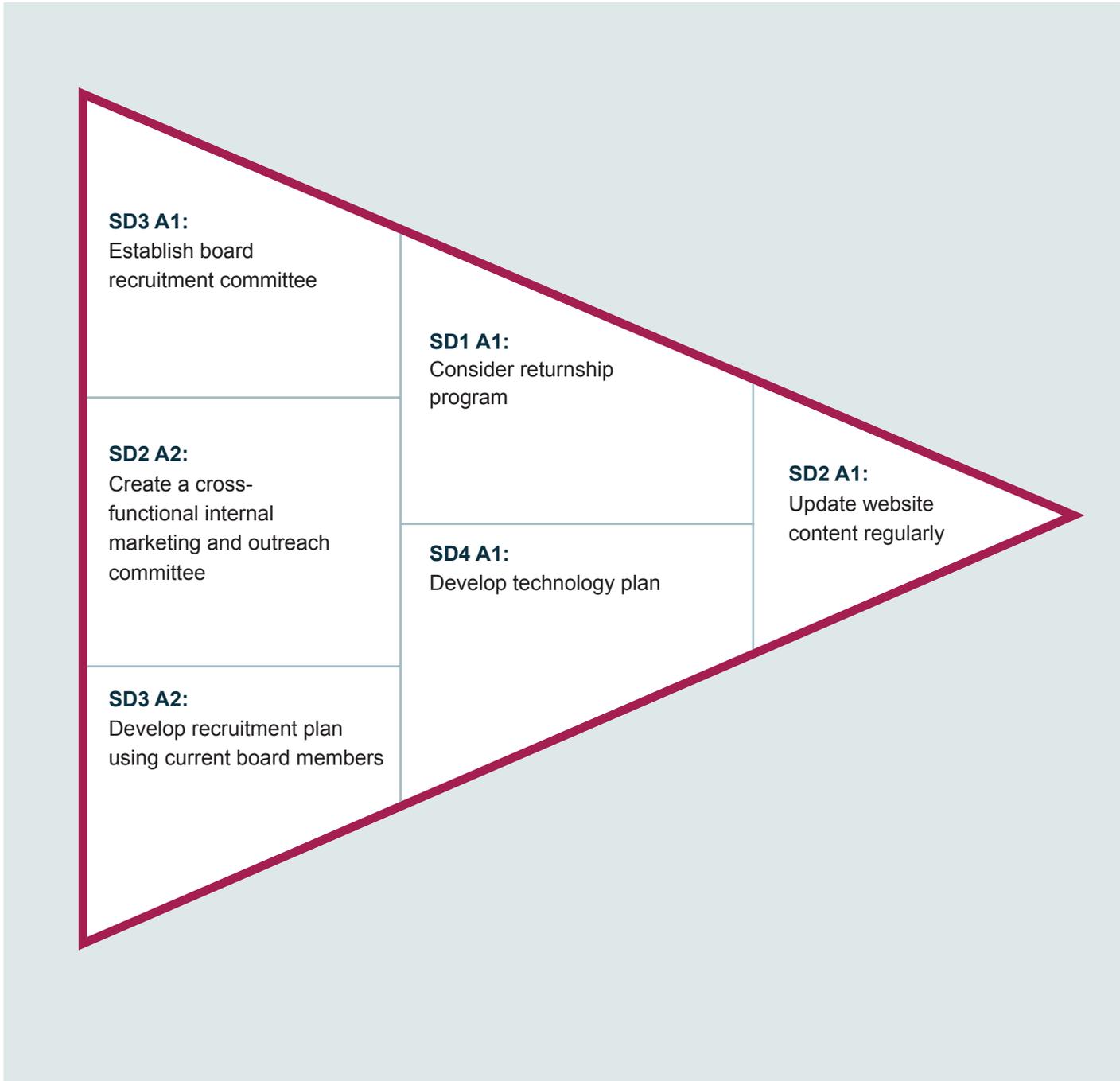
SD3 A1:
Establish board recruitment committee

SD1 A1:
Consider returnship program

SD2 A2:
Create a cross-functional internal marketing and outreach committee

SD2 A1:
Update website content regularly

SD4 A1:
Develop technology plan

SD3 A2:
Develop recruitment plan using current board members

Appendices

AEOA
ARROWHEAD ECONOMIC OPPORTUNITY AGENCY

Appendix 1
Strategic Planning Process

APPENDIX 1

Strategic Planning Process

Arrowhead Economic Opportunity Agency has prepared this 3☐year strategic plan to guide its activities and achieve accomplishments consistent with the group's vision and mission. The strategic process steps, session dates, and agendas are included as an attachment, as are the results of the sessions that followed.

PROCESS STEPS

Collection of Background Information & Internal and External Analysis
Strategy Committee, Board, & Staff Survey

1. 01.31.23 Strategic Planning Retreat A
2. 02.14.23 Mini Survey
3. 02.14.23 Strategic Planning Retreat B
4. Draft Strategic Plan Review & Feedback
5. 04.19.23 Strategic Plan Board Presentation

COLLECTION OF BACKGROUND INFORMATION & INTERNAL AND EXTERNAL ANALYSIS

The strategic planning process began with a series of meetings and communications with AEOA staff that provided contact information, materials detailing the organization's work and impact, and clarification over the plans for the engagement. This phase also included the collection of background demographic data from the US Census American Community survey to supplement AEOA Community Needs Assessment data from its service area. Combined with background materials and extensive survey work, this information was included in a context-grounding presentation in the first strategic planning session.

STRATEGY COMMITTEE, BOARD, & STAFF SURVEY

In order to directly inform the strategic planning process, AEOA solicited input from staff, board, and strategy committee members in a survey completed in August and September 2022. The survey received 30 responses. Participants were asked to rate the organization's execution on its previous strategic plan; assess its existing mission, vision, and values; brainstorm ideas for the practical vision, underlying contradictions, and strategic directions workshops within the strategic planning process; and identify the organization's strengths, weaknesses, opportunities, and threats. The full results of the survey are available in the appendix titled A EOA Board Staff Strategy Committee Survey Summary 01.31.23.

STRATEGIC PLANNING RETREAT A

AGENDA | January 31, 2023 | 9:00 AM – 4:30 PM

9:00   Welcome, Agenda, & Introductions
9:20   Context Presentation
10:20   Practical Vision Workshop
12:00   Break & Back to Working Lunch
12:20   Underlying Contradictions Workshop
2:20   Strategic Directions Workshop
4:20   Next Steps
4:30   Adjourn

On January 31, 2023, the strategy committee met for the first time and received a presentation on the results of the survey, demographic research, and analysis of background information provided by AEOA.

PRACTICAL VISION

In the first workshop of the strategic planning process, the strategy committee developed a practical vision for the process. The thoughts that fed into this practical vision are included in the appendix document titled AEOA Practical Vision Underlying Contradictions Strategic Directions 1.31.23. Elements of the practical vision included:

- Increased, Clear Internal & External Communications

- Improved & Implemented Organizational Technology

- Increased, Retained Quality Workforce

- Expanded, Equitable Services

- Increased, Sustainable Funding

- Engaged, Knowledgeable Board

UNDERLYING CONTRADICTIONS AKA BLOCKS

The next workshop focused on blocks that prevent AEOA from reaching the practical vision outlined in the first workshop. Participants identified five contradictions or blocks that they believed inhibited AEOA's efforts. These blocks are available in the appendix in the document titled AEOA Practical Vision Underlying Contradictions Strategic Directions 1.31.23.

Underlying Contradictions
- Internal and external staff turnover limits abilities & services
- Funding sources challenge expanding and sustaining programs
- Outdated technology restricts & challenges day-to-day operations
- Fragmented communication confuses staff and partners
- Uncommitted, inconsistent board participation blocks progress

STRATEGIC DIRECTIONS

With the contradictions in mind, the participants then moved to six directions that they believe will allow AEOA to overcome these blocks. These strategic directions are available in the appendix in the document titled AEOA Practical Vision Underlying Contradictions Strategic Directions 1.31.23.

Strategic Directions

1. Recruiting, training, and retaining talent

2. Advancing the mission through outreach and communications

3. Expanding board involvement & recruitment

4. Reformulating technology to meet program needs

5. Engaging rural communities to share needs

6. Seeking & accessing innovative, sustainable funding sources

POST-STRATEGIC DIRECTIONS MINI-SURVEY

After the first retreat day, a mini survey asked AEOA strategy committee members several questions to help them envision the future. It also identified the organization's strengths and weaknesses for implementation of the plan, along with the benefits and dangers of its success. The results of this survey are available in the appendix titled AEOA Mini Survey Summary 02.14.23.

STRATEGIC PLANNING RETREAT B

AGENDA | February 14, 2023 | 9:00 AM – 1:00 PM

    9:00   Welcome, Agenda, & Introductions
    9:10   Post Strategic Directions Mini-Survey Results Review & Conversation
    9:20   Focused Implementation
                Current Reality, Success Indicators, Actions
                Timeline
                Priority
                Next Steps
    12:10   90-Day Plan Teams
    12:50   Next Steps
    1:00   Adjourn

On February 14, 2023, Northspan facilitated a second, half-day retreat with the strategy committee.

FOCUSED IMPLEMENTATION

AEOA defined its current reality, identified success indicators, and developed outcomes and accomplishments that will allow the organization to move from current reality to success on each of its strategic directions. These accomplishments and the ideas that led to their creation are available in the appendix in the document titled AEOA Current Reality, Success Indicators & Actions 02.14.23. The strategy committee then further defined the strategic plan timeline, which is available in the appendix titled AEOA Strategic Plan Timeline 02.14.23 and identified the most important priorities for the first quarter of the strategic plan, which is available in the appendix titled AEOA Priority Wedge 02.14.23. Subsequent quarterly planning sessions will identify responsible parties and track progress on the timeline, making adjustments as necessary.

DRAFT STRATEGIC PLAN REVIEW AND FEEDBACK

Once complete, Northspan shared a draft strategic plan document with the strategy committee for review and comment. Strategy committee members recommended edits which were then incorporated into a final, designed document.

STRATEGIC PLAN BOARD PRESENTATION

On April 19, 2023, Northspan presented a finalized strategic plan to the full AEOA board for approval.

Appendix 2
Background Information

APPENDIX 2

Background Information

In order to develop an understanding of AEOA's situation, Northspan conducted considerable background research on the organization. This effort included the review of the following:

- A Community Action board training video
- The 2019 AEOA Strategic Plan
- An April 2021 Covid Community Needs Assessment
- The 2021 AEOA Community Needs Assessment
- The 2022 AEOA Annual Report
- Additional data collected from the US Census and American Community Survey

This information was shared with the strategy committee in a context presentation during its first workshop on January 31, 2023, and provided a lens through which to assess. This document includes a summary of its findings.

2022 ANNUAL REPORT

The 2022 AEOA Annual Report provided a series of highlights from the year that showed the extent of AEOA's reach:

- Served 28,438 individuals
- 289 individuals exited workforce programming
- Helped 283 households maintain safe, affordable housing
- 347,732 uses of transportation services
- Helped 8,447 seniors maintain independent living
- 316 students provided school readiness skills
- 57 free produce distribution events
- 4,565 hygiene kits distributed
- 916 pairs of back-to-school shoes and 4,580 pairs of socks given out
- Share the Warmth distributed 724 pairs of boots, 800 hats, and 250 family meal kits
- AEOA named Laurentian Chamber of Commerce 2022 Non-Profit Organization of the Year

The Annual Report also noted several challenges facing AEOA. As with many organizations, staff shortages were a frequent issue, with Arrowhead Transit and Head Start noted as among the most affected. Some services shifted to virtual settings to accommodate a lack of staff, which is not always ideal for service delivery. Inflation also took a toll on AEOA in 202, with increasing costs for home delivery containers, vehicle parts, and gas. Vehicle parts were also subject to supply chain delays, further disrupting transportation services. The organization's funding has also ticked downward somewhat from a peak in 2019, which can stretch resources in an inflationary environment.

CUSTOMER SATISFACTION SURVEY

AEOA conducts a customer satisfaction survey annually. The survey is available both online and through individual departments, which will send or share it with their clients directly. Results from the three most recent years are below:

	2020	2021	2022
Did you feel welcomed?	98%	98%	99%
Were you treated with respect?	98%	98%	99%
Was the facility clean?	97%	99%	98%
Was the facility accessible?	98%	98%	98%
Were you helped in a timely manner?	97%	96%	95%
Did you get the information and/or services you needed?	97%	98%	96%
Were you referred to community programs if AEOA could not help you?	79%	79%	79%
Were you informed about other AEOA services?	98%	97%	97%

The results show consistent, very high levels of satisfaction with AEOA services and the professionalism of its staff. The only indicators that showed some room for improvement included referral to other programs if AEOA is unable to assist (which may not be relevant to all survey-takers) and cross-promotion of other AEOA services. This final point underscores some frustrations with internal communication identified in the strategic planning process.

COMMUNITY NEEDS ASSESSMENT

AEOA completes a Community Needs Assessment (CNA) every three years, and most recently released a CNA in 2021. It features a series of one-on-one interviews and electronic surveys with clients, community members, partners and staff, and proceeds to conduct demographic, economic, and social data analysis. Taken as a whole, the CNA is among the most comprehensive overviews available of trends affecting the three-county Arrowhead region and the populations AEOA serves. The 2021 CNA surveyed 304 AEOA clients, 404 community members, 63 community partners, and 135 AEOA staff.

Analysis in the CNA provided an overview of the challenge many residents face in AEOA's service territory. It identified the percentages of AEOA clients and community members who had experienced a wide range of hardships, including food insecurity, housing instability, physical health struggles, mental health challenges, insufficient access to resources and benefits, transportation barriers, and other shortages of support. Dominant trends included housing instability, mental health issues, substance use, transportation barriers, and criminal background issues. Respondents found Meals on Wheels, housing services, transportation, Head Start, and energy assistance to be the most valuable AEOA programs. Barriers to AEOA services identified by clients included transportation, awareness, and technology, while staff added money, mental health, and housing. Many of these trends have been exacerbated by the Covid-19 pandemic and its aftermath, with additional smaller-scale CNAs conducted in May 2020, October 2020, and February 2021 highlighting the increased needs brought on during this timeframe.

Despite these challenges, respondents saw AEOA as a valuable partner to help solve many of them.

The organization's longstanding reputation, compassionate and knowledgeable staff, variety of programs, and support from partners all emerged as genuine strengths. Arrowhead Transit directly addresses transportation barriers, while Senior and Nutrition Services tackles many of the challenges related to an aging population and food access. The housing department specifically focuses on this emerging need, while Head Start helps fix an identified lack of capacity for to support youth in the region. AEOA's fifth department, Employment and Training, seeks to address the poverty that underlies the challenges of so many of its clients.

DEMOGRAPHIC ANALYSIS

While the CNA provides a thorough overview of Arrowhead area demographics, Northspan pulled some more recent data to provide additional context and provide some commentary on trends in the region over the past decade. All data in this section comes from the 2010 US Census and its 2021 American Community Survey.

Table 1: Change in AEOA Region Population by County, 2010-2021

	2010	2021	% Change
St. Louis County	199,472	200,311	0.4%
Lake County	10,900	10,835	-0.6%
Cook County	5,211	5,574	7.0%
Total	215,583	216,720	0.5%

The population of AEOA's three main counties of St. Louis, Lake, and Cook was relatively stable between the 2010 Census and the most recent American Community Survey estimates. Of the three, Cook County showed substantial growth over the decade, though its small size resulted in a relatively small absolute population growth. The other two counties saw relatively little population change, with modest growth in the greater Duluth area and modest decreases in Lake and rural St. Louis Counties.

Table 2: AEOA Region Population by Age, 2010-2021

	2010 Pop.	2010 Pct.	2021 Pop.	2021 Pct.	% Change
Under 18	42,626	19.8%	41,206	19.0%	-3.3%
18-34	49,934	23.2%	50,495	23.3%	1.1%
35-65	88,203	40.9%	81,610	37.7%	-7.5%
65+	34,820	16.2%	43,409	20.0%	24.7%

While the population of the three Arrowhead counties is relatively flat, its composition is changing over time. The population under age 18 and in the prime working years of 35-65 declined over this time period, while the 65-plus age bracket saw substantial growth. This shift is both the product of an aging population, as a large Baby Boomer cohort aged into the 65-plus category, and in the migration of many retirement-age individuals to the region, most notably in Cook County. The growth in the 18-34 age group, which was carried primarily by the population in the city of Duluth, offers some promise of renewed population growth if these residents remain in the area and have children.

Table 3: AEOA Region Population by Race, 2010-2021

	2010 Pop.	2010 Pct.	2021 Pop.	2021 Pct.	% Change
White	201,349	93.4%	198,258	91.5%	-1.5%
Black/African American	2,738	1.3%	3,290	1.5%	20.2%
Amer. Indian/Native American	5,096	2.4%	4,095	1.9%	-19.6%
Asian	1,990	0.9%	2,216	1.0%	11.4%
Some Other Race	904	0.4%	1,038	0.5%	14.8%
Two or More Races	3,493	1.6%	7,776	3.6%	122.6%
Hispanic/Latino (Any Race)	2,613	1.2%	4,022	1.9%	53.9%

The Arrowhead counties are slowly but steadily becoming more racially and ethnically diverse. While the percentage of the population identifying as white remains over 90%, the absolute number of white people dropped between 2010 and 2021, while the Black, Asian, Hispanic, and populations identifying as some other race all grew noticeably, albeit from low starting points. The seeming drop in the Native American population comes with some caveats, as Native American populations have tended to shift back and forth with the Two or More Races category over time, a product of complex historical forces and changes blood quanta used by some tribes to determine membership. While there are many individuals of two or more races that are not Native American, the increase in the Two or More Races is substantially larger than the drop-off in the Native American population, suggesting their numbers are at least stable, if not growing.

Table 4: Change in AEOA Region Median Household Income by County, 2010-2021

	2010	2021	% Change
St. Louis	$44,941	$61,213	36.2%
Lake	$46,765	$66,828	42.9%
Cook	$49,162	$65,045	32.3%

The AEOA core counties showed healthy growth in median household income between 2010 and 2021. These incomes all outpaced the national inflation rate of 24.3% over this time period. They still, however, lag statewide and national figures; median household income in the U.S. was just under $50,000 in 2010 and just over $70,000 in 2021, while the Minnesota figures for the same years were $57,000 and $77,000, respectively.

Table 5: AEOA Region Housing Statistics, 2010-2021

	2010 Pop.	2010 Pct.	2021 Pop.	2021 Pct.	% Change
Owner Occupied	68,855	59.8%	67,715	57.9%	-1.7%
Renter Occupied	25,494	22.1%	25,347	21.7%	-0.6%
Vacant Other (incl. Vacation)	18,810	16.3%	21,369	18.3%	13.6%
Remaining Vacant	2,070	1.8%	2,503	2.1%	20.9%
Total Units	115,229		116,914		1.5%
Cost Burdened - Homeowner	12,523	18.2%	8,464	12.5%	-32.4%
Cost Burdened - Renter	12,475	48.9%	11,692	46.1%	-6.3%

The Arrowhead has a complicated housing market. While the number of total units grew by about 1,700 over the 11-year study period, all of this growth occurred in the "vacant other" U.S. category, which predominantly consists of vacation homes. Full-time residences in the region actually declined over this decade, with the larger drop coming in owner occupied units. Nearly half of renters are cost-burdened, and while this figure dropped somewhat over the study period, it remains substantial. These data points reflect a tight housing market with relatively few new units and substantial competition over existing units, which has been reflected in price increases in recent years.

Table 6: AEOA Region Population by Educational Attainment, 2010-2021

	2010 Pop.	2010 Pct.	2021 Pop.	2021 Pct.	Pct. Change
Less Than High School	11,380	7.8%	8,048	5.4%	-29.3%
High School Diploma	134,674	92.2%	141,450	94.6%	5.0%
Some College or More	89,630	61.4%	103,144	69.0%	15.1%
Bachelor's Degree or More	37,288	25.5%	46,712	31.2%	25.3%
Professional Degree or More	11,822	8.1%	16,366	10.9%	38.4%
Total Pop. 25+	146,054		149,498		2.4%

The AEOA region has relatively high levels of basic education, though its attainment of college degrees lags state and national figures. Its percentage of the population with high school diplomas is very high by national standards, as is its number of people with associate's or two-year degrees. There has been substantial growth in the college-educated population over the past decade, however, with significant growth in Cook County and in the greater Duluth area.

CONCLUSIONS

An analysis of all background information compiled by AEOA underscores the significant needs in its service territory and the vital role it plays in addressing many of them. The data shows a population facing elevated poverty rates, challenges exacerbated by the Covid-19 pandemic, and a lack of access to many resources that could help address many issues. It also shows shifting challenges in the region, including an increasingly diverse population, a large cohort of aging residents, and stagnant population growth. Many of AEOA's offerings reflect the highest priority needs identified by the Community Needs Assessment, and the work the organization undertakes directly supports the organizational mission, the Community Action Promise, and the requirements of the Results-Oriented Management and Accountability (ROMA) system employed by AEOA to ensure its strategic plans stay on track.

Appendix 3

Board, Staff, & Strategy Committee Survey Summary

01.31.23

BACKGROUND

In January 2023, Northspan administered a survey of Arrowhead Economic Opportunity Agency (AEOA) staff, board members, and strategy committee participants. It sought to assess the group's progress on the current strategic plan and reflect on ALS' vision, mission, and values. In addition, participants were asked to complete an analysis of the organization's strengths, weaknesses, opportunities, and threats and identify a vision for the future. The survey received 30 responses.

PROGRESS ON CURRENT STATEGIC PLAN

Participants were asked to evaluate progress on AEOA'S existing strategic plan by ranking each action item *Completed/Accomplished, Needs More Work, or No Longer a Priority.* The vast majority of the actions were rated as needing more work, reflecting the ongoing nature of many of them. Actions that were ranked highly as completed included two operational directions with discrete outcomes. Only rarely did survey respondents believe that actions were no longer relevant to the organization.

Goal #1: Increase the visibility and awareness of the Agency's mission and available programming within the organization and throughout AEOA's service area.			
	Completed/ Accomplished	Needs More Work	No Longer a Priority
Increased community awareness of all services and programs provided by AEOA	10.0%	90.0%	0.0%
Improve internal communication and employee awareness of all services provided by AEOA	10.0%	90.0%	0.0%
Improve communication with community partners and people served by AEOA	17.9%	82.1%	0.0%
Advocate on behalf of AEOA mission, programs, and people served	33.3%	66.7%	0.0%
Goal #2: Enhance service delivery through the development of mission-driven community specific teams.			
	Completed/ Accomplished	Needs More Work	No Longer a Priority
Improve internal communication and employee awareness of all services provided by AEOA	16.7%	83.3%	0.0%
Increase cross-department collaboration and reduce silo effect	20.0%	76.7%	3.3%
Goal #3: Increase community support and capacity for affordable housing including homes for young families, senior community living, and workforce housing with access to broadband.			
	Completed/ Accomplished	Needs More Work	No Longer a Priority
Improve knowledge of housing capacity in local communities	23.3%	76.7%	0.0%
Develop partnerships with economic and workforce development, senior service, and family service agencies, municipalities, broadband advocates, and other housing developers	20.0%	80.0%	0.0%

Operational directions:			
	Completed/ Accomplished	Needs More Work	No Longer a Priority
Evaluate wages and benefits in 2020 to remain competitive	55.2%	44.8%	0.0%
Improve IT leadership	67.9%	28.6%	3.6%

MISSION, VISION, VALUES

Next, respondents were asked about ALS' current mission, vision, and values. Most participants recognized the current statements and were asked to provide further feedback on the relevance.

VISION: All people served will make measurable progress toward self-reliance or independence.

-AEOA Annual Report, 2022

- 72% recognize this as the vision statement
- 100% feel the statement is relevant

MISSION: To strengthen communities by providing opportunities for people experiencing social and economic challenges. This mission is based on the belief that all people should be treated with respect and given the same opportunities to achieve self-sufficiency.

-Last updated in 1992. Board Reaffirmed, 2020-2022 Strategic Planning

- 100% recognize this as the mission statement
- 100% feel the statement is relevant

CORE VALUES: We value and respect the people we serve. When they succeed, we succeed. Stronger TogetherStronger together. We believe in local wisdom and build coalitions with partners that move our mission forward.BelieveWe believe in our mission and support each other in our work.

-AEOA Annual Report, 2022

- 93% recognize these as the value statements
- 100% recognize them as relevant

STRENGTHS, WEAKNESSES, OPPORTUNITIES, THREATS (SWOT) ANALYSIS

Strengths	Weaknesses
• Strong, experienced, large staff • Variety of programs/breadth • Collaboration & partnerships • Rooted & known in community • Established, diverse funding sources • Commitment to work • Leadership • Adaptable • Breadth of board perspectives • Large area covered • Fill a gap in the region	• Staffing turnover/vacancies • Communication/transparency • Size of organization/lack of flexibility • Silos • Org. structure & documentation • Loss of experience • Complex mission/spread too thin • Disparities/lack of diversity • Reliance on certain funding sources • Size of region
Opportunities	**Threats**
• Strengthened partnerships • More funding • Ongoing need • State budget surplus/legislative relationships • Greater advocacy role • Status as Community Action Agency • Aging in place services • Food distribution/community farms • Go after competitive grants • Growing diversity • New employees • Improving public transportation • Marketing internet opportunities • IT upgrades • More board engagement • Housing development/ownership • Electric vehicle infrastructure	• Funding/budget cuts • Staff retention • Negative publicity/"handouts" • Economic climate • Losing out on grants • Inflation/cost of major investments • Cyber security/technology • Regulatory changes/complexity • Lack of awareness • Competition • Size of region • Service delivery time limitations • Lack of child care for staff/clients • Demographics

PRACTICAL VISION

The next section of the survey asked participants to consider the question: *"What do you want to see in place in 5 years as a result of our strategic planning actions?"* Responses clustered into the following themes:

- Improved internal connections & procedures
- Connected to community needs
- Strengthened marketing and outreach
- Talent attracted and retained
- Centered core services
- Improved transportation
- Updated IT & security

UNDERLYING CONTRADICTIONS

After identifying their practical vision, survey participants were next asked to identify **underlying contradictions,** addressing the prompt *"What may be blocking or holding us back from moving toward our practical vision?"* Responses include:

- Fragmented organization inhibits communication and collaboration
- Dated technology and internal systems stifle innovation
- Complex funding streams limit flexibility
- Challenging regional economy and culture create unique obstacles
- Staffing challenges undercut service delivery

STRATEGIC DIRECTIONS

Finally, respondents were asked to reflect on their answers to the previous two questions and asked to consider *"What innovative things (actions, programs, or efforts) can our organization and staff do, create or take one to move our Practical Vision ideas into accomplishments?"* Seven aggregated strategic direction ideas emerged:

- Strengthening organizational culture through improved communication
- Streamlining IT & client management process for improved experience
- Gathering community input, reviewing programs, and prioritizing investment
- Growing staff capacity to deliver quality services
- Developing clearer budget cycle for increased understanding & advocacy
- Expanding awareness through external communications

Appendix 4
Practical Vision, Underlying Contradictions, and Strategic Directions 01.31.23

Staff, Board, & Strategy Committee Survey Summary 01.31.23

PRACTICAL VISION | *What we want to see in place in five years as a result of our actions?*

- Improved internal connections & procedures
- Connected to community needs
- Strengthened marketing and outreach
- Talent attracted and retained
- Centered core services
- Improved transportation
- Updated IT & security

UNDERLYING CONTRADICTIONS | *What may be blocking us or holding us back from moving toward your Practical Vision?*

- Fragmented organization inhibits communication and collaboration
- Dated technology and internal systems stifle innovation
- Complex funding streams limit flexibility
- Challenging regional economy and culture create unique obstacles
- Staffing challenges undercut service delivery

STRATEGIC DIRECTIONS | *What innovative, substantial actions, programs or efforts can our board or staff do, create, or take on that will address our blocks and move us toward our Practical Vision?*

1. Strengthening organizational culture through improved communication
2. Streamlining IT & client management process for improved experience
3. Gathering community input, reviewing programs, and prioritizing investment
4. Growing staff capacity to deliver quality services
5. Developing clearer budget cycle for increased understanding & advocacy
6. Expanding awareness through external communications

Improved internal connections & procedures	Improved internal connections & procedures CONTINUED	Connected to community needs	Strengthened marketing & outreach
• improvement of internal relationships	• Increased communication and transparency internally and externally	• Better understanding of racial disparity	• Improved awareness and marketing of programs/services
• Communication between all departments	• Universal Client Intake Application	• Better Preventive programs to end poverty.	• Reach everyone no matter the location
• Centralized system for communication to staff throughout the agency	• Universal Intake System and Tracking Methods	• Connection to community needs	• Enhanced public relations
• more team building	• Internal Fundraising Growth	• New programs	• Advocacy efforts on behalf of our offerings and client needs
• more communication between locations	• Universal intake to better serve clients	• Improving overall housing situation.	• Complete Branding for Agency and Market It
• Expanded partnerships	• Agency plan for moving towards a carbon and waste neutral footprint	• Develop and strengthen partnerships	• Make community aware of all AEOA programming
• Increased board member involvement	• create more laserfiche workflows	• Building, owning, and managing mixed income housing units.	• Solidify AEOA branding and communicate to employees
• Departments sharing what they do more often	• Evaluate and Improve Programs, Policies, Procedures, Forms/ Applications	• Adult engagement in activities, specially in winter.	
• Grant research and writing across departments		• Building, owning, and managing a shared "commercial incubator" facility/ campus	
• Centralized Agency Safety, Sustainability, and Customer Service Departments.		• Financial education classes for adults.	
• Identifying greater opportunities for inter-program collaborations, plans for implementing specific and sustainable collaboration partnerships, and measurable benchmarks for progress.		• Building, owning, and managing a shared "maker space."	

Talent attracted and retained	Centered Core Services	Improved transportation	Updated IT & security
• Employee Satisfaction and Retention Plan • Improve training/orientation • Talent strategy • Improved staff safety/training to manage mental health issues • more board training on community action	• Greater community service delivery in already established programs. • Refined goals • Focus on Core Programs, Less Pilots/Small Programs • Funding opportunities steady	• Free transportation region-wide • Improving public transport • Transportation • Free "trunk routes" (i.e. Duluth to Virgina, Duluth to Grand Portage)	• more detailed plan/vision on IT system upgrades • Fully integrated IT services and support to remove all paper consumption. • Technology Plan for IT for hardware • Improve Physical Security

Fragmented organization inhibits communication and collaboration	Dated technology and internal systems stifle innovation	Complex funding streams limit flexibility	Challenging regional economy and culture create unique obstacles	Staffing challenges undercut service delivery
• Fragmented offerings • Siloed Departmental Structure • Disconnect to come together as an agency • limited trust and confidence in employees • Conflicting opinions of what is most important • Perception departments not treated equally • filtered communications to the board • fragmented departments lead to less communication • Underdeveloped Planning for What Programs are Needed and if they Align with the Agency Mission Before Applying • Inconsistent beliefs on the importance of branding and making all PR materials consistant • inconsistent board training • Uncoordinated Efforts in Creation of Marketing Materials - Too Many Staff Involved and Not Following Brand • Underdeveloped systems of communication • Inconsistent deadlines	• Program Tracking Systems Do Not "Talk" to Each Other, Preventing Option for Universal Intake System • Outdated training materials/ missing information • Underdeveloped formal plans for agency implementation of internal changes. • We've always done it that way • underutilized software programs • Neglected/Outdated Orientation to Agency and Position • Thinking outside of the box • Looking for alternative avenues for getting things done more efficiently • Including department content leads, not just directors, when decision making • Outdated Beliefs and Unbalanced Willingness Across the Agency to Change with Times	• More and bigger is better-attitude • Lack of adequate federal funding • Limited resources • restricted funds • Lack of regional resources • Complex funding paths • Limited funding	• Mental health stigma • Lack of local resources • Physical location-whether it be aging infrastructure or inaccessibility. • Diverse and expansive area to serve • Unstable, homogenous economies • Corporate(especially "big box") values	• unrealistic expectations of customers • Family counseling • Underdeveloped talent recruitment and retention • Staffing shortage

Strengthening organizational culture through improved communication	Streamlining IT & client management processes for improved experience	Gathering community input, reviewing programs, and prioritizing investment	Growing staff capacity to deliver quality services	Developing clearer budget cycle for increased	Expanding awareness through external communications
• Build relationships between board members and employees • Work on communication between all departments • Build relationships within the Board • Better collaboration with "those in the know" within departments • create a schedule for board training • Create a better workplace culture where employees can get to know each other and what everyone does • Create committee to specifically identify collaboration opportunities. • Board training & engagement • Encourage staff to connect with their coworkers to create a more positive work culture so employees enjoy their work. When they enjoy going to work, they are happier which reduces burnout, and they will likely work harder • Involve non-management staff in safety committee. • Promote Agency wide recycling program in all locations.	• Identify common application data across programs • educate staff on software capabilities • Work with other Community Action Agencies to learn who is already implementing a universal intake system and how they have accomplished it. • Develop formal complete Agency technology project plan • Updating and streamlining policies across the agency • check lists for what is needed • Implement a Controlled-Access Solution • Implement an electronic Advertising Interest Form Department Staff submit to Planning for any advertising needs. Planning will create and send back to department for approval and assist with marketing upon request. • Increased use of technology platforms for increased awareness	• Bold leadership • Project prioritization • Implement an electronic Grant Interest Form Departments submit to the Planning Department, with exception of recurring grants. Planning will evaluate the program to determine whether it aligns with the Agency's mission, the most recent time the Agency has applied to that funder, if the department would like assistance in applying, etc. • Establish priorities • Evaluate Agency Programs • Instigate community conversations • Facilitate regular(monthly) community celebrations with conversations • Looking at other-high performing CAP Agencies and how they function • Scandinavian tours/ visioning sessions	• Increase staffing levels in key central support services. • Cross training • Work on training new staff and welcoming them as well as continually training existing staff and making them feel heard	• Budget cycle roadmap • Creative funding or increased grant application opportunites • Semi-annual Fundraising Events	• Outreach and communication strategy • Create awareness of the Agency and our mission in ALL of the communities that we are in • Regular engaged legislative reporting

Appendix 5
Post Strategic Directions Mini Survey Results
02.10.23

February 10, 2023
ARROWHEAD ECONOMIC OPPORTUNITY AGENCY (AEOA)

OUR CURRENT REALITY

STRENGTHS **What are the strengths this group has toward creating the Practical Vision? What are our strengths as a team?**	WEAKNESSES **What are the weaknesses this group has toward accomplishing the Strategic Directions? What are our weaknesses as a team?**
- Leadership - Shared vision - Passionate - We all share a belief in our mission - cooperation - Our Team/Staff - Fantastic staff - LEADERSHIP - Enthusiasm for constructive change - Motivated - We have been around for a long time - coordination - The experience that we have - State and local connections - DESIRE - Perspectives - We are a large agency and receive a lot of funds - Our Partnerships - Proven record - LOYALTY - Open minded - We have staff that have a long history with the programs - Being a part of a larger network (Community Action) - Resources - Experience - We also have new staff willing to try out new things - Existing services - Broad geographic area	- overwhelming work schedule - varied program missions and requirements across depts. - Disconnection - We've been "silos" for so long it's hard to break that habit - board attendance - Staff Turnover - Not all staff are engaged - NEW STAFF - burnout - Transparency - Restrictive budgets, can't update our systems with our funding streams - staffing shortages - Communication between departments - Broad geographic area - insufficient participation of the whole - Reluctance to change - Retirements, losing that knowledge, how can we retain the knowledge - loss of experience - Outdated Technology - Funding limitations stifle what some folks really need - Time - Cover a large geographical area, hard to communicate consistently - We do not always have a unified voice - Lack of funding to meet certain needs - The area cover and the amount of programs that we have - Programs can be very complicated

February 10, 2023
ARROWHEAD ECONOMIC OPPORTUNITY AGENCY (AEOA)

BENEFITS **What benefits will our success bring?**	DANGERS **What obstacles or dangers do we anticipate confronting when we are highly successful?**
- improved participation/cooperation - Reach and help more people - Able to help more clients - improved results - Happier Staff - Changing lives for people in need - SATISFACTION - Serve whole families - Uniform intake for potential clients - job satisfaction - Higher Productivity - Stable agency to continue as a community resource - SENSE OF ACOMPLISHMENT - Hire & retain motivated Staff who believe in the mission - With new technology things can run faster - Better meeting clients' needs - GROWTH - Improved internal connections leads to increase in client referrals - Positive Community Engagement - Increased external partnerships for referrals, funding, and other resources - Staff Retention	- Serve more people and not enough staff to do the work - As we grow, we create more policies to follow, which can make staff dissatisfied - over confidence - Change is scary to some people - We need quality staff now and for any future expansion - RAPID GROWTH - Serve more people, not enough funding - With more funding and more staff there's a greater risk for fraud - Complacency - Unable to meet demands/needs - IT, Fiscal and HR resources also need to grow along with expansion - FALSE SENSE OF ACCOMPLISHMENT - Work ourselves out of a job - Stretching too our staff too thin - OVER COMMITMENT - More awareness may bring more communication from people with uneducated, negative perceptions of our work - Lack of Funding - Running out of physical space

February 10, 2023

ARROWHEAD ECONOMIC OPPORTUNITY AGENCY (AEOA)

THE FUTURE
What are your aspirations or dreams for the Arrowhead Economic Opportunity Agency (AEOA)?
- Come together as an unit and not separate entities.
- Attract and retain quality staff
- To strengthen the foundation of the Agency, including but not limited to preventing staff burnout, improving staff retention, educating staff on the important issues that affect clients and the Agency, improve internal processes and review policies, increase internal communication, reduce number of temporary programs, improve brand, improve marketing and public relations, and ultimately create a universal intake system.
- grow our current funding to help more clients. Expand our core areas.
- continued and improved services and programming
- To be able to better help existing clients in order for them to actually move out of poverty. As well as help more people to the same. To have the community know all of what AEOA does and include the community in living out the Community Action Promise.
- To be solid financially and to provide the most help we can to folks in need.
- To operate like a well-oiled machine.

How would things be different if your aspirations & dreams came true?
- We would be working together toward agency goals. A cohesive unit like the food distributions. That every department is valued.
- Ability to maintain and grow programs/services
- I believe AEOA would be a stronger Agency if we have staff who work here because they believe in the mission and want to help others. Even if all staff are here for the right reasons, it will still be important to educate them on issues they may not have been trained on before, such as trauma informed care, harm reduction, etc. Not only is it good to have this knowledge as a staff person, but also to educate others in their lives and advocate for what the Agency stands for. Improved processes and revisited policies would ensure the Agency is operating efficiently and effectively. Improved internal communication would help to reduce silos to improve client and Agency outcomes. Solidifying the Agency brand and marketing it the same way across all departments would make the Agency stand out when we are representing the Agency in the community and to partners. Rather than seemingly being five small organizations that provide different services, we must bring awareness that these services are one single Agency that provides more services than known. Reducing the number of programs and limiting the number of pilots would ensure it is easier for staff, partners, and the community to be aware of what the Agency has to offer, as well as make it easier for implementing a universal intake system. Pilots should be based on identified community needs in the CNA.
- We would need more staff to handle the extra funds coming in, program staff as well as admin staff to process payments and payroll for the expanded program staff.
- broadening of service areas
- With more people knowing exactly what we do more people may want to work here, volunteer here, or donate here. Because of that more people will be able to be served better which will help more people in our community, making our communities a better place.
- The agency would continue to be a proven resource to the community and would have an even greater impact for people in need.
- Efficient, seamless delivery of programs

AEOA
ARROWHEAD ECONOMIC OPPORTUNITY AGENCY

Appendix 6
Current Reality, Success Indicators & Actions
02.14.23

Current Realities, Success Indicators, & Actions

Current Reality: *Description of the current situation as it relates to the Strategic Direction.*
Success Indicators: *Explains what will be different in 3 years if the organization mobilizes around and gets behind the Strategic Direction.*
Actions/Accomplishments: *Considers and answers "What do we need to accomplish at a level of program, project, or event to begin moving from Current Reality to Success as described?"*

SD1. Recruiting, training, and retaining talent

Current Realities
- Tough employment market
- Aging workforce creates need for succession planning
- Talent difficult to recruit
- Housing market challenging
- Compensation not as competitive as it could be
- Training and onboarding not standardized
- More things have moved online; people are more isolated
- Need for greater employee recognition
- Some jobs are easy to fill; some are impossible
- Organization provides freedom to run with programs/services; need self-starters
- Staff believes in mission; little turnover

Success Indicators
- Less staff turnover
- Onboarding process and professional development plans in place
- More jobs are filled or have shorter vacancies
- More diverse applicant pool/workforce
- Competitive compensation & benefits package

Actions/Accomplishments
1. Consider returnship program
2. Develop cross-training plan in each department
3. Restart all-staff days
4. Explore possibility of more hybrid or remote work
5. Update and analyze exit interview data
6. Formalize management and leadership training with mentorship component
7. Develop internship program and consider AmeriCorps or Vistas to attract talent
8. Review and update compensation packages
9. Create professional development plan process
10. Implement onboarding process that includes who to go to when
11. Develop robust, performance-based employee recognition program

SD2. Advancing the mission through outreach and communications

Current Realities
- Social media presence exists (Facebook, Instagram, Twitter, LinkedIn)
- Website exists but lacks consistent process for updating
- No centralized communication function for organization
- Marketing and communications planning is ad hoc (e.g., Transit has its own)
- AEOA is a participant in community events
- Website is not mobile friendly
- Newsletter in Hometown Focus
- Grapevine (employee newsletter) exists
- Customer satisfaction survey exists
- Email is only internal communication
- Department directors responsible for most internal communication

Success Indicators
- Strong branding guide with templates
- Well-attended community events with strong volunteer pools
- Communications help identify funding streams
- Broader understanding and awareness of variety of services and cross-promotion (all departments included
- Improved, quicker communications
- Groups automatically updated when staffing changes

Actions/Accomplishments
1. Update website content regularly
2. Create a cross-functional internal marketing and outreach committee
3. Create multi-channel annual marketing, outreach, and communication plan, including funding appeals
4. Ongoing survey of what staff want for communication
5. Select a method or tool to utilize for communication
6. Create email community newsletter with board and staff highlights
7. Host community events and fairs
8. Rebuild website to make it more user-friendly
9. Create intranet for internal guides, newsletter, calendar, policies, forms, and who-to-contact lists
10. Cross-promote services through program activities and delivery
11. Determine who will update internal communication process

SD3. Expanding board involvement & recruitment

Current Realities
- Open board positions
- Lack of board member involvement
- Lack of board member attendance
- Geographical distance a barrier for some
- Application and interview process exists

Success Indicators
- Full board
- Strong board attendance
- Increase board volunteers

Actions/Accomplishments
1. Establish board recruitment committee
2. Develop recruitment plan using current board members
3. Market board meetings publicly
4. Develop orientation and onboarding process
5. Create board training
6. Create opportunities for board to hear from staff on what they do
7. Create event for board to meet with staff

SD4. Reformulating technology to meet program needs

Current Realities
- Aging infrastructure
- Manual processes – "bean counting"
- Issues with scalability
- At capacity for network
- Insufficient funding flexibility to meet needs
- Multiple non-integrated platforms require double entry
- Every program has own application process
- Duplicated counts of people served
- Poor referral process between departments

Success Indicators
- Network infrastructure meets the needs for current and future needs
- Daily tracking service numbers across all departments
- System stability
- Full integration of all shareable resources
- Simple, universal intake application in place
- Community Service Block Grant reporting simplified
- Increased referrals to programs

Actions/Accomplishments
1. Develop technology plan
2. Develop funding plan and secure funding
3. Purchase updated and scalable hardware and infrastructure
4. Explore software options for single platform solutions
5. Explore universal intake solutions
6. Create generic department emails for intake referrals
7. Implement business process automation
8. Increase website integration for program needs, including communication and reporting
9. Implement staff training & cross-training

SD5. Engaging rural communities to share needs

Current Realities
- Resource guide by county exists
- Many communities are left out due to size or geography
- Many under-sourced or served communities
- No hosting location or agency in places
- Community needs assessment covers core area (St. Louis, Lake, and Cook), but results might not tell whole picture

Success Indicators
- Increased program participation in rural communities
- Prescheduling of AEOA services and/or local referrals (economies of scale)
- Local partners to work with identified

Actions/Accomplishments
1. Day of connection partnering types of events, including local leaders
2. Pick number of underserved areas to offer services each year
3. Develop baseline and goal metrics
4. Develop listing of what we can offer by area and prioritize
5. Create beta mobile or remote service alternatives, e.g., mailing or "bookmobile"

SD6. Seeking & accessing innovative, sustainable funding sources

Current Realities
- Seek out state, federal, and foundation funding for programs
- Assessing current funding constraints
- Leave programs that do not have current funding opportunities unfunded
- Normally go it alone

Success Indicators
- Greater collaborative program funding
- More flexible and unconstrained funding options
- Consistent fundraising plan and schedule
- Funding to meet any identified community needs in place
- Have more revenue-generating programs

Actions/Accomplishments
1. Improve program development prior to requesting funding
2. Conduct legislative outreach and education
3. Increase internal fund awareness and utilization
4. Implement a fundraising committee
5. Address Foundation branding in marketing plan
6. Better define AEOA Foundation goals and uses
7. Identify and engage with community partners to collaborate and partner with programs
8. Explore revenue-generating programs that fit AEOA mission

Appendix 7
Strategic Plan Timeline 02.14.23

	2023							2024				2025				2026
	March/April	May	June	July	Aug	Sept	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
SD1: Recruiting, Training, and Retaining Talent																
A1. Consider returnship program	Start					End										
A2. Develop cross-training plan in each department			Start		End											
A3. Restart all-staff days				Start & Ongoing												
A4. Explore possibility of more hybrid or remote work					Start	End										
A5. Update and analyze exit interview data						S & E				S & E				S & E		S & E
A6. Formalize management and leadership training with mentorship component						Start		End								
A7. Develop internship program and consider AmeriCorps or Vistas to attract talent							Start	End								
A8. Review and update compensation packages								Start	End							
A9. Create professional development plan process										Start	End					
A10. Implement onboarding process that includes who to go to when											Start	End				
A11. Develop robust, performance-based employee recognition program													Start		End	
SD2: Advancing Mission Through Outreach and Communications																
A1. Update website content regularly	S & E					S & E		S & E		S & E		S & E		S & E		S & E
A2. Create a cross-functional internal marketing and outreach committee		Start			End											
A3. Create multi-channel annual marketing, outreach, and communication plan, including funding appeals					Start	End										
A4. Ongoing survey of what staff want for communication						S & E					S & E			S & E		S & E
A5. Select a method or tool to utilize for communication								Start	End							
A6. Create email community newsletter with board and staff highlights										S & E	S & E	S & E		S & E		S & E
A7. Host community events and fairs										S & E			S & E			S & E
A8. Rebuild website to make it more user-friendly											Start		End			
A9. Create intranet for internal guides, newsletter, calendar, policies, forms, and who-to-contact lists													Start			
A10. Cross-promote services through program activities and delivery														Start		End
A11. Determine who will update internal communication process														S & E		
SD3: Expanding Board Involvement & Recruitment																
A1. Establish board recruitment committee	Start	End														
A2. Develop recruitment plan using current board members			Start		End											
A3. Market board openings publicly				Start & Ongoing												
A4. Develop orientation and onboarding process								Start	End							
A5. Create board training								Start	End							
A6. Create opportunities for board to hear from staff on what they do									S & E		S & E		S & E			S & E
A7. Create event for board to meet with staff											S & E		S & E		S & E	
SD4: Reformulating Technology to Meet Program Needs																
A1. Develop technology plan			Start			End										
A2. Develop funding plan and secure funding						Start				End						
A3. Purchase updated and scalable hardware and infrastructure								Start			End					
A4. Explore software options for single platform solutions									Start	End						
A5. Explore universal intake solutions											Start	End				
A6. Create generic department emails for intake referrals											Start	End				
A7. Implement business process automation												Start			End	
A8. Increase website integration for program needs, including communication and reporting													Start		End	
A9. Implement staff training & cross-training														Start		End
SD5: Engaging Rural Communities to Share Needs																
A1. Day of connection partnering types of events, including local leaders	S & E								S & E				S & E			S & E
A2. Pick number of underserved areas to offer services each year					S & E				S & E				S & E			S & E
A3. Develop baseline and goal metrics						Start	End									
A4. Develop listing of what we can offer by area and prioritize								Start	End							
A5. Create beta mobile or remote service alternatives, e.g., mailing or "bookmobile"												Start			End	
SD6: Fostering Governmental Relationships to Initiate Growth Campaign																
A1. Improve program development prior to requesting funding	Start			End												
A2. Conduct legislative outreach and education	S & E							S & E				S & E				S & E
A3. Increase internal fund awareness and utilization		Start				End										
A4. Implement a fundraising committee				Start	End											
A5. Address Foundation branding in marketing plan					Start		End									
A6. Better define AEOA Foundation goals and uses					Start	End										
A7. Identify and engage with community partners to collaborate and partner with programs						Start					End					
A8. Explore revenue-generating programs that fit AEOA mission									Start				End			

Appendix 8
Priority Wedge 02.14.23

SD3 A1: Establish board recruitment committee

SD1 A1: Consider returnship program

SD2 A1: Update website content regularly

SD2 A2: Create a cross-functional internal marketing and outreach committee

SD4 A1: Develop technology plan

SD3 A2: Develop recruitment plan using current board members