



Community Action Agency Strategic Plan

2023-2026



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Presented By:



Introduction

Community Action Agency, like many organizations in our service area, is adjusting to the reality of the post-pandemic environment including the changes and challenges that are presented. We have learned much about the resilience of our staff, residents and communities. We have used this knowledge and the data gathered through our Community Needs Assessment, staff and Board surveys to create the plan within these pages. This 2023-2026 Strategic Plan consists of **4 strategic goals** and **16 strategic objectives** that will guide our future growth. It is important to note that while Elite Research facilitated the process, the Community Action Agency administrative team is entirely responsible for the strategic goals, objectives, activities, and measures of success outlined in this document. It is the ownership of this process and content that increases the likelihood of integration into the agency.

Systematic attention to this plan, will allow Community Action Agency to stay focused on what is most important to its community residents and will allow for advancement in the areas that need it most.

Toby Berry, CEO

Executive Summary

Background

Over the years Community Action Agency has made an enormous impact in our service area of Jackson, Lenawee and Hillsdale counties. We are proud to have been instrumental in bringing several programs to the area, such as: Head Start, Special Supplemental Nutrition Program for Women, Infants, and Children (WIC), Volunteer Income Tax Assistance (VITA), Housing Assistance for at-risk or homeless citizens, Individual Development Account Program (IDA), Weatherization Assistance, Residential Lead Remediation, Supportive Services for Veteran Families (SSVF), and many more. To continue to bring programs and services that are meaningful to our residents, we conduct Community Needs Assessments (CNA) to give voice to our residents' needs and then strategically plan around the priorities that have been identified. In addition to the CNA, this strategic plan also considers the Equity Assessment data that was collected in 2022.

Community Action Agency partnered with Elite Research, LLC, a strategic planning, research, and evaluation consulting firm based in Dallas, TX, to facilitate and build out a strong strategic plan to guide the agency over the next 3-5 years.

Data Sources

- [Community Needs Assessment \(Survey\)](#)
See Quantitative Report for findings.
- [Community Needs Assessment \(Focus Groups & Interviews\)](#)
See Qualitative Report for findings including program utilization.
- [Internal Stakeholders \(Survey\)](#)
[Appendix](#) for findings summary.
- [Internal Stakeholders \(Interviews & Focus Group\)](#)
[Appendix](#) for findings summary.
- [Equity Assessment](#)
See Equity Audit Report for findings.

Strategic Planning Team

- Codi Benjamin – *Children's Program Director*
- Clint Brugger – *Director of Training and Outreach*
- Katrina Duling – *Assistant to the Chief Executive Officer*
- Laura Reaume – *Director of Community Programs*
- Lora Higgins – *Human Resources Director*
- Tami Farnum – *Tri-County Programs Manager*
- Toby Berry – *Chief Executive Officer*
- Tony Samon – *Chief Financial Officer*

Strategic Planning Process

The strategic planning process included data gathering (data sources above), and then a 5-session collaborative process covering the following topics:



The sessions were held via Zoom. Facilitators prepared and presented session slide decks that folded in data sources for consideration throughout the topic. The strategic planning team (SPP) collaborated in discussion and development of concepts through an online interactive Google document. The goal of each session was to develop the content, which was then word smithed by the facilitators and presented to the group at the beginning of the next session. Once the content was “confirmed,” the next session began. By the end of the 5th session, almost the entire strategic plan content was confirmed.

Within this strategic plan, the SPP has defined new Strategic Goals and Objectives, as well as modified and refined the agency’s vision statement, mission statement, and core values. The SPP identified organization priorities as well. Key activities that are priorities are noted as follows:



This **red** symbol indicates a **High Organizational Priority (HOP)**



This **grey** symbol indicates a **Medium Organizational Priority (MOP)**

Both HOPs and MOPs are near term results or achievements that the agency wants to accomplish within approximately 6 months. HOPs are limited in number and reflect the top near-term performance improvement priorities of the organization.

Strategic Goals & Objectives

Strategic Goal 1. Advocacy & Engagement

- Strategic Objective 1.1. Advocate and educate about social determinants of health in poverty
- Strategic Objective 1.2. Build awareness of the realities of poverty at a local level through data and personal stories
- Strategic Objective 1.3. Support residents to advocate for system change in their own communities
- Strategic Objective 1.4. Leverage partnerships to build capacity and maximize impact

Strategic Goal 2. Advancing Equity

- Strategic Objective 2.1. Create path towards intentional equity focus
- Strategic Objective 2.2. Build awareness and acceptance
- Strategic Objective 2.3. Provide equitable opportunities that build resiliency for staff, families, and communities
- Strategic Objective 2.4. Utilize strategic partnerships to create more equitable opportunities

Strategic Goal 3. Community Impact

- Strategic Objective 3.1. Educate individuals, families, and staff in reaching full potential
- Strategic Objective 3.2. Align internal and external communication with Social Determinates Of Health (SDOH) terminology
- Strategic Objective 3.3. Enhance external communication related to programming
- Strategic Objective 3.4. Utilize strategic partnerships to strengthen and expand opportunities for education

Strategic Goal 4. Operational Excellence

- Strategic Objective 4.1. Strengthen internal and external communication systems
- Strategic Objective 4.2. Equip staff with principles, systems and tools that result in sustainable improvement
- Strategic Objective 4.3. Build opportunities for staff's own self-sufficiency
- Strategic Objective 4.4. Utilize strategic partnerships to optimize referrals

Overview

Vision

We aim to provide equitable and inclusive opportunities and community partnership to address the causes and conditions of poverty to support individuals, families, and communities in reaching their full potential.

Mission

We provide an equitable and inclusive local approach to support individuals, families, and communities in reaching their full potential through impactful collaboration, education, programs, advocacy, and leadership.

Values

Integrity – we build trust with our stakeholders, both internally and externally, by upholding strong ethical values, ensuring quality, accountability, and transparency in all areas of our work.

Collaboration – we believe in the power of working together in service excellence to significantly enhance individual, team, and community capacity.

Learning – we value knowledge, education, and mutual creativity through dialogue and curiosity in order to grow in benefit to our communities.

Inclusion, Diversity, Equity & Anti-racism (IDEA) – we respect the knowledge, abilities and experience of all individuals in a nondiscriminatory manner, and actively work to dismantle disparities within our organization and with residents and community members, especially those whose voices have traditionally been marginalized.

Results-Oriented – we are driven to make a difference, being proactive with how we think about our services and clients, adaptable to emergent needs, and capable to provide effective results in periods of change.

Person-Centered – we see our clients as ambassadors of their own change and respectfully partner with them to provide services that help them live a life they choose to live.

History & Enabling Legislation

In 1964 President Lyndon B. Johnson declared a “War on Poverty” and created community action agencies through the Economic Opportunity Act. The Jackson-Hillsdale Commission on Economic Opportunity opened its doors in 1965 to serve those counties, while Community Action was established in Adrian to serve

Lenawee County. The two organizations merged in 1974, incorporating as Region II Community Action Agency, serving Jackson, Lenawee and Hillsdale counties.

Location & Offices

- CAA Administrative Office
1214 Greenwood Avenue
Jackson, MI 49203
- Lenawee County Office
400 W. South Street
Adrian, MI 49221
- Hillsdale County Office
55 Bernard Street
Hillsdale, MI 49242

Employees

As of January 2022, CAA had approximately 188 employees: 47 in Hillsdale, 120 in Jackson, and 21 in Lenawee.

Strategic Goal 1

Advocacy & Engagement

Community Action Agency is committed to advocacy and engagement. These efforts are at the heart of everything we do. The agency recognizes that we are at a critical place in history, recovering from the global pandemic, where our communities are engaging on the issues that we were created to address. In this 2023-2026 strategic plan, specific attention is given to education around social determinants of health in poverty, building awareness about the realities of poverty, supporting residents to advocate for system change, and leveraging partnerships for reaching our greatest collective impact.

Strategic Objective 1.1. To advocate and educate about social determinants of health in poverty

Key Activity 1. Develop and **implement “centralized housing focus”**



communication strategy (advocate for programs that allow those experiencing homelessness to have affordable housing - leveraging key opportunities).

Measures of Success

- Draft and final versions are complete
- Communication strategy has been defined and identified action plans have been developed with delineations and timeline

Key Activity 2. Develop and **implement “health and nutrition needs”** communication strategy (access/quality)

Measures of Success

- Draft and final versions are complete
- Communication strategy has been defined and identified action plans have been developed with delineations and timeline

Key Activity 3. Develop and **implement “education” communication** strategy (access/quality)



Measures of Success

- Draft and final versions are complete
- Communication strategy has been defined and identified action plans have been developed with delineations and timeline

Key Activity 4. Embed “**economic stability**” across all advocacy and education strategies

Measures of Success

- 5-Whys have been well defined
- Communication strategy has been defined and identified action plans have been developed with delineations and timeline

Strategic Objective 1.2. To build awareness of the realities of poverty at a local level through data and personal stories

Key Activity 1. Implement “realities of poverty” communication strategy (outward)

Measures of Success

- Draft and final versions are complete
- Strategy KPIs have been defined

Key Activity 2. Develop and implement CAA “navigating poverty systems” communications strategy (internal/external)

Measures of Success

- Draft and final versions are complete
- Metrics for implementation success have been defined

Key Activity 3. Develop and implement internal program strategy for understanding staff roles and their importance

Measures of Success

- Draft and final versions are complete
- Metrics for implementation success have been defined

Strategic Objective 1.3. To support residents to advocate for system change in their own communities

Key Activity 1. Identify and participate in community opportunities

Measures of Success

- Information to non-participating residents on available groups has been provided
- Public support and marketing on resident lead initiatives has been provided

Key Activity 2. Support resident coalitions to action

Measures of Success

- Resident Coalitions that exist in our county service areas have been identified;
 - Regional Groups
 - Other Agency Resident Groups

- Grass Root Groups
- Communication with Resident Coalitions to determine what support looks like or would be helpful to them has been conducted
- Education to Resident Coalitions to support their sustainability has been provided

Strategic Objective 1.4. To leverage partnerships to build capacity and maximize impact

Key Activity 1. Foster partnerships connected to Early Pre-K



Measures of Success

- Participation in partnership groups with public school districts and ISDs (LEAs)
- Joint efforts in programming between partners and Head Start have been enhanced

Key Activity 2. Advocate for collaborations connected to Early Pre-K



Measures of Success

- Opportunities have been identified for advocacy as State Universal PreK is being formed
- Participation in State workgroups for planning of Universal PreK

Key Activity 3. Engage with and strengthen relationships with grassroots organizations, resident coalitions, lenders and financial coalitions, and health systems

Measures of Success

- Organizations that exist in our county service areas have been identified
- Opportunities for collaboration have been determined

Strategic Goal 2

Advancing Equity

Community Action Agency is committed to advancing equity. Concerted efforts began in 2022 with the Equity Audit that was conducted across staff and board members. The agency recognizes that advancing equity within our organization and communities will provide meaningful outcomes and address a root cause of poverty to realize our mission. In this 2023-2026 strategic plan, specific attention is given to developing an intentional path forward in advancing equity, building awareness and acceptance, providing more equitable opportunities for our community members.

Strategic Objective 2.1. To create path towards intentional equity focus

Key Activity 1. Identify staff and team readiness



Measures of Success

- Supervisors have identified staff ready to do the work
- A tool to determine staff readiness has been developed
- Equity Assessment has been used to determine/identify where we are

Key Activity 2. Create DEI Working Group (WG)



Measures of Success

- A leader has been assigned
- Firm and non-judgmental guidelines for the work have been set
- Established members exemplify diversity (gender, BIPOC, LGBTQ+)

Key Activity 3. Review policies for obstacles to diversify hiring

Measures of Success

- All policies and procedures (P&P) have been reviewed with an equity lens
- P&P have been reviewed and accepted by DEI working group
- Complete updates, additions, and changes to interview questions
- Application process is revised in the hiring process

Key Activity 4. Create plan for increasing staff and board diversity

Measures of Success

- A sustainable recruitment plan has been developed
- A plan to communicate vacancies on the Board has been developed
- A plan for staff recruitment has been developed

Strategic Objective 2.2. To build awareness and acceptance

Key Activity 1. Enhance and expand equity-lens training with Board (add onboarding component)



Measures of Success

- A virtual platform in place for onboarding Board members has been developed
- A quarterly training process (routine) has been implemented

Key Activity 2. Enhance and expand equity-lens training with Supervisors & Managers (add onboarding component)

Measures of Success

- A virtual platform for onboarding Supervisors and Managers has been developed
- All Supervisors and Managers have completed onboarding
- Supervisors and Managers are comfortable to mentor equity lens practices for their staff
- Mentorship (external mentors) program has been developed and implemented

Strategic Objective 2.3. To provide equitable opportunities that build resiliency for staff, families, and communities

Key Activity 1. Develop and implement “how-to” trainings that break down scenarios and provide tools for addressing equity

Measures of Success

- All staff have been trained on Bridges Out of Poverty and ACEs

Key Activity 2. Embed individual financial equity into all aspects of programming



Measures of Success

- A financial equity piece has been written into all of our grants

Strategic Objective 2.4. To utilize strategic partnerships to create more equitable opportunities

Key Activity 1. Expand partnerships and opportunities



Measures of Success

- A partnership with Ebeid Neighborhood Promise has been established
- Partnerships with (other) organizations in our three counties have been established

Key Activity 2. Develop activities and strategies tied to opportunities

Measures of Success

- Participation in activities tied to racial equity within our municipalities
- We have and are engaged in equity-focused community outreach events
- We have sponsored events focused on advancing equity

Strategic Goal 3

Community Impact

Community Action Agency is committed to the community impact. The agency recognizes that we can play a pivotal role in the individuals and families that we serve reaching their full potential. In this 2023-2026 strategic plan, specific attention is given to education, alignment of communication to social determinants of health (SDOH), enhancing program communication within the community, and concentrating efforts around neighborhood and housing stability.

Strategic Objective 3.1. To educate individuals, families, and staff in reaching full potential

Key Activity 1. Enhance and expand financial empowerment/coaching



Measures of Success

- Funding to expand staffing to reach more people has increased
- Internal staff have received education on creating additional referrals
- Partnerships with employers (MDHHS, etc) have been enhanced to increase reach
- Program staff have been cross-trained for initial financial assessment (SSVF, Family Engagement Staff, Housing staff, WIC)

Key Activity 2. Implement *Smart Connections*



Measures of Success

- Plan (calendar) for *Smart Connections* implementation has been established
- Parent participation in *Smart Connections* has increased
- Family engagement in *Smart Connections* has increased (outcomes are measured)

Key Activity 3. Promote and sustain *Getting Ahead*

Measures of Success

- Awareness of the *Getting Ahead* program/outcomes in the community has increased
- Partners have been invited to *Getting Ahead* graduations to increase awareness
- Funding to expand the *Getting Ahead* program has increased

- Community partnerships have been enhanced to sustain *Getting Ahead* funding

Key Activity 4. Create growth opportunities for individuals, families, and staff

Measures of Success

- Number of staff (and number of successful completions) in the NHTSA CDA program has increased to facilitate promotion; first cohort assessed
- Funding for Individual Development Accounts for families/individuals has increased

Strategic Objective 3.2. To align internal and external communication with SDOH terminology

Key Activity 1. Identify and align CAA programmatic outcomes to SDOH language

Measures of Success

- Drafts and final versions are complete
- Communication strategy has been defined and identified action plans have been developed with delineations and timeline

Key Activity 2. Revise CAA internal and external communication

Measures of Success

- Drafts and final versions are complete (added emphasis in annual report)
- Communication strategy has been defined and identified action plans have been developed with delineations and timeline

Strategic Objective 3.3. To enhance external communication related to programming

Key Activity 1. Identify eligibility requirements for each program (*focus on clients and outside referral agencies*)

Measures of Success

- Agency Program Guide draft/final version have been updated and completed
- Electronic, searchable version of the Agency Program Guide has been created and uploaded to the agency website

Key Activity 2. Identify program description, services, and contact information (*focus on clients and outside referral agencies*)

Measures of Success

- Agency Program Guide draft/final version have been updated and completed

- Electronic, searchable version of the Agency Program Guide has been created and uploaded to the agency website

Key Activity 3. Articulate program outcomes for collaborators and partners

Measures of Success

- 1- pager draft/final version for each program has been created
- 1-pager is sent out periodically via email in newsletter format

Strategic Objective 3.4. To develop and implement strategy for neighborhood and housing stability

Key Activity 1. Identify gaps and enhance homeless service system

Measures of Success

- Gaps (what is missing) have been identified in:
 - Available housing
 - Service population
 - Application processes and needs
- Agencies and staff coordination
- Communication needs within the homeless service system have been identified
- Public education on what does/does not exist has been provided
- Funding for service gaps have been identified

Key Activity 2. Expand asset development and protection

Measures of Success

- Available funding for expansion has been identified
- Public education on what does/does not exist has been provided

Key Activity 3. Create and maintain safe and affordable housing units

Measures of Success

- Available funding for expansion has been identified
- Public education on what does/does not exist has been provided
- Community organizations who would lead developments of new building have been identified

Strategic Goal 4

Operational Excellence

Community Action Agency is committed to the continual improvement of its internal and external operations. The agency recognizes that to provide the best possible service to our staff, residents and communities, we must seek operational excellence. In this 2023-2026 strategic plan, specific attention is given to strengthening communication systems, equipping staff with tools for operational improvement and self-sufficiency, and optimizing the referral process.

Strategic Objective 4.1. To strengthen internal and external communication systems

Key Activity 1. Identify program description, services, and contact information (folding in SDOH language)

Measures of Success

- SDOH language has been imbedded in program descriptions and presentations
- Key roles and functions by title in departments have been identified
- Interactive organizational chart has been developed and is available on website

Key Activity 2. Identify eligibility requirements for each program

Measures of Success

- Program-specific eligibility requirements are available on program websites

Key Activity 3. Articulate program outcomes and logic models (folding in SDOH & ROMA language)

Measures of Success

- ROMA-aligned program outcomes have been determined
- ROMA-aligned logic models are being utilized
- SDOH-aligned program outcomes have been articulated

Key Activity 4. Build in feedback loop from staff



Measures of Success

- Available avenues for feedback have been identified
- "What we are doing that is currently working" has been identified

- Retention changes tracked

Key Activity 5. Build in feedback loop from residents



Measures of Success

- Universal CSS is utilized across all programs

Strategic Objective 4.2. To equip staff with principles, systems and tools that result in sustainable improvement

Key Activity 1. Identify the pandemic processes that enhanced and diminished productivity

Measures of Success

- Programmatic/Departmental analysis of pandemic processes by program has been conducted
- Survey staff regarding enhanced/diminished productivity

Key Activity 2. Build efficient internal systems based off of feedback

Measures of Success

- Drafts/final versions of policies have been created
- Process changes established by department have been identified

Key Activity 3. Build in trauma-informed approach into all internal and external operations (includes secondary trauma and mental health supports)



Measures of Success

- Trainings on secondary trauma/supports have been conducted
- Education around available EAP benefits has been conducted
- Internal/external operations have been evaluated through a trauma lens
- Staff have been surveyed on results of evaluation and changes have been implemented as necessary
- Retention tracked

Key Activity 4. Align mindsets from service provider to ambassador

Measures of Success

- Staff repository of training has been developed and implemented
- Staff have been offered training in:
 - Understanding agency/mission (History of Community Action)
 - Poverty simulation
 - Bridges out of Poverty
 - ACEs
 - National Community Action

Strategic Objective 4.3. To build opportunities for staff's own self-sufficiency

Key Activity 1. Build avenues for transparent conversations and processes

Measures of Success

- In-person staff meetings (all staff, quarterly manager/supervisor) have been reinstated
- Staff questions or feedback requests for monthly meeting updates are implemented

Key Activity 2. Provide external education related to self-sufficiency

Measures of Success

- Available resources to bring into the agency have been identified

Strategic Objective 4.4. To utilize strategic partnerships to optimize referrals

Key Activity 1. Share programmatic information with community partners

Measures of Success

- Programmatic information has been shared with community partners

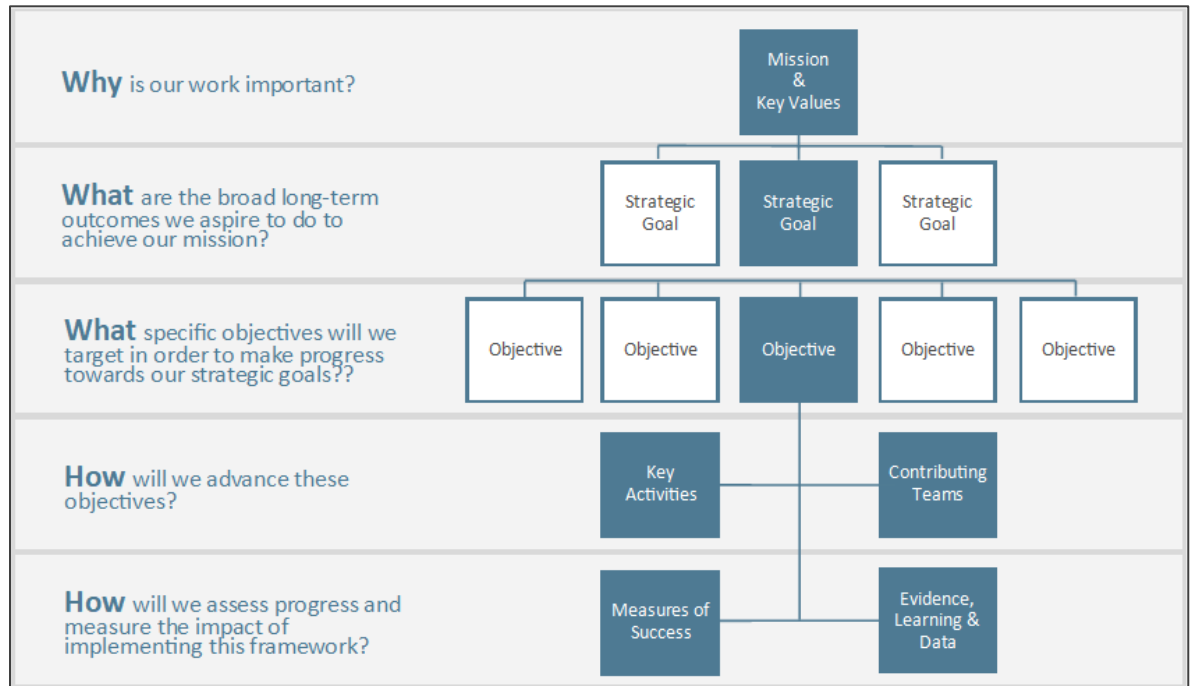
Key Activity 2. Request critical information feedback from partners to determine gaps in needed communication materials and onboarding clients

Measures of Success

- Gaps in communication modes and materials have been identified
- Gaps in the onboarding process have been identified
- Gaps in partner audience (who should receive) have been identified
- Processes, modes, and materials have been updated to address gaps

Strategic Planning Process

Strategic planning is the process of documenting and establishing a direction of your organization. It is about assessing where an organization is at and where it wants to go, taking a proactive approach to organizational learning and advancement through data. The infographic below illustrates the standardized structure of Elite Research's strategic planning process, starting from the top, and helps readers understand the purpose, logic, and terminology that comprise each strategic goal.



The strategic plan (SP), this document, is a document that outlines an organization's mission, vision, key values, and strategic goals. The plan details the objectives for reaching those goals, as well as the prioritized activities that will need to be taken in meet the objectives. Priorities are usually foundational elements that provide the infrastructure to long-term activities, allowing an easing into new thinking and processes.

Strategic planning provides a concentrated examination of the strengths, weaknesses, opportunities, and threats that could bolster or hinder your research efforts. This is especially helpful when there are multiple voices in the process, as each voice experiences the organization in a different way (levels of internal and external engagement, management, etc.) and could help identify best options for implementation.

Meetings

The Community Action Agency internal team and Elite Research conducted five half-day Strategic Planning sessions. These took place on January 31, 2023, February 10, 2023, February 16, 2023, February 23, 2023, and February 28, 2023. Elite Research facilitated the sessions and provided organizational homework to Community Action Agency. This internal homework included individual SWOTs and refining the mission statement, values, strategic goals, objectives, activities, measures of success that were developed throughout the sessions. The Community Action Agency strategic planning team were also asked to think set actionable priorities, identify and detail timelines and those that would be responsible for each activity.

SWOT

The following is a summarized version of the combined SWOT that was conducted with the Community Action Agency strategic planning team:

Strengths: Community Action Agency's strengths lie in its trauma-informed work, multiple funding sources, flexibility, connections and strong relationships, quality programs, knowledgeable staff, and equity data to drive decisions.

Weaknesses: Community Action Agency's weaknesses stem from grant parameters or eligibility requirements (unmet needs) that leave clients feeling frustrated, lack of staff capacity, internal and external communication, lack of diversity in its leadership and board, and mission creep that causes a loss of focus and changes how the community views CAA.

Opportunities: Community Action Agency sees opportunities within homelessness work, trauma-informed approaches and next step trainings, advocacy opportunities for policies that open new possibilities for clients, housing funding to keep residents sheltered, utilizing social determinants of health (SDOH) as part of its communication strategy, enhancing internal and external communication, increasing diversity of staff and board, opportunities for growth, and financial education for future issues.

Threats: Community Action Agency acknowledges that the communities' perceptions of the agency and its response to COVID, anti-racist stances, revolving board dynamics, staff burnout and shortage stand to threaten its advancements.

Governance

Community Action Agency's administration team will oversee the governance of the 4 strategic goals and will periodically assess progress for each of the strategic objectives. Bi-annually, Community Action Agency will conduct a strategic review of each strategic objective's progress.

Strategic planning should be conducted every 3-5 years. The strategic plan, however, is considered a **living document** and should be updated as Community Action Agency progresses forward. Organizations that get the most out of this process are those that regularly review and evaluate the plan to stay on track to achieve their goals and objectives.

Terms & Definitions

Strategic Goal – Includes the goal statement and goal overview. The highest-level statement of aim or purpose that is included in the strategic plan. This plan's strategic goals articulate clear statements of what CAA wants to advance within its mission.

Strategic Objective – Includes the objective statement; this plan's 16 strategic objectives are the primary unit for strategic analysis and decision-making. Strategic objectives reflect the outcome or management impact CAA is trying to achieve.

Key Activity – Represents key approaches, initiatives, and tactics that will be pursued to advance the related strategic objective.

Organizational Priority – Strategic objectives may include an Organizational Priority (OP); CAA has identified high OP (HOP) and medium OP (MOP). HOPS and MOPs are a near term results or achievements that the agency wants to accomplish within approximately 6 months. OPs are limited in number and reflect the top near-term performance improvement priorities of CAA.

Success Measure – Success measures used to track progress toward achieving a strategic objective. CAA will measure and monitor the trend for these indicators.

Contributing Teams by Strategic Objective



Strategic Plan Overview 2023-2026

Strategic Goals		Contributing Teams																		
1. Advocacy & Engagement		Strategic Objectives																		
1.1. Advocate and educate about determinants of poverty		Clint Brugger	Codi Benjamin	Katrina Duling	Laura Reaume	Lora Higgins	Steve York	Tami Farnum	Toby Berry	TBD New Hire	Communications Dept	DEI Working Group	EHS Manager	Elite Research	Family Services Manager	Health & Nutrition Manager	TBD Based on Opportunity	Managers & Supervisors	Program Leads	WIC Manager
MOP strategy	KA1. Develop and implement "centralized housing focus" communication strategy	◆			◆			◆		◆	◆									
	KA2. Develop and implement "health and nutrition needs" communication strategy		◆													◆				
HOP	KA3. Develop and implement "education" communication strategy		◆						◆											
	KA4. Embed "economic stability" across all advocacy and education strategies	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆									
1.2. Build awareness of the realities of poverty at a local level through data and personal stories																				
HOP	KA1. Implement "realities of poverty" communication strategy	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆									
	KA2. Develop and implement CAA "navigating poverty systems" communications strategy		◆	◆	◆	◆	◆	◆	◆	◆	◆									
	KA3. Develop and implement internal program strategy for understanding staff roles and their importance					◆											◆			
1.3. Support residents to advocate for system change in their own communities																				
HOP	KA1. Identify and participate in community opportunities															◆				
	KA2. Support resident coalitions to action															◆				
1.4. Leverage partnerships to build capacity and maximize impact																				
HOP	KA1. Foster partnerships connected to Early-Pre-K	◆	◆																	
	KA2. Advocate for collaborations connected to Early-Pre-K		◆																	
HOP	KA3. Engage with and strengthen relationships with grassroots organizations, resident conditions, lenders and financial conditions, and health systems																			



Strategic Plan Overview 2023-2026

Strategic Goals		Strategic Objectives																			
2. Advancing Equity		2.1. Create path towards intentional equity focus																			
HOP	KAI	Clint Brugger	Codi Benjamin	Katrina Duling	Laura Reaume	Lora Higgins	Steve York	Tami Farnum	Toby Berry	TBD New Hire	Communications Dept	DEI Working Group	EHS Manager	Elite Research	Family Services Manager	Health & Nutrition Manager	TBD Based on Opportunity	Managers & Supervisors	Program Leads	WIC Manager	
HOP	KAI1. Identify staff and team readiness	◆																			
HOP	KAI2. Create DEI Working Group (WG)	◆																			
	KAI3. Review policies for obstacles to diversity hires					◆	◆														
	KAI4. Create plan for increasing staff and board diversity						◆														
2.2. Build awareness and acceptance																					
HOP	KAI1. Enhance and expand equity-lens training with Board (add onboarding component)			◆																	
	KAI2. Enhance and expand equity-lens training with Supervisors & Managers	◆					◆														
2.3. Provide equitable opportunities that build resiliency for staff, families, and communities																					
HOP	KAI1. Develop and implement "how-to" trainings that break down scenarios and provide tools for addressing equity																				
	KAI2. Embed individual financial equity into all aspects of programming																				
2.4. Utilize strategic partnerships to create more equitable opportunities																					
HOP	KAI1. Expand partnerships and opportunities																				
	KAI2. Develop activities and strategies tied to opportunities																				



Strategic Plan Overview 2023-2026

Strategic Goals 4. Operational Excellence	Strategic Objectives																				
	4.1. Strengthen internal and external communication systems	Clint Brugger	Codi Benjamin	Katrina Duling	Laura Reaume	Lora Higgins	Steve York	Tami Farnum	Toby Berry	TBD New Hire	Communications Dept	DEI Working Group	EHS Manager	Elite Research	Family Services Manager	Health & Nutrition Manager	TBD Based on Opportunity	Managers & Supervisors	Program Leads	WIC Manager	
	KA1. Identify program description, services, and contact information (folding in SDOH language)					◆	◆			◆	◆								◆		
	KA2. Identify eligibility requirements for each program							◆											◆		
	KA3. Articulate program outcomes and logic models (folding in SDOH & ROMA language)	◆																	◆		
	MOP KA4. Build in feedback loop from staff	◆						◆													
	HOP KA5. Build in feedback loop from residents			◆									◆								
	4.2. Equip staff with principles, systems and tools that result in sustainable improvement																				
	KA1. Identify the pandemic processes that enhanced and diminished productivity			◆				◆											◆		
	KA2. Build efficient internal systems based off of feedback			◆				◆											◆		
	HOP KA3. Build in trauma-informed approach into all internal and external operations (includes secondary trauma and mental health supports)	◆						◆											◆		
	KA4. Align mindsets from service provider to ambassador			◆				◆													◆
	4.3. Build opportunities for staff's own self-sufficiency																				
	KA1. Build avenues for transparent conversations and processes	◆		◆		◆															
	KA2. Provide external education related to self-sufficiency					◆				◆											
	4.4. Utilize strategic partnerships to optimize referrals																				
	KA1. Share programmatic information with community partners									◆									◆		
	KA2. Request critical information feedback from partners to determine gaps in needed communication materials and onboarding clients			◆							◆										◆

Facilitator Overview

Elite Research, LLC.

Overview

Elite Research, LLC is a WBENC-certified Women Owned Small Business (WOSB), Historically Underutilized Business (HUB), and SBA certified strategic planning, research, evaluation, and statistical consulting firm based out of Dallas, Texas. For over 19 years, Elite Research (ER) has provided superior research and evaluation design, statistical and qualitative analysis support, strategic planning, and grant (federal and foundation) services to medical/health organizations, academic institutions, nonprofit organizations, and independent researchers and practitioners. ER's mission since inception is to "empower the world's researchers," which truly focuses on training and capacity building throughout each of their services.

ER's team of Masters and PhD level consultants have extensive experience and training in theoretical statistics and their application, design, sampling, data collection methodologies, training, and project involvement both domestically and internationally. Our professional and academic backgrounds vary from Public Policy, Informatics, Sociology, Statistics/Biostats, and International Relations to Economics, Anthropology, and International and Comparative Education, which allow for cross-reference of experience and abilities. The collaborative nature of the work that we do often lead to extended partnerships resulting in lasting impact.

Leadership

Dr. Rene Paulson, Founder, President and Senior Statistician of ER, earned a Ph.D. and Master's degree in Experimental Psychology from Texas Christian University after obtaining her Bachelor's degree from Ohio University. She has worked on a number of assessment projects, particularly around campus climate, domestic violence, trauma-informed care, health education, and attitude and behavioral change in adolescents, and is well published in the field. She holds Six Sigma certifications in process optimization and organizational integration and memberships for several professional organizations, including Association for Women in Mathematics, American Evaluation Association, American Psychological Association, and the American Statistical Association. Examples of her conference presentations include the Joint Statistical Meetings in 2014 and the Canadian Association for Health Services and Policy Research in 2012. In the fall of 2015, she earned an honorary Doctor of Community Leadership from Franklin University for her dedicated work in the field.

Appendix

CAA Internal Survey Summary



Community Action Agency conducted an internal survey in December 2022 with staff, supervisors and managers, and board members to understand their perception of the internal workings of the organization. The findings are intended to inform strategic planning.

The staff survey had 142 valid responses for analysis (119 staff, 21 managers, and 2 unknown). The board survey had 11 valid responses for analysis.

Key Findings – Staff and Supervisors/Managers

- 18% of staff and 10% of supervisors/managers report that information is not communicated clearly and in a timely manner by leadership.
- 13% of staff and 10% of supervisors/managers do not feel that staff work together to effectively communicate and engage community members; 18% of staff do not have a strong opinion about this question.
- 21% of staff do not feel they can communicate problems to supervisors without fear of retaliation; an equal 21% do not have a strong opinion about this question.
- 73% of staff and 86% of supervisors/managers feel encouraged to serve on committees, etc. as active participants in decision-making; 19% of staff do not have a strong opinion about this question.
- 84% of staff and 81% of supervisors/managers know the agency mission and are able to express it to the community; 9% of staff do not have a strong opinion about this question.
- While 71% of staff and 81% of supervisors/managers feels that agency culture demonstrates mutual support and respect, 18% of staff neither agree or disagree with this statement and 12% disagree altogether.
- One-quarter of staff (25%) are undecided whether agency culture is viewed in a positive light by the community while 66% would say that it is. Eighty-one percent of supervisors/managers would say that agency culture is viewed in a positive light by the community, but 20% would disagree or are undecided.
- Three-quarters of staff and 80% of supervisors/managers view agency culture is positive and supportive, but 15% of staff and 10% of supervisors/managers are on the fence.
- 77% of staff and 72% of supervisors/managers report feeling adequate workspace and equipment to effectively perform their job; 10% of staff and 19% of supervisors/managers disagree.
- 86% of staff and 95% of supervisors/managers believe the program to have adequate technology and supplies for operation.
- 27% of staff and 43% of supervisors/managers are unaware of the agency's organizational structure and who holds key positions.

- 78% of staff and 86% of supervisors/managers think leadership is responsive to their requests of items needed for their jobs; 22% of staff are undecided or disagree; 14% of supervisors/managers disagree.
- 68% of staff and 62% of supervisors/managers are undecided or do not feel that staff vacancies are filled in a timely manner.
- 64% of staff and 91% of supervisors/managers report knowing the policies and procedures for problem resolution; 27% of staff are undecided.
- 80% of staff and 90% of supervisors/managers feel they are given good opportunities for continuous learning; 12% of staff and 10% of supervisors/managers are undecided.
- 80% of staff and 75% of supervisors/managers believe their performance goals and objectives are clearly defined.
- 35% of staff are undecided or disagree that they receive improvement coaching by their supervisors. 95% of supervisors/managers feel they receive sufficient improvement coaching.
- 50% of staff and 40% of supervisors/managers are unsure or do not feel that there are clear opportunities for career advancement.
- 35% of staff and 20% of supervisors/managers are unsure or do not feel that they have a pulse on what is happening in their communities.
- 28% of staff and 10% of supervisors/managers are unsure whether staff make a priority to connect with the community to improve their work; approximately two-thirds say they do.
- 29% of staff and 10% of supervisors/managers are unsure whether leaders meet with other nonprofit leaders to develop social advocacy strategies; 66% of staff and 90% of supervisors/managers say they do.
- 43% of staff and 45% of supervisors/managers are unsure whether staff participate in advocacy-related public forums; 48% of staff and 50% of supervisors/managers say they do.
- 38% of staff and 25% of supervisors/managers are unsure whether they need to be informed about what is happening in the community to better serve community needs; 60% of staff and 65% of supervisors/managers say they do.
- 48% of staff and 26% of supervisors/managers are unsure or do not know if the agency has an effective Continuous Quality Improvement Plan that is reviewed quarterly.
- 52% of staff and 37% of supervisors/managers are unsure or do not know about procedures that are in place for correcting program or service deficiencies.
- 53% of staff and 26% of supervisors/managers are unsure or do not know about the agency using a Results Oriented Management and Accountability (ROMA) system for performance tracking.
- 50% of staff and 28% of supervisors/managers are unsure or do not know about the agency communicating to its stakeholders the program outcomes, achievements, etc. through newsletters, emails, press releases, social media, and other sources.

Top Needs In the Community

- Affordable and safe housing
- Livable wages
- Childcare / daycare
- Medical / dental providers
- Counselors (children's, drug and alcohol, trauma, mental health)
- Rehabilitation center
- Education (overall, financial, parenting, life-skills, self-sufficiency, ACEs, conflict resolution, gun safety, etc.)
- Homeless housing
- Transportation and services for those who cannot afford it
- Support for young mothers (groups, diapers, etc.)
- Job opportunities and support (training, assistance, etc.)
- Assistance & how-to's: food, utility, heat/colling, home repairs, winter clothing
- Family activities
- Teacher shortage
- Resource access and knowledge
- CAA hours

Suggested Strategies to Address Needs

- Understanding more in-depth how to create more housing
- Gas gift-cards to families
- Sending individuals home to families
- Involving more managers to develop partnerships and go after grants
- Grant-funded single bedroom units or "tiny" home communities
- Refurbishing buildings for homeless shelters
- Public transportation vouchers (monthly)
- Rural transportation
- Food pantries "after hours"
- Making parents aware of parenting classes that could help them with daily stress
- Up-to-date resource and contact information for all locations
- Developing a HEAP/PIPP program that can help with heat/cooling assistance
- Advocating for public transportation
- Self-sufficiency trainings through financial literacy training and Youth Build programs
- Funds for after school programs that offer open gym, arts and crafts and help with homework
- More timely housing vouchers
- Job fairs and workshops
- Funding to extend services
- Make classes mandatory for CAA funding
- More transportation sites

- Parenting classes offered at hospital
- Set accountability goals or incentive points for:
 - Families – ex. When a family agrees to pursue a goal, support them to achieve that goal, but they may lose a benefit of a program if they do not fulfill their responsibilities
 - Potty training – ex. Family workshops, updated policies, provide families with examples of reasonable expectations related to potty training, support for classrooms with many children potty-training.
 - Job goals – ex. Family workshops to help working adults have reasonable expectations for schedules and attending work regularly, supporting families to help them maintain and value continuous employment-- accountability when they do not.
- Make public schools more desirable than private schools; provide stipends to families earning <\$70,000 / year
- Small advertisements through social media
- Staff in each department understanding what is offered by CAA and communicating with clients in a positive way so the clients want to get involved in the programs
- Utilize the community room more; ensure police presence during prime times
- Connection to the city counsel or representation with city government
- Throw fundraisers
- Take into system consideration that not all clints are computer-literate

Key Findings – Board Members (* Indicates missing responses)

- 18% report that information is not communicated clearly and in a timely manner by leadership.
- 91% feel that board members work together to effectively communicate and engage community members.
- 27% are unsure whether staff can communicate problems to supervisors without fear of retaliation.
- 63.7% feel that staff are encouraged to serve on committees, etc. as active participants in decision-making.
- 91% know the agency mission and can express it to the community.
- 91% feel that agency culture demonstrates mutual support and respect.
- 27% are unsure or do not think that agency culture is viewed in a positive light by the community.
- 18% do not view agency culture as positive and supportive.
- 36% are unsure or do not think that staff have adequate workspace and equipment to effectively perform their jobs.
- 91% are unaware of the agency's organizational structure and who holds key positions.
- 82% believe staff vacancies are filled in a timely manner.
- 91% know there are policies and procedures for problem resolution.
- 90% believe staff and board members understand their roles and boundaries. *

- 90% say the board and CEO have a constructive working relationship. *
- 80% feel that board members take an active interest in staff needs. *
- 40% are unsure or do not feel that board members and senior staff often attend public events together. *
- 80% say the board is well versed on agency programs and services. *
- 100% say the board is diverse and represents the populations it serves. *
- 90% believe the board ensures that the operating budget reflects strategic priorities. *
- 90% believe the board ensures that the strategic plan is realistic. *
- 30% are unsure whether board members are trained in social advocacy strategies. *
- 50% are unsure whether the board makes social advocacy a priority and members personally meet with local and state legislators to advocate for adequate funding and policy change. *
- 90% believe that the CEO is receptive to suggested community partnerships provided by board members. *
- 90% believe that the CEO connects to other local non-profit leaders in the communities it serves. *
- 33% are unsure or do not think that board members participate in public forums related to advocacy efforts. *
- 90% believe that the board effectively allocates resources. *
- 90% believe that the board ensures prudent risk management. *
- 90% believe that program supervisors work with leadership to develop program budgets and stay within them. *
- 90% believe that the agency has a development plan that ensures the financial health and viability of the agency. *
- 22% are unsure or do not know if the agency has an effective Continuous Quality Improvement Plan that is reviewed quarterly. *
- 20% are unsure or do not know about procedures that are in place for correcting program or service deficiencies. *
- 20% are unsure or do not know if the agency uses a Results Oriented Management and Accountability (ROMA) system for performance tracking.*
- 90% believe the agency communicates to its stakeholders the program outcomes, achievements, etc. through newsletters, emails, press releases, social media, and other sources. *

Top Needs In the Community

- Affordable and safe housing
- Migrant services
- Education (literacy, budgeting, and parenting skills)
- Resource access and knowledge
- Extra-curricular opportunities for children (educational)
- Drug prevention and awareness
- Substance abuse treatment
- Domestic violence support and resources
- Inflation effects

- Transportation
- Food accessibility and affordability
- Job upskilling
- Temporary housing (transitory needs)
- Homeless needs
- Veteran needs

Suggested Strategies to Address Needs

- Winter program for migrant workers
- Private sector funding to clean up distressed portions of cities we serve
- Tax incentives and corporate sponsorship of run-down “blocks”
- Partnerships with private entities to address housing needs
- Partnerships with economic development and intermediate school district to address job training
- Education/training programs in local systems
- Support systems for local teachers and aides
- Community campaign for highlighted issues and why we should all care

CAA Internal Interviews & Focus Group Summary



Interviews with Staff and Supervisors/Managers, as well as a single focus group with Board Members, were conducted to further explore findings from the Community Action Agency's internal survey and make recommendations for improvement. Thirteen internal staff and supervisors/managers were interviewed between January 10-20, 2023. The board's focus group, consisting of ten members, was conducted January 18, 2023.

Key themes that emerged from staff and supervisor/manager interviews were that they need more time dedicated for intentional communication and training – central to both of these are the need for personal (and in-person) connections with their teams, other departments, and leadership.

Key Recommendations – Staff and Supervisors/Managers

Improving internal communication

- Demonstration from Upper Management down on type and need for communication and follow-through (model expectations)
 - Ensure all counties received the same information at the same time, instead of the information trickling down
- Seek clarity on what exactly they want in CEO's Update Emails
 - CEO updates should be intentionally focused more on setting priorities, celebrating accomplishments, motivating teams, relaying board directives, and recognizing employees – while also having a personal touch
 - Emails could be moved to monthly updates
 - HR weekly updates could replace CEO updates for "informational" or "reminder" elements (possibly ask staff to communicate to their manager when they have read it)
- Seek clarity on what exactly staff want in Director of Training's monthly updates via Zoom
- Provide clarity on what funds are available
- Provide forum for more staff provide updates from their programs
- Ask for input from staff and management at all levels (understanding that there has to be a commitment to change if there is an ask)
 - Encourage intentional planning and coordinated efforts for vision
 - Encourage program managers and supervisors to identify the information from their teams that may be lacking
 - Provide forum for staff and management to present suggestions or ideas
 - Include categories such as: celebrations, communication, programs, buildings and maintenance, etc.
- Provide monthly (or other frequency) updates for:

- Personnel no longer with the agency
- Services no longer funded
- Community events and ways to be involved
- Allow supervisors/managers more time to plan and support staff
 - Free up some of their time to dedicate to communication
- Hire “in office supervisor/director” that will:
 - Always be available and accessible to staff
 - Coordinate information related to company and community events
- Be more aware of “who” should be included when meetings occur
 - If *recruitment* is being discussed, for example, someone from that program that deals with *recruitment* should be included
- Have management meet more frequently
 - Management wants to interact more with CEO to understand direction, discuss issues, and feel more included in broader conversations – which then can trickle down to their teams
 - The “talking tour” during a time of agency turmoil was highly impactful
- Instate 24-hour response time with CC to other persons to ensure that responses are timely and appropriate
- Conduct more area visits
- “Circle the wagons” post-Covid to identify *new ways of working*
- Implement more “soft touches” of communication
 - “We have a really hard job, our clients are tough...because of that, it would be helpful to have more soft touch stuff to recognize [staff]”

Improving internal mutual support and respect

- Understand what it is that everyone does
 - Potentially removing “dead weight” or see where capacity could be shared
- Take a deeper look into how supervisors are supporting their staff
 - Understand what “drives” staff (incentives, rewards, affirmations, etc.)
- Ask deeper questions of staff, asking “when you don’t feel supported, what does that mean?”
- Demonstrate from the top down what is being asked of staff
 - “It doesn’t matter what you say you are going to do; it matters what you do.”
- Provide training for what it means to be Trauma-Informed at Administrator, Supervisor/Manager, and Line-Staff levels
 - If Trauma-Informed is a value, it should be integrated into internal procedures and protocols
 - “People trained on working with clients are now seeing the discrepancy and lamenting it not happening interpersonally.”
- Listen, honor, and strategize when staff (at all levels) say they are over-stretched in their capacity to do their job
- Strategize *with* personnel that wear multiple hats and do their jobs well to provide support *they actually need*

- Consider moving departments/groups back together again instead of merging departments at locations
 - This saves time for teams and managers
- Implement committee of diverse agency representatives (across counties) much like Strategic Planning committee to help with staff input
- Create and communicate opportunities to network and connect with other staff across levels
 - Hold team-building opportunities (opportunities for connection)
 - Hold more “fun” activities
- Acknowledge and celebrate staff
 - Cultural differences - educate and make staff aware of differing family and value systems
 - Accomplishments – recognize their hard work in a way that everyone (remote and in all the offices) are able to see
 - Recognize that “wins” usually involve a group effort (sometimes 2-3 individuals working together to get a client to a case manager), not only the individual that onboards a client
- Encourage staff to leave political opinions at the door
- Hold management accountable to CAA's stated values (ex. human-centered approach – valuing people over tasks)
 - Build trust
 - Staff's personal feelings should not affect their treatment at work
- Create “open door” policies for staff to get information or speak up about challenges
- Have Upper Management participate in the Wellness Initiatives to provide greater sense of unity and community within the agency
 - Example: the staff enjoyed the door decorations during the holidays, but noticed that Upper Management did not participate

Improving external perceptions of agency culture

- Educate who we are and who are not
 - Manage expectations: “If we put ourselves out there as a hub and catch all for a lot of social issues...when we aren't able to help, we will be viewed negatively.”
 - Increase awareness of what CAA offers and why
 - Provide talking points for community and client engagement
- Intentionally train staff (especially those working directly with clients) on human-centered approaches
 - Aim to understand the lived experiences of others
 - Encourage meaningful connections
- Change the perception that CAA is a hand-out agency through increased communication and invitations for involvement
 - Work to change perceptions from a political level
- Increase education about the benefits of the “social net”
- Listen to grievances aired by former employees and make efforts to change those procedures

- Build in trust-building mechanisms to reach certain demographics in the communities across counties
- Increase professional image of the agency to gain community respect
 - Timeliness of services
 - Office presentation
 - Staff presentation
 - In office
 - At community events

Improving internal procedures for employee policy confidence

- “Get on the same page” from the highest levels of management down to the line staff
- Ask for anonymous feedback that provides *specific policy issues to address*
 - At agency level
 - At department level
- Put together staff committee that reviews and updates the policies (handbook) and procedures
- Build in time for individual teams to review items and procedures and how it relates to their work
 - They need to understand which new guidance replaces what older guidance.
- Involve supervisors/managers in training instead of relying solely on shadowing or video-link trainings
- Provide more training-focused time (“the only time that we learn the policies is when we break them”)
- Provide organizational chart on intranet
 - Interactive chart where users “click” on program and it identifies titles and names
- Incorporate directions into the manual on conflict resolution and who to go to
 - Identify persons of authority to handle specific situations
- Explain “why” new policies and procedures are in place, not just “how to implement”
- Encourage staff to ask questions, even if they think it is simple
- Make HR easier to access for questions
- Incorporate half-day training and half-day team building/bonding days

Improving the staff and community connection

- Encourage staff to volunteer in the community
- Encourage more communication from upper-level staff who are more engaged in community affairs and committees to those that have direct contact with clients
 - Ask and expect CAA representatives that attend community and state meetings to provide updates to ensure that information is available to managers who might need it
 - Identify who should attend what community meetings and if more than one individual should be there

- Hire Community Liaison or Specialist who acts as a CAA Ambassador
- Reach out to key community groups and find out what events are taking place and request to be present and involved
 - Encourage staff that have “engaging personalities” to attend
 - Provide “Recruitment 101” training to those attending community meetings and/or events before sending them into the community
 - Provide CAA branded shirts (with QR code on them that leads to program information on the website) that representatives wear to community meetings and events
- Ask or require staff to attend the monthly Zoom (Director of Training's monthly updates) where Director presents what's going on in the agency, what's available and going on in each county, in-case-of-emergency emails, what other agencies are offering that might benefit clients, etc.
 - Add community events to the updates and encourage involvement
- Incentivize staff to attend community-wide (non-CAA) events, such as City Council meetings.

Improving staff understanding of CAA programs

- Make (deeper) training a priority and provide the time needed for it
 - Leadership should be proactive in recognizing and identifying what training is needed instead of waiting until staff articulate their dire need for it
 - Programs training at onboarding.
- Overall - for example, what we do, how we work, the wheels that make the agency work, and case studies of how programs work
 - Programs that may have overlapping referrals should know who to provide communication to
- Specific - ask staff what they need
- Promote staff self-sufficiency and efficient use of staff time by providing all-staff monthly email that details agency directory (“we don't have a directory”):
 - Personnel: identifies who works where (accounting for staffing changes)
 - Program Contact: identifies who to contact for what information (same titles often have different areas such as applications, transportation, etc.)
 - Program Information: identifies current services and/or funding changes
 - Last updated date

This email:

- Could link to the intranet drive, where you could list other “helpful documents” under different heading topics
- Provides direct demonstrated push to intranet to increase engagement with the intranet
- Should be provided by HR and Communications Departments as support to those working the programs themselves
 - Could also provide procedural updates as well

- Should be updated on a schedule (ex. monthly) to keep it current and at the forefront of staff's emails/thoughts
- Provide FAQs for each department and set of services OR bullets of what each provides
- Include in job descriptions the need to know what other programs and departments do and then evaluate them on this performance area
 - "Understanding CAA programs and departments" is a best practice
- Develop and implement staff "scavenger hunt" on website to promote access and use (with incentive)
- Encourage walkthroughs
- Ask staff the questions they have about the agency and the programs offered, and then respond to those in the monthly updates
- Ask if staff find the monthly Zoom (Director of Training's monthly updates) calls helpful and what would make it more effective
 - Provide notes/minutes from monthly Zoom meeting for those who are unable to attend or have to step out
- Encourage staff to ask questions of their supervisors
- Meetings where everyone learns what the other departments do
 - Celebrate accomplishments of the program and staff
 - Lunch & Learn events
 - Encourage departments to host information session and invite everyone to attend
 - Publish notes
- Instate a "housekeeping session"
- Reinstate annual All-Staff meetings which allow staff to put faces to names, names to titles and roles in programs – also bridging connections
 - Keynote
 - Year in review of accomplishments
 - Acknowledgement of the work put in
 - Goals for moving forward
 - Food
 - Share strategic planning findings
 - Share key procedures
- Try new things and see what sticks (implement and evaluate)
- Provide minutes for Upper Management, Management, Board, and other staff meetings that are available

Improving client connection to programs

- Listen to clients
 - "When we see them as human beings, we are doing it well"
- Make the language less complicated
- Get clients to sign release forms for internal and external referrals
- Increase the number of paid social media posts
- Physically reach out to those in other programs; make the connection directly for the client

- Encourage clients to call 211 and be connected to CAA or call CAA directly and dial “0” for direct access to Operator who can most appropriately direct the call
- Case studies would help staff members problem solve, understand that they are not the only ones feeling what they feel, and can process their emotions
- Encourage staff to ask questions of their supervisors who can point them to the right direction
 - This mutually reinforces both knowledge and connection/relationship
 - Direct conversation where possible, otherwise email
 - Always ask before sending the client to the wrong contact person
- Develop “hot list” resource guide for who to call for what programs and services
 - Titles only (in case staff member changes)
 - Can be printed
- Develop “decision tree” for clients (and staff)
 - County → Program → Asks questions → Contact info
 - Have highlighted person responsible for answering questions and directing inquiries (management might be best suited given less turnover)
- Incorporate personal touches to current information flyers
 - Include who to contact
- Increase cross-agency planning for coordinated efforts that can be provided earlier to the community *and* staff (for work and personal planning):
 - **Schedules with rotated offerings**
 - **Easily accessible information**
 - **Communication plans** and training that allow anyone in the agency to respond to inquiries
- Create ways to let clients know that not all services are income-dependent, so that that they do not turn away altogether
- Update the phone system so that clients are connected to the appropriate departments
- Require annual DEI and Human-Centered training
- Hold staff accountable to CAA’s stated values and best practices
 - Provide support for staff who feel burned or have lost the empathy to work with clients

Training

Although training was not a specific question that was asked, it came up in every category. “Training has not been prioritized...it is so important and yet so lacking – it needs to be a focus.” Potential training topics or topics requested (with focus on staff due to high turnover) with some trainers needing expertise:

- All-Staff training
- Community involvement / Recruitment 101 training
- Conflict training (what to do when issues arise and who to contact)
- Department awareness training (the wheels that make the agency work and who to contact for what)

- DEI internal and external training
 - Consider a variety of racial backgrounds for trainers
- Grant-specific requirements training
- Group behavioral communication training
- Interpersonal communications training
- Human-centered approach training
- Policies and procedures training
 - Agency level
 - Department level
- Program awareness training (what we do, how we work, and **case studies** of how programs work – understanding in “real time”)
 - Include “if this, then this” type training
- Program referral training
- *Ensure Head Start teaching staff get wellness trainings (which is hard to do given they are teaching most of the time)*

Key Findings – Board Members

Improving communication

- Make more efforts for transparency:
 - Share minutes from the meetings
 - Invite staff to attend meetings or find ways to be involved with the staff
 - Offer Brown Bag Lunches to talk about what staff want to discuss
 - Share what information is and is not available to share *and why* (i.e., client confidentiality)

Improving external perceptions of agency culture

- Improve or expand opportunities for community collaborations
- Improve or expand referrals within community for gap-filling
- Continue to procure funding for non-federal grant services, so that more clients can be served with fewer terms and conditions
- Increase awareness within the community about CAA programs (taking the information to them)

Improving board members' understanding of CAA programs

- Have program staff come to board meetings and highlight **services** offered, **success stories**, and referral procedures
 - Success stories should be “emotive, personal” stories that help you learn how clients accessed the program
- Provide board training packet on the web and certify that you have read and understood the material
 - Description of program
 - Description of services
 - Who to contact
 - Limitations of funding

- Provide training materials in different formats for those who absorb knowledge differently
 - Reading materials
 - YouTube
 - Other

Improving private sector funding

- Focus on awareness (“awareness brings funding”)
- Consider funding model and whether to decrease federal dependency in order to increase capacity and resource utility
- Approach employers to help their own employees with “in kind” assistance such as transportation
 - Identify a group of people that have the same need

Improving CAA's educational efforts

- Expand the successful *financial literacy* program
 - Get the program more integrated into the community by training community groups/leaders who can implement it within *their* spheres of influence (“We have a level of accountability to push some education into community...helping people lead their own change”)
- Decrease self-sufficiency barriers for parents by providing alternative education forums and training times (“there are already so many barriers to achieving self-sufficiency, so why make it harder on the people trying to do that”)
 - Offer programs in the evenings and weekends for parents who can make those times
 - Offer online programs and develop ways to gauge knowledge through this type of forum

Improving staff support and connection

- Bring staff “in front of us to ask questions, to know we are there, and that we are there to support them”
- Bring the board to staff (“showing up in their space in a tangible way”) at:
 - Annual meeting
 - Community gatherings
- Consider hiring a Deputy to help CEO; this “team” could focus on different HR connections and staff issues
- Ask if staff want to hear from us or management