

CAFI Strategic Plan - 2021 to 2024



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1. STRATEGIC PLAN REPORT

1.1. Executive Summary

CAFI participated in a Strategic Planning process that involved the community, CAFI staff, and CAFI's Board of Trustees. The Executive Director, Agency Staff, and members of the agency's Board of Trustees participated in initial strategic planning discussions in late 2019, continuing into 2020. They discussed the state of the Agency, identified internal and external issues that could potentially impact organizational sustainability, reviewed the organizational mission statement and began to set the course for a new Strategic Plan.

In 2020 a global pandemic affected CAFI and the world. As the virus known as COVID19 ravaged the world, CAFI staff met the challenge with optimism. We continued to assess our needs and develop a plan for the future.

A Strategic Planning Committee was established in 2020. The Committee, guided by a ROMA Implementer (Terisa Liang Buchanan), met and established initial objectives. The Agency's Community Needs Assessment was being finalized at the end of the strategic planning cycle. Once the Community Needs Assessment was complete, a meeting was held to review the data. CAFI established final objectives and strategies to guide our work into the next three (3) years.

1.2. Board Authorization

The Board of Directors was presented with a detailed, specific overview of the 2021-2024 Strategic Plan at its March 2021 Meeting. The Board voted to approve the Plan. A copy of the signed approval is included in [the Appendix I](#).

2. AGENCY DESCRIPTION AND PROGRAM PROFILE

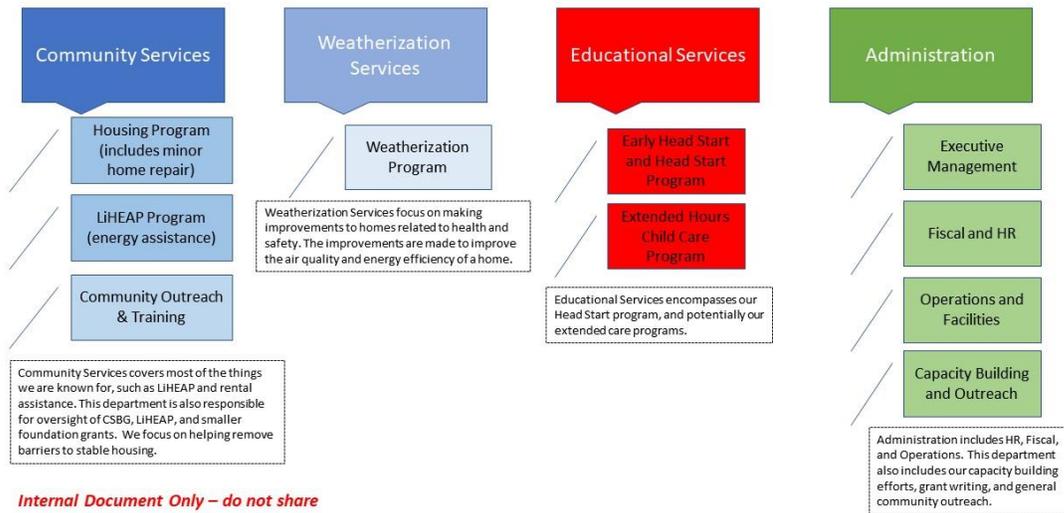
Founded in 1966, CAFI's mission is to enhance the quality of life of individuals and families by providing services and resources that facilitate the building of self-esteem and self-sufficiency through active involvement of the total community. CAFI provides comprehensive resources and services to reduce poverty and improve the lives of those who experience it. CAFI's services include community referrals, educational services, housing stability and repair, food security, utility and energy services stabilization, benefits advocacy, and other supports. Currently, CAFI provides Community Services in five (5) counties: Carroll, Coweta, Heard, Meriwether, and Troup. Our Head Start Program serves in Carroll, Coweta, and Heard. Weatherization Program serves in all five counties plus three (3) additional counties: Douglas, Muscogee, and Harris.

CAFI receives Low-Income Home Energy Assistance Program (LIHEAP) and the Community Services Block Grant (CSBG) under the Office of Community Services (OCS); Head Start Program under the

Office of Head Start (OHS) federal funds via the Department of Health and Human Services (HHS). CAFI is also a grantee of the U.S. Department of Energy (DOE) to administer the Weatherization Assistance Program.

The chart below describes CAFI Internal Departments.

CAFI Internal Departments

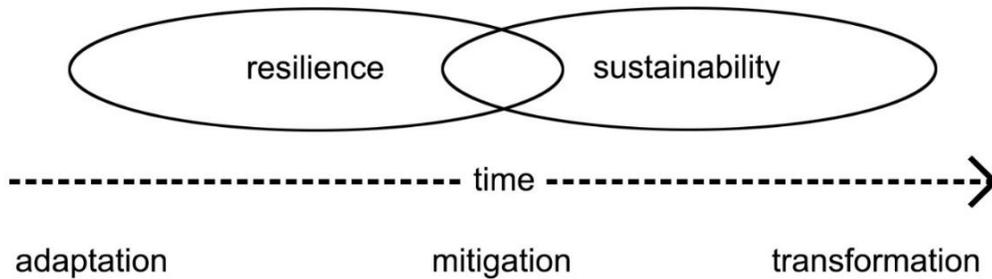
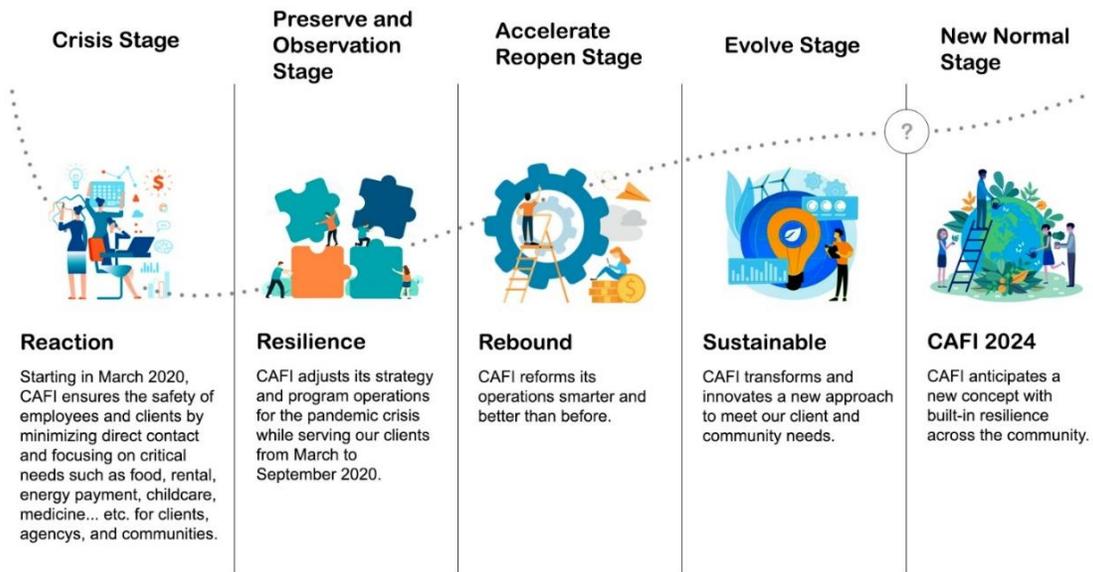


3. CURRENT STATUS INFORMATION

3.1. Phase of COVID 19 response and resiliency road map

Illustrated here is the current external environment and CAFI's actions. At the beginning of 2020, an unpredicted health crisis affected the entire United States and nations across the globe: COVID-19 Pandemic. Since then, more than 30 million people are facing an eviction crisis.

5 Phases of COVID-19 CAFI Response



We will continue working through the COVID-19 vaccination period to be a voice of the vulnerable population. We will use “whole family” and equity lens approaches to evolve and design our program implementation.

3.2. Programs

CAFI provides Community Social Services, Head Start Program, Low-Income Home Energy Assistance (LIHEAP), and Weatherization. Although CAFI serves income-eligible populations, there are slight differences between each program/service.

Lines of Programs		
Programs	Clients	Difference
Community Social Service – Rental assistance	Homeless or at risk of eviction	125% - 200%Poverty guidelines; Homeless prevention;
Community Social Service – Temporary shelter	Homeless	125% - 200% Poverty guidelines; Provide safe & temporary place to stay; Hotel stay up to seven days
Community Social Service – Utility assistance	Currently housed	125% - 200% Poverty guidelines;
Community Social Service – USDA 502 Loan	Currently housed (potential Homeowners)	Low- or mid-income Affordable Housing
LIHEAP	Housed clients	200% Poverty guidelines; Housing stability; Financial assistance up to \$400 per household and per season
Weatherization	Housed clients	200% Poverty guidelines; Safe & decent housing
Early/Head Start	Currently housed to be potential homeless and currently homeless	Education, empowerment

4. STRATEGIC PLAN PROCESS

4.1. Purpose/ Preparation

Before developing a strategic plan for the next three years, we evaluated and analyzed CAFI’s past three years’ (since the last strategic plan) performances.

4.1.1. STRENGTHS, WEAKNESSES, OPPORTUNITIES, THREATS (SWOT)

In the summer of 2020, CAFI staff and board members assessed CAFI’s strengths, weaknesses, opportunities, and threats. The table below is a summary of CAFI Strengths and Weaknesses Survey’s feedback from staff and board members.

CAFI Strengths and Weaknesses – Staff and Board of Directors		
Area	Strength	Weakness
SERVICES TO FAMILIES	<ul style="list-style-type: none"> • Desire to expand programs • 2 Family oriented • Client base • Encourages clients to become self sufficient • Scholarships to students • CAFI Cares • Utility assistance • Home assistance • CAFI advocates • Head Start • The only agency that can administer LIHEAP 	<ul style="list-style-type: none"> • Schedule and have more in- house services • Lack of constancy of program execution • Too much energy and staffing spent on LIHEAP programs • Lack of Follow up • Large service area • Information on website not clear • Being able to encourage more training of our clients • More organized • A better way to take appointments so there are fewer duplicates • Locking the public we serve out during business hours
COMMUNITY RELATIONSHIPS	<ul style="list-style-type: none"> • Community Partners • Work together • Serving communities daily • The community has an outlet to come get help 	<ul style="list-style-type: none"> • Lack of community support • Lack of community involvement • Lack of community interaction; no information being shared through social media accessible to all ages
AGENCY CAPACITY	<ul style="list-style-type: none"> • Organizational compliance • Awareness of needs 	<ul style="list-style-type: none"> • Management skills • Poor management

<p>FISCAL</p> <p>ACCOUNTABILITY</p> <p>MANAGEMENT, LEADERSHIP, GOVERNANCE</p> <p>COMMUNICATION</p>	<ul style="list-style-type: none"> • National wide agency • Handling of grant funds • Seeks new resources • Uses resources wisely • Funds available to assist clients • Provides flexibility • Using statewide Data System • Data collection; data quality • Coordinator willing to help others • Administration and personnel • Great Leadership • Board commitment • Board willing to work towards goals to enhance agency 	<ul style="list-style-type: none"> • Lack of midterm and long term vision • Lack of credibility • Mismanagement of agency funds • Cash flow • Lack of funds • Lack of fundraising • Limited resources-can't meet everyone's need • Micromanaging by some staff members • Board lacks community leadership/involvement • Board participation • Inability to fill all vacant board positions • Communication with peers • Communication with board members • Lack of information between all involved in well being of agency
<p>STAFF DEDICATION AND COMPETENCE</p>	<ul style="list-style-type: none"> • Willingness to do whatever is needed to help community • Meets individual and family needs • Growing services • Compassion • Staff and commitment to serve • Dedication/ Devoted • CAFI exhibits professionalism in their efforts to bring assistance to all • Genuine desire to help low income people 	<ul style="list-style-type: none"> • Employee frustration • Gossip creates an unhealthy and insecure environment • Small staff-many tasks done by few • Unclear chain of command • Wrong people in wrong positions • Not enough team meetings • Not having team players/ • Teamwork • Not employing good workers

Environment and Support for Staff	<ul style="list-style-type: none"> • Has client's best interest at heart • Ability to deliver quality assistance • Resourceful • Longevity/stability of staff/ Core staff • Integrity • Diversity • Proper Training • Great place to learn • Genuine desire to rebuild agency personnel • Provide benefits 	<ul style="list-style-type: none"> • Employee educational improvement • Not knowing the latest trends in nonprofit-IT, trauma informed • Salaries are not competitive • No health benefits • Benefits and training • No 401k • No HR Personnel
OTHER	<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> • No feed the family plan available • Unable to meet more needs of the community

Opportunities:

- More schools/institutions/ local providers focus on providing families and individuals who are affected by the pandemic with a safe and stable housing situation.
- More local agencies are willing to work collaboratively to address community issues due to the pandemic impact.
- More funding come from the government to address pandemic impact.

Threats:

- Lack of new technologies.
- Unpredictable public health situations.
- Lack of communication of CAFI progresses and reports to the public.
- Misinterpretation of CAFI's role in the community. (i.e: public thought CAFI is a government agencies)
- US economy-increase in unemployment will need to increase in request for help/
Lack of work
- Another pandemic/
- A depression
- Government corruption
- Government shutdown

4.1.2. SWOT analysis

From the feedback above and focus group interviews, the popularity of main concerns from staff and board members are –

- Communication: Agency information sharing internally and externally.
- Agency benefits and training.

In addition to the SWOT analysis, we use the CAA Mgmt Crisis Checklist Document to evaluate CAFI's current performances in seven different categories. As a result, CAFI is in the Stable status for Financial Management, Programs and Services, Human Resources, Community Relations categories.

Agency Status	Financial Management I	Agency Management II	Programs and Services III	Human Resources IV	Community Relations V	Board of Directors VI	ROMA VII
Thriving	<ul style="list-style-type: none"> Highly diverse base. Strong reserve. Excellent Controls. System is responsive. 	<ul style="list-style-type: none"> Systematic and regular feedback. ROMA integrated. Strategic planning. Timely submission of reports. 	<ul style="list-style-type: none"> Innovative programs. Results oriented. Improvement sought. Best Practices. 	<ul style="list-style-type: none"> Staff creative. Plans for staff development. Excellent controls. Exemplary information. Very little staff turnover. 	<ul style="list-style-type: none"> Provide leadership. Strong, respected advocate. Visible and influential in the community. Facilitates and participates in collaborative responses to community problems. 	<ul style="list-style-type: none"> Board Creative. Advocate for poor. Set direction. Advocates for agency. Know and accept Board and role responsibilities. Staff attends Bd meeting and provides information. Board is kept informed and understands all financials. 	<ul style="list-style-type: none"> ROMA integrated throughout agency. All staff aware of ROMA concept and used. Supported by Exec. Dir. Board cognizant of concept.
Safe	<ul style="list-style-type: none"> Some diversity in funds. Adequate reserve. Adequate controls. System is responsive. 	<ul style="list-style-type: none"> Clear vision; little action Regular data review. Feedback system. ROMA used. Multi-year planning. Timely submission of reports. 	<ul style="list-style-type: none"> Programs grow. Change oriented. Fulfills commitments. Effective practices. 	<ul style="list-style-type: none"> Staff morale high. Staff trained. Controls assure compliance. Adequate information. Staff competent and committed. Little staff turnover. 	<ul style="list-style-type: none"> Partnerships and networking. Seen as positive. Some advocacy. 	<ul style="list-style-type: none"> Committed to serving poor. Pursue direction. Belief in agency and its staff. Board knows & understands agency's programs. Board is kept informed & understands all financials. 	<ul style="list-style-type: none"> Most staff aware of ROMA concept. Supported by Ex. Dir. Beginning to integrate ROMA throughout agency. Board learning concept.
	In Between						
Stable	<ul style="list-style-type: none"> Funds cover activities. Little reserve. Controls weak / unfunctioning. System response is timely most of the time. 	<ul style="list-style-type: none"> Required Feedback. ROMA language. Annual planning. Self-assessment performed/ implemented. Reports occasionally late 	<ul style="list-style-type: none"> Agency no longer in danger. Programs stable. Grant oriented. Delivers service. People are served. Commitment to change. Addresses organizational weaknesses. 	<ul style="list-style-type: none"> Staff competent. Weak controls; functioning, Little information shared. Some staff turnover. 	<ul style="list-style-type: none"> Attends meetings. Neutral image. Little advocacy, but some education. 	<ul style="list-style-type: none"> Understand poverty. Stay on course. Participate; don't micromanage. Info discussed regularly. 	<ul style="list-style-type: none"> Some staff aware of concept. ROMA used only as required. Little board training. Supported by Ex. Directors.
						In Between	In Between
Vulnerable	<ul style="list-style-type: none"> Limited funding base/tight. Controls not functioning consistently. System cannot respond in timely manner. No reserve funds. 	<ul style="list-style-type: none"> Little/no feedback. No outcomes/results. No planning beyond grant objectives. Probation status needs intervention. Reports consistently late. 	<ul style="list-style-type: none"> Programs stagnant. Do not consistently meet grant goals. Inconsistent practice. People not served. 	<ul style="list-style-type: none"> Staff lack skills. Controls are inconsistent. No information shared. May need staff changes. High staff turnover. 	<ul style="list-style-type: none"> No regular contact. Negative image. No advocacy or community effort for poor. 	<ul style="list-style-type: none"> Apathetic. Micromanage or fail to do basics. Lack faith in staff or aren't told truth. Needs Board training. Lack of financial discussion. 	<ul style="list-style-type: none"> Not meeting all requirements. Most staff unaware / unwilling. Ex. Dir. non-committal. Board unaware of concept.
In Crisis	<ul style="list-style-type: none"> Cannot cover expenses; deficit spending. Borrowing for operating expenses. No controls. No systemic response capability. Corruption. 	<ul style="list-style-type: none"> No feedback/ignore feedback. Not meeting simple goals / objectives. No planning/totally reactive. Unwilling to change. Needs strong outside intervention. No reports. 	<ul style="list-style-type: none"> People not served. Programming does not meet funder standards. Ineffective/harmful practices. Misrepresentation of activity. 	<ul style="list-style-type: none"> Staff incompetent. No controls. No information shared. High staff turnover 	<ul style="list-style-type: none"> Excluded from community activity. Seen as corrupt or incompetent. Seen as not being of assistance to the poor. 	<ul style="list-style-type: none"> Disagree with CAA philosophy. Micromanage. Don't attend. Corrupt. Incompetent. "Rubber Stamp" 	<ul style="list-style-type: none"> Not meeting any requirements. Ex. Dir. not committed. Staff unwilling / unaware. Board unaware of concept.

4.2. Customers Survey

CAFI conducted a Customer Survey in December 2020. CAFI received more than 1000 responses. Currently, responses are being analyzed.

4.3. Community Partners Survey

CAFI conducted a Partner Survey in November 2020. CAFI received nearly 100 responses. Currently, responses are being analyzed.

4.4. Mission Statement

CAFI has not updated its mission statement since 1964. In 2020, CAFI used the ROMA Principles to review its mission statement. The Executive Director, Jennifer Corcione, led the conversation with staff to create a proposed statement to board members.

Here is the staff suggested mission statement:

- To collaborate with the total community by igniting opportunities for income-eligible individuals and families to help them relieve the burdens of poverty and become empowered voices of advocacy.

After reviewing the staff suggested statement, board members developed four drafts of a new mission statement for discussion:

- To partner with the community in creating opportunities to help reduce the burdens of poverty and build stronger families and communities.
- To create lasting solutions for low-income families to overcome the burdens of poverty.
- Working collectively with partners to build stronger communities in which vulnerable people are heard, healthy, and have hope.
- To address affordable housing through community-based solutions, while offering comprehensive services and advocacy to low-income families.

On August 13th, 2020, at the annual board training, CAFI board members worked with ROMA professionals, Barbara Mooney and Carey Gibson from the National Community Action Agency Partnership to review and decide on a mission statement.

Below is a comparison of the old mission statement and the new mission statement. The new statement is shorter and more specific than the previous mission statement.

Mission Statement		
Mission Elements	Current Mission (Before 2020)	New Mission (2021)
Who do we serve?	individuals and families	low-income households
What difference do we make in their lives?	enhance the quality of life	help reduce the burdens of poverty
What's our competitive advantage?	providing services and resources that will facilitate the building of self-esteem and self-sufficiency through the active involvement of the total community.	providing services and resources utilizing the "whole family" approach
Complete Statements		
	<p>Current Mission (Before 2020)</p> <p>To enhance the quality of life of individuals and families by providing services and resources that will facilitate the building of self-esteem and self-sufficiency through the active involvement of the total community.</p>	<p>New Mission (2021)</p> <p>To build sustainable communities with partners by providing services and resources utilizing the "whole family" approach with low-income households to help reduce the burdens of poverty</p>

5. DEPARTMENT GOALS AND ACTION PLAN

COMMUNITY ACTION NATIONAL GOALS

Goal 1: Individuals and families with low incomes are stable and achieve economic security.

Goal 2: Communities where people with low incomes live are healthy and offer economic opportunity.

Goal 3: People with low incomes are engaged and active in building opportunities in communities.

AGENCY GOALS FOR 2021 TO 2024

CAFI created Agency Goals in 2017. In October 2020, all current CAFI board members agreed to keep the same four goals from 2017 as CAFI's *next* three years Agency-wide goals. (Three out of these four goals are also National goals.)

Goal 1: Individuals and families with low incomes are stable and achieve economic security.

Goal 2: Communities where people with low incomes live are healthy and offer economic opportunity.

Goal 3: People with low incomes are engaged and active in building opportunities in communities.

Goal 4: The organization is compliant & has established an accountability framework to deliver quality services with a high level of efficiency & effectiveness.

In order to achieve the Agency's Goals, below are the detailed descriptions for each CAFI program and service internally and externally.

ROMA & Data Collection Program Goals (2021 – 2024)

CAFI focuses on the results and outcomes for clients. We aim to operate "beyond compliance." We aim for excellence. Our clients and community want to see results that are impactful. Part of telling the story of our impact is to gather results and data. That data must be correct and complete; Therefore, ROMA must be put into practice.

Ultimate Goal: Agency will exercise the ROMA Cycle each year.

Strategies:

1. Provide regular ROMA training and materials to staff and Board.
2. Plan times and regular intervals to "practice" the cycle of ROMA.

Metrics:

- Provide ROMA training at least 2 times per year to staff and Board.
- Utilize ROMA Implementer to guide the process during 2021.

Goal #1: Capture accurate data and ensure the integrity of the Database by auditing up to 3 times per year.

Strategies:

1. Update EasyTrak client profile and information for repeating clients.
2. Provide ongoing training to ensure adequate data collection.
3. Recruit an employee with a qualified credential education background.

Metrics:

- Facilitate at least 2 data audits and file audits per year.
- Provide training from SmartQuest at least 1 time per year.
- Recruit and hire a data analyst by 2022.

Goal #2: Establish a universal entry process to have a complete non-duplicated count of clients.

Strategies:

1. Implement an E-reception to collect all data, including those that we cannot help.
2. Combine all family data into EasyTrak from Hancock and ChildPlus.

Metrics:

- Fully utilize EasyTrak and all functionality available by 2022
- Combine all client data into EasyTrak (from Hancock and ChildPlus) by the end of 2021.
- Implement an e-reception by the end of 2023.

External programs will be reviewed from three different levels of need: 1) Individual/ family, 2) Agency, and 3) Community.

Head Start Program Goals (2021 – 2024)

Overall program goal: Ensure children and family needs can be met for their continued growth and sustainability.

Strategies:

1. Partner with the University of West Georgia and consider dual enrollment.
2. Use its resources to secure families with CSBG, LIHEAP, Adult Education, Social Services, and Weatherization opportunities.
3. Maintain a network of community resources for wrap-around support services for children and families.

Individual/ Client Level:

Goal #1: Provide access to an early learning program for children and enhance their parents' opportunity to obtain jobs or receive family-supporting income. (2- Gen approach)

Strategies:

1. Provide drive-thru enrollment activities.
2. Collaborate and participate in job fairs with Goodwill Industries, Three Rivers Regional Commission, Staffing companies, Department of Labor and/or other local job readiness training agencies or schools.
3. Attend community meetings to promote CAFI clients who need a job.

Metrics:

- 3% of Head Start Program parents refer to CAFI Community Social Services Program to receive employment support in 2021 and 2022.
- Full capacity enrollment for each school year.

Agency Level:

Goal #2: Provide high-quality instruction and care-giving that promotes healthy and safe learning environments and adult/child interactions.

Strategies:

1. Provide additional training to staff.
2. Observe teachers using CLASS™ assessment; Management will use data to navigate support to teachers.
3. Ensure healthy and safe practices to reduce the spread of COVID-19.

Metrics and milestone:

- During the 2020-2021 school year, all Head Start/Early Head Start teachers will receive training in Emotional Support, CLASS Dimensions, Literacy/Language Development, and Science/STEM.
- March 2021, all staff will receive training in Emotional Support/Sensitivity, Early Childhood Mental Health.
- During the 2020-2021 school year, all Head Start classrooms will be observed using CLASS™ assessment. Management will use data to navigate support to teachers.
- Provide COVID-19 policy and training to staff during the 2020-2021 school year.

Goal #3: Enhance Program Management systems and increase effectiveness and efficiency for positive program outcomes over the course of the five-year grant.

Strategies:

1. Use the "HSELOF" tool to ensure positive development outcomes.
2. Provide additional training to staff.

Metrics and milestone:

- During the 2020-20201 school year, the CAFI management team will use the "HSELOF" tool to ensure positive development outcomes.
- Staff will receive training on and understand the Head Start Management Systems Wheel (tool) during the 2020-2021 school year.

Goal #4: Utilize the Parent, Family, Community Engagement (PFCE) goals and School Readiness (SR) goals to increase collaborations between participating families and staff, to reinforce the home-school connection (bringing classroom learning experiences into the home setting).

Strategies:

1. Ensure a successful transition by using data such as TSG goals and monitor by CAFI management staff.

Metrics and milestone:

- CAFI will use TSG Goals to monitor staff and provide training and follow up during 2020-2021 school year.

Community Level:

Goal #5: Build collaborative partnerships between Government-funded Early/Head Start programs and other local early childhood programs to increase resources for children and their families.

Strategies:

1. Attend community meetings monthly.
2. Write grants for additional funds.

Metrics:

- Secure at least (2) new community partnerships during 2020-2021 school year.
- Apply for up to (3) foundational grants to secure additional resources.

Housing Program Goals (2021 – 2024)

Current situation:

Due to COVID-19, many residents are facing a housing crisis. Many government and foundation grants support housing stability and homelessness prevention. With that funding, the funders are looking for a well-structured and designed housing program addressing Fair Housing and Anti-Discrimination Protections as well as racial and income equity. CAFI has been offering rental assistance and supportive services, including case management. In addition, CAFI helps clients apply for USDA 502 loan to purchase a home. There is a high probability for CAFI to be awarded more housing-related funding.

Resiliency Plan:

Two funding opportunities may come to CAFI to help support those affected by the pandemic. These opportunities may be available within the next 24 months:

- 25 billion Emergency Rental Assistance Program (ERAP) established by the Consolidated Appropriations Act, 2021: Funding is being dispersed through local municipalities for counties with populations over 200,000. Smaller communities will be eligible for funding through the Department of Community Affairs (DCA). CAFI has been contacted by DCA for potential discussions to help administer rental assistance.
- AmeriCorps State Program: CAFI is expected to receive AmeriCorps members to assist in CAFI's Housing Program by creating workshops and training for CAFI clients. The workshops will focus on eviction education, fair housing topics, tenants' rights, etc.

Expected Outcome in the five years:

Become a HUD-approved housing counseling agency.

Individual/ Client level:

Visions:

- Help clients through the post- COVID 19 period and economic recession thereafter.
- Address inequity and structural racism embedding in the housing crisis and the COVID-19 pandemic.

Goal #1: Increase employment among non-working clients by 3% or up to 15 people per year. (client self-sufficiency)

Strategies:

1. Collaborate with Goodwill Industries, Three Rivers Regional Commission, and/or other local job readiness training agencies or schools.
2. Collaborate and participate in job fairs with Goodwill Industries, Three Rivers Regional Commission, Staffing companies, Department of Labor and/or other local job readiness training agencies or schools.
3. Attend community meetings to promote CAFI clients who need a job.
4. Promote CAFI Client job seekers on CAFI social media channels.
5. Collaborate to employ veterans within the community.

Metrics:

- Increase in the number of employed clients by 1% to 2%.
- Agency participates in up to 3 job fairs per year.
- Increase the number of clients who are referred to job readiness programs or work training programs.

Agency level:

Goal #2: Establish a comprehensive and well-structured Housing Program.

Strategies:

1. Increase of individuals who apply for government-assisted home buyer programs such as USDA loan, GA Dream Home, etc.
2. Update CAFI Housing Program Manual by the end of 2021 and review it annually.
3. Implement the Housing Counseling concept with AmeriCorps State members' assistance.
4. Provide ongoing training such as Case Management or Housing Counseling related training to Housing Program Staff (and encourage them to get certification from HUD or related agencies.)
5. Increase outreach to provide information about affordable loan options.
6. Ensure CAFI staff are certified to package USDA loans.

Metrics and milestone:

- By 2022, CAFI will complete the Housing Counseling Agency Eligibility Tool and start the application process.
- Attend at least 5 community events or meetings to discuss the USDA 502 loan.
- Package up to 10 USDA loans per year.
- By 2023, CAFI will have AmeriCorps members to assist Program County Coordinators with Housing Program clients.

Community Level:

Goal #3: Work within the community to develop options for affordable housing in the Region.

Strategies:

1. Develop community partnerships to increase and improve available affordable housing in the Region.
2. Increase capacity by ensuring MOUs for up to 3 new partners annually.
3. Attend city/county meetings ongoing.
4. Consider joint grant writing opportunities to develop, renovate, or construct temporary or permanent housing.

Metrics:

- Sign 3 new MOUS for community partners who address housing annually.
- Apply or joint-apply one community development grant.

LIHEAP Program Goals (2021 – 2024)

Individual/ Client Level:

Goal #1: Help clients avoid disconnection and interruption of service.

Strategies:

1. Connect repeating clients with available resources in the Region.
2. Continue to administer 100% of LiHEAP funding.

Metrics:

- Spend 100% of LiHEAP funding by the end of each grant period.

Agency Level:

Goal #2: Provide efficient and effective service to clients.

Strategies:

1. Research new online tools for appointments and select a tool by 2022.
2. Establish an e-reception that will integrate with the new online scheduler tool.

Metrics:

- By the end of the 2022 contract year, CAFI will research and select an online scheduler tool.
- Establish an E-reception that will integrate with a new online schedule tool by the end of 2022.

Community Level:

Goal #3: Advocate for clients, especially those with high energy burdens.

Strategies:

1. Contact CAFI top 10 to 15 LiHEAP vendors to create a good relationship, targeted outreach.
2. Share CAFI information with vendor partners.

Metrics:

- Complete advocacy campaign by Spring of 2022.

Weatherization Program Goals (2021 – 2024)

Individual/ Client Level:

Goal #1: Increase referrals for minor home repair by up to 5 households per year.

Strategies:

1. Utilize the Weatherization waiting list to make referrals for home repair.
2. Continue to budget for home repair in the CSBG funding.

Metrics:

- Produce up to 5 referrals for home repair annually.

Agency Level:

Goal #2: Increase the program's capability in order to assist an additional 20 households by 2024.

Strategies:

1. Expand staff.
2. Partner with local churches, volunteers, and/or home repair programs.

Metrics:

- Expand staff by hiring new crew workers by 2022.
- Partner locally to assist homeowners.

Community Level:

Goal #3: Develop community partnerships to bring awareness of Home Weatherization and increase opportunities in the Region.

Strategies:

1. Contact CAFI top 10 to 15 paid vendors from the LIHEAP program to bring awareness of Home Weatherization.
2. Increase capacity by ensuring MOUs for up to 2 new partners annually.
3. Attend city/county meetings ongoing.

Metrics:

- Provide targeted outreach to the top 10 largest LIHEAP vendors by the end of 2022.
- Develop at least one partnership to assist with home repair and weatherization by 2022.

Board Program Goals (2021 – 2024)

Individual Level (as an individual board member)

Goal #1: Strengthen CAFI Board, fill vacant seats, and ensure basic Board duties are being fulfilled.

Strategies:

1. Understand board member roles and responsibilities as a CAFI board member.
2. Engage with their community to improve CAFI's reputation and create new partnerships with CAFI.
3. Attend board meetings to learn if the progress is being made towards achievement, what obstacles are faced, and what resources are needed (Know if goals have been met or not met).
4. Raise resource or monetary value more than \$200 per person a year for CAFI capital campaign and/or programs.

Metrics:

- All new members participate in New Board Member Orientation within 60 days of being installed.
- Present at each of the (5) counties within the year.
- Each member participates in the fundraising efforts.

Agency Capacity Building Program Goals (2021 – 2024)

Employee Development and Relations

Goal: Establish strengths development and self-care plan, including training to staff.

Strategies:

1. Increase the number of staff who receive job-related certification such as Case Management, ROMA Implementors.
2. Continue updating CAFI July Annual Training Week Plan.
3. Host employee recognition program annually.

Metrics:

- 1% decrease of turnover rate.
- 1% increase of certified employees.

Community Relations

Goal: Develop partnerships to help local people engage in their community.

Strategies:

1. Assist Calumet Homeowners Association with the revitalization project.
2. Develop a Policy Council for Head Start.
3. Further Develop Participant Action Council.
4. Engage with at least three local community events.

Metrics:

- Continue working on Calumet Project for the second year.
- Fully operational Policy Council by June 2021.

Agency Capacity

Goal: Increase the capacity and capability of the Agency.

Strategies:

1. Implement the AmeriCorps program to receive additional assistance.
2. Boards raise resource or monetary value more than \$200 per person a year for CAFI capital campaign and/or programs.

Metrics:

- Include AmeriCorps support funding into permanent grants by 2022.
- Fully develop AmeriCorps Program to strengthen Agency's proficiency by 2023.
- Hire a new employee to manage and fully establish the AmeriCorps Program (VISTA and State).

Information Technology

Goal: Update and modify technology for better efficiency and remote working conditions.

Strategies:

1. Improve technology.
2. Consider electronic enrollment/applications.

3. Provide training such as OneDrive, SharePoint, Teams to all staff so that staff is ready to work remotely.

Metrics:

- Improve virtual technology in the Board room by April 2021.
- Upgrade phone technology by 2022.
- Establish VPN for management by the end of 2021.
- Staff will complete the MS-tools training.

Financial

There are four different types of funding models: Anchor Funding, Diversification, Philanthropic, and Earned Income. The descriptions are below:

1. Anchor Funding: 80% of funding comes from one source or type of funding.
2. Diversification: 1/3 from government, 1/3 contributed revenue, 1/3 earned income – fees..etc.
3. Philanthropic: receive by giving or donation.
4. Earned Income: funding comes from program fees paid by the participant or billing a third party for the services or mixture of both.

Our current financial resources are LIHEAP, CSBG, Head Start, Weatherization, CSBG CAREs (temporarily), LIHEAP CAREs (temporarily), private donations, and rental income from CAFI owned properties. CAFI's current funding model is considered Anchor Funding, in which most of the funding comes from one resource- government fund, even though it is from different government departments.

Goal #1: Evaluate and improve CAFI's wage compensation plan, benefits package, and staffing plan by 2022.

Strategies:

1. Evaluate CAFI's wage compensation plan.
2. Implement a 401k Plan.

Metrics and milestone:

- Using an industry expert, evaluate CAFI's wage compensation plan and build a lasting and updated plan with relevant, competitive, and fair wages by the end of 2021.
- Obtain indirect cost rate lower than 25% by the end of 2021.
- Implement a 401k Plan for staff by Spring 2021 and match funds (up to 3%) for the next three years.
- Complete staffing plan by Summer 2021 that includes all potential positions necessary for the next three years.

Goal #2: Increase CAFI's Unrestricted Funds (cash reserves).

Strategies:

1. Expand the variety of income sources.
2. Develop resources and seek other grants or funds.
3. Establish a Development team from Board members, AmeriCorps VISTA, and volunteers, as well as recruit a new employee to manage, track, and report.

Metrics and milestone:

- Achieve an operating reserve of at least \$100,000 by the end of FY 2021.
- Complete and implement a Resource Development and Fundraising Action Plan for the next three years by May 2021.
- Establish a Development team from Board members, AmeriCorps VISTA, and volunteers, as well as recruit an employee to manage, track, and report by the end of 2022.

Goal #3: Diversify funding resources by 2023.

Strategies:

1. Increase opportunities for CAFI to present to the public or other organizations or municipalities.
2. Create a list of grants and funding sources to apply to within the next three years.
3. Establish a Development team and recruit a Board Member to manage and track.
4. Continue implement fundraising events and activities agency-wide.

Metrics and milestones:

- Create a Board Speaker's Bureau and start engaging local officials and business sectors by summer 2021.
- Complete and implement a Resource Development and Fundraising Action Plan for the next three years by May 2021.
- Create a list of grants and funding sources to apply to within the next three years by Fall 2021.

Appendix

- I. Board Authorization of Strategic Plan
- II. Whole Family Approach definition
- III. SWOT analysis from board and staff
- IV. Census Population for CAFI serves counties.
- V. 2020 Community Needs Assessment

Appendix I - Board Authorization of Strategic Plan

Board Authorization of Strategic Plan

Authorization designates board member's approval of the strategic direction and action plans described in this strategic plan document.

Name of Board Member (President): _____

Signature: _____

Date Signed: _____

Name of Board Member (Vice President): _____

Signature: _____

Date Signed: _____

Name of Board Member: _____

Signature: _____

Date Signed: _____

What Does “Whole Family Approach” mean? Read below from experts in our field.

What is a multi-generation/whole family approach?

Human services programs and social policies frequently focus only on adults, or only on children. This is even true of many programs and policies explicitly aimed at families. For example, while the goals of the Temporary Assistance for Needy Families program (TANF) include providing assistance to needy families so that children may be cared for in their own homes, TANF services and performance measures are almost exclusively focused on parents.

A multi-generation or whole family approach to human services is one that focuses on the needs of parents and other adult family members and the needs of children together, and considers the challenges and resources of family members outside of the assistance unit, all out of recognition that children do better when their parents are healthy and stable, and that parents do better when their children are healthy and stable.

American Public Human Services Association

WHAT IS THE WHOLE FAMILY APPROACH?

Strong families are essential to the well-being of children, adults and the community. The Whole Family Approach is a family-led strategy that provides adults and children with the tools they need to set goals together, create plans, and to achieve those goals.

While families are made up of individuals, their challenges and successes are interdependent. By using the Whole Family Approach, family members work together to support each other’s goals and achieve long-term change and stability.

The Whole Family Approach recognizes that reaching large goals, and maintaining them, requires the support of all family members.

Family Strengthening Network

The Whole Family

Head Start supports families facing difficult circumstances and seeks to mitigate obstacles to learning in the early years. Flash forward 50 years, President Barack Obama in his 2014 State of the Union address called for more focused and dedicated work to ensure vulnerable children and families have access to high quality care and education in their earliest years. His FY2016 budget, included a commitment to expand and strengthen child care and early education programs, specifically increasing the duration of Head Start to a full school day and year. Clearly, providing early learning opportunities for at-risk children has become not only a focal point for lawmakers, but a shared national commitment.

What makes the whole child and whole family model so powerful? Nobel-prize winning economist James Heckman has suggested that the social-emotional development cultivated by programs may be the true contributor to long-term impacts, and health benefits which range from decreased child mortality to adult health behaviors. Furthermore, an additional motivator behind children's success through elementary school and beyond are very likely parents. By helping families who are struggling with poverty and other socio-economic challenges achieve their goals for education, employment, and housing, Head Start plays a transformative role across two generations.

National Head Start Association

Appendix III - SWOT analysis from board and staff

Community Action For Improvement

SWOT Assessment-Board

Facilitators: PRI staff- Dr. Barbara Mooney, Ed.D. and Carey Gibson, MSW, NCRP

Today's political, economic and competitive influences are different than those CAFE, Inc. has encountered during most of its 40 years as the Community Action Agency for the Georgia counties of Carrollton, Coweta, Heard, Meriwether and Troup. As a result, it is important to understand what the board and staff believe those differences mean to CAFE's ability to meet the needs of the community. Agency board and staff were asked to respond to a brief survey to share their perspective on where CAFE is now and where it could be going forward.

Survey Participation:

- 14 board members were asked to complete the survey
- 9 board members submitted responses, though not all members answered all questions. See detailed response rate under each item. Having only 6 or 7 responses from a 14 member board does not provide sufficient data to inform decision making.
- 4 board members said they had participated in the previous strategic planning process in 2017 that produced the 2018-2020 Strategic Plan, while 5 indicated they were not involved in this process.

Board Meeting Discussion:

- Survey Responses from board members were analyzed and presented for further discussion to the CAFE Board of directors on June 4, 2020.
- 7 board members and 1 agency staff were present for a virtual meeting

Review of Previous Goals:

Response Rate: 7 answered question; 2 skipped

The four goals included in the 2018-2020 Strategic Plan were reviewed, and participants asked to indicate if they felt the goal was still relevant or not and what efforts toward the goal should be taken in the future.

Findings:

Goal 1: Individuals and families with low incomes are stable and achieve economic security

Based on survey results and discussion with board, the majority believe that Goal 1 was met, but still very relevant. It is important to continue and expand.

Goal 2: Communities where people live are healthy and offer economic opportunity

- Majority of board deemed met, but still very relevant. It is important to continue and expand.
- 2 members said this goal was not met, but still relevant and is important to maintain efforts to meeting it.
- 1 member said met, still relevant, but less important than 5 years ago, and that efforts could be reduced.
- 1 member said it was not met, no longer relevant, and could be discontinued.

Goal 3: People with low incomes are engaged and active in building opportunities in the community

- Majority (3 board members) deemed met, but still very relevant. It is important to continue and expand.
- 2 said it was not met, but still relevant and is important to maintain efforts to meeting it.
- 1 said not met-still relevant, but less important than 5 years ago. Effort could be reduced.
- 1 said not met, no longer relevant and could be discontinued.

Goal 4: The organization is compliant and has established an accountability framework to deliver quality services with a high level of efficiency and effectiveness

- The majority of board members (4) said this goal was met, but still very relevant. It is important to continue and expand.
- 1 said not met, still very relevant, important to maintain efforts
- 2 said met, still relevant, but less important than 5 years ago, effort could be reduced.

Review of Previous Objectives:

Response Rate: 7 answered question; 2 skipped

The 2018-2020 Strategic Plan outlined specific objectives as a means of obtaining the 4 primary goals. Respondents were asked to review each individual objective and indicate, from their perspective, how well the objective had been achieved.

Objectives by Area:

Finance

1. The organization increased programmatic funds
2. The agency increased operational funds

Findings: for both items-

- 3 board members said not achieved, work still needed
- 2 said achieved or progress made, work still needed
- 2 said achieved, no further work needed.

3. The agency reduced debt

Findings:

- 1 said not achieved, work still needed.
- 5 said achieved or progress made, work still needed
- 1 said achieved, no further work is needed.

4. There is an agency wide budget in place

Findings:

- 1 said not achieved, work still needed.
- 3 said achieved or progress made, work still needed
- 1 said achieved, no further work is needed.

Governance

1. The agency experiences an increase in the number of low-income board members participating on the Board of Trustees

Findings:

- 4 board members of 7 said this objective has not been achieved, work is still needed.
- 1 said this had been achieved or progress made and work was still needed
- 1 said achieved, no further work needed
- 1 said they did not have information on this item.

2. The agency's Board demonstrated active participation in the ROMA Cycle

Findings:

- 3 said not achieved, work still needed.
- 4 said achieved progress made, work still needed.

3. The structure of the Board of Trustees is compliant with all requirements in the Community Action Organizational Standards and contains elements of best practices for Community Action Agencies and nonprofit organizations

Findings:

- 2 said not achieved, work still needed,
- 1 said achieved or progress made, work still needed
- 4 said achieved, no further work is needed.

4. The Board of Trustees understand their roles and responsibilities

Findings:

- 5 said achieved or progress made, work still needed.
- 2 said achieved, no further work is needed.

Agency Accountability

1. The organization improves quality data

Findings:

- 1 board member said not achieved, work still needed.
- 4 said achieved or progress made, work still needed.
- 1 said achieved, no further work needed
- 1 said they did not have information on this item.

2. The organization obtains an unduplicated count

Findings:

- 2 members said they did not have information about this item
- 1 member commented they were not sure wan an unduplicated count was.
- 3 members said that this had been achieved or progress made, work was still needed
- 1 member said achieved, no further work needed.

It should be noted that for this item, only 6 board members responded.

Human Resources

1. The organization has written personnel policies that have been reviewed by an attorney and approved by the Board of Trustees

Findings:

- 4 said achieved or progress made, work still needed.
- 3 said achieved, no further work is needed.

Agency Management

1. Do we have the administrative capacity (Finance and Governance) to support or programs and services?

Taking the responses related to finance, governance and human resources into account, what is the boards perception of overall agency administrate capacity?

Community Relations

1. The organization improves public relationships

Findings:

- 2 said not achieved, work still needed.
- 3 said achieved or progress made, work still needed
- 2 said achieved, no further work needed.

2. How would you rate the quality of the agency's community relationships?

Findings:

1. board gave overall star rating of 4.3.

Note: only 6 board members gave a rating, 3 skipped this question.

SWOT:

A key element in the Strategic Planning process is to identify internal agency strengths and weaknesses, along with opportunities and threats that are external to the agency. This process is typically referred to as a SWOT analysis.

Two things are important to note when completing the Agency's SWOT:

1. A "Strength" can also be a "Weakness" – Long-tenured employees may be positive in that there is consistent execution, but negative in that new ideas are not being developed.
2. This is not a linear process – Some Weaknesses may only become clear once the external "Opportunities" and "Threats" have been identified.

Prior SWOT:

CAFI staff and Board were asked to look at areas that had been identified as SWOTs in the 2017 planning process and identify if those areas should be included in the 2020 discussion. Identifying areas of internal strengths to build upon and external opportunities to leverage can help CAFI to mitigate internal weaknesses and external threats as it develops strategies to strengthen capacity, operations, and impact.

Review of Previous SWOT areas:

Board Response Rate: 7 answered question; 2 skipped

The survey asked board members to look at each item in the following categories and chose from three rating options- still relevant, no longer relevant, or “I don’t know if this is relevant”.

Agency Stability

1. Agency ownership of facilities
2. E D and Governing Board communication

Findings: All 7 board members noted that agency ownership of facilities and the communication between the ED and Governing Board were categories that were still considered relevant.

3. Cash flow
4. Debt

Findings: Only 6 board members responded to the question related to cash flow and debt. All 6 respondents said these itmes were still relevant.

5. Funding is primarily government grants.

Findings:

- 5 board members said still relevant,
- 2 said they did not know if that item was relevant or not

6. Quality Improvement Plan

Findings:

- 6 members said that the Quality Improvement Plan and compliance is still relevant
- 1 member saying they did not know if the item was relevant or not.

7. Organizational restructuring

Findings:

- The majority (4) of members said they did not know if organizational restructuring was relevant
- 3 said that it was.

8. Governing Board Structure

Findings:

- 4 said this item was still relevant
- 3 said they did not know if the item was relevant or not.

9. By law revisions

Findings:

- 4 members said by law revisions were still relevant
- 2 said they did not know if they were relevant or not
- 1 said they were not relevant.

Dedication and Competence of Staff

1. Formal, structured training plan for staff
2. Staff trained in case management
3. Staff trained in data collection
4. Staff trained in ROMA
5. Staff are dedicated and some have long service with the agency
6. Human Resources policies and procedures

Findings:

- 7 out of 7 board members agree items 1, 5 and 6 are relevant
- For items 2, 3, and 4, 6 board members agree these items still relevant, but 1 said they did not know if the item was relevant or not.

Reputation in the Community

1. Knowledge of agency programs in the community
2. Partnerships
3. Relationships with public officials
4. Public relations plan

Findings:

- 7 out of 7 board members agree items 1, 3 and 4 are relevant
- For item 2, 6 out 7 thought the item was still relevant, but 1 did not know if it was relevant or not.

Ability to document results

1. Data collection
2. Data integrity

Findings:

- 7 out of 7 board members agree items are relevant

Review of New Strengths and Weaknesses:

Response Rate: Only 5 board members gave examples of what they saw as strengths, weaknesses, opportunities, and/or threats. 1 member said “I don’t know” for each area.

This is of concern, because if members of the board do not know things related to agency strengths, operations, performance, etc., then it is likely that agency staff and community members will not know these things as well.

CAFI STRENGTHS and Weaknesses -Staff and Board of Directors		
Area	Strength	Weakness
SERVICES TO FAMILIES	<p>Desire to expand programs 2 Family oriented Client base Encourages clients to become self sufficient Scholarships to students CAFI Cares Utility assistance Home assistance CAFI advocates Head Start The only agency that can administer LIHEAP</p>	<p>Schedule and have more in-house services Lack of constancy of program execution Too much energy and staffing spent on LIHEAP programs Lack of Follow up Large service area Information on website not clear Being able to encourage more training of our clients More organized A better way to take appointments so there are fewer duplicates Locking the public we serve out during business hours</p>
COMMUNITY RELATIONSHIPS	<p>Community Partners Work together Serving communities daily The community has an outlet to come get help</p>	<p>Lack of community support Lack of community involvement Lack of community interaction; no information being shared through social media accessible to all ages</p>
AGENCY CAPACITY	<p>Organizational compliance Awareness of needs National wide agency</p>	<p>Management skills Poor management Lack of midterm and long term vision Lack of credibility</p>
FISCAL	<p>Handling of grant funds Seeks new resources Uses resources wisely Funds available to assist clients Provides flexibility</p>	<p>Mismanagement of agency funds Cash flow Lack of funds Lack of fundraising</p>

<p>ACCOUNTABILITY</p> <p>MANAGEMENT, LEADERSHIP, GOVERNANCE</p> <p>COMMUNICATION</p>	<p>Using statewide Data System Data collection; data quality</p> <p>Coordinator willing to help others Administration and personnel Great Leadership Board commitment Board willing to work towards goals to enhance agency</p>	<p>Limited resources-can't meet everyone's need</p> <p>Micromanaging by some staff members Board lacks community leadership/involvement Board participation Inability to fill all vacant board positions</p> <p>Communication with peers Communication with board members Lack of information between all involved in well being of agency</p>
<p>STAFF DEDICATION AND COMPETENCE</p> <p>Environment and Support for Staff</p>	<p>Willingness to do whatever is needed to help community Meets individual and family needs Growing services Compassion Staff and commitment to serve Dedication/ Devoted CAFI exhibits professionalism in their efforts to bring assistance to all Genuine desire to help low income people Has client's best interest at heart Ability to deliver quality assistance Resourceful Longevity/stability of staff/ Core staff Integrity Diversity</p> <p>Proper Training Great place to learn</p>	<p>Employee frustration Gossip creates an unhealthy and insecure environment Small staff-many tasks done by few</p> <p>Unclear chain of command Wrong people in wrong positions Not enough team meetings Not having team players/ Teamwork Not employing good workers Employee educational improvement Not knowing the latest trends in non profit-IT, trauma informed</p> <p>Salaries are not competitive No health benefits Benefits and training No 401k 2</p>

	Genuine desire to rebuild agency personnel Provide benefits	No HR Personnel
Other		No feed the family plan available Unable to meet more needs of the community

New opportunities and threats:

Opportunities (Board):

Opportunities can be built upon to expand existing services or create new services

Improved community relations, outreach

- Community collaboration

Community partners

Community support

Find a way to network with other agencies (to feed the family)

- Be a presence in community affairs

Building relationships with business leaders; local employers; community leaders

BOD influence in the community

- **Community interest in programs**

Make services known to more in community

Make communities aware of what we have to offer

Better outreach to maintain public awareness

Solicit more media exposure

Develop resources

- **Willingness of board members to serve**
- Volunteers/interns
- Foundation funding
- Grants and programs/Larger grants
- Experience we get from trainings

Threats(Board):

General, National, Crisis Related

- US economy-increase in unemployment will need to increase in request for help/ Lack of work
- **Another pandemic/**

- A depression
- Government corruption
- Government shutdown

Public relationships

- Not connecting with active agencies to collaborate projects and programs
- No communication of CAFI progress and programs to all possible stakeholders
- Bad publicity

Negative past reputation

Negative client attitudes due to our limited funding

People who did not get help are not happy with us

Community gossip

Lack of public trust in our dispersing of services

Community support

Findings: Most of the responses were agency strengths and weaknesses, rather than external opportunities and threats. This might point to an lack of understanding of the role and relationship of the agency both in the immediate community and in the larger network.

Review of Agency Mission statement:

Response rate: 6 answered question; 3 skipped

Staff and Board members were asked to review the agency Mission Statement, “**To enhance the quality of life** of individuals and families by **providing services and resources** that will facilitate the building of **self esteem and self sufficiency** through the **active involvement of the total community**”, and to note if they thought it accurately reflects the purpose of the agency.

Findings:

- 4 board members said yes
- 1 said it is what we do
- 1 said no, “I feel that the agency does not build self esteem and self sufficiency and that does not need to be in the statement.

Words in bold font were indicated as ones that stood out as being important.

How would you describe your agency’s implementation of the full ROMA cycle?

Response rate: 7 answered, 2 skipped

Findings:

- 4 board members said it is used throughout the agency
- 2 said in some agency programs
- 1 said some parts of the cycle are being used

Do you have a nationally certified ROMA trainer or implementer on staff?

Response rate: 6 answered question; 3 skipped

Findings:

- 3 board members said “I don’t know”
- 2 said “yes”
- 1 said “no”

Impact of Programs:

Response Rate: 6 answered question; 3 skipped

Board members were asked to evaluate how well they believed each program offered by the agency was conducted to achieve the organizations mission.

Programs:

Energy Assistance

Housing Stability and Homelessness Prevention Program

Weatherization Assistance Program

Client Service Connection

Findings:

Energy Assistance

- Matches but not achieving (1)
- Matches achieving appropriate objectives (1)
- Matches with outstanding record (4)

Housing stability

- Matches achieving appropriate objectives (1)
- Matches with outstanding record (2)
- I do not have information about this item (3)

Weatherization

- Matches achieving appropriate objectives (3)
- Matches with outstanding record (3)

Client Service Connection

- Matches achieving appropriate objectives (1)
- Matches with outstanding record (4)
- I do not have information about this item (1)

If CAFI was restricted to undertaking one thing in the community, in your judgement, what would that be?

Response Rate: 6 answered question; 3 skipped

Findings:

- support the elderly
- energy assistance
- not sure
- services to individuals and families
- provide services
- Head Start

SUMMARY COMMENTS

As external observers, and based on our work with other agencies, we raise the following areas that CAFI Board may wish to explore:

Governance:

Board members need to understand their responsibilities as “owners” of the corporation. Some roles of the Tripartite Board are identified in the CSBG Organizational Standards, and outline where the board must be active and involved in governance of the agency. The limited number of board members participating in the survey calls into question their understanding of their roles and responsibilities as a CAA board member.

An improvement in governance is that board member term limits have been instituted. This is a best practice that should lead to increased agency board functioning.

New members are excited to go out into the community and create new partnerships. They want to promote CAFI and work to improve the reputation of the agency in the community.

Board members on the virtual meeting noted a need for board training and on boarding for new board members. This will be important as members rotate off and new members come on, to maintain knowledge in the governing body and not lose institutional memory.

Agency information sharing:

Board members noted that they do get information related to agency operations and performance, but they often do not understand it. They note that the volume of material they are given makes it impossible to get through all of the documents during their meetings. Recommended that a streamlined reporting process be developed, such as a simple ‘report card’ or dashboard approach.

When asked about prior goals being met, responses were inconsistent. Some stated that goals had been achieved, while others said they had not been met, or were still in progress. Board members must know if goals have been met or not met, if progress is being made towards achievement, what obstacles are faced, and what resources are needed.

There does not seem to be a clear process or structure in place for board members to ‘share out’ the results of the agency with the broader community. There appears to have been a negative perception of the agency in the past. Sharing of successes can improve how the community sees the agency. This is an area that most staff and board members agree is important.

The board should accept responsibility for sharing information with staff about things that are of concern to the overall agency-cash flow, debt, and findings from audits or risk assessments. When staff do not understand these things, this can lead to feelings of unrest.

Agency benefits:

Many issues were raised by staff about compensation, benefits, training, and lack of HR personnel. Again, board acknowledgement of staff’s concern about these items can minimize staff unrest. A pay study or salary survey could be conducted to determine if CAFI staff are paid wages in line with similar positions, and the results of the study can be processed to share with staff.

Results Oriented Management and Accountability:

Implementation of the full ROMA cycle is required in the CSBG Organizational Standards, and the board plays a significant role in ensuring actions associated with each phase of the cycle are completed. An agency that is “Results Oriented” is focused on outcomes, and uses information gleaned from the analysis of data to improve efficiency and effectiveness of service delivery. While some board members believe this performance management framework is implemented

agency wide, others noted it was only followed in a few programs or that only parts of the cycle were implemented. As ROMA implementation was an item identified in prior planning process, the lack of knowledge here may indicate a need for a more specific strategy going forward.

Moving forward:

The agency acknowledges it has been through significant changes over the past several years, leading to overall improvements in agency operations.

Board members on the virtual meeting acknowledged that there are improvements that still need to be made, but indicated that had this survey been conducted a year ago, there likely would have been more weaknesses. They were proud to share that many of the items noted as weaknesses in the previous SWOT analysis have been resolved.

We cannot provide specific recommendations to inform the strategic planning process due to the limited amount of data collected during this SWOT process. It is recommended that board members further discuss and explore the future direction of the agency. Without consensus and guidance from the full board, the agency is at risk of being pulled in different directions.

Community Action For Improvement

SWOT Assessment-Staff

Facilitators: PRI staff- Dr. Barbara Mooney, Ph.D. and Carey Gibson, MSW, NCRP

Today's political, economic and competitive influences are different than those CAFE, Inc. has encountered during most of its 40 years as the Community Action Agency for the Georgia counties of Carrollton, Coweta, Heard, Meriwether and Troup. As a result, it is important to understand what the board and staff believe those differences mean to CAFE's ability to meet the needs of the community. Agency board and staff were asked to respond to a brief survey to share their perspective on where CAFE is now and where it could be going forward.

Survey Participation:

- 20 Staff were asked to complete the survey
- 20 staff members submitted responses, though not all staff answered all questions.
- The majority of staff noted they had not been involved in the previous strategic planning process in 2017 that produced the 2018-2020 Strategic Plan.

Staff Meeting Discussion:

- Survey Responses were analyzed and presented for further discussion to CAFE staff on May 22, 2020.
- 11 CAFE staff were present for the discussion and 1 staff joined by webinar.

Review of Previous Goals:

Response Rate: 15 answered question; 5 skipped=75% response rate

The four goals included in the 2018-2020 Strategic Plan were reviewed, and participants asked to indicate if they felt the goal was still relevant or not and what efforts toward the goal should be taken in the future.

Findings:

Goal 1: Individuals and families with low incomes are stable and achieve economic security

Based on survey results and discussion with staff, the majority believe that Goal 1 was met, but still very relevant and needed to be maintained or expanded.

Goal 2: Communities where people live are healthy and offer economic opportunity

Majority of staff deemed as not yet met, but still relevant; noted that there were some opportunities for economic opportunity, but that they were limited. For example, the Kia Car Plant offers opportunity for some, but not all.

Goal 3: People with low incomes are engaged and active in building opportunities in the community

Majority deemed as not met, but still very relevant. Noted that because Goal 2 was not met, there were limited opportunities for people to be engaged and involved in their community.

Goal 4: The organization is compliant and has established an accountability framework to deliver quality services with a high level of efficiency and effectiveness

The majority of staff said this goal was met, but still very relevant and needed to be maintained or expanded.

Review of Previous Objectives:

Response Rate: 18 answered question; 2 skipped=90% response rate

The 2018-2020 Strategic Plan outlined specific objectives as a means of obtaining the 4 primary goals. Respondents were asked to review each individual objective and indicate, from their perspective, how well the objective had been achieved.

Objectives by Area:

Agency Capacity Building

3. The organization improves quality data
4. The organization obtains an unduplicated count

Findings: Majority of staff said item 1 was achieved or in progress, with further work needed. For item 2, majority of staff (14 out of 18 answered– 2 skipped) said that they did not know if this objective had been met.

Finance

5. The organization increased programmatic funds
6. The agency increased operational funds
7. The agency reduced debt
8. There is an agency wide budget in place

Findings: Items 1-3, majority of staff said they did not know if the objective had been met. Item 4-majority of staff agreed that progress had been made, but further work still needed.

Governance

Note: This was not included as a discussion point in the staff meeting, but will be important for Board discussion.

5. The agency experiences an increase in the number of low-income board members participating on the Board of Trustees
6. The agency's Board demonstrated active participation in the ROMA Cycle
7. The structure of the Board of Trustees is compliant with all requirements in the Community Action Organizational Standards and contains elements of best practices for Community Action Agencies and nonprofit organizations
8. The Board of Trustees understand their roles and responsibilities

Agency Management

Note: This was not included in the staff meeting discussion, but will be important for Board discussion.-

2. Do we have the administrative capacity (Finance and Governance) to support or programs and services?

Human Resources

3. The organization has written personnel policies that have been reviewed by an attorney and approved by the Board of Trustees

Findings: There was a near even split between staff saying "this had been achieved, no further work needed" and "I do not have information." Follow up with the board and management will be needed to understand if this goal has been achieved or not.

Community Relations

1. The organization improves public relationships
4. How would you rate the quality of the agency's community relationships?

Findings: Majority of staff said this was something that had been achieved or progress made, but more work was still needed.

Staff gave overall star rating of 3.3.

(note: Board rating will be added)

Note: Unsure what is behind the large number of “I don’t know” responses. Question from facilitators: Are there information sharing processes in place to ensure that information flows from staff to board and back to staff? The lack of definitive knowledge about these items limited the opportunity for discussion and analysis.

SWOT:

A key element in the Strategic Planning process is to identify internal agency strengths and weaknesses, along with opportunities and threats that are external to the agency. This process is typically referred to as a SWOT analysis.

Prior SWOT:

CAFI staff and Board were asked to look at areas that had been identified as SWOTs in the 2017 planning process and identify if those areas should be included in the 2020 discussion. Identifying areas of internal strengths to build upon and external opportunities to leverage can help CAFI to mitigate internal weaknesses and external threats as it develops strategies to strengthen capacity, operations, and impact.

Review of Previous SWOT areas:

Response Rate: 18 answered question; 2 skipped=90% response rate

The survey asked staff to look at each item in the following categories and chose from three rating options- still relevant, no longer relevant, or “I don’t know if this is relevant”. Then, in the virtual staff meeting, staff were given a worksheet with those same items, and rather than noting relevance, were asked to note if each was a strength, a weakness, or an area they did not know about. Worksheets were collected at the end of the virtual staff meeting, scanned and sent to facilitators, who then tallied responses.

Agency Stability

Agency ownership of facilities

Cash flow

Debt

Quality Improvement Plan

Organizational restructuring

Governing Board Structure

By law revisions
E D and Governing Board communication
Funding is primarily government grants.

Findings: Majority of staff surveyed noted that all items in this category, are, from their perspective, still considered relevant.

During the virtual staff meeting, staff were asked, from their perspective if each item in this category would be a strength, weakness, or “I don’t know”. Verbal responses were limited, but scores on the worksheet were tallied at the end of the meeting and revealed that the majority of staff said they would consider agency ownership of facilities, organizational restructuring and funding is primarily government grants as strengths.

For governing board structure, the same number of staff said “I don’t know” if the item was a strength or a weakness as said that it was a weakness.

All other items were majority rated as “I don’t know”.

In the virtual meeting staff did not want to comment on elements of agency functioning as they said they didn’t have information.

Dedication and Competence of Staff

Formal, structured training plan for staff
Staff trained in case management
Staff trained in data collection
Staff trained in ROMA
Staff are dedicated
some have long service with the agency
Human Resources policies and procedures

Findings: Majority of staff surveyed noted that all items in this category, are, from their perspective, still considered relevant. During the virtual meeting staff were asked, from their perspective if each item would be a strength, weakness, or “I don’t know”.

Verbal responses were limited, but scores on the worksheet were tallied at the end of the meeting and revealed that the majority noted strengths as staff being trained in data collection, being dedicated, and having longevity with the agency. Other categories were majority rated as “I don’t know”.

Note that many of the staff identified themselves as new employees.

Reputation in the Community

Knowledge of agency programs in the community

Partnerships

Relationships with public officials

Public relations plan

Findings: Majority of staff surveyed noted that all items in this category, are, from their perspective, still considered relevant. During the virtual meeting staff were asked, from their perspective if each item would be a strength, weakness, or “I don’t know”. Verbal responses were limited, but scores on the worksheet were tallied at the end of the meeting and revealed that the knowledge of agency programs in the community and partnerships had the same amount of votes for strengths and weaknesses. Without a clear majority, it is not possible to determine the overall perception of the status of this objective. Majority said “I don’t know” with regards to relationships with public officials or the presences of a public relations plan.

Ability to document results

Data collection

Data integrity

Findings: Majority of staff surveyed noted that all items in this category, are, from their perspective, still considered relevant.

During the virtual meeting staff were asked, from their perspective if each item would be a strength, weakness, or “I don’t know”. Verbal responses were limited, but scores on the worksheet were tallied at the end of the meeting and revealed that majority noted data collection was a strength. With regards to data integrity, majority said “I don’t know.”

***Staff present expressed reluctance to engage in facilitated discussion about these items. Many questions were met with silence. Some topics were deemed as “uncomfortable” to discuss in the group setting.**

When equal numbers of people said an item was a strength as said it was a weakness, the data collected is at that point inconclusive and does not provide clear direction. Often this can be resolved in a staff discussion format, but in this case the lack of discussion makes analysis a challenge.

Review of New Strengths and Weaknesses:

Response Rate: Only 12 out of 20 staff provided actual responses to this section. This means that 40% skipped this in the survey or said “I don’t know” or “new staff.”

CAFI STRENGTHS and Weaknesses – Staff Perspectives		
Area	Strength	Weakness
SERVICES TO FAMILIES	<p>Desire to expand programs 2 Family oriented Client base Encourages clients to become self sufficient Scholarships to students CAFI Cares Utility assistance Home assistance CAFI advocates Head Start The only agency that can administer LIHEAP</p>	<p>Schedule and have more in-house services Lack of constancy of program execution Too much energy and staffing spent on LIHEAP programs Lack of Follow up Large service area Information on website not clear Being able to encourage more training of our clients More organized A better way to take appointments so there are fewer duplicates</p>
COMMUNITY RELATIONSHIPS	<p>Community Partners Work together Serving communities daily The community has an outlet to come get help</p>	<p>Lack of community support</p>
AGENCY CAPACITY	<p>Organizational compliance Awareness of needs National wide agency</p>	<p>Management skills Poor management Lack of midterm and long term vision Lack of credibility</p>
FISCAL	<p>Handling of grant funds Seeks new resources Uses resources wisely</p>	<p>Mismanagement of agency funds Cash flow</p>
ACCOUNTABILITY	<p>Funds available to assist clients Provides flexibility</p>	<p>Lack of funds</p>

<p>MANAGEMENT, LEADERSHIP, GOVERNANCE COMMUNICATION</p>	<p>Using statewide Data System Data collection; data quality</p> <p>Coordinator willing to help others</p> <p>Administration and personnel Great Leadership Board commitment</p>	<p>Lack of fundraising Limited resources-can't meet everyone's need</p> <p>Micromanaging by some staff members</p> <p>Board lacks community leadership/involvement Board participation Inability to fill all vacant board positions</p> <p>Communication with peers Communication with board members</p>
<p>STAFF DEDICATION AND COMPETENCE</p> <p>Environment and Support for Staff</p>	<p>Willingness to do whatever is needed to help community Meets individual and family needs</p> <p>Growing services Compassion Staff and commitment to serve Dedication/ Devoted CAFI exhibits professionalism in their efforts to bring assistance to all Genuine desire to help low income people Has client's best interest at heart Ability to deliver quality assistance Resourceful Longevity/stability of staff/ Core staff Integrity Diversity</p> <p>Proper Training Great place to learn Genuine desire to rebuild agency personnel Provide benefits</p>	<p>Employee frustration Gossip creates an unhealthy and insecure environment Small staff-many tasks done by few Unclear chain of command Wrong people in wrong positions Not enough team meetings Not having team players/ Teamwork Not employing good workers</p> <p>Not knowing the latest trends in non profit-IT, trauma informed</p> <p>Salaries are not competitive No health benefits Benefits and training No 401k 2 No HR Personnel</p>
<p>Other</p>		<p>No feed the family plan available</p>

		Unable to meet more needs of the community
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Findings: During the meeting, staff said they did not know enough to respond. “We don’t know about that stuff.” Facilitators tried to draw out some perceptions, saying “Even if you have only been working for a few days, you have formed some opinions about the agency and about the work environment. We just want to hear what you think.” But that did not produce responses either.

With regards to the category Services to Families, it was noted, in terms of Head Start, that this was a strength when the agency operated the program, and would be considered an area of strength if the agency were to resume delivery of this program.

Several staff also stated that what might be a strength in one county, could be a weakness in another. In smaller counties, CAFI is often the only provider of community support services. This can lead to frustraion from individuals who come to seek assistance with a need that the agency cannot meet. The agency may wish to focus on messaging and information sharing with other community agencies, in order to decrease the amount of referrals to CAFI for a need that the agency does not have the capacity to address.

Overall, Staff presented as reluctant to engage in the facilitiated discussion about these items. Many questions were met with silence. Some topics were deemed as “uncomfortable” to disucss in the group setting.

New opportunities and threats:

Opportunities:

- Improved community relations, outreach
- Develop resources
- Expansion of existing services or new services

Threats:

- General, National, Crisis Related
- Concerns about workforce
- Finance
- Public relationships

Findings: Most of the responses were agency strengths and weaknesses, rather than external opportunities and threats. This might point to a lack of staff understanding of the role and relationship of the agency both in the immediate community and in the larger network.

Review of Agency Mission statement:

Response rate: 15 answered question; 5 skipped=75% response rate

Staff and Board members were asked to review the agency Mission Statement, “**To enhance the quality of life** of individuals and families by **providing services and resources** that will facilitate the building of **self esteem and self sufficiency** through the **active involvement of the total community**”, and to note if they thought it accurately reflects the purpose of the agency. 12 said yes, and 3 said no.

Words in bold font were indicated by staff as ones that stood out as being important.

How would you describe your agency’s implementation of the full ROMA cycle?

Response rate: 17 answered question but 6 said “I don’t know”; 3 skipped= response from only 11 individuals or 55% response rate

Findings: Majority stated they did not know about how ROMA was implemented in the agency.

Do you have a nationally certified ROMA trainer or implementer on staff?

Response rate: 17 answered question but 9 said “I don’t know”; 3 skipped = response from only 8 individuals or 40% response rate

Findings: Majority stated they did not know if there was a nationally certified trainer or implementer on staff. In addition to demonstrating a lack of knowledge, comments indicated a negative impression of ROMA. Comments provided were: “ROMA is a rip off, nothing more than mangement by objective” and “Who cares, waste of time and money.”

Impact of Programs:

Response Rate: 13 answered question; 7 skipped=65% response rate

Staff were also asked to evaluate how well they believed each program offered by the agency was conducted to achieve the organizations mission.

Programs:

Energy Assistance

Housing Stability and Homelessness Prevention Program

Weatherization Assistance Program

Client Service Connection

Findings:**Energy Assistance**

- Matches but not achieving (2)
- Matches achieving appropriate objectives (3)
- Matches with outstanding record (5)
- No information (3)

Housing stability

- Does not Match (2)
- Match, not achieving (2)
- Matches achieving appropriate objectives (4)
- Matches with outstanding record (1)
- No information (4)

Weatherization

- Matches achieving appropriate objectives (5) 1 Board
- Matches with outstanding record (5) 3 Board
- No information (5)

Client Service Connection

- Matches but not achieving (2)
- Matches achieving appropriate objectives (5)
- Matches with outstanding record (1)
- No information (5)

If CAFI was restricted to undertaking one thing in the community, in your judgement, what would that be?

Response Rate: 13 answered question (1 said “I don’t know”); 7 skipped=65% response rate

Findings: Head Start, Weatherization, Housing Support Services, energy assistance and services to seniors were noted.

Also noted was the potential to network with schools to get more people in the community trained and working then they would be more self sufficient.

During the meeting, it was also suggested that clients of the agency be mandated to receive training, not just tangible assistance. When asked to elaborate on what this would look like, the training was described as being needed to address the impact of trauma many clients are experiencing. For example, rather than receiving one month's rental assistance, clients would have to take a mandatory class to teach skills like budgeting, getting and maintaining a job, etc.

Another observation was that much of the training opportunities available to individuals in the community were limited to those leading to factory work and not to higher earning potential careers. The suggestion was that CAFI have some influence on expanding opportunities for alternate training.

Note: after review of the survey and the meeting responses, we thought that this question could have been worded differently to be clearer. Some thought it meant "how should agency programs be restricted?"

SUMMARY COMMENTS

As external observers, and based on our work with other agencies, we raise the following areas that CAFI Board may wish to explore:

Interactions with clients:

Staff expressed concern about negative reactions from clients when services are not available. It is unknown how staff manage these interactions with clients when having to deny their request for assistance. Staff noted that when clients leave unhappy, this creates a negative impression of the agency in the community and "gossip" about the agency.

There may be an opportunity for the agency to support staff in enhancing conflict resolution skills and empathy based help giving practices to improve client perceptions about the agency.

Agency information sharing:

There was a significant number of "I don't know" responses to survey questions. In the words of management guru Peter Drucker, the agency..."must be information based. Information must flow from the individuals doing the work to the board management and it must flow back as well." Lack of information sharing can lead to incorrect assumptions about agency operations, a lack of accountability, and staff and client frustration. A part of this issue also surfaced in "weakness" comments, and were related to chain of command, lack of team work, and

“communication” (at several levels). All of this can be a part of the identified “employee frustration.”

Agency benefits:

Many items were raised about compensation, benefits, training, and lack of HR personnel.

Results Oriented Management and Accountability:

An agency that is “Results Oriented” is one that does not operate in “silos”, is focused on outcomes, and uses information gleaned from the analysis of data to improve efficiency and effectiveness of service delivery. While some staff believe this performance management framework is implemented agency wide, others noted it was only followed in a few programs, and the majority said they did not know if the cycle was being followed – and a couple said they didn’t care. As ROMA implementation was an item identified in prior planning process, the lack of knowledge here may indicate a more specific strategy going forward.

Impact of change:

The agency acknowledges it has been through significant changes over the past several years. Frequent changes in structure and leadership can have a negative impact on staff morale. “Change fatigue” can leave staff, clients, and the community confused and disengaged.

It is recommended that the impact of the changes CAFI has experienced be fully assessed and that specific strategies be considered to address the possible disruptions as a part of the planning process.

Appendix IV - Census Population for CAFI serves counties.