COMMUNITY ACTION INC. OF ROCK AND WALWORTH COUNTIES

Strategic Plan 2024-2026

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OVERVIEW

- CAI Overview and ROMA Goals
- Executive Summary
- 2022 Needs Assessment Key Findings
- CAI Areas of Focus for 2024-2026

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HOW IT ALL BEGAN

"It is therefore the policy of the United States to eliminate the paradox of poverty in the midst of plenty in this nation by opening, to everyone, the opportunity for education and training, the opportunity to work, and the opportunity to live in decency and dignity."

Economic Opportunity Act, 1964

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OUR MISSION

At Community Action we provide access and opportunity for those we serve and those who support our efforts. Through innovative programs and strong community partnerships we eliminate barriers, establishing clear pathways to economic self-reliance.

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OUR VISION

We fully leverage the commitment, talents and resources of our Board, staff and partners to ensure that individuals and families living in or close to poverty have access to the opportunities that enable them to pursue and achieve self-reliance. In doing our work we consistently affirm and cultivate the inherent potential of those we serve. We firmly believe in the capabilities of our participants and create programs that offer a ladder up, not a handout. We understand our neighborhoods and communities will thrive only when all members have access to opportunities. We recognize that opportunity is not available equally in our communities and institutional barriers can be a roadblock to self-reliance. We have the courage to challenge policies and practices, within CAI and our communities, to ensure we are effective and accountable to those we are intended to serve.

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OUR VALUES

- We believe people want access to opportunities that will enable them to reach their full potential.
- The people we serve are our most knowledgeable resource; we need to engage them and listen to them.
- Strong working relationships are critical to our success; relationships must be built on a foundation of honesty, compassion and respect.
- We respect and are sensitive to the beliefs, needs and capabilities of our culturally diverse customers and staff.
- Collaboration is essential to building effective poverty solutions.
- The systems in which we work must be creative and flexible.
- We strive to develop an environment that provides support, resources and opportunities for high staff achievement.
- We must be accountable to communities, funders and those we serve and must use our resources strategically and thoughtfully.

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CAI DIVERSITY AND INCLUSION

Inclusion is the process of involving and valuing all people in an environment regardless of their differences. Inclusion requires a proactive strategy that reflects a conscious decision to respect individuals by affording them the opportunity to become a valued part of the organization.

For inclusion to occur, the environment that is created must reflect these values and those that promote cohesion, as well as equal physical and social access.

- We have a written anti-discrimination policy approved by the Board of Directors.
- We have a written diversity and inclusion statement approved by the Leadership Team which will be provided to all staff and presented in each CAI business location.
- Our Executive Director has 1) articulated a case for why greater diversity is important to the organization's mission and performance, 2) ensured that strategies are in place that strengthen the diversity of the workplace and build an inclusive work environment and 3) dedicated to obtaining the proper resources necessary to achieve results.
- We ensure that racially and ethnically diverse candidates are considered for all job opportunities in the organization to the greatest extent possible.
- We seek out and employ best practices in recruiting, hiring, managing and recognizing diverse employees, and eliminating attitudinal, behavioral, physical and procedural barriers to diversity.
- We implement human resources policies and practices for employees that support a fair workplace, including clear goals and expectations for employees, orientation to the organization and their role, rewards and recognition based on merit, supervisors who provide coaching and feedback on performance, and opportunities for development and advancement.

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AGENCY PLANNING PROCESS

- Community Action, Inc. (CAI) utilizes a planning cycle based on Results Oriented Management and Accountability (ROMA).
- All parts of this cycle are guided by the agency's strategic plan and, in turn, inform the strategic planning process every three to five years.

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ROMA GOALS

RESULTS ORIENTED MANAGEMENT AND ACCOUNTABILITY

A performance-based initiative designed to preserve the anti-poverty focus of community action and to promote greater effectiveness among state and local agencies receiving Community Services Block Grant (CSBG) funds. CAI has aligned ROMA with CSBG priorities of Family, Community and Agency in developing Strategic Plan Goals and Strategies.

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ROMA 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.

DEVELOPMENT OF 2022 NEEDS ASSESSMENT

- Office of Community Services (OCS) requires all CAA's to complete a comprehensive needs assessment every 3 years.
- CAI created a new survey by utilizing questions from the 2019 CAI survey, as well as utilizing questions and formatting from a survey shared with CAI by CAP Services.
- For the current assessment, CAI implemented extensive surveys of low-income people on the fuel assistance waiting list. Data was pulled from several Federal, State and Local sources.
- A large portion of the data gathered for the assessment comes from the U.S. Census Bureau's American Community Survey (ACS). The data from the ACS was gathered from 2015-2020.

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EXECUTIVE SUMMARY

Community Action, Inc. carried out a Community Needs Assessment in 2022 to determine the top needs and to confirm that CAI's mission is addressing the causes and consequences of poverty in Rock and Walworth Counties. The comprehensive assessment process included focus groups with community members, staff, Board members and stakeholders..

The 2022 assessment included electronic surveys available in multiple languages and hosting stakeholder focus groups. CAI staff utilized the survey from the 2019 with the addition of questions regarding climate change and a more robust comment section.

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EXECUTIVE SUMMARY

The assessment included a review and analysis of state, regional and local data demographics. Each piece of the assessment process was significant in informing the strategies, plans and approaches that the Agency will take over the next three years to address the top needs identified: Economic Self-Reliance, Lack of Health and Mental Health Support, Affordable Housing, Education and Training and Youth Mentoring and Development.

There are many reasons why poverty still endures, including high housing costs in our service area. It has become very difficult for individuals and families to find adequate, fair market value housing. Many low-income individuals and families simply do not have a "living wage" sufficient to support the housing costs that continue to rise in the area.

TOP 10 ISSUES 2020

Area of Concern	2020 Survey Rank
Lack of savings	1
Finding safe, affordable housing	2
Cost of rent	3
Having enough money to pay all the monthly bills	4
Have enough money to respond to unexpected emergencies	5
Cost of car repairs	6
I cannot afford to buy a decent house	7
Getting affordable legal services	8
High household debt	9
Cost of maintaining car (insurance, gas)	10

TOP 10 ISSUES 2022

Area of Concern	2022 Survey Rank
Cost of rent	**1**
I cannot afford to buy a decent house	**2**
Finding safe, affordable housing	**3**
Have enough money to respond to unexpected emergencies	4
Lack of savings	5
Cost of maintaining car (insurance, gas)	6
Cost of car repairs	7
Having enough money to pay all the monthly bills	8
Paying for school	9
Paying for childcare or transportation so I can go to school	10

KEY FINDINGS

- In a marked shift since 2019, housing costs are the top issues facing the respondents of the 2022 Needs Assessment. Housing-related concerns make up the top three issues in the 2022 Needs Assessment with nearly **60% of respondents identifying the cost of rent as a major concern.**
- These data reflect the trend of rising housing costs around the country, the effects of which are made more severe by stagnating wages.
- That wages are lagging is true for survey respondents as well. Among the top 10 issues identified by those surveyed are a general lack of savings, inability to adequately save for an emergency, and having money to pay monthly bills are indicative of insufficient household incomes.
- The Black population of Rock and Walworth counties are disproportionately impacted by these issues, as the poverty rate for Black people in Rock and Walworth counties is more than twice that of their white counterparts (ACS 2020).

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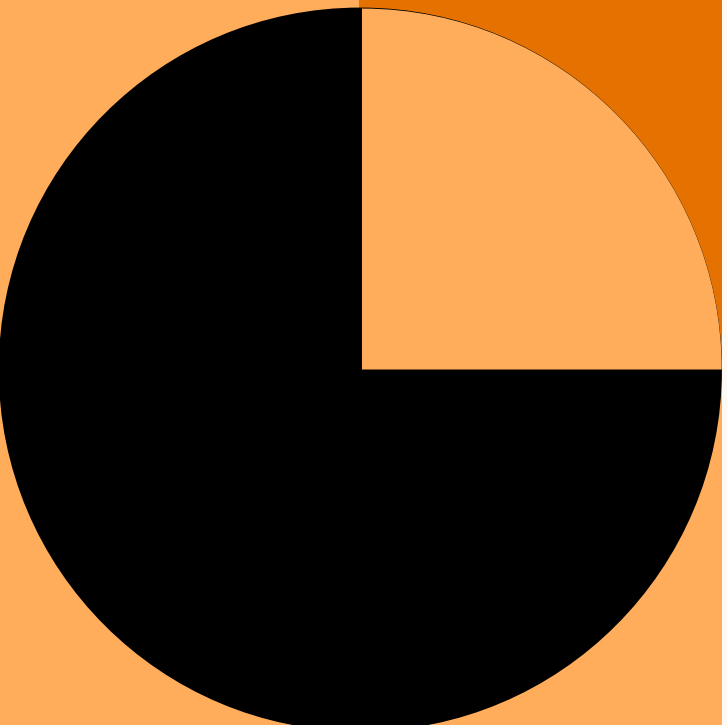
KEY FINDINGS

- 46 million people live in poverty in the United States. This number has increased 38% over the last 13 years – the highest rate in almost 60 years.
- More than 11 million Americans now pay more than half their salaries for their monthly income for rent. This rate has increased more than 30% over the last five years, which is also a record high. **Nearly half of 2022 survey respondents list having enough money to respond to unexpected emergencies as a major issue.**
- 15 million children (or 21% of all children) live in families with incomes below the federal poverty level. **Almost one-third of children in Beloit are living in poverty, about 10% above the national average.**



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KEY FINDINGS

- Poor housing and poor health are tied together, especially with children. When homeless or low-income families must compromise on housing, their health declines including worsening asthma and allergies tied to poor housing conditions; pests; molds and chronic dampness; lead exposure and increased accidents/injuries from exposed wiring and other needed repairs.
- Millions of Americans are struggling to afford a place to live. To afford a modest, two-bedroom apartment in the U.S., renters need to earn a wage of $20.30 per hour.
- On average, in Rock and Walworth County, a renter needs to earn a wage of $16.55 and $18.38, respectively to pay rent affordably[1].
- US (and Wisconsin) minimum wage is $7.25/hour. A renter would need to work 70-74 hours per week to afford a one-bedroom rental home in Rock and Walworth Counties and 91-105 hours per week to afford a two-bedroom[2].

[1]Assuming affordable rent is 33% of income
[2]American Community Survey 2021

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HOW THE NEEDS ASSESSMENT IS UTILIZED FOR PROGRAM DEVELOPMENT

CAI's triennial Needs Assessment is a key part of the ROMA planning cycle. The data and findings are analyzed and discussed by the Board of Directors in the context of the mission statement and strategic plan. The next steps include:

- Prioritization of needs by Board
- Discussion and decisions by Board on strategies to address identified needs
- Development by staff of annual work plans (key results) with projected goals, objectives and measurement of outcomes
- Board review/discussion/approval of annual work plans
- Implementation of programs and strategies
- Regular collection, evaluation and discussion of results through program progress reports
- CAI's Board utilizes needs assessment data, program progress reports and other ongoing sources of information to explore ways to improve or expand existing programs or create new programs to alleviate or reduce poverty

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DETERMINATION OF PROGRAM FUNDING PRIORITIES

Needs assessment results are analyzed and inform both the strategic and annual work planning processes. Prioritization is led by the Board of Directors. The process of selecting poverty problem priorities and funding allocation consider an array of factors, such as:

- Fit with CAI's mission and vision statements approved by the Board
- Fit with priorities already set by Board in current strategic plan (these may change during next round of strategic planning based, in part, on needs assessment results)
- Assessment of existing community resources and gaps in service based on experience, knowledge and partnerships with numerous public and private entities in local communities
- Input from low-income people through Board and committee participation, surveys and low-income advisory groups

DETERMINATION OF PROGRAM FUNDING PRIORITIES CONTINUED

Needs assessment results are analyzed and inform both the strategic and annual work planning processes. Prioritization is led by the Board of Directors. The process of selecting poverty problem priorities and funding allocation consider an array of factors, such as:

- Input from community members and elected officials through Board and committee membership as well as involvement in an array of coalitions and partnerships
- Discussion and analysis of feasibility, costs and benefits of various programs and strategies
- Likelihood of successful impact
- Review and discussion of research and literature on solutions to poverty
- Availability of public or private funding
- Capacity of the organization to take on a given program or approach

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PROGRAM FRAMEWORK

Client Niche

The programs of Community Action will strive to effectively serve those individuals and families most likely to be living in poverty, including racial and ethnic minorities and single-parent households. We will also work to serve those families with multiple barriers to employment and sufficiency and those who are under- or unsuccessfully served by traditional mainstream systems.

Self-Sufficiency Focus

We acknowledge that poverty-related work can include assisting families to meet their basic needs; assisting families in working their way from poverty to self-sufficiency and challenging and supporting the work of communities to change the underlying conditions that cause poverty. Community Action is committed to investing most heavily on devising solutions that will effectively move individuals and families to self-sufficiency.

Defining Self-Sufficiency

Self-sufficiency includes having the capacity to meet the basic emotional, physical and financial needs of a household/family. For the purposes of our work we will define the income needed to achieve self-sufficiency as 200% of the federal poverty level.

Building Self-Sufficiency: Our Beliefs and Programming Framework

Self-sufficiency is a journey. The length of the journey depends on the individual, their community, their natural supports and the available resources to assist along the way.

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2024-2026 Strategic Plan

ROMA GOAL 1

People with low-incomes are engaged and active in building opportunities in communities.

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ROMA GOAL 2

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

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ROMA GOAL 3

People with low-incomes are engaged and active in building opportunities in communities.

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AREAS OF FOCUS

Areas Identified by Strategic Plan

- Housing Stability/ Homelessness
- Living Wage Employment/Economic Security
- Adult Preparation/Youth Development
- Racial Disparity

Areas Necessary for Agency Prosperity

- Staff Development
- Fiscal Responsibility
- Board Engagement

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ECONOMIC SELF-RELIANCE

National ROMA Goal	Individuals and families with low incomes are stable and achieve economic security.
Outcome	Families will stabilize or increase household income and strive to reduce reliance on public assistance.
Goal (Destination)	CAI will offer a range of services designed to assist low-income consumers to become more self-sufficient; we will prioritize services targeted to needs identified by consumer stakeholders including employment, education, childcare, housing stability, health services and financial literacy.
Rationale (identifies reason for the goal)	Identified in our 2022 Needs Assessment, individuals indicated lack of access to living wage employment as a barrier to self-sufficiency.
Objective (Performance Target)	During FY2024-2026, 70% of low-income individuals or households who successfully exit our programs will obtain stable housing, acquire higher education/job training and/or employment.

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ECONOMIC SELF-RELIANCE STRATEGIES

- We will maintain the Fresh Start, , Transitional Jobs, Project Thrive and Skills Enhancement programs to assist households to gain the skills and experience necessary to become more self-sufficient through employment.
  - We will routinely evaluate the success and effectiveness of our programs to ensure they are in line with our mission and are assisting families in moving toward economic security. (P&E) committee
  - All programs will be evaluated during the implementation of the strategic plan
- We will work with participants to develop individualized action plans to support the pathway from poverty to economic self-reliance by setting goals and helping them obtain adequate skills through various job training opportunities (i.e., short term trainings, certifications, and soft skills training) with the ultimate outcome of placing participants in living wage jobs.
  - For each case managed program, participants will have established plans and maintained in the participant files and/or client database

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ECONOMIC SELF-RELIANCE STRATEGIES CONTINUED

- We will improve client outcomes by working with partner agencies to ensure that basic financial stability needs are met so that participants can focus on goals identified by their action plans.
  - Referrals will be identified in participant files and client database
  - Partnerships will be reported quarterly
- We will enhance community engagement, particularly with non-traditional poverty partners (including consumers and employers) to build creative and collaborative poverty solutions.
  - Management staff identify participation in community groups, reevaluated annual to ensure community engagement
- We will work to retain key staff to ensure program quality and enhance longstanding relationships with community partners.
  - Through annual reviews, staff development plans are implemented to include retention strategies and support community engagement

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HOUSING SERVICES

National ROMA Goal	Communities where people with low incomes live are healthy and offer economic opportunity.
Outcome	Low-income families will obtain or maintain stable housing.
Goal (Destination)	We will work with private and public sector partners to plan and develop additional permanent housing and emergency shelter to provide more families with a pathway to housing stability.
Rationale (identifies reason for the goal)	The lack of emergency shelter to provide an intervention for situational homelessness and the lack of permanent affordable housing for low-income families leads to an increase in chronic homelessness.
Objective (Performance Target)	We will enhance our ability to secure affordable housing.

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HOUSING STRATEGIES

- We will identify opportunities to rehab/build housing in the communities we serve through:
  - Weatherization - maintain existing homes and lowering cost of energy bills
  - Merrill Housing Initiative - home rehabilitation to promote affordable homeownership
- We will work with families to improve economic stability to qualify for homeownership opportunities
- We will complete construction on a new emergency shelter to continue to meet the needs of our homeless population.
  - Identify and obtain property for a new build
  - Identify funding to complete the build
  - Expand the capacity with the new shelter to serve more individuals and families
  - Establish an endowment for ongoing shelter operations
- We will identify and explore new housing stability models.

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CULTURAL EQUITY

National ROMA Goal	Communities where people with low incomes live are healthy and offer economic opportunity.
Outcome	Marginalized groups will no longer face systemic discrimination
Goal (Destination)	We will provide culturally competent service delivery and serve as a role model for our community by promoting the importance of cultural competence to eliminate barriers that inhibit progress towards economic self-reliance.
Rationale (identifies reason for the goal)	Systemic discrimination creates barriers to economic self-reliance and disproportionately impacts ethnic and cultural minority groups.
Objective (Performance Target)	CAI will provide minimum of 120 hours of cultural equity training and advocacy annually.

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CULTURAL EQUITY STRATEGIES

- We will work collaboratively with area service providers to increase utilization of best practices for culturally competent service delivery.
- We will provide training and educational opportunities for our staff, board, and our partners regarding Diversity, Equity and Inclusion
- We will work with partners to eliminate environmental and cultural barriers to service
- We will ensure that our Board of Directors reflects the populations that we serve by pursuing candidates from diverse ethnic and cultural backgrounds
- We will ensure that our workforce reflects the populations that we serve by pursuing candidates from diverse ethnic and cultural backgrounds

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ADULT PREPARATION

National ROMA Goal	Individuals and families with low incomes are stable and achieve economic security.
Outcome	Youth will successfully navigate adolescence, avoid risky behaviors and be prepared to enter the workforce or continue their education.
Goal (Destination)	We will increase prevention and early intervention programming for youth to reduce poverty and the impacts of poverty in order to strengthen families to achieve their potential.
Rationale (identifies reason for the goal)	Providing evidence-based programming and healthy alternatives to risky behaviors will keep adolescents in the community and out of the juvenile justice system.
Objective (Performance Target)	Continue partnerships with youth serving agencies throughout our service area to enroll a minimum of 300 youth in adult preparation and continuing education programs.

ADULT PREPARATION STRATEGIES

- We will provide services to youth from challenged backgrounds to promote high school completion or attainment of GED, enrollment in post-secondary education and/or increase job-readiness skills
  - Continue Fresh Start programming and maintain Mentoring program
- We will continue to incorporate Evidenced-Based and Best Practice Standards in our program design, service delivery and program evaluation models to ensure program quality and effectiveness.
  - As part of the program evaluation, curriculum will be reviewed for to ensure standards are maintained
  - Staff are encouraged to participate in training opportunities and reflected in annual staff development expectations

ADULT PREPARATION STRATEGIES

- We will continue to provide early childhood education for low-income youth
  - Ensure quality childcare and maintain state requirements for Wisconsin's YoungStar program
  - Seek opportunities to expand our childcare services to marginalized groups
- We will provide employment and volunteer opportunities for youth
  - Through agency programming and community partnerships, volunteer opportunities, work experience, apprenticeships and employment are provided
- We will continue to provide reproductive health education for youth through AHOP
  - All youth engaged in programming are received evidenced-based education
  - AHOP collaborates with local schools to provide reproductive health education
- We will continue to expand our partnerships with area school districts to provide school and summer programming
  - Continue to provide after school and summer programming in the Beloit community,
  - Seek opportunities to expand youth programming in other communities within our service territory

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STAFF DEVELOPMENT

National ROMA Goal	Communities where people with low incomes live are healthy and offer economic opportunity.
Outcome	CAI is the recognized leader in combating poverty in our community
Goal (Destination)	CAI will retain key staff to ensure program quality and enhance longstanding relationships within the community.
Rationale (identifies reason for the goal)	Qualified staff are key to maintaining successful programming
Objective (Performance Target)	Develop succession plans for key staff roles

STAFF DEVELOPMENT STRATEGIES

- We will work to retain key staff to ensure program quality and enhance longstanding relationships with community partners.
  - Through annual reviews, staff development plans are implemented to include retention strategies and support community engagement
- We will encourage balance between professional demands and need to focus on personal issues, friends and family.
  - Through HR continue to provide monthly newsletter and annual events to support family/work life balance
- We will appropriately manage and support staff in an environment of increasing participant demands
  - Maintain Employee Assistance Program (EAP) and training opportunities to address workplace demands
- We will create targeted staff development opportunities focused on core identified needs including CAI services and goals, resources/system navigation, cultural competence, employability, management skills and leadership development
  - Continue to obtain feedback from staff on training needs and development during annual reviews
  - Maintain internal Courageous Conversations and support external community opportunities
- Human Relations Team will plan education sessions and explore ways to promote positive work environment and celebrate success.
  - Led by the HR Manager, implement and maintain HR Team to address work environment and recognitions

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FISCAL RESPONSIBILITY

National ROMA Goal	Communities where people with low incomes live are healthy and offer economic opportunity.
Outcome	CAI will remain financially viable for decades to come
Goal (Destination)	CAI will continue to build our financial strength with an emphasis on building assets and discretionary financial resources.
Rationale (identifies reason for the goal)	Discretionary financial resources allow CAI to respond to emerging needs in the community
Objective (Performance Target)	CAI will work to establish an endowment fund.

FISCAL RESPONSIBILITY STRATEGIES

- We will increase private donor base including the number of individual, corporate and foundation donors to increase the total dollars raised for the organization
- We will research, develop and implement a Planned Giving Program
- We will research and initiate the establishment of an endowment fund
- We will engage the Board in Fund Development activities
- We will ask Board members to “open doors” to prospective donors
- We will update the Board of Directors on the financial viability of the organization through regular fund development reports

BOARD ENGAGEMENT

National ROMA Goal	People with low-incomes are engaged and active in building opportunities in communities.
Outcome	The Board of Directors will reflect the communities we serve
Goal (Destination)	CAI will continue to actively recruit Board members and committee members from diverse professional, cultural and racial backgrounds
Rationale (identifies reason for the goal)	Boards with diverse skill sets and from varied backgrounds empower the organization to see its work through a number of lenses.
Objective (Performance Target)	CAI will increase the involvement of People of Color and other marginalized groups on Boards and Committees.

BOARD ENGAGEMENT STRATEGIES

- We will provide regular education sessions to keep board up to date on programs and services and enhance the capacity of the Board to act as effective ambassadors
- We will implement regular orientation and training to ensure that all members are trained regarding governance and legal duties, CSBG standards and ROMA requirements.
- We will ensure Board committees have community member participation in order to strengthen the pipeline of volunteers for the Board
- We will provide an annual Cultural Equity Training for Board members

A LEVEL PLAYING FIELD

A level playing field is a concept about fairness. A metaphorical playing field is said to be level if no external interference affects the ability of the person to compete fairly, to succeed. Despite efforts to bring greater access and opportunity to our community, too many individuals — especially low-income, ethnic and cultural minority individuals — face greater systemic impediments when striving to succeed. Discrimination and disparities still persist; the playing field is not level. Our mission is to create access and opportunity; to eliminate external interference or barriers, and in effect, level the playing field.