

# Community Services, Inc. (CSI)

## AGENCY-WIDE STRATEGIC PLAN – 2017-2022

Approval by the Community  
Services, Inc. Board of  
Directors – 10/17/2017

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### Motto

*Helping People – Changing Lives*

*One person at a time*

Helping **people**;  
**Improving**  
communities.



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## I. Introduction

Community Services, Inc. (CSI) is in the midst of an exciting time of reflection, refinement, and creativity. Our strategic planning process challenged us to consider the past, present and future of the agency. We looked at where we have been and what benefit CSI brings to the many Texas communities. Planning helped us look at current trends and determine if we are meeting identified community needs as defined in the agency's Community Needs Assessment (CNA). It also reinforced our shared vision of the future, reaffirmed core values, defined CSI priorities over the next five years, and identified and quantified measures that will determine our success.

This plan is the result of several months of information gathering and analysis from CSI staff, board, community stakeholders, partners, funders, and participants. That work was crucial to our self-reflection and is a product of current affairs in the world, the government, and economic changes in Texas and the service delivery area. More than 100 people shared data and ideas regarding the needs of people with low income in the service delivery area. The planning process produced a deliberate and proactive framework for adapting to change and assisted us in reflecting on how well we utilize resources to meet community needs. We developed a clear understanding of our mission, adjusting it to better clarify CSI's current and future work.

Within these pages is CSI's response about how we will grow and improve our services locally; what our agency's goals and internal needs are for the next five years; and a roadmap of how we'll meet these goals.

This long process was overseen by a Strategic Planning Committee comprised of CSI board and staff and completed with full input and support from CSI's full-time staff and Board of Directors. Pro-bono Consultants kept the process focused and well-documented, gathered information from interviews and focus groups of participants, board, and staff; completed research and analysis; and, helped identify and determine CSI's objectives, strategies, and priorities.

As CSI moves into the future, this plan will serve as a guide to help us assist in alleviating the conditions of poverty in our ten-county service delivery area and surrounding counties. Our staff and Board of Directors will assure that this plan is followed and has built in accountability steps to ensure progress.

We would like to extend our gratitude to external and internal stakeholders, consultants, the full Board of Directors, CSI staff, and the Strategic Planning Committee. Their considerable time and effort helped to insure the quality and depth of this Strategic Plan as we understand that this is a living document and a work in progress.

Sincerely,

Reverend Dairy Johnson, *Chair, Board of Directors*

Sincerely,

Daniel Edwards, Sr., MPA, *Executive Director*

## II. History

Community Services, Incorporated (CSI) began in Navarro County, Texas in 1966 as a Community Action Agency (non-profit), developed from the Economic Opportunity Act of 1965. CSI was founded with a mission to help clients – specifically, low-income citizens in rural areas achieve success and rewards through confidential case management, direct coordination of resources, support services, and peer celebration activities. A few years after its inception, it expanded from Navarro County into Ellis County. As additional projects were added (such as job training, weatherization, and other initiatives), the organization's service area expanded throughout rural east and central Texas counties. For a brief period, CSI served 42 counties in central and east Texas in order to assess the seasonal farm worker/migrant worker. The CSI service area is currently more focused and includes services offered in the following ten counties: Anderson, Collin, Denton, Ellis, Henderson, Hunt, Kaufman, Navarro, Rockwall, and Van Zandt.

CSI has conducted activities in a variety of service areas to promote opportunity, quality of life, and self-sufficiency for the under-served and low-income population. Services have included housing counsel, job training and placement, energy-conservation, educational skill development and counseling, and outreach/referral services. In addition, CSI conducted assessments for farm workers and migrant workers in central and east Texas and on the needs of women in crisis. It also had initiatives for special programs to provide education to low income families, heat crisis relief, and energy crisis assistance.

In 1977, CSI responded to the need for child care services and acquired a nonprofit childcare center in Corsicana which it operated for many years in order to meet local needs. CSI has been a continuous source of special program assistance to low-income citizens throughout Texas and serves as a constant contact for residents via phone, website, and regular mail with questions about services, as well as addressing various problems and needs. CSI's current major service lines include the following:

### **Community Services Block Grant/Direct Client Services (CSBG/DCS)**

Funded by the Texas Department of Housing and Community Affairs (TDHCA), CSI provides administrative support and direct client services in Anderson, Collin, Denton, Ellis, Henderson, Hunt, Kaufman, Navarro, Rockwall, and Van Zandt counties. Particularly pertinent in the summer months due to storms and potential flooding, the CSGB assistance is provided to clients in emergency, one-time assistance situations. Clients also receive comprehensive case management services requiring monthly meetings/updates with case managers to record outcomes, successes, and/or barriers to accomplishing established goals. Other typical uses of the assistance are used to support educational advancement (tuition, books, student housing, and fees) for people working to enhance job skills.

In addition to the major service lines noted above, since its inception, CSI has supported the communities that it serves in ways such as those shown below:

- Assisting with transportation services to provide service area residents with greater access to community services.
- Delivering over 2,000 meals a month to seniors, through a program called Meals on Wheels.

- Logging over a quarter million (273,119) total miles on 54,222 trips – collecting fares of \$73,306 – in the CSI Transit Services service line.
- Assisting 7,855 elder clients and 16,817 people with disabilities.

The CSI leadership includes the following members of the Board of Directors:

- Reverend Dairy Johnson  
*President*
- Lakeshea Brown  
*Vice President*
- Cedric Fields  
*Treasurer*
- Jeffery Cardell Enoch, Sr.  
*Secretary*
- Monetha Fletcher
- Andrea Griggs
- Graciela Hernandez
- Ruth Woods



CSI's Agency-Wide

### III. Community Profile

#### Population and key demographics

The ten-county CSI service area includes a highly diverse population of approximately 2.25 million people. Some of the population and demographic highlights include the following:

- Combined, Collin and Denton Counties comprise approximately 75% of the entire service delivery areas population.
- Approximately 250,000 people in the service area live in poverty. In half of CSI's service area counties, more than one in seven people have household incomes less than the Federal Poverty Level (FPL).
- The median age across counties is fairly consistent in the mid-to upper-30s, yet in Henderson and Van Zandt Counties, the median age is over 43 years. This suggests that people in these areas may be more likely to benefit from health and transportation services.
- The service area has a strong representation of people who are ethnically Hispanic (10% to 20% in most counties).
- The African American population is most heavily concentrated in Anderson County.
- Median household income and education (i.e., "Percent with a Bachelor's Degree or Higher") are highly correlated.

*Section left blank to include full table below.*

## Key Demographic Measures per CSI Service Area County

Measure	Anderson	Collin	Denton	Ellis	Henderson	Hunt	Kaufman	Navarro	Rockwall	Van Zandt	TOTAL
<b>Population</b>	57,930	854,778	728,799	155,976	78,675	87,048	108,568	48,038	85,245	52,481	2,257,538
<b>Median Age</b>	39.5	35.8	33.8	35.7	43.9	38.5	35.9	38.1	36.8	43.1	35.9
<b>Median Household Income</b>	\$41,279	\$81,315	\$75,099	\$59,257	\$39,069	\$44,361	\$61,004	\$38,423	\$92,466	\$43,220	\$71,881
<b>Percent Living in Poverty<sup>1</sup>:</b>	20.3%	7.8%	8.8%	11.9%	18.9%	19.9%	13.3%	21.1%	5.9%	16.4%	10.2%
<b>Ethnicity</b>											
<b>% White</b>	60.2%	61.2%	62.5%	64.2%	79.4%	73.9%	68.0%	58.4%	72.8%	84.7%	64.2%
<b>% African American</b>	20.7%	9.0%	8.9%	8.9%	6.4%	8.0%	10.3%	13.3%	5.8%	2.8%	9.0%
<b>% Hispanic</b>	16.9%	15.0%	18.9%	24.6%	11.8%	14.6%	18.8%	25.0%	16.7%	10.0%	17.2%
<b>Percent with Bachelor's Degree or higher<sup>2</sup></b>	11.7%	51.0%	42.1%	21.9%	15.4%	17.7%	18.7%	17.6%	38.1%	14.4%	39.1%
<b>Percent 16+ unemployed<sup>3</sup></b>	4.7%	3.2%	4.3%	3.4%	5.7%	7.0%	6.0%	5.9%	3.2%	3.6%	4.0%

Source: County Health Rankings, [www.countyhealthrankings.org](http://www.countyhealthrankings.org), 2015.

<sup>1</sup>Source: Community Commons, [www.communitycommons.org](http://www.communitycommons.org)

<sup>2</sup>Source: ESRI, 2015.

<sup>3</sup>Source: ESRI, 2015.





## Poverty Analysis by CSI Service Area County

### Counties

<u>Measure</u>	<u>Texas</u>	<u>Anderson</u>	<u>Collin</u>	<u>Denton</u>	<u>Ellis</u>	<u>Henderson</u>	<u>Hunt</u>	<u>Kaufman</u>	<u>Navarro</u>	<u>Rockwall</u>	<u>Van Zandt</u>
<b>ORIGIN</b>											
<b>One race</b>	18.0%	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
<b>White</b>	16.5%	16.4%	7.5%	7.6%	11.0%	18.9%	14.4%	11.9%	18.3%	4.7%	16.6%
<b>Black or African American</b>	24.7%	35.8%	11.4%	15.3%	18.7%	30.6%	33.6%	23.6%	37.7%	17.9%	NA
<b>American Indian and Alaska Native</b>	23.3%	NA	NA	10.4%	NA	NA	NA	NA	NA	NA	NA
<b>Hispanic or Latino origin (of any race)</b>	26.5%	41.9%	18.3%	14.9%	26.8%	36.3%	30.8%	25.8%	33.8%	9.8%	36.4%
<b>White alone, not Hispanic or Latino</b>	9.5%	11.1%	5.7%	5.9%	6.7%	17.1%	14.5%	8.8%	12.8%	3.4%	14.7%
<b>EDUCATIONAL ATTAINMENT</b>											
<b>Population 25 years and over</b>	13.4%	13.9%	6.7%	6.2%	9.9%	15.8%	14.3%	10.9%	16.1%	4.7%	12.7%

## Poverty Analysis by CSI Service Area County

### Counties

<u>Measure</u>	<u>Texas</u>	<u>Anderson</u>	<u>Collin</u>	<u>Denton</u>	<u>Ellis</u>	<u>Henderson</u>	<u>Hunt</u>	<u>Kaufman</u>	<u>Navarro</u>	<u>Rockwall</u>	<u>Van Zandt</u>
Less than high school graduate	29.9%	26.6%	24.3%	20.3%	23.8%	25.6%	29.1%	26.3%	30.2%	12.7%	25.7%
High school grad. (incl. equivalency)	15.1%	14.9%	11.0%	8.1%	11.2%	16.4%	16.0%	11.1%	17.0%	7.6%	12.2%
Some college, associate's degree	10.2%	10.7%	6.2%	5.4%	7.1%	13.5%	10.6%	7.6%	12.1%	3.2%	9.2%
Bachelor's degree or higher	4.3%	2.7%	3.4%	3.2%	1.9%	6.2%	3.9%	1.5%	3.5%	2.5%	5.2%
<b>EMPLOYMENT STATUS</b>											
Civilian labor force 16 years +	10.8%	10.2%	4.9%	6.5%	8.0%	12.3%	14.1%	7.2%	15.4%	4.2%	9.7%
Employed	8.9%	9.1%	4.1%	5.4%	6.4%	9.7%	9.0%	5.3%	11.4%	3.3%	8.3%
Male	8.0%	7.3%	3.7%	4.6%	5.9%	8.7%	8.8%	4.1%	11.9%	4.0%	6.7%
Female	9.9%	11.5%	4.5%	6.3%	6.9%	10.9%	9.2%	6.6%	10.8%	2.5%	10.2%
Unemployed	33.6%	33.0%	19.9%	23.1%	28.0%	40.4%	47.6%	27.5%	46.8%	16.2%	31.6%
Male	30.6%	31.9%	18.3%	23.3%	20.5%	37.7%	44.8%	30.4%	37.1%	9.7%	25.0%
Female	37.0%	34.5%	21.7%	22.9%	34.3%	43.6%	51.4%	24.2%	55.8%	21.1%	42.9%

**SOURCE: U.S. Bureau of Census, 2011-2013 American Community Survey 3-Year Estimates.**

**Note:** Population for whom poverty status is determined will vary +/- 1% from Census, 2011-2013 data and Community Commons data.

- In Henderson and Navarro Counties, one-third of children live in poverty.
- Black/African American residents of each county are approximately twice as likely as Whites to live in poverty.

- The following section describes some of the conditions and causes of poverty in the CSI service area and elsewhere.

### Fund Allocation Schedule (Based on Poverty Scale)

*\*Note: FY18 CSBG Award is \$1.5M and the true need for all ten counties within CSI's Service Delivery Area is cited above as a point of reference only and based on current poverty data and not inclusive of administrative cost. True service dollars cited and counties with the greatest need will be served as funding allows and in compliance with FY18 CAP.*

## Poverty conditions and causes

The Robert Wood Johnson Foundation (RWJF) has found that poverty and health are inseparable.<sup>1</sup> National research by the RWJF, the CDC, the Institute for Healthcare Improvement, and others support the position that social determinants of health (SDH), drive poverty levels and – in turn – community health. The CDC Office of Disease Prevention and Health Promotion authored the seminal publication, “Healthy People 2020” in which they explore the social determinants that comprise healthy communities; in their work, poverty is one of the core tenets of good health.<sup>2</sup> According to the CDC, the social determinants of health include the following:

<b>Social Determinant</b>	<b>Subfactors / Correlative Factors</b>
Economic Stability	Poverty Employment Food Security Housing Stability
Education	High School Graduation Enrollment in Higher Education Language and Literacy Early Childhood Education and Development
Social and Community Context	Social Cohesion Civic Participation Perceptions of Discrimination and Equity Incarceration/Institutionalization
Health and Health Care	Access to Health Care Access to Primary Care Health Literacy
Neighborhood and Built Environment	Access to Healthy Foods Quality of Housing Crime and Violence Environmental Conditions

The strategic initiatives identified in this plan are driven by the SDHs (including poverty) shown above while simultaneously designed to use resources efficiently.

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<sup>1</sup> Lavizzo-Mourey MD, Risa, Open Forum: Voices and Opinions from Leaders in Policy, the Field, and Academia, Robert Wood Johnson Foundation, 2013.

<sup>2</sup> Secretary’s Advisory Committee on Health Promotion and Disease Prevention Objectives for 2020. Healthy People 2020: An Opportunity to Address the Societal Determinants of Health in the United States. July 26, 2010. Available from: <http://www.healthypeople.gov/2010/hp2020/advisory/SocietalDeterminantsHealth.htm>

## IV. Trends

The current trends explored during the strategic planning process were: improving community health and wellness, creating expanded pathways to employment, advocating for affordable housing, and giving attention to the City's changing demographics. Community health and wellness was noted by nearly half of those interviewed as a potential focus area for Community Services, Inc. This focus includes sustaining community programs that address the social determinants of health such as healthy food access as well as healthcare access which ensures a more vibrant and physically fit community. These issues were discussed in the context of addressing poverty for families through two-generational and multi-generational approaches, specifically addressing issues such as ACES (Adverse Childhood Experiences).

Creating expanded pathways to employment (such as addressing issues that prohibit people from getting jobs and training people for available jobs) were noted by a third of those interviewed as an area of need for CSI service delivery area. Among promising practices that create broader pathways to employment are: building partnerships with colleges (to address employer skills gaps); getting people ready for higher entry level jobs (that do not require degrees), and wealth disparities education. The importance of addressing barriers associated with employment was also emphasized. These were: 1) access to childcare and associated costs, 2) easing barriers associated with criminal histories, 3) the effects of limited access to technology, 4) access to living wage jobs, 5) racism and equity in accessing and sustaining employment, 6) educational expenses (including student loan debt and impact on cash assistance), and 7) reliable transportation.

The need for affordable housing and coordinated ways of addressing housing issues was also highlighted by the focus groups. These included: 1) housing conditions (such as high rent and code violations), 2) creating more affordable housing; 3) the need for more affordable rental units, 4) supportive and emergency housing for people who are homeless.

Also noted were changing demographics (number of younger people in the community compared to older people and greater cultural diversity), and issues associated with low high school graduation rates for students of color as well as Hispanics, Latinos, and poor whites.

## V. \*\*Mission, Vision, and Core Values

### Mission

The mission of Community Services, Inc. is to provide support services that empower and enrich low-income individuals, families, and communities.

### Vision

CSI is dedicated to engaging the community and pursuing a clear and focused vision described as follows:

- The individuals we serve will have the ability to provide for themselves and their families with self-confidence, increased knowledge, and skills.
- Our partners value our understanding of poverty as we work together to assure our clients achieve their goals, utilizing our combined resources.
- Our communities will grow more prosperous as those we serve become self-sufficient.

### Core Values

CSI's works to embed core values in all services provided to the community and in all interactions with its staff and supporters. Our core values include the following:

- **Support** - We believe the support we provide genuinely benefits and assists in the growth of individuals and the community.
- **Empowerment** – We believe in empowering clients to trust their strengths and capabilities as the foundation to becoming self-sufficient.
- **Customer Service** - We believe in providing the best customer service possible to all our stakeholders.
- **Integrity** - We believe in operating with integrity, in a transparent and open manner.
- **Ethical** - We believe in ethical behavior, fairness, and fiscal responsibility.
- **Work Environment** - We believe a positive work environment and teamwork will result in outstanding achievements.

*\*\* As reflected in the Board of Directors agenda of June 27, 2017 and approved board minutes.*

## VI. ROMA Statement

The goals outlined in the strategic plan are consistent with the six broad anti-poverty goals developed by the Community Services Network. These ROMA (Results Oriented Management and Accountability) goals provide a framework for continuous growth and improvement for community action agencies across the nation. The goals are:

- Low-income people become more self-sufficient.
- The conditions in which low-income people live are improved.
- Low-income people own a stake in their community.
- Partnerships among supporters and providers of service to low-income people are achieved.
- Agencies increase their capacity to achieve results.
- Low-income people, especially vulnerable populations, achieve their potential by strengthening family and other supportive systems.
- Community Services, Inc.'s 2017-2022 Strategic Plan establishes objectives and strategies that are linked to ROMA goals. Each objective and strategy is connected to a responsible party, a timeframe for completion, and the desired outcome. Each ROMA goal, along with related objectives, strategies and priorities is presented below.

CSI has developed a clear set of goals, objectives, and strategies to address each ROMA statement (detailed below). In addition, CSI will regularly monitor and revise (as needed) activities in order to effectively and efficiently meet or exceed ROMA standards. A process now driven and supported by CSI's Community Needs Assessment (CNA) – findings from the CNA, focus groups, partner meetings, conference calls, and funder/community input fed into the Strategic Planning process and guided board, management, staff, and volunteers during the implementation/development stages. *As reference, CSI will incorporate the ROMA Checklist (see Appendix C) into its operations.*

*CSI is also excited about building on the initial focus of ROMA as well as ROMA Next Generation and serves as the Pillars for the 6-Goals outlined deeper in this plan to maintain a forward thinking approach to lean processes with a focus on evidence based practices. Out of the box thinking with a focus on Community Needs Assessment data and the strategic framework of this plan will drive best practices in this ever changing network of Community Action.*

### **What is ROMA Next Generation?**

- ROMA Next Generation (NG) is a system for continuous quality improvement to enable the network to measure, analyze and communicate performance.
- ROMA NG will help Community Action at local, state and national levels shift to a culture of continuous learning rather than a compliance and reporting culture.



- Ultimately, ROMA NG will help the CSBG Network generate robust results for individuals with low-incomes and the communities served.

Now...	Under ROMA Next Generation...
Varying data quality and analysis →	Infrastructure for multi-level analysis
No picture of services and strategies →	Multi-level information of services & strategies
No data on accountability measures →	Results on State and Federal accountability
No data on Organizational Standards →	Results on Organizational Standards
Thin data on community level efforts →	Added Community Indicators
No ability to show community level work over multiple years →	Space to report community level work over time
Not OMB Cleared →	3-year OMB Clearance

### Theory of Change

The [Theory of Change](#) is intended to provide a graphic overview of the core principles, performance management framework, and services and strategies implemented and led by the Network to achieve the goals of Community Action across the nation.

# The National Community Action Network Theory of Change

## Community Action 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.



## Services and Strategies



Employment



Education & Cognitive Development

Income, Infrastructure & Asset Building



Housing

Health/Social Behavioral Development



Civic Engagement & Community Involvement

### Core Principles

- Recognize the complexity of the issues of poverty
- Build local solutions specific to local needs
- Support family stability as a foundation for economic security
- Advocate for systemic change
- Pursue positive individual, family, and community level change
- Maximize involvement of people with low incomes
- Engage local community partners and citizens in solutions
- Leverage state, federal, and community resources

### Performance Management

How well does the network operate?

What difference does the network make?

- Local Organizational Standards
- State and Federal Accountability Measures
- Results Oriented Management and Accountability System

- Individual and Family National Performance Indicators
- Community National Performance Indicators

*A national network of over 1,000 high performing Community Action Agencies, State Associations, State offices, and Federal partners supported by the Community Services Block Grant (CSBG) to mobilize communities to fight poverty.*

This publication was created by NASCSP in the performance of the U.S. Department of Health and Human Services, Administration for Children and Families, Office of Community Services, Grant Number 90ET0451.

<http://nascsp.org/ROMA/919/ROMA-Next-Generation.aspx?iHt=24>

### Confirmation of adherence to ROMA NG, Organizational Standards and TDHCA requirements

The TDHCA Organizational Standards Checklist is designed to be a succinct reference to clarify requirements associated with key measures. Similarly, CSI is dedicated to providing the TDHCA (and others) with a clear mechanism that reflects CSI's efforts to address the requirements. Please note the following table that includes TDHCA requirement, as well as CSI's response to measures specifically linked to Strategic Plan activities:

<u>Section</u>	<u>TDHCA Requirement</u>	<u>Recommended Supporting Documents</u>	<u>CSI Response</u>
6.1	The Organization has an agency-wide Strategic Plan in place that has been approved by the governing board within the past 5 years.	Strategic plan, Board minutes, developed checklist of strategic plan elements	Reflected in this Strategic Plan, as well as the Plan acceptance as noted in the dated October 2017 Board minutes.
6.2	The approved Strategic Plan addresses reduction of poverty, revitalization of low-income communities, and/or empowerment of people with low incomes to become more self-sufficient.	Strategic plan, developed checklist of strategic plan elements	Section VII of the 2017 Strategic Plan which responds to the ROMA Goals stated in Section VI.
6.3	The approved Strategic Plan contains Family, Agency, and/or Community goals.	Strategic plan	Section VII of the 2017 Strategic Plan which responds to the ROMA Goals stated in Section VI.
6.4	Customer satisfaction data and customer input, collected as part of the Community Assessment, is included in the strategic planning process.	Strategic plan including appendices, Notes from strategic planning process, Customer satisfaction data/reports, Customer input data/reports	Strategic Plan Section IX and Appendix F.
6.5	The governing board has received an update(s) on meeting the goals of the Strategic Plan within the past 12 months.	Strategic plan, plan updates/reports, Board pre-meeting materials/packet, Board minutes	<i><b>This is CSI's first Agency-Wide Strategic Plan First Pass considered/ approved in September 26, 2017 board meeting with final approval at the October 17, 2017 board meeting.</b></i>

The full set of requirements shown in the TDHCA Organizational Standards Checklist are contained in Appendix E.

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## VII. Goals, Objectives, and Strategies

The strategic plan supports CSI's overall objective of being a high functioning and adaptive organization, widely known and respected in the community for its programming; competent staff; the engagement, commitment, and oversight of its board; and its strong partnerships with community organizations that share CSI's commitment to provide support services that empower and enrich low-income individuals, families, and communities.

**CSI's 11 strategic objectives are listed below and described in more detail on the following pages address The National Community Action Network Theory of Change and specifically Community Action Goals 1 – 3 cited above through expanded services offerings with an ancillary focus to build on the service strategies and core principles:**

- Continue to offer exemplary existing and new outcome-based programming designed to foster fund diversification.
- Support citizen involvement by providing volunteer opportunities beyond required board involvement to include a potential Consumer Council.
- Develop and implement an integrated communications plan to build awareness of CSI programs, eligibility, and ways to access them via the agency website.
- Increase agency feedback and broaden community volunteer opportunities via the required needs assessment.
- Inspire and equip leaders throughout the community to end poverty through collaborative efforts with local officials.
- Improve internal communication systems and remove obstacles to staff job satisfaction.
- Continue effective board governance, targeted financial oversight of short and long-term strategic initiatives and the overall agency, making full use of the talent and resources of CSI board and staff.
- Enhance agency-wide data gathering to better enable measurement of program effectiveness through lean practices.
- Use ROMA and ROMA NG to determine CSI's overall effectiveness; inform annual and long-range planning; and support agency advocacy, funding, and community partnership activities.
- Maintain diverse revenue sources, strong financial partnerships, and an individual donor base.
- Continue to successfully work with education partners to increase parental involvement in children's school experiences. Adopt a two-generation approach in programming, where appropriate.



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The top strategic priorities for 2017-2022 are:

1. Exemplary outcome-based programming;
2. Strong awareness of CSI programs, eligibility, and ways to access them; and
3. Inspiring community leaders to be strategic in the fight to end poverty.

## GOAL #1: People with low incomes become more self-sufficient.

### OBJECTIVE

**Continue to offer exemplary existing and new outcome-based programming.**

### STRATEGIES

#### Employment

- Expand employment-related CSBG programming over the next two years by enacting an enhanced model which includes potentially adding more program staff to achieve small caseloads to facilitate intensive and individualized advocacy and employment and educational goal plans.
- As part of the employment expansion, hire a business liaison to build in-depth relationships with employers in the area and establish links to CSI participants seeking employment.
- Expand partnerships with employers to hire 20% more CSI participants than were hired by employer partners in 2016.
- Develop employer partners to provide paid and unpaid internships and on-the-job training for CSI participants.
- Increase CSI transitional jobs by 50% over the next three years.
- Conduct a feasibility study to identify current and emerging workforce development needs and ways that CSI can train participants to meet those needs.
- Explore bike maintenance as volunteer work experience or transitional employment.
- Expand participation in the GED program through enhanced collaborative efforts with local agencies and other service organizations.

#### Housing

- Expand working partnerships to strengthen advocacy resources for tenant rights and housing stabilization.
- Explore a more streamlined process for referrals to other providers of housing services.
- Enhance community engagement and offer free training sessions regarding housing rights; self-advocacy; tenant rights groups; and, insight about local, state, and federal resources in conjunction with other advocacy groups and legal aid programs and services.

## **Health, Wellness, and Food Access**

- Use existing partnerships to engage a coordinator of health and wellness by 2019.
- Through existing partnerships, engage a Healthcare Access Advocate for CSI participants.
- Enhance the internal knowledge, marketing, and coordination of CSI's health and wellness referral services.
- Assess the need for increased health and wellness information on the agency website.
- Explore ways to better connect program participants to mental health services through referrals and partnerships.
- Explore the interest in, and feasibility of providing, nutrition and other health related classes.
- Expand partnerships with providers of Medicare services to increase referrals to better serve seniors.

## **Transportation**

- Expand transit services and increase agency footprint in Dallas County.
- Organize and expand agency/transit information to the public and ridership on how to advocate on transportation issues in underserved areas.
- Explore creation of fixed route programs with local colleges/universities.

## **Financial Stability**

- Explore the addition of an adult/family-centered financial education curriculum.
- Provide logistical support to host regular tax clinics during tax season for existing clients transitioning out of poverty.
- Explore the possibility of one or more staff being certified to work on taxes during tax season in conjunction with local tax preparer (i.e. H&R Block or Jackson Hewitt).
- Promote use of [MyFreeTaxes.com](https://www.myfreetaxes.com) (e.g., new brochure, CSI website, new partners).
- Expand MyFreeTaxes partnerships from current partners (Corsicana Public Library and Navarro College) to additional community partners and other Community Action Agencies.

## GOAL #2: The conditions in which people with low incomes live are improved.

### **OBJECTIVE**

**Nurture citizen involvement through volunteer opportunities.**

### **STRATEGIES**

#### **Community Engagement**

- Keep community engagement, anti-racism and public policy advocacy work at agency core and integrated across programs.
- Explore implementation of community engagement policy dialogue, support, and engage in culturally specific community/civic leadership development.
- Expand community involvement and focus on the Town Hall Meetings on 5 trending issues in 2018; and build coalitions/community partnership to address two identified issues in 2019.
- Increase by 20% the number of people engaged in Town Hall Meetings by 2019.
- Explore designing and launching of a culturally specific and culturally led Adult Learning Pilot Program to organize, mobilize and empower communities of color to address structural barriers that hinder economic development, job opportunities, civic engagement, and non-profit development opportunities.
- Increase participation of people with low incomes in transportation governance policy and planning issues at the agency/local level.

### **OBJECTIVE**

**Develop and implement an integrated communications plan to build awareness of CSI programs, eligibility, and ways to access them.**

### **STRATEGIES**

#### **Communications**

- Explore the possibility of investing in selectively expanded marketing/ development activities.
- Develop a new marketing plan designed to effectively communicate the nature and value of agency service offering.
- Continue to improve and implement agency newsletter, website, e-news, annual report, branding, marketing, and in-reach into the communities served.
- Develop and implement targeted and inclusive outreach/in-reach marketing campaigns to reach traditionally underserved groups (e.g., adults over 45 and singles, communities of color) and potential donors.
- Explore grant opportunities to support participant-driven outreach/marketing work.
- Increase visibility/marketing of agency to broader donor base.
- Increase marketing cohesion of all programs, services, and opportunities (e.g., show relevancy of services to a broader population, demonstrate how services relate to one another, create return on investment report and publicize data on agency outcomes).

### GOAL #3: People with low incomes own a stake in their community.

#### **OBJECTIVE**

**Increase agency feedback and broaden community volunteer opportunities.**

#### **STRATEGIES**

##### **Volunteer Opportunities**

- Create and train a CSI Participant Advisory Council to provide on-going feedback and input on work.
- Recruit, train and maintain a diverse, broad section of participants as Advisory Council Members. Diversify the Council's membership (e.g., age, gender, race, culture/ ethnicity).
- Encourage more participants to volunteer at CSI (e.g., Meals on Wheels Program and Customer Service).
- Encourage more participants to register and vote in all public elections; provide education regarding voter registration, voting locations, voting day transportation sources, places (virtual or otherwise) to get information about issues/people included on ballots.
- Provide support, encouragement, and training for organizations wanting help to instill policies of inclusion for low income representation on their boards, committees, and commissions.
- Increase the number of people with limited incomes that are represented in local organizations, on boards, committees, and commissions by building awareness of opportunities, providing education regarding the importance of their insight, requirements, and training to participants.
- Increase the number of opportunities people with low incomes have to provide testimonies at public hearings, local forums, online venues, and community events.



GOAL #4: Partnerships among supporters and providers of service to people with low incomes are achieved.

**OBJECTIVE**

**Inspire and equip leaders throughout the community to end poverty.**

**STRATEGIES**

**Strong Partnerships and Board Initiatives**

- Improve the efficiency and impact of CSI's partnerships with community organizations, employers, public sector entities, and others (e.g., establish shared goals, build joint community impact plans, create an environment of mutual respect and collaboration, sign MOUs where needed, etc.).
- Grow awareness of CSI programs that build skill sets, identify job opportunities, recruit business participation in CSI programs, provide job and career training, and inclusively encourage community participation.
- Engage board members, community leaders, social service leaders, and others involved with workforce development and education, and training to take action to end poverty.
- Become the recognized and valued place in the community for people to gather and access a wide array of services, programs, activities, education, trainings, and special events.

**Health, Wellness and Food Access**

- Explore partnership opportunities with local available services to ensure that seniors have access to nutritious meals by referrals to community home-delivered meals programs, food banks/pantries and the food stamp program.
- Explore partnership opportunities with available services to community transportation options in counties not served by CSI to enable seniors needing transportation assistance for health related needs and support to access pantries, local Farmers Market, Walmart Stores, etc. to meet immediate needs.
- Explore partnership opportunities with Community Gardens in identified counties to enhance the availability of fresh foods in communities underserved in that market impacted by food deserts.

## GOAL #5: Agencies increase their capacity to achieve results.

### **OBJECTIVE**

**Improve staff job performance by improving internal communication systems.**

### **STRATEGIES**

#### **Capacity Building**

- Improve and promote healthy, respectful communication and transparency between departments, between managers and staff; and, between the board and staff.
- Align job descriptions, department goals, and individual work plans with strategic plan.
- Increase training, on-boarding, support, recognition, and performance feedback for staff.
- Institute an anonymous employee survey once per year; embed survey results in strategic plans and other management initiatives.
- Identify opportunities for cross-training staff; provide cross-training opportunities.
- Promote a healthy staff and work environment by implementing simple strategies such as promoting lunch break walks, and providing ongoing professional and personal wellness training to encourage balance between professional demands and need to focus on personal issues, friends, and family.
- Establish, maintain, and promote a common understanding of professional boundaries between staff, community members, partners, and participants.
- Use Outlook Calendar to communicate agency events and opportunities to start programs and classes.
- Improve CSI resource sharing, resource organization, and ease of access/use of information between/among staff for more effective coaching, advocacy, and referrals.

### **OBJECTIVE**

**Continue effective involvement of the board in order to provide governance, financial oversight of short and long-term strategic initiatives, and insight and guidance to overall agency operations; make full use of the talent and resources of CSI board and staff.**

### **STRATEGIES**

#### **Strategic Leadership, Compliance, and Oversight**

- Continue board education and training local and regional (i.e., CAPLAW etc.).
- Expand opportunities for board members to actively participate in CSI activities.
- Review board policies, where helpful, in order to support goals and actions that enhance board member involvement in CSI initiatives.
- Raise the board's fiduciary profile as responsible trustees of the organization's assets.

### **OBJECTIVE**

**Enhance agency-wide data gathering to better enable measurement of program effectiveness.**

## STRATEGIES

### Performance Measures

- Establish consistent use of an easy-to-read database that presents impact (e.g., number of participants, hours of service, resources allocated, etc.) by program by month. Enhance the ability to track progress and measure performance relative to goals.
- Explore the possibility of creating a database to track system performance as measured in community engagement levels – for example, the number of CSI participants who join civic initiatives and boards, testify at public meetings and hearings, or otherwise.
- Use ROI (Return on Investment) data and other quantifiable measures to evaluate new initiatives prior to launch. Qualitative data may also be employed to help illuminate important issues that are difficult to fully quantify or would benefit from qualitative insight.
- Use a similar quantitative evaluation process in order to evaluate existing programs and initiatives.

## OBJECTIVE

**Use ROMA NG to determine CSI's overall effectiveness; inform annual and long-range planning; and, support agency advocacy, funding, and community partnership activities.**

## STRATEGIES

### Operational Excellence

- Provide annual ROMA training to board and staff.
- Through community engagement/adult education and leadership development, serve as a role model for the community by promoting the importance of cultural competence within all organizations as a means to eliminate barriers that inhibit progress towards economic self-reliance and self-sufficiency.

## OBJECTIVE

**Maintain diverse revenue sources, strong financial partnerships, and an individual donor base.**

## STRATEGIES

### Sustainability

- Increase annual fundraising by 5% based on agency's annual budget by developing a strategic fundraising plan and evaluating the possibility of hiring a full-time marketing/development director.
- Increase sustainability with expanded work to grow donor base.
- Create a donor recognition plan.
- Continue to explore revenue-generating activities (e.g., establishing self-sustaining and revenue generating service delivery models through expanded Transit services).

GOAL #6: People with low incomes, especially vulnerable populations, achieve their potential by strengthening family and other supportive systems.

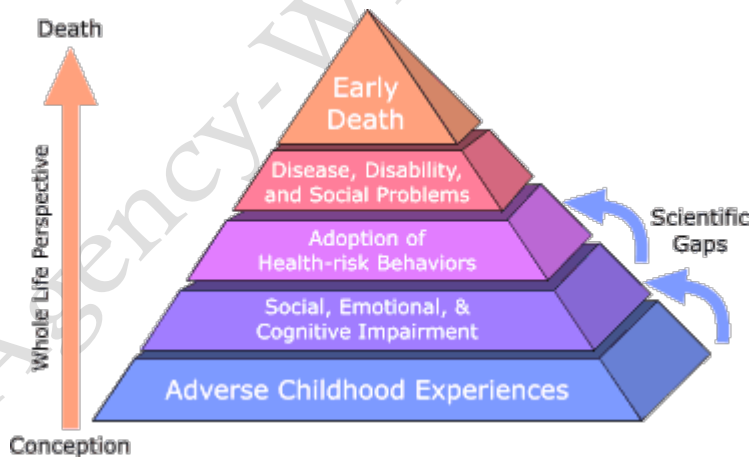
## OBJECTIVE

**Continue to successfully work with education partners to increase parental involvement in children's school experiences. Adopt a two-generation approach in programming, where appropriate.**

## STRATEGIES

### Education

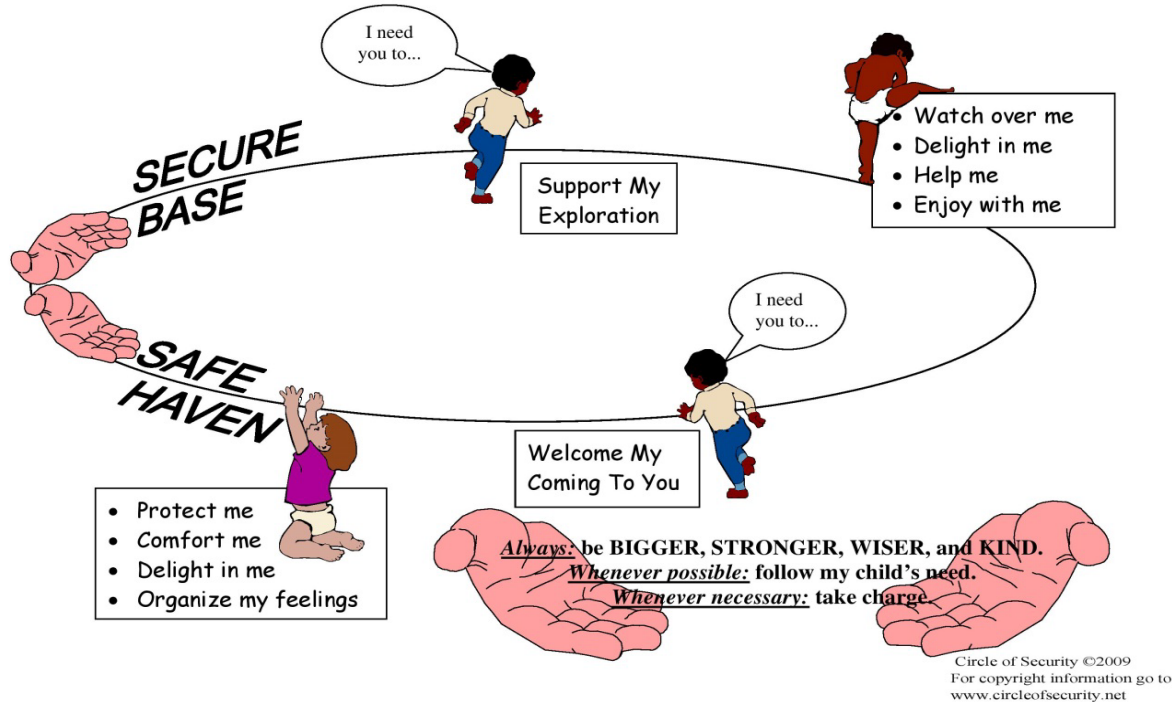
- Embed two-generation (e.g., address children and parents needs simultaneously) and multigenerational approaches into CSI programming. Coordinate two-generational/multigenerational issues through referrals to other services and programs, where helpful.
- Provide parents/family members with culturally competent education opportunities on issues important to parents in the further development of their children.
- Integrate motivational interviewing techniques throughout the agency. Provide additional staff training, where needed.
- Provide assistance and support for parents/family members and the greater community to advocate for the educational advancement of children – inclusive of all economic, ethnic, gender, social, or other strata.
- Explore use of ACE's (Adverse Childhood Experiences) framework for improving understanding of participants' experiences from a parents' perspective.



- Explore the use of the Circles of Security framework (i.e., trainings that focus on the childhood intervention models designed to increase attachment and security) to help individual parents, groups of parents, coaches, and others better recognize and address children's needs by sharing a common framework.

# CIRCLE OF SECURITY®

PARENT ATTENDING TO THE CHILD'S NEEDS



- Explore the addition of the AMAZE<sup>3</sup> and Second Step<sup>4</sup> programs (or similar programs) for use with children while parents are in CSI programming.
- Explore and evaluate the possible impact of modifying CSI facilities in order to enhance the provision of services.
- Explore an increased partnership with children and family collaboratives in the service area.
- Promote opportunities for local agencies and local partners to utilize race awareness and culturally sensitive resourcing to promote cultural competency and equity.

**VIII Program-Specific Plans** – *Note: Program specific plans included – CSI's holistic approach is driven by targeting immediate and long-term needs of the client, family, and the community. Solid and viable programs and departments participating directly and indirectly in the ROMA cycle process nurture the continuum of care and service delivery process.*

## Community Transit Service

*Note: Support Holistic Approach of Agency-Wide Strategic Planning Process.*

<sup>3</sup> Information available at <http://www.amazeworks.org/>

<sup>4</sup> Information available at <http://www.secondstep.org/>



## Vision

We envision a region with adequate and secure funding to support public transportation options designed to meet the needs of citizens and businesses and to support livable, healthy, and sustainable communities.

## Mission

Community Transit Service's mission is to develop and manage transportation resources and to coordinate the effective and efficient delivery of safe transportation options to the Ellis and Navarro County citizens.

## Guiding Principles

***Develop community benefit*** in an overall, not just a public transportation, focused manner by enhancing the ability of citizens to make choices for transportation and providing alternative transportation for those who have no choices.

***Maximize public investment*** in transportation options throughout the two counties to ensure that resources are utilized efficiently and effectively.

***Provide connectivity*** to create ease of services between people, places, and transportation modes by ensuring that reasonable ways to connect between different providers and modes are not only available, but are truly easy to understand and easy to use.

***Develop a geographic reach*** to ensure that the concerns of stakeholders, both rural and urban, are thoughtfully integrated into the planning and delivery of transportation options to the greatest degree possible.

***Ensure quality customer service*** by placing the customer as the focal point of our processes and assure that ease of use, flexibility of service, and satisfaction are of paramount concern to CTS, transportation providers, and other partners.

***Be action oriented*** by providing the appropriate sense of urgency not only for immediate transportation improvements, but also for longer range planning efforts, with the ultimate goal of enhanced livability for the citizens in the two counties.

***Work as a team*** in collaboration with our partners, stakeholders, and the public by demonstrating our willingness to improve how we work together for the benefit of our component.

*Communicate openly, directly, and constantly* in an honest manner on all things, always encouraging positive communication, and creating an environment where everyone's contribution to the region is acknowledged and respected.

## **Priority, Goals, and Strategies**

The priority, goals, strategies, and objectives define the general actions to be taken in order for CTS to be successful in the future. These are defined from the high-level view (priority) down to the very specific (objectives). **Priorities** set the focus. **Goals** set the target. **Strategies** state how the goals will be achieved. **Objectives** state what we will do now. Action plans tie back to how resources will be deployed and accountability for results.

### **Priority 1**

Secure stable funding sources to continue the public transportation system in Ellis and Navarro counties.

### **Priority 2**

Expand the public understanding of how a fully implemented regional public transportation system will increase access to transportation for all Ellis and Navarro county citizens.

#### Program Background

Community Transit Service (CTS) operates as a component of CSI. CTS is a rural public transportation program that provides services for the Ellis and Navarro County area. Hours of operation are Monday through Saturday 5:00 a.m. to 5:30 p.m. excluding holidays. Reservations are taken Monday through Friday from 8:00 a.m. to 4:00 p.m.

The CTS program was developed to provide safe and efficient transportation to the general public and to persons with special needs as specified by Americans with Disabilities Act (ADA) and as defined by contracts into which CTS may enter.

The buses have low floors so the first step is more accessible, and they are equipped with a wheelchair lift. The transit operators are trained to assist people with disabilities in boarding and securing their wheelchairs on the bus. By federal law, our operators announce major transfer points, intersections, and destination points along each route.

## **STRATEGIC GOALS FOR 2017-2022**

### **Goal 1: Ensure Availability of Transit Service to Navarro and Ellis County Residents and Visitors**

#### *Objectives:*

- Provide transit service that meets demand and needs.
- Identify the appropriate service area for CTS.
- Increase span of service, as appropriate.
- Comply with all requirements of the Americans with Disabilities Act (ADA).

### **Goal 2: Enhance local and regional transit connectivity**

#### *Objectives:*

- Coordinate urban and rural transportation networks.
- Integrate transit routes and mode connections with corresponding service schedules to facilitate efficient passenger transfer transition.

### **Goal 3: Develop cost effective transit alternatives**

#### *Objectives:*

- Implement an evolutionary process within corridors programmed for CTS development by gradually building up service.
- Implement smaller scale transit projects during the TDP (Transit Development Plan) timeframe that will be needed to support large, capital intensive improvement projects in later years.

### **Goal 4: Build institutional and regional capacity**

#### *Objectives:*

- **Seamless Customer Information Enhancements**
  - Phone system enhancements.
  - Online and phone reservation system.
  - Real-time customer information mobile apps.
- **Technology Improvements**
  - Asset Management.
  - Automated Vehicle Locator System.
  - Demand Response scheduling system.
- **Secure and Stable Funding Sources**
  - Public transportation ambassadors and outreach campaign.



- Coalitions and partnerships.
- **Capital Enhancements**
  - Facility upgrade.

## **Goal 5: Investigate Innovative Approaches to the Provision of Efficient Transit Service**

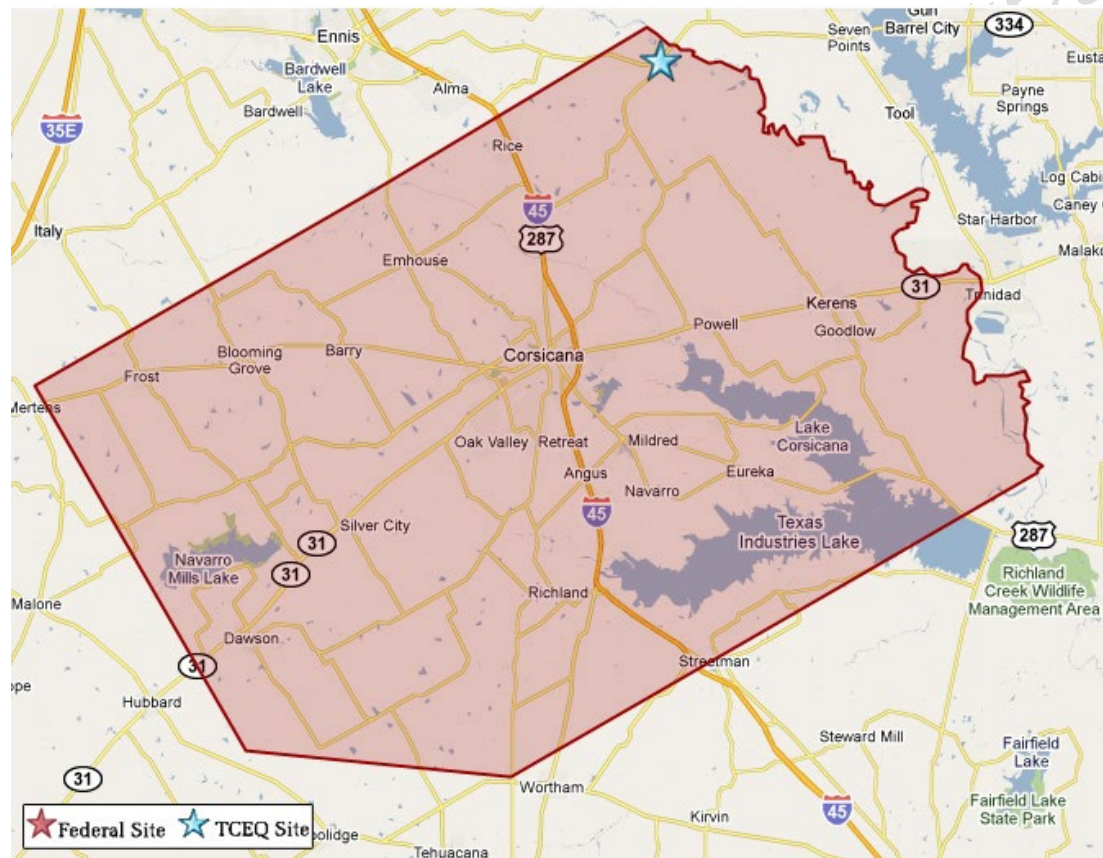
### *Objectives:*

- Explore the use of smaller vehicles.
- Investigate private funding/operating opportunities.

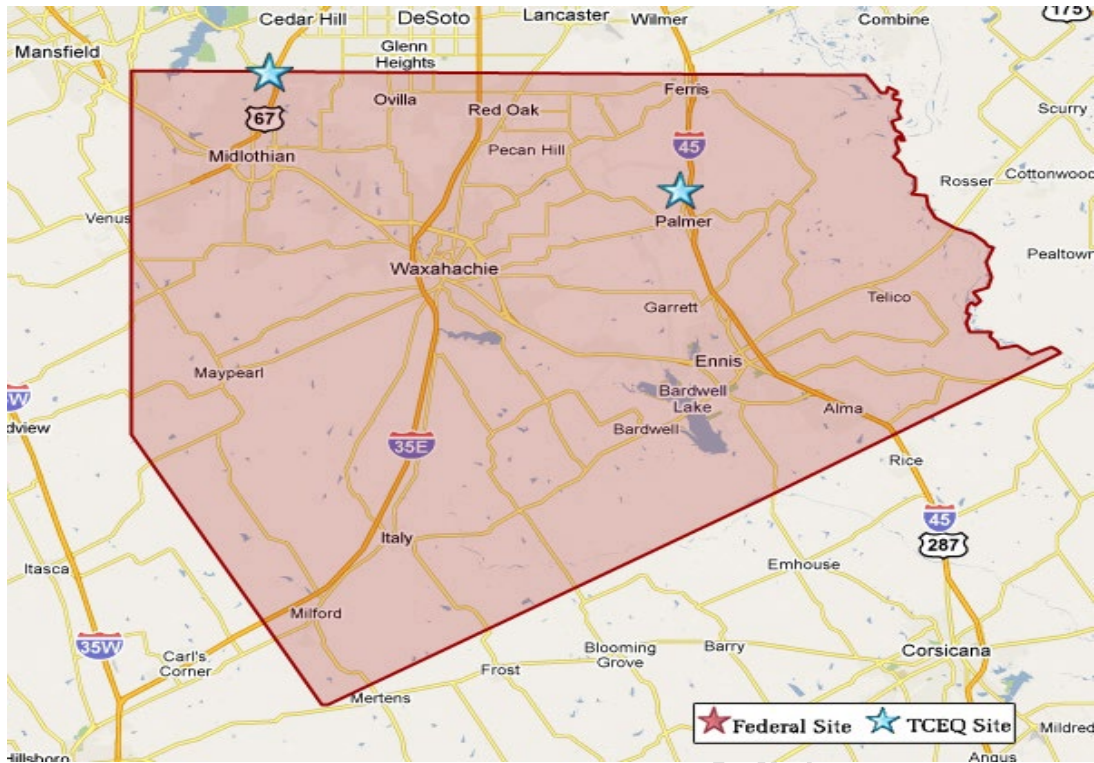
## Performance Indicators and Transit Propensity

A transit propensity analysis was prepared for the transit needs study and current needs assessment for the FY 2017 - FY 2022 to understand existing transit demand. This analysis was used to identify areas that may be candidates for service adjustment. The analysis is based on 2016 U.S. Census data at the census tract level. The data was plotted in a GIS information base. The data used are: population density, density of employment, density of persons over age 65, density of households below poverty level, population and employment density, and density of households without a vehicle. These factors are related to the propensity of the Census Tract population to be, or to become, transit riders. This information is presented with the transit service area map. The results of this portion of the needs study concluded that, relative to existing demand, the current structure (demand response) of the transit system provides excellent coverage. It was also recognized that increased levels of service may be warranted in some areas.

### Navarro County Map



## Ellis County Map



## Meals on Wheels

*Note: Support Holistic Approach of Agency-Wide Strategic Planning Process.*

### **Vision**

At CSI, we are focused on two things: nourishing those in need and delivering assistance where and when it is needed

### **Mission**

*To enrich the lives of seniors and others by providing nutritious meals and services that promote dignity, well-being, and independence.*

### **Guiding Principles**

**Improve self-sufficiency.** By preparing and delivering meals directly to clients in their home, CSI Meals on Wheels helps seniors and others in the community to maintain what they often value most—a sense of autonomy and independence—at a time in their lives when their ability to do so is often in decline.

**Enhance community support and engagement.** A hot, nutritious meal delivered each weekday to their door by a friendly volunteer can make a world of difference. This service is the driving force and purpose of the organization, and to which the board, the staff, and the volunteers are so deeply committed.

**Reduce the effects of poverty and limited access to services.** A periodic visit by a volunteer can also be an important check on the health and welfare of our clients; and an opportunity for us to refer clients and family members to other important services in the community.

### **Priority, Goals, and Strategies**

#### **Priority 1**

Provide a sustainable stream of services to seniors and low income and disabled adults from the age of 21 and higher.

#### **Priority 2**

Expand capabilities such that CSI effectively provides additional support or wrap-around services.

### Program Background

The planning process of CSI Meals on Wheels is an annual exercise tied to budget development and operational plans for the coming year. The executive director and the Board usually review this document at the October meeting in preparation for the new fiscal year (beginning November 1) and a review of the next fiscal year. Normally, only small adjustments would be made to the overall mission statement and long-term goals. However, significant changes are likely in the short-term goals and operating plans for the coming fiscal year.

The strategic plan serves as the foundation for the annual operating budget and the executive director's annual operational plan.

The Meals and Games Net Extra Treasures (MAGNET) program provides home delivered meals to low income Seniors and disabled individuals certified eligible through Texas Department of Aging and Disability Services (TDADS) in Navarro County Monday through Friday including Holiday meals and emergency meals determined by environmental changes (weather related). MAGNET Senior Services meets the community needs of serving low income disabled clients that may not be able to cook for themselves a nutritious meal Monday through Friday. MAGNET Senior Services also serves the need of seeing that each client is safe. The targeted population receiving MAGNET Senior Services include low income and disabled adults from the age of 21 and higher.

The goals of MAGNET Senior Services are to see that each client receives a hot, nutritious meal five days per week according to the contract agreement with TDADS. Frozen meals are allowed to a limited number of clients approved by TDADS. The program's focus is to achieve the following: 1) The quantitative outcome for the clients is that they receive a hot nutritious meal Monday through Friday. 2) The qualitative outcome for the clients is that their health will improve and independent living is extended. Currently, TDADS focus points include the following:

- TDADS staff does a yearly update with clients unless the client has a change in mental or health status. The client is then re-evaluated and an update is forwarded to MAGNET Senior Services. The grantor also does a yearly update with the clients to certify the services the clients are receiving is adequate or if other ancillary services are required.
- Agency program drivers report changes as observed to the Food Service Supervisor. Home visits are conducted and coordinated with TDADS as deemed necessary. Assessments are ongoing including concerns reported to TDADS verbally or written based on the level of need.

#### Approach to the Five-Year Plan

In September 2014, CSI Meals on Wheels moved to a process to have meals produced by an outside vendor, a transition and decision which significantly increased the organization's capacity to provide healthy/nutritional meals to our clients and meet the needs of the community. The two largest questions in FY2017 facing this organization are 1) "How can we help more people within our boundaries?" and 2) "How can we help the people we serve even more?"

These two fundamental questions have shaped our strategic plan as we focus on finding new ways to enlist new clients in need of our services while looking to do even more than simply providing them with a nutritious meal through wrap around services and by offering all agency services to all clients through that familiar holistic approach and as part of the ROMA cycle across all services.

### Expected Community Needs and Demand for Services Growth: 2017-2022

Like the nation as a whole, the Texas population is aging. In 2016, the population of Texas age 65 and older was estimated at 3.365 million people. Projections put the population in 2017 at 3.515 million – a growth rate of about four percent in a single year. (See Table 1). Navarro County will exhibit a similar growth rate among the senior population. This data suggests that the organization will need to continue to grow at a significant pace if it is to meet the needs of an aging population.

<b>Table 1: Population Projections Age 65+</b>			
<b><u>Geography</u></b>	<b><u>Total 2016</u></b>	<b><u>Total 2017</u></b>	<b><u>Percent Increase</u></b>
Texas Age 65 and older	3,365,237	3,512,243	4%
Navarro County All Ages	49,486	49,791	1%
Navarro County Age 65 and older	8,105	8,272	2%

Source: U.S. Census Bureau. Available at

[https://factfinder.census.gov/faces/tableservices/jsf/pages/productview.xhtml?pid=ACS\\_15\\_5YR\\_S0101&prodType=table](https://factfinder.census.gov/faces/tableservices/jsf/pages/productview.xhtml?pid=ACS_15_5YR_S0101&prodType=table); accessed August 25, 2017

In Table 2, the annual growth rate of the senior population in Navarro County (5 percent) has been used to project meals to be served during the next five-year period. This projection assumes that we will continue to serve the same proportion of the senior population in our service area as we have in the base year 2017.

<b>Table 2: Daily Meal Projections for CSI Meals on Wheels 2017-2022</b>						
<b><u>Measure</u></b>	<b><u>Base Year 2017</u></b>	<b><u>2018</u></b>	<b><u>2019</u></b>	<b><u>2020</u></b>	<b><u>2021</u></b>	<b><u>2022</u></b>
Matching Current Rate of Service to population (5 percent annually)	95	99.75	104.74	109.98	115.48	121.26

***Note: Base year and projections are for average daily counts for December of each year.***



## A New Emphasis

Even as we look to increase our meal service to the community of the Navarro County area, volunteers and board members alike see a need to take on some additional functions. Clients who suffer from loneliness and isolation may need greater interaction with our volunteers to combat those feelings. Clients who are ill or in need of other social services may need better referral to other agencies in the community and notification of family members. Given the proper training, direction, and expansion of our volunteer base CSI Meals on Wheels will be in a better position to meet these needs on a client-by-client basis. Other social functions that will serve the senior community may also be appropriate.

For CSI Meals on Wheels to meet the challenges outlined above, the Board has developed **three goals** which correspond to the two central questions (linked to the program's priorities, as shown earlier) of: 1) "How can we provide a sustainable stream of services help more people within our service boundaries?" and 2) "How can we help the people we serve with additional services or wrap around services?"

### **STRATEGIC GOALS FOR 2017-2022**

- 1. Grow our Volunteer Base:** Our volunteers are the "glue" that holds everything together. In all that we do, increasing our volunteer base will be the single most important factor in achieving success. We cannot grow our client base and meet the nutritional needs of an aging population without more volunteers that are able to deliver the food. Similarly, we cannot take more time with each client to meet their emotional or physical needs unless more volunteers are utilized. We cannot take on new functions, such as potentially serving meals at our base location without additional help. In recent years, we have expanded our use of volunteers, not only as drivers, but in our operations and administrative functions. In the future, we will look for new opportunities to use the rich resources of volunteers to meet our program needs.
- 2. Recruit New Clients:** As our population ages in accordance with our population projections listed above, CSI Meals on Wheels must actively engage in efforts that promote the organization. To date, the organization has had limited ability or time to communicate the availability of our service to clients. Most seniors and their family members continue to learn about CSI Meals on Wheels through word-of-mouth or the referral process. This needs to change through a more proactive marketing approach.
- 3. Raise our profile within the community and expand our support base:** In recent years, the executive director has made successful efforts to connect and partner with other organizations and businesses in the community. We are now active members of the Navarro County Chamber of Commerce and have effective partnerships with other service organizations. We are also working to expand the number of individuals who are making financial contributions to the organization, especially through the use of our online giving website – [www.csicorsicana.org](http://www.csicorsicana.org).

In addition, we have become more systematic and strategic in our grant applications to private foundations. Finally, our board has taken a more active role in managing successful fund-raising events. All of these efforts should continue and expand over the next five years. This will translate into a solid and diverse financial base for the organization.

## Conclusion

*Make no little plans; they have no magic to stir men's blood...Make big plans, aim high in hope and work.*

[Daniel H. Burnham](#)

*US architect & city planner (1846 - 1912)*

CSI Meals on Wheels has set high goals in the past.

*We set our sights on a new facility that could serve the region within our service delivery area.*

*We strove to put our organization on a solid financial base after the financial woes in recent years.*

### **We have accomplished these goals.**

*We have streamlined our operation, expanded our use of volunteers, hired competent staff, and reached out to the community around us.*

*We have improved the nutritional quality of our meals with plans to provide affordable meals to non-traditional clients and residents.*

*Our board and staff are more committed than ever to the organization.*

**Now it is time to take the organization to a new level of service – to increase the number of meals delivered, to provide service to “feed the soul” as well as the stomach, and to continue to partner with others in the community to assure our success.**

This plan will take us down that road to success.



## IX. Client Satisfaction

CSI programs each have a clear vision and mission for improving the community, guiding principles, and clear strategies. CSI's programs are also very successful from consumers' perspectives, as customer service scores are very high. In each of three service lines (MAGNET / Meals on Wheels, CSBG, and Transit Services), clients were asked to complete a short, ten-question customer satisfaction survey. Responses from select questions are shown below; the full tables of responses are included in the appendices.

**CSI satisfaction scores are at, or above, 85% favorable on nearly all measures across all service lines.**

CSI Customer Satisfaction Survey Summary	
MAGNET Program / Meals on Wheels	
The quality of the meals is excellent or good	85%
Always or sometimes eat the meals	100%
Drivers (delivery) are always friendly	100%
Meal variety is excellent or good	88%
Community Service Block Grant Programs	
Taught me to find the services that I needed (strongly agree or agree)	90%
I am better able to provide for myself and my household (strongly agree or agree)	85%
The program has taught me better problem-solving skills (strongly agree or agree)	92%
I am better able to budget (strongly agree or agree)	92%
Transit Services	
I was satisfied with the services I received (strongly agree or agree)	94%
The scheduler was polite and courteous (strongly agree or agree)	90%
The driver was polite and helpful (strongly agree or agree)	94%

**Note: CSI will continue to manage all applicable survey data toward complete legal fulfillment of all contract requirement and specifically ROMA NG, Organizational Standards, and program contracts to assess agency service offering and program designs.**

## X. Human Resources Strategic Plan (2017-2022)

*Note: Support Holistic Approach of Agency-Wide Strategic Planning Process.*

Human Resources Strategic Plan. The purpose of this plan is to stabilize and modernize the Human Resources system (people, processes, organization) by first building its infrastructure and then revolutionizing core areas in order to proactively respond to Community Services, Inc. growing needs to manage resources. A need for long-term planning was recognized, which resulted in the formation of this first ever Strategic Plan for the Human Resources Division. It supports the CSIs' Mission, Vision and Values and aligns with the President's Three Pillars: One Voice, Public Stewardship, and Staff Success. Further, the plan reflects the cornerstones of HR, which inform how the Division will operate now and in the future: Accountability, Collaboration and Communication. Ultimately, the strategic plan contains goals and strategies to stabilize and modernize the HR division/system in the areas of talent acquisition, development, and retention. The plan establishes a framework for advancing Human Resources' Vision, Role Statement and Guiding Principles providing a roadmap for how the HR system will be designed in a manner conducive to attracting and retaining a diverse talented workforce.

### **Vision**

To be the premier HR system among Community Action Agencies.

### **Mission / Human Resources Role Statement**

The Role of Human Resources is to provide knowledge, counsel, and services to help CSI attract, develop, and retain a talented, diverse workforce.

### **Human Resources Guiding Principles:**

- We work collaboratively and share ideas to provide seamless and consistent employee service.
- We foster relationships built on trust by delivering consistent employee resolutions that inspires confidence and credibility.
- We are accountable to ethically utilize our resources in an efficient and effective manner.
- We embrace and promote an inclusive environment where everyone is treated with fairness and respect.
- We encourage innovation and creativity through an open exchange of ideas, progressive thinking and responsible risk taking.
- We demonstrate and advocate for value added personal and professional development.

### ***Workforce Demographics***

In order to fully appreciate the content and context of the HR strategic plan, it is important to understand the environment in which it was created.

CSI is a multigenerational workforce comprised of a diverse group of talented, dedicated professionals. As of January 2017, CSI employed over 25 full and part-time employees categorized primarily into two groupings: exempt and non-exempt. Employee groups exist representing the various professions within the agency. Human Resources works closely and collaboratively with these groups to remain abreast of employee interests and the changing dynamic of the workforce.

Demographics of the CSI workforce are continuously evolving. With a low percentage of CSI's workforce eligible to retire in the next five years, Human Resources will play a key role in determining changes in benefits offerings, salary structures, talent acquisition efforts and onboarding strategies, succession planning, knowledge management, employee retention, and myriad other aspects of human resources management associated with the micro and macro cultural shifts indicative of an evolving workforce.

### ***CSI Initiatives***

CSI is operating in a changed landscape. Given the seismic reductions and ultimate elimination of state funding, CSI must find other sources of sustainable revenue. Additionally, efficiencies of scale and scope must be realized as identified in CSI Priorities and in tandem with the tenants of a lean and efficient CSI.

CSI has a number of forward-focused, ambitious initiatives aimed at positioning the organization to continue providing access to more opportunities for diverse work force and communities. In accordance with CSI Strategic Plan, organizational integrity is integral to the values of CSI and *will strengthen policies and practices to guide the effective use of public resources*; HR has worked, and will continue to work, collectively and responsibly to align its areas of focus, priorities and ultimate mission with that of CSI.

### ***Governing Board Outcomes and Limitations***

Governing Board Outcomes set the focus and priorities of the agency at the highest level with execution through the Office of the Executive Director. They are:

- 1.1 - Resource Transfer Education and General Program Education for the Public
- 1.2 - Workforce and Fund Development agency wide
- 1.3 - Developmental Education for Staff
- 1.4 - Community Development and Civic and Global Engagement

The HR system supports CSI's commitment to create and maintain an environment conducive to a positive employment experience. An environment whereby staff are engaged, valued, treated fairly, oriented toward results, accountable and experience professional growth.

### ***History and Challenges Since 2013***

The CSI Human Resource function evolved organically over several years. Long-term planning (though limited) helped guide core functional services while encountering challenges and new opportunities. Some of the immediate highlights that impacted Human Resources in the 2013 to 2016 period include:

- **Leadership Instability:** There was turnover of key staff. During a 3-year period (2013-2016), there was Executive Director, as well as periodic Directorship changes/vacancies.
- **State and National Economic Issues/Downturn:** Services were realigned. Years of reduced state funding resulted in contract termination and the relinquishing of programs and budget cuts; Human Resources growth was stagnated or completely absent.
- **Governing Board Membership and Role Changes:** There were shifts in priorities and areas of focus.
- **Human Resources Organizational Structure:** Changes were required in order to focus on “serving” as opposed to “process.” CSI Human Resources’ operations and staffing levels were developed individually in silos and without coordination. Clearer community engagement was necessary.
- **Antiquated Compensation and Classification Structure:** Ineffective practices, due to an absence of classification/compensation expertise, to facilitate classification and compensation were used limiting competitive recruitment and retention of talent.
- **Inefficient Technology Capabilities:** System technology deficiencies reduced operational efficiencies. Separate and customized systems lacked interfacing capability, leading to work redundancy, duplication of effort, and heavy reliance on contractual services to maintain systems.
- **Multiple Employee Practices not congruent with Policy Manuals:** Policies and protocols were not pertinent to many employees. Policies were designed for management and were not applicable to individual employee groups. Policies and protocols contain inconsistent language and unclear interpretation. The governance model for policy development was dependent on inept leadership and limited skill-set methodology.
- **Professional Growth Programs:** Programs were not strategically targeted. There was a lack of coordination between employee needs and capabilities, training topics selected for professional growth, and the relevance of training – the ability to improve client outcomes and to meet organizational / operational goals.

#### *Addressing the Challenges in 2017 and Beyond – What We Plan to Look Like in the Future*

Human Resources is transforming from a highly reactive and transactional focus to an expanded consultative role in response to the growing workforce needs of CSI. The Human Resources division reinvented itself to a unique service-driven department with a plan to create the follow areas of focus:

- Office of the Director for Human Resources
- Human Resources Administration
- Human Resources Solutions Center
- Center for Employee and Organizational Development
- Center for Human Resources Innovation, Strategy, and Planning

- Equal Employment Opportunity/Affirmative Action.

CSI management and HR personnel plan to continue to examine its newly created model for appropriateness based on the unique needs of CSI. HR is evolving processes to enhance the employment experience and position CSI to have the best talent now and in the future.

Human Resources is establishing a **customer-focused environment** that serves to become more clearly connected to and supportive of employee engagement and achievement by creating and maintaining a system which encourages safe, productive and positive work practices throughout all aspects of the employment life cycle. Human Resources seek to build upon the current reputation of CSI as a great place to work by transforming the Human Resources system. Collectively, Human Resources have made great strides with notable achievements, including:

- **Establishment of the President's Three Pillars – a “ONE CSI” Employer Brand:** Established ONE HR. CSI HR individually and collectively gained an understanding of how the employer brand relates to human resources in order to support a more collaborative and cohesive agency.
- **Flexible Employer:** CSI HR developed, implemented, and facilitated multiple diverse programs related to, and in support of, employee well-being and work life/balance, such as flexible work schedules, leaves of absence, and sabbaticals.
- **Policy Consolidation:** CSI HR developed a continuous and diligent effort to merge separate Employee Policies into one set of staff policy documents reflective of all classified employees. Progress has been made to efficiently restructure the staff policies documents, which govern all employee groups in order to ensure consistency of policy application and interpretation affecting CSI's workforce. The governance model for policy development is collaborative with board governance and applies an interest-based methodology.
- **Strategically and Collaboratively Responsive:** Human Resources has effectively and successfully responded to often challenging local and federal mandates, e.g., Affordable Care Act (ACA), changes to the American Disability Act (ADA), Family Medical Leave Act (FMLA), and Jobs for Veterans Act (JVA).
- **Socially Responsible:** Social responsibility is an important and valued practice within CSI. HR has fostered, and will continue to foster, this culture through programs and services such as CSI CSBG Program, Transit Program, Meals on Wheels Program, United Way activities, volunteering at colleges during peak times, and volunteering through the other Foundations and Organizations.
- **Collaboration with Community and National Organizations:** By benchmarking, conducting best practice research, partnering with federal/state agencies on knowledge sharing, participating on local boards, and participating in national organizations, CSI HR has built, and will continue to build, on this issue and successfully develop cutting edge initiatives such as health incentives, a smoke free organization, and leadership training.
- **HR Brand:** CSI HR has enhanced its visibility and its brand by executing the Human Resources Role Statement and Guiding Principles which translates “who we are”, “what we do”, and “why it matters”; and has established practices of unity regardless of work site or location.
- **Excellence in Leadership:** CSI plans to launch a leadership development strategy focused on the development of all “Department Leaders” throughout CSI. The focus is to assist leaders in

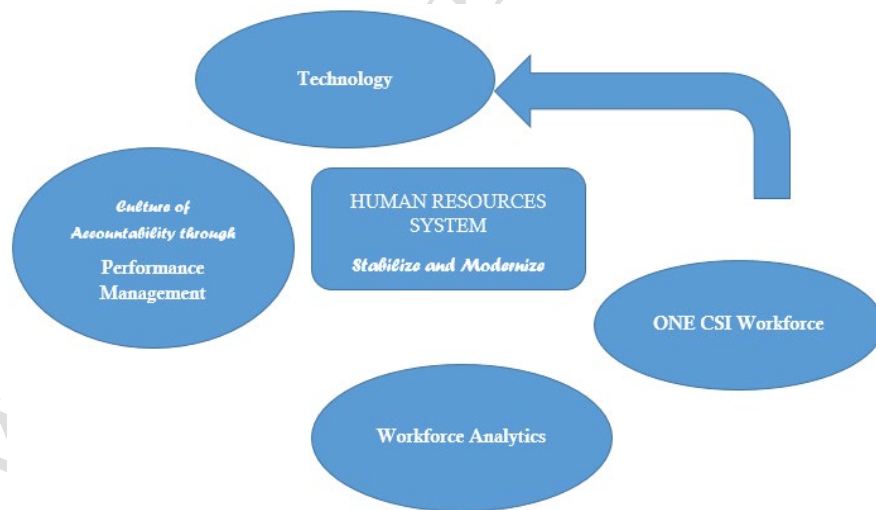
understanding their holistic role and expectations of them. The program develops leadership skills, supervisory skills and diversity and inclusion awareness.

- **Online Training:** Utilizing cooperation, collaboration, and communication, CSI HR has developed and implemented an online training delivery strategy to address administrative regulations mandatory training requirement for full-time employees. The goal is to achieve a 95% completion rate.

### Future Focus: Infrastructure Areas

Five goals and several related strategies have been identified and are contained in this strategic plan. Cascading from CSI Strategic Plan Organizational Integrity: *CSI will strengthen policies and practices to guide the effective use of public resources* each of these goals and strategies is related to a core or infrastructure area of HR critical to the success and sustainability of a robust HR system. These areas include:

- Technology
- Culture of Accountability through Performance Management
- ONE CSI Workforce
- Classification & Compensation
- Consistency in Policies
- Internal Efficiencies
- Metrics and Workforce Measures



*Over the next five years, HR's focus will be on stabilizing and modernizing in these areas using a holistic approach grounded in communication, collaboration and accountability. In an ongoing manner, CSI will continue to review, and manage to, the 2017-2022 HR Strategic Plan.*

# Human Resources Strategic Plan: Goals and Strategies (2017-2022)

**Goal One:** *Stabilize the HR system and create HR infrastructure which advances the capability of the function*

## Strategies

1. Internal efficiencies
  - Establish role clarity for HR Business Partner role (Summer 2018)
  - Revise EEO administrative review process (Summer 2018)
  - Evaluate and plan the establishment of intake or “triage” desk/function (Fall 2018).  
Implement the HR Help Desk function (Spring 2019)
2. Improve and standardize CSI’s personnel policies negotiating changes to personnel policies in 3 identified areas for all staff employees (Summer 2018)
  - Simplify employment terms (i.e., hire, promote, transfer, demote, exempt, non-exempt) (Spring 2018)
  - Revise as needed SOP’s and employee related tools to allow consistent and accurate administration of revised personnel policies (Spring 2016)
3. Administer CSI’s Leaves of Absence and Paid Time Off in compliance with policy, applicable laws and best practices (Spring 2018)
4. Continue working on the Classification/Compensation study
  - Strategically align the classification/compensation system with industry/peer comparators and best practices and merge classification and compensation (Fall 2018)
  - Create clear, transparent processes for interim use during study completion; disseminate to all-staff (Summer, 2018)
5. Realign HR staffing model both internally to provide more effective HR services and to execute on strategic and operational imperatives (Fall 2018 - implement new structure Fall 2019)
6. HR Internet pages – Incorporate process on revamped agency website and provide content and structure of the core HR internet pages (About HR, & Others) (Fall 2019) in order to provide current and accurate information to employees that is organized in a way that is easy to access
7. Create a One-CSI model of accountability for employee well-being by defining the roles and responsibilities for all counties and wellness professionals and Outlining specific role expectations based on CSI needs, industry trends, and best practices (Fall 2019).



**Goal Two:** *Acquire the technology needed to automate core processes*

**Strategies:**

1. Initiate two-year multi-phased HRMS stabilization and modernization project addressing current HRMS stability, security, and functionality (Spring 2019)
2. Work to develop and implement an employee Learning Management System (Fall 2019).

**Goal Three:** *Strengthen CSI's position in the employment marketplace by improving its ability to source, onboard, and retain stellar personnel*

**Strategies:**

1. Review and gather data necessary to enhance the hiring process and provide consistency and structure to part-time hiring and practices
2. Strengthen diversity recruitment by developing a strategy to increase the number of qualified women and minorities in identified vacant or newly created positions (as guided by Affirmative Action plan and board outcome expectations) (Spring 2018)
3. Enhance Legislative monitoring activities at the local, state and national level
4. Develop or coordinate outreach and/or marketing to augment onboarding experiences (Spring 2018)
5. Develop a plan to create a health benefits strategy (aligned with peer best practices) with cost-effective programs that enhance the well-being of employees and families (Spring 2018)

**Goal Four:** *Develop a ONE CSI Workforce strategy in support of ONE CSI*

**Strategies:**

1. Assess employee group model and create plan (Summer 2018)
2. Create Culture of Accountability by implementing an agency-wide performance management system for all staff employees at CSI (Fall 2018)
3. Expand alternative delivery library for professional and personal development (Fall 2019)
4. Improve ADA implementation for CSI employees, facilities and technologies beyond compliance in order to be effective, inclusive and fiscally accountable (Fall 2019)
5. Provide access to information resources used by departments and department leaders (Fall 2019)

**Goal Five:** *Establish workforce measures and metrics to drive enterprise decisions to ensure responsible public stewardship*

**Strategies:**

1. Establish workforce measures and metrics
  - Identify dashboard metrics (Summer 2018)
  - Develop plan to gather and report basic workforce data (Fall 2018)
  - Develop plan to collect and report advanced workforce data (Summer 2018)

## XI. Plan Implementation and Accountability

The Community Services, Inc. Strategic Plan will be implemented by staff teams with input from managers and oversight from CSI's executive director. Teams will align program plans and budgets with the organization-wide strategic plan. Teams will include existing staff that already work together and new teams that will be established expressly to address new priorities, objectives, and strategies. Other teams will include those that call upon different partners.

Senior leadership will devote time each month to review implementation progress and CSI's executive director will report to the Board of Directors on a monthly basis all progress made regarding CSI's Agency-Wide Strategic Plan. This report shall be shared quarterly at board meetings using the newly created CSI progress dashboard.

At the 6-month meeting of the Board, a 6-month progress report will be presented. All existing grants and all future funding proposals, as of that time, will identify which of the strategic objectives are being addressed. After the Board approves the reports, copies will be shared with CSI staff and Advisory Committee. Each of the goals and objectives presented in CSI's Agency-Wide Strategic Plan addresses community change and issues, and as a result the need to communicate with the community and CSI partners is recognized and will continue via Town hall Meetings.

In order to maintain high levels of financial integrity, transparency, efficiency, and accuracy, CSI developed an in-depth Financial Services Plan (see Appendix B). The Financial Services Plan undergirds the service line activities described above, as well as other ROMA/ROMA NG Goal-oriented activities.

The implementation strategies require focus and attention from senior leadership and all employees involved in implementation.

**POLICY:** **Community Services, Inc.** is committed to providing exemplary services in all programs administered by the agency. The Customer Satisfaction Survey System provides feedback on how we are meeting the needs of our customers and helps in identifying areas to be targeted for performance improvement activities.

**PURPOSE:** Through the customer satisfaction survey, data will be gathered to determine how the customer perceives the service provided. From this information, Community Services, Inc. can adjust and/or improve its service or discover other opportunities in which to better serve our customer's needs.

**PROCEDURE:**

1. A customer satisfaction survey will be conducted on a bi-annual basis in all programs, excluding surveys etc. required by other program funding sources. Surveys will be distributed at the point of contact or by mail. Completed surveys may be received at the point of contact or by mail.
2. Blank surveys will be provided to program staff by the Community Services Block Grant (CSBG) Supervisor, the Community Transit Services (CTS) Operations Manager and Meals on Wheels (MAGNET) Coordinator. Program Staff will distribute the surveys to the customers.
3. Surveys will be available in English and Spanish.
4. Surveys may be coded in order to obtain data about specific providers.
5. Completed surveys will be returned to the CSBG Quality Assurance Manager for compliance assurance, tabulation, and preparation of a report of survey findings.
6. The report of the Customer Satisfaction Survey findings will be presented to the Executive Director, the CSBG Supervisor, the CTS Operations Manager and MOW Coordinator for analysis and review. Reports will be used for discussion with all staff and identification of improvement activities.
7. A written report of the Customer Satisfaction Survey findings will be provided to the Board of Directors during the next regularly scheduled meeting following Leadership and Supervisory staff review of the analyzed data.

## Appendices

The appendices include the following materials:

- Appendix A: Acknowledgements – (Partners/ Affiliates)
- Appendix B: Financial Services Plan

- Appendix C: County Maps and Profiles
- Appendix D: Summary of Programs, Priorities, Goals, and Objectives – (Program Specific)
- Appendix E: ROMA Checklist – *Note: CSI considers this Strategic Plan to be a living document and as required by the requirements set forth will manage the NG process to maintain compliance with the cycle/checklist. This document will be populated and tracked post approval from the Department.*
- Appendix F: Organizational Standards Checklist
- Appendix G: Client Satisfaction Survey Tool, Data Tables, and Charts
  - ✓ *Transit Services*
  - ✓ *Community Service Block Grant*
  - ✓ *MAGNET Program / Meals on Wheels – (See survey documents/tools in Appendix K)*
- Appendix H: Attachment L – *Note: CSI has an immediate and continuous focus on the Goals and Objectives proposed in the FY17 CAP and has a Strategic focus of those outlined and proposed in the FY18 CAP. CSI program staff & management will continue to monitor the status of proposed goals/objectives to ensure complete legal compliance with contract requirements and all related organizational standards. CAP goals and objectives undergird CSBG related activities and nurture the strategic framework outline in the agency's Strategic Plan.*
- Appendix I: CNA 2015 Client Surveys & Focus Group Reports
- Appendix J: Collaborative Acknowledgements – (Referral Partners/Affiliates) as captured in the CAP for FY18
- Appendix K: MOW Survey documents/tools – Program Governance Information

## Appendix A: Acknowledgements – (Partner Affiliates – By County)

Completion of the *Community Services, Inc. Strategic Plan* would not have been possible without the input of the Board of Directors, key community stakeholders (i.e., DADS, TDA, TDHCA, & TXDOT), supporters and partners, and others. CSI staff members were involved in plan development, data gathering, and other support that helped develop the plan's objectives and strategies.

We are very grateful for all contributions to the plan and for ongoing stakeholder/affiliate support.

ANDERSON COUNTY				
Organization	Address	Telephone	Contact	Organization Type
Sanctuary House	919 S Magnolia Palestine 75802	903-723-2930	Emma Boykin <a href="http://www.netministries.org">www.netministries.org</a>	Shelter, meals, work program, transportation to work
Meals on Wheels Palestine	200 N Church St. Palestine 75801	903-729-6344	Camille Graham cag518@gmail.com	Nutritious meals
First Resource Center	801 N Sycamore Palestine 75801	903-731-9270		Food bank
WIC-Women Infants and Children (Palestine)	305 E Lacy St #130 Palestine 75801	903-729-2310	<a href="http://www.wicprograms.org/ci/tx-palestine">www.wicprograms.org/ci/tx-palestine</a>	Support services for low income pregnant women and infant care
United Church Charities	101 Parker Elkhart 75839	903-764-0146	Johnnie Keeling	Individualized assistance, medical prescription assistance
Palestine Resource Center	421 Avenue A Palestine 75801	903-729-7505		Information and referral for elderly, disabled clients
American Red Cross	200 N Church St. Palestine 75801	903-723-0610	<a href="http://www.redcross.org">www.redcross.org</a>	Emergency assistance
Crisis Center of Anderson and Cherokee Counties	313 West Debard St. Palestine 75801	903-723-5858	<a href="http://www.mycrisiscenter.com">www.mycrisiscenter.com</a>	Family violence, assault, self- esteem, assistance to relocate battered women
First United Methodist Church (Palestine)	422 S Magnolia St. Palestine 7581	903-729-6205	<a href="mailto:office@fumcpalestine.org">office@fumcpalestine.org</a> <a href="http://www.fumcpalestine.org">www.fumcpalestine.org</a>	Utilities
United Way of East/Central Texas	101 W Oak St. Suite 3	903-727-8798	<a href="mailto:ectxunitedway@yahoo.com">ectxunitedway@yahoo.com</a>	Information and referral

ANDERSON COUNTY				
Organization	Address	Telephone	Contact	Organization Type
	Palestine 75801		<a href="http://www.unitedwayofeastcentraltexas.org">www.unitedwayofeastcentraltexas.org</a>	
Lone Star Legal Aid	414 Pillar St. Nacogdoches 75961	936-560-1455	<a href="http://www.lonestarlegal.org">www.lonestarlegal.org</a>	Legal services, information and referral
Palestine Community Food Pantry	1434 Court Drive Palestine 75803	903-723-5406		Food, household needs
Family Protective Services	330 E Spring St. #B Palestine 75801	903-729-0174	<a href="http://www.dfps.state.tx.us">www.dfps.state.tx.us</a>	Investigates allegations of child and elderly abuse
Texas Workforce Commission	2000 S Loop 256 Ste. 18 Palestine 75801	903-212-9982 Ext. 5509	<a href="mailto:john.valent@twc.state.tx.us">john.valent@twc.state.tx.us</a> <a href="http://www.easttexasworkforce.org">www.easttexasworkforce.org</a>	Job resources, youth services, veteran services, child care services, business resources
Angelia Snow (Area Manager)		903-677-3521		

COLLIN COUNTY				
Organization	Address	Telephone	Contact	Organization Type
Community Lifeline Center	1601 N. Waddill St. #102 McKinney 75069	972-542-0020	Laura Pearson <a href="http://www.communitylifeline.org">www.communitylifeline.org</a>	Medical, Dental, Food, Housing, Household Items, Education classes
Texas Dept. of Health and Human Services – McKinney (Medicare/Food Stamps)	901 McDonald St. Suite 800 McKinney 75069	972-562-5832	<a href="http://www.foodstampsoffices.com/mckinney-tx">www.foodstampsoffices.com/mckinney-tx</a>	TANF, SNAP, support services for low income individuals
Allen Community Outreach	801 E. Main Street Allen 75002	972-727-9131	Janet Smith <a href="http://www.acocares.org">www.acocares.org</a>	Housing, utilities, food, health services, education, and employment services
Legal Aid Northwest Texas	901 N. McDonald St. #702 McKinney 75069	800-906-3045	James Esh <a href="http://www.lanwt.org">www.lanwt.org</a>	Legal assistance and advice
Texas Workforce Commission	1701 W. Eldorado Pkwy #250 McKinney 75069 1101 Resource Drive #100 Plano 75074	972-542-3381  469-229-0099	Andrea Brown <a href="mailto:abrown@dfwjobs.com">abrown@dfwjobs.com</a>  James Cigan <a href="mailto:jcigan@dfwjobs.com">jcigan@dfwjobs.com</a>	Job resources, youth services, veteran services, child care services, business resources
Office of Child Support	2020 Avenue G Suite 1004 Plano 75074	469-241-6500	<a href="http://www.texasattorneygeneral.gov">www.texasattorneygeneral.gov</a>	Child support services



<b>DENTON COUNTY</b>				
<b>Organization</b>	<b>Address</b>	<b>Telephone</b>	<b>Contact</b>	<b>Organization Type</b>
Texas Workforce Commission	1300 Teasley Lane Denton 76209	940-382-6712	Perry Singer – Center Manager <a href="http://www.dfwjobs.com">www.dfwjobs.com</a>	Job resources, youth services, veteran services, child care services, business resources
Ann Windle School for Young Children	901 Audra Lane Denton 76209	940-369-3900	Kelly Sutton <a href="http://www.dentonisd.org">www.dentonisd.org</a>	Early childhood programs, deaf education, special education
Hope Inc.	117 W. Sycamore Denton 76201	940-382-0069	Customer Service <a href="http://www.hopeincdenton.com">www.hopeincdenton.com</a>	Rental assistance, utility assistance, case management
Interfaith Ministries of Denton	1109 N. Elm Street Denton 76201	940-565-5479	Melody Trevino <a href="http://www.ifmdenton.org">www.ifmdenton.org</a>	Utility assistance, rent/shelter assistance (Denton residents only), personal care assistance, transportation assistance
Christian Community Action	200 S. Mill Street Lewisville 75057	972-221-1224	Customer Service <a href="http://www.ccahelps.org">www.ccahelps.org</a>	Shelter, food, medication, vocational classes, utilities, job prep.
Denton Police Department	601 E. Hickory St. #E Denton 76205	940-349-7909	Richard Godoy – Family Svcs. Coordinator <a href="http://www.cityofdenton.com">www.cityofdenton.com</a>	Community services, information and referral
United Way of Denton County	1314 Teasley Lane Denton 76205	940-566-5851	Customer services <a href="http://www.unitedwaydenton.org">www.unitedwaydenton.org</a>	Information and referral

ELLIS COUNTY				
Organization	Address	Telephone	Contact	Organization Type
North Ellis County Outreach/ Pennies From Heaven	404 S. Highway 342 Red Oak 75154	972-617-7261	<a href="mailto:executivedirector@necoutreach.org">executivedirector@necoutreach.org</a> <a href="http://www.necoutreach.org">www.necoutreach.org</a>	Food, clothing, rent, utilities, prescription & non-prescription medications
Manna House of Midlothian	214 W. Avenue F Midlothian 76065	972-775-1800	<a href="mailto:sissy@mannahousemidlothian.org">sissy@mannahousemidlothian.org</a> <a href="http://www.mannahousemidlothian.org">www.mannahousemidlothian.org</a>	Food pantry, clothing, shelter, counseling
Helping Hands of Ennis	604 NE Main St. Ennis 75119	972-875-0218	Rose Cervantes <a href="http://www.helpinghandsofennis.org">www.helpinghandsofennis.org</a>	Food pantry, utilities, mortgage, rent
Salvation Army Waxahachie	620 Farley St. Waxahachie 75165	972-937-7727	<a href="mailto:frankiezuniga@uss.salvationarmy.org">frankiezuniga@uss.salvationarmy.org</a> <a href="http://www.salvationarmyusa.org">www.salvationarmyusa.org</a>	Emergency services, shelter
Waxahachie Care	1208 Ferris Ave. Waxahachie 75165	972-923-2273	<a href="mailto:waxahachiecare@sbcglobal.net">waxahachiecare@sbcglobal.net</a> <a href="http://www.waxahachiecare.org">www.waxahachiecare.org</a>	Food pantry, utilities

HENDERSON COUNTY				
Organization	Address	Telephone	Contact	Organization Type
Casa of Trinity Valley (Anderson & Henderson)	1104 E Tyler St Athens 75751	903-675-7070	<a href="mailto:casaemily@embarqmail.com">casaemily@embarqmail.com</a> <a href="http://www.casaoftv.org">www.casaoftv.org</a>	Child advocacy
Henderson County Help Center	309 Royal Street Athens 75751	903-675-4357	Rosa Frater <a href="http://www.thehelpcenter.org">www.thehelpcenter.org</a>	Emergency assistance
Henderson County Food Pantry	715 E Corsicana Athens 75751	903-677-1600	Karen Whitten	Emergency food assistance
Henderson County Community Services	115 S Murchison St. Athens 75751	903-677-5022		Utilities, propane, home weatherizing
Family Resource Center	412 S Terry St. Malakoff 75148	903-489-0085		Food, medications, utilities, clothing for burn victims
Faith in Action and Salvation Army	103 S Terry St. Malakoff 75148	903-489-7500	<a href="mailto:info@fiaoutreach.org">info@fiaoutreach.org</a> <a href="http://www.fiaoutreach.org">www.fiaoutreach.org</a>	Emergency services, rent, food pantry, medications, counseling
Seven Points Family Resource Center	205 W Cedar Creek Pkwy Seven Points 75143	903-432-4427	Richard Bruner	Food, medications, utilities, emergency clothing for fire victims
Texas Dept. of Health & Human Services - Athens (Medicare/Food Stamps)	101 Baker St. Athens 75751	903-675-9141	<a href="https://medicaidoffice.us/texas-medicaid-offices/athens-tx-medicaid-medicare-food-stamp-office/">https://medicaidoffice.us/texas-medicaid-offices/athens-tx-medicaid-medicare-food-stamp-office/</a>	TANF, SNAP, support services for low income individuals
Texas Workforce Commission  Angelia Snow (Area Manager)	205 N Murchison St. Athens 75751	903-677-3521  903-677-3521	<a href="mailto:debra.holcomb@twc.state.tx.us">debra.holcomb@twc.state.tx.us</a> <a href="http://www.easttexasworkforce.org">www.easttexasworkforce.org</a>	Job resources, youth services, veteran services, child care services, business resources

HUNT COUNTY				
Organization	Address	Telephone	Contact	Organization Type
Hunt County Shared Ministries	2805 King St. Greenville 75401	903-455-0545	<a href="mailto:info@hcsmfish.org">info@hcsmfish.org</a> <a href="http://www.hcsmfish.org">www.hcsmfish.org</a>	Food, utilities, holiday baskets
Hunt County Kids	8493 Highway 34 South Quinlan 75474	214-762-7550	<a href="http://www.huntcountykids.org">www.huntcountykids.org</a>	Basic medical, eye glasses, school supplies, clothing and housing assistance
Greenville Texas habitat for Humanity	2311 Ridgecrest Rd. Greenville 75402	903-454-7470	<a href="mailto:office@greenvilletxhabitat.org">office@greenvilletxhabitat.org</a> <a href="http://www.greenvilletxhabitat.org">www.greenvilletxhabitat.org</a>	Home owner assistance
Office of Child Support	2507 Lee Street Greenville 75401	903-408-4100	<a href="http://www.texasattorneygeneral.gov">www.texasattorneygeneral.gov</a>	Child support services
Texas Workforce Commission	2500 Stonewall St. #201 Greenville 75401	903-454-9350	Molly Thompson <a href="mailto:mthompson@dfwjobs.com">mthompson@dfwjobs.com</a>	Job resources, youth services, veteran services, child care services, business resources
Greenville Housing Authority	4417 O'Neal St. Greenville 75401	903-455-1771	<a href="http://www.greenvillehatx.org">www.greenvillehatx.org</a>	Housing for elderly, disabled and low income families
Community Health Service Agency	4500 Wesley St. Greenville 75401	903-455-5986	<a href="http://www.completemedicalhome.org">www.completemedicalhome.org</a>	Basic medical assistance
Community Seed Agency	602 College St. Lone Oak 75453	903-654-5673	<a href="mailto:info@cseeds.org">info@cseeds.org</a> <a href="http://www.cseeds.org">www.cseeds.org</a>	Food pantry, GED, nutrition, and ESL classes, clothes for employment
Drug Free Greenville Interagency Network	4207 Wesley Street Greenville 75401	903-454-4321	Bonita Malone <a href="http://www.drugfreegreenville.org">www.drugfreegreenville.org</a>	Substance abuse

KAUFMAN COUNTY				
Organization	Address	Telephone	Contact	Organization Type
Kaufman County Senior Citizen Center	1125 Jackson St. Kaufman 75142	972-932-7002	<a href="http://www.nohungrysenior.org/kaufmancenter">www.nohungrysenior.org/kaufmancenter</a>	Hot lunches, food pantry
Salvation Army Kaufman County	5 Oak Creek Dr. Kaufman 75142	972-962-1345	<a href="http://www.salvationarmyusa.org">www.salvationarmyusa.org</a>	Emergency services, shelter
Kaufman Christian Help Center	400 S Terrell Highway Kaufman 75142	972-932-8866	<a href="http://www.kaufmanhelp.org">www.kaufmanhelp.org</a>	Food pantry
WIC-Women Infants and Children (Kaufman)	Kaufman Field Office 100 Old Railroad Ste. E & F Kaufman 75142	972-932-1961	<a href="http://www.wicprograms.org/ci/tx-kaufman">www.wicprograms.org/ci/tx-kaufman</a>	Support services for low income pregnant women and infant care
Child Support & Social Services	5201 East R. L. Thornton Frwy Dallas 75223	214-887-3100	<a href="http://www.texasattorneygeneral.org">www.texasattorneygeneral.org</a>	Child support services
Texas Workforce Commission	109 Tejas Dr. Suite 300 Terrell 75160	972-563-7271	Katherine Ware <a href="mailto:kware@dfwjobs.com">kware@dfwjobs.com</a>	Job resources, youth and veteran services, child care services, business resources

NAVARRO COUNTY				
Organization	Address	Telephone	Contact	Organization Type
American Red Cross Corsicana	301 Hospital Dr. Ste. G102 Corsicana 75110	903-874-4551	<a href="http://www.redcross.org">www.redcross.org</a>	Emergency services
Salvation Army Corsicana	212 E 1 <sup>st</sup> Avenue Corsicana 75110	903-874-7131	<a href="http://www.salvationarmyusa.org">www.salvationarmyusa.org</a>	Emergency services, shelter
Social Security Administration	221 S. 45 <sup>th</sup> St. Corsicana 75110	903-872-2099	<a href="http://www.ssa.gov">www.ssa.gov</a>	Support and shelter for children and adults
Texas Dept. Health & Human Services-Corsicana (Medicaid/Food Stamps)	800 N Main St. Ste. J Corsicana 75110	903-872-4621	<a href="http://www.foodstampsoffices.com/office/2765/corsicana-health-and-human-services-office">www.foodstampsoffices.com/office/2765/corsicana-health-and-human-services-office</a>	TANF, SNAP, support services for low income individuals
WIC-Women Infants and Children (Corsicana)	618 N Main St. Corsicana 75110	903-872-674.	<a href="http://www.wicprograms.org/ci/tx-corsicana">www.wicprograms.org/ci/tx-corsicana</a>	Support services for low income pregnant women and infant care
Navarro County Child Advocates (CASA)	120 E 2 <sup>nd</sup> Avenue Corsicana 75110	903-872-3772	<a href="mailto:admin@kidadvocates.org">admin@kidadvocates.org</a> <a href="http://www.kidadvocates.org">www.kidadvocates.org</a>	Child advocacy, survivor project
Food Pantry of Navarro County	122 W 1 <sup>st</sup> Avenue Corsicana 75110	903-872-9055		Food pantry
Lakes Regional Community Center	800 N Main St. Corsicana 75110	903-872-2491	<a href="mailto:johnd@lrhmrc.org">johnd@lrhmrc.org</a> <a href="mailto:krisb@lrhmrc.org">krisb@lrhmrc.org</a> <a href="http://www.lakesregional.org">www.lakesregional.org</a>	Early childhood intervention, Mental health, substance abuse, intellectual developmental disability

ROCKWALL COUNTY				
Organization	Address	Telephone	Contact	Organization Type
Office of Child Support	111 E. Yellow Jacket Ln. Rockwall 75087	972-882-2873	<a href="http://www.texasattorneygeneral.org">www.texasattorneygeneral.org</a>	Child support services
Outreach Health Services	106 Kenway St. Rockwall 75087	972-771-9541	<a href="http://www.outreachhealth.com">www.outreachhealth.com</a>	Home care services, WIC services, pediatric home health
Rockwall Helping Hands	401 W. Rusk Street Suite 100-200 Rockwall 75087	972-772-8194 972-771-4357	<a href="http://www.rockwallhelpinghands.com">www.rockwallhelpinghands.com</a>	Assistance & referral, health center, thrift store and boutique
This is Your Season Ministries	5326 Rochelle Rd. Rockwall 75032	972-772-4411	<a href="http://www.thisisyourseason.org">www.thisisyourseason.org</a>	Food pantry
Royce City Housing Authority	305 N. Houston St. Royse City 75189	972-635-2933	<a href="https://affordablehousingonline.com/housing-search/Texas/Royse-City">https://affordablehousingonline.com/housing-search/Texas/Royse-City</a>	Low income housing assistance



VAN ZANDT COUNTY				
Organization	Address	Telephone	Contact	Organization Type
Red Cross Van Zandt County	320 E Rieck Rd. Tyler 75703	903-581-7981	Cheryl Thomas – 972-922-6243 <a href="http://www.redcross.org">www.redcross.org</a>	Emergency assistance
Texas Dept. Health & Human Services – Canton (Medicaid / Food Stamps)	555 TX-243 Canton 75103	903-567-4147	<a href="http://www.foodstampsoffices.com/office/2820/canton-health-and-human-services-office/">www.foodstampsoffices.com/office/2820/canton-health-and-human-services-office/</a>	TANF, SNAP, support services for low income individuals
PATH (People Attempting to Help)	402 W Front St. Tyler 75702	903-597-7284	<a href="mailto:info@pathhelps.org">info@pathhelps.org</a> <a href="http://www.pathhelps.org">www.pathhelps.org</a>	Transitional housing, food bank, youth mentoring, basic medical, family case management
Texas Workforce Commission  Angelia Snow (Area Manager)	1760 N Trades Day Blvd Canton 75103	903-567-4706  903-677-3521	<a href="mailto:pamela.kittles@easttexasworkforce.org">pamela.kittles@easttexasworkforce.org</a> <a href="http://www.easttexasworkforce.org">www.easttexasworkforce.org</a>	Job resources, youth and veteran services, child care services, business resources

## Appendix B: Financial Services Plan

*Note: Support Holistic Approach of Agency-Wide Strategic Planning Process.*

Finance Division  
Community Services, Inc.

Strategic Plan 2017-2022

# Introduction

## **FINANCE DIVISION**

**T**he Finance Division of CSI provides financial management, enterprise planning and stewardship in support of strategic goals of the Chief Financial Officer and division leadership team oversee Budget and Financial Planning, Controller's Office, Business Systems and Services, and Audit Services. Within those units lie critical business functions including, but not limited to payroll, financial reporting, accounts receivable and payable, procurement, the agency purchasing and expense reporting, and financial systems.

### **PURPOSE**

The purpose of the strategic plan is threefold: (1) to set and align organizational goals and priorities with those of the agency; (2) to maintain the highest standards of service; and (3) to ensure the achievement of our goals through measurable standards. Because of limited resources, CSI must be strategic in allocating its resources to provide the greatest return to clients, stakeholders and the communities being served. By providing data, insight, and analysis, we assist leadership and the board of directors in the financial decisions that can fulfill its highest goals and priorities while maintaining a position of financial strength.

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## MISSION & VALUES

Our mission is to provide Agency partners and stakeholders with the tools and resources needed to be well informed leaders and effective decision makers. We provide data, information, analysis, knowledge and methods for our leaders to anticipate and respond effectively to the challenges facing the agency.

*“Outstanding people have one thing in common: an absolute sense of mission.”*

— **Zig Ziglar**

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- **Act as Stewards** of the financial resources entrusted to the agency in support of its mission.
- **Serve and Support** clients, staff, and others who have a vested interest in the financial activity and health of the agency; to accomplish this, we share our knowledge and experience to advise on strategic financial planning and decision making, provide access to financial data, and ensure compliance with applicable laws and regulations.
- **Adhere to our Core Values** including:
  - Dedication to excellence, high ethical standards, and fiscal integrity in everything we do.
  - Recognition of the talents, strengths, and contributions of our division’s people as well as our partners.
  - Collaboration and communication in order to build strong bonds both internally and externally.
  - Innovation in the products and services we provide while staying abreast of market trends and products that may present opportunities for the agency.
  - Efficiency in business practices; demonstrating agility and adapting quickly to changing needs while providing direction and value in all applicable areas.
  - Excellence in customer service.



## **VISION**

The Finance Division is committed to being an exemplary organization that enables CSI to excel in the Community Action Network, community, social/policy change. The division will strive to be a business model, recognized among the funding sources in Community Action delivering expertise in finance. The Finance Division will be an industry leader in innovation, productivity and sustainability.

This plan was created collaboratively with input from division leadership and staff, agency leadership, and our stakeholders in the social service community. We are grateful to everyone who provided their time, feedback, and vision in support of this strategic planning project.

To reach our vision, we are dedicated to the following goals:

- Commit to Excellence
- Engage, Partner, and Collaborate
- Empower Decision Making with Data
- Cultivate, Recognize, and Reward our People
- Shape a Culture of Innovation

## **GOAL: COMMIT TO EXCELLENCE**

**Commit to excellence within the Finance Division by ensuring all processes and operations are necessary, clearly defined, and efficiently designed to align people, systems, and policies and to maximize productivity, improve efficiency and achieve higher quality and value.**

In order to be a valuable resource to the agency, the Finance Division must commit itself to excellence. We must be a cohesive organization working together across departments, divisions and funders to enhance quality and excellence for the entire agency. We will demonstrate excellence through participating in decision-making, implementing process improvements, adhering to the highest work and support standards, and striving to be the best in our industry.

As business, financial, technology, and procurement specialist, we have a responsibility to steward the finances and capital planning of the agency. By identifying and recommending cost-saving mechanisms and revenue-generating ideas, the division will strengthen the financial position of the Agency and allow for continued excellence in social services and CAA network, locally, at the State level, and nationally.

**The following strategies will be considered in the division's strategic plan:**

- Establish a Finance and Business Center of Excellence to solicit, identify, evaluate, design, test, operationalize, and implement innovation; a center that will identify innovative ideas and processes; assess the impact on people; establish and utilize new technology; plan and execute innovation and measure its impact on cost-reduction, revenue-generation, organizational productivity, and staff morale.
- Evaluate current systems, policies and processes to identify opportunities to best optimize Agency resources by eliminating redundancies and by increasing automation and system functionality.
- Streamline and improve the procurement process to maximize its value to the vendor community and realize cost saving opportunities at both the unit and Agency level.
- Fulfill the space demands of the Agency by planning, designing and potentially constructing world-class service facilities and administrative spaces.
- Review and analyze all Agency property and space to help us understand current usage, ongoing maintenance costs, and opportunities for consolidation and/or relocation.
- Continue to identify opportunities for shared services internally between units and externally with community partners.
- Define and implement project management processes and tool(s) that meet the needs of the division as well as the institution for portfolio and project management.

## **GOAL: ENGAGE, PARTNER, AND COLLABORATE**

**Engage, partner, and collaborate within the division and across the Agency by building frequent, targeted, and transparent communication for seamless services and improved customer/funder satisfaction.**

The CSI community, which consists of several Engagements, partnerships, and collaboration, unify communities, schools and colleges, administrative units, and a staff, requires unification across, between, and within each of these audiences. As the division accountable for Agency technology, finance business and space, it is the job of the Finance Division to share, educate, and connect our financial knowledge with the appropriate audiences. Combined with engagement, providing excellent response time with regards to services and resources to all stakeholders will secure our reputation as a valuable partner and advocate of Agency initiatives.

Across the Agency, the people of the division are recognized as season professionals in our field. We must ensure that stakeholders receive the information and support needed through efficient channels. In order to provide excellent service, the ways in which we interact with our funders/stakeholders must be evaluated and redefined for improvement.

It is imperative that we define our audiences and their needs. By taking a proactive approach to sharing the right information with the right people, we position ourselves as a valuable asset in the decision-making process at CSI. Crafting, sharing, and presenting unified messaging will solidify our reputation as a cohesive, responsive, and respected unit.

**The following strategies will be considered in the division's strategic plan:**

- Review current support of and collaboration with other units, research best practices on service models within higher the non-profit space, and develop and implement a support model for the division in collaboration with other units/programs.
- Consult with our stakeholders to obtain feedback, measure progress, and determine areas for improved partnership, collaboration, and engagement.
- Collaborate within the division and with programmatic and administrative units to implement enterprise wide initiatives in order to support the agency community.
- Initiate and maintain ongoing partnerships with internal and external stakeholders to share technical expertise, data, and other resources for problem-solving and strategic planning.
- Communicate with the agency community by utilizing agency groups, implementing information-sharing forums, developing focused training sessions, and presenting to the board of directors on finance and business topics.



## **GOAL: EMPOWER DECISION MAKING WITH DATA**

**Integrate advances in information and systems technology to enhance the collection, structuring, and analysis of data for decision-making and change management.**

The decision-making environment in CAA Network can be very complex. There are generally multiple stakeholders from various areas of the agency that need reliable access and require dynamic views and customized analysis of information in order to make sound funding decisions. Requests for more timely and relevant data will steadily increase as constituents strive to make informed strategic and operational decisions.

***“Data are widely available; what is scarce is the ability to extract wisdom from them.”***

**– Hal Varian (UC Berkeley and Chief Economist, Google)**

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Improving the agency’s decision-making capabilities means assessing and overcoming challenges. There needs to be a common understanding of where data reside, how to retrieve data in a manner that will provide the desired results and what data mean. Currently, Agency data are housed across several separate administrative systems. Often, programs also have systems of their own to capture unit-specific data requirements. We need to break down barriers to the information that is housed across the various systems. Data need to be unified and provided in a meaningful way so that it is easily accessible, practicable and independent of the tools used to retrieve it. We must serve as a champion for data driven decision-making and provide the entire agency with the support and resources to act in the same manner.

In order to provide decision makers with a consistent data set that will empower responsible decision making, we must understand the questions, issues, and problems that the data should answer and address.

**The following strategies will be considered in the division’s strategic plan:**

- Assess organizational budgeting and planning approach in order to define strategies and solutions that will advance Agency strategic initiatives and strengthen financial sustainability.
- Evaluate data available in financial systems as well as other administrative systems to identify and address gaps between the data available and the data desired.
- Develop operational and analytical query tools for data analysis and reporting to strengthen operations and guide decision-making. Assess usage and effectiveness of reports and dashboards and evaluate opportunities to improve.
- Create a community of business intelligence experts within the Finance Division and across the Agency who will share their expertise and best practices for developing tools and reports to increase analytical data-driven decision making.
- Build executive dashboards and self-service mechanisms in conjunction with Agency leadership in order to utilize accurate and timely data in both operational and strategic decision making.
- Conduct an Agency wide space audit.
- Implement space and construction management software to support data-driven decision making in space planning and capital project management.

## **GOAL: CULTIVATE, RECOGNIZE, AND REWARD OUR PEOPLE**

**Provide an infrastructure within the Finance Division that supports and cultivates our people through professional and personal development, recognizes and rewards the contributions made towards achieving the mission of the division and the Agency at large, and offers opportunities that position our people, as well as the division, for success.**

Our people are our single greatest asset and are recognized as leaders in their respective fields. Our people are depended upon to provide reliable and accurate information, to uphold policies, to maintain systems, and to manage relationships with vendors, sponsors, and governing agencies. Our people also provide expertise to maximize utilization of space and technology.

To retain our assets, we need to determine what motivates our people and respond accordingly. Supporting our people and attracting the best of the best requires the ability to demonstrate that we support the growth of our people.

We need to provide a roadmap for career development within the division which includes expected competencies, professional development plans, and an overall architecture which will assist our people in achieving their career goals. We need to allow for personnel assessment in an atmosphere of trust and respect in order to identify what type of professional and/or personal development may be needed. We need to continuously plan for short term and long term initiatives and determine what will be necessary to ensure that our people can and will be active participants in strategic projects and decision-making. At the same time, these opportunities for individual growth and career development need to be balanced against the essential areas that the division must continue to support in order to ensure the success of the Agency.

**The following strategies will be considered in the division's strategic plan:**

- Cultivate a positive and supportive environment in which people feel comfortable sharing their ideas and expressing their views.
- Standardize a performance management program, incorporating a focus on innovation and process improvements; such a program will set and coordinate expectations with staff and include a training regimen to ensure consistency across the division.
- Utilize the division's knowledge and experience in program designed to encourage collaboration and resources and people to develop a mentoring focus on personal, professional, and leadership development.
- Incentivize, support, and recognize our people in their pursuit of certifications and continuous learning through an ongoing professional development program.
- Celebrate divisional and employee achievements and innovation through an employee recognition and rewards program that showcase the division's people, products, services, and best practices.

*"The delicate balance of mentoring someone is not creating them in your own image, but giving them the opportunity to create themselves."*

**– Steven Spielberg**

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## **GOAL: SHAPE A CULTURE OF INNOVATION**

**Shape a culture of innovation within and beyond the Finance Division in which people collaborating come up with new ideas, methods, and processes to increase productivity, improve efficiency, reduce costs, and manage the assets of the Agency toward a sustainable and viable future.**

Innovation is the process of conceiving new ideas and taking them from concept to reality. It embodies a set of strategies that when enacted over time becomes institutionalized. This provides a foundation for sustainable development which will result in massive and successful advances at CSI.

Innovation is successful when leaders, employees and partners engage in collaboration to share their ideas and work together as a team to implement those ideas. This kind of interaction requires an open and supportive environment in which people feel free to express their ideas, learn from each other, and works as a team to implement new ideas. A culture of innovation will enable the division to improve organizational productivity, increase efficiency of operations, reduce costs, generate new processes, services, and revenues, and enhance the sustainability of the Agency's mission of service to the communities served.

**The following strategies will be considered in the division's strategic plan:**

- Conduct an Agency-wide survey on innovation.
- Develop a website through which employees may suggest new ideas for reducing costs, improving efficiency and generating new revenue; engage interested consultants to assist with organizational problem-solving.
- Construct a program evaluation in conjunction with programmatic and administrative units to maximize performance, prioritize efforts and focus, and better align with organizational strategies.
- Design and implement a leadership development program for collaborative innovation.
- Develop a system to assess alternate project delivery methods for high quality and efficient capital project management.

## **CONCLUSION:**

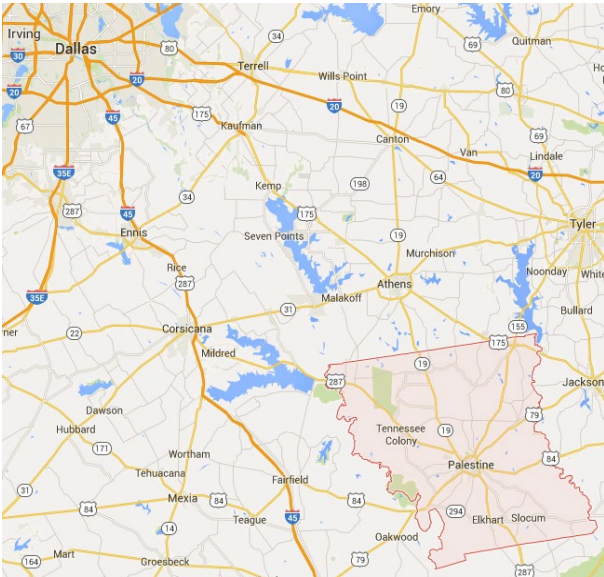
The Finance Division is committed to aligning our mission to support the organization. We will identify priorities, create a portfolio of projects, and market and communicate the strategic plan. This plan will serve as a roadmap for the division for the next five years as we "aim for the highest" in support of the Agency's strategic vision. While it will not exclusively dictate our business operations and strategies, it will guide our future. The Finance Division actively seeks opportunities to expand the organization's financial means and recognizes the current and future challenges faced not only by CSI, but by all CAAs and social service organizations. Through this plan, we will develop a course of action to support CSI in meeting challenges; we will create new strategies and opportunities for organizational growth and optimization while maintaining our unique culture and agency.

- Progress and achievement of the goals and priorities of this plan will be measured, monitored, and reported on annually via the agency's website at [www.csicorsicana.org](http://www.csicorsicana.org).
- Please direct questions regarding the strategic plan of the Finance Division to [hickey@csicorsicana.org](mailto:hickey@csicorsicana.org).

## Appendix C: \*County Maps and Profiles

*Note: CSI will remain loyal to the data captured as result of its' CNA since that document undergirds the entire Strategic Planning process and support all related ROMA/ROMA NG activities moving forward to ensure evidence based practices in the continuum of care & service delivery offering for our clients.*

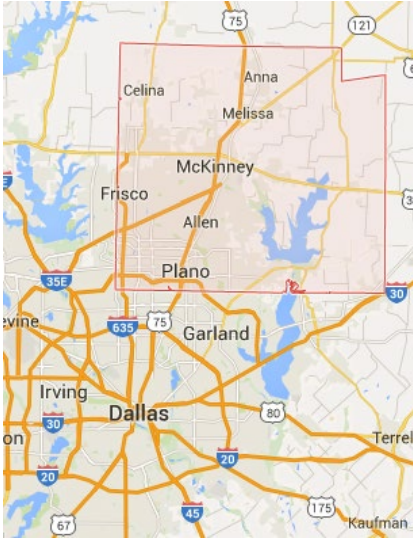
### Anderson County

	<p>Key facts</p> <p>Population: 57,930</p> <p>Median Age: 39.5</p> <p>Median Household Income: \$41,279</p> <p>Percent Living in Poverty**: 20.3%</p> <p>Ethnicity</p> <ul style="list-style-type: none"><li>% White: 60.2%</li><li>% African American: 20.7%</li><li>% Hispanic: 16.9%</li></ul> <p>Diversity Index: 67.4</p> <p>Percent with Bachelor's Degree or higher: 11.7%</p> <p>Percent 16+ unemployed: 4.7%</p>
<p>Primary services offered by Community Services, Inc.</p> <ol style="list-style-type: none"><li>1. CSBG services</li><li>2. Utility assistance</li><li>3. Home weatherization</li></ol>	<p>Top five needs</p> <ol style="list-style-type: none"><li>1. Self-sufficiency skills training</li><li>2. Transportation</li><li>3. Computer skills training</li><li>4. Childcare</li><li>5. Programs and activities for seniors</li></ol>

\*\* (i.e., Percent with income 100% of the Federal Poverty Level or less)

\*Source: CSI's CNA

## Collin County


	<p>Key facts</p> <p>Population: 854,778</p> <p>Median Age: 35.8</p> <p>Median Household Income: \$81,315</p> <p>Percent Living in Poverty**: 7.8%</p> <p>Ethnicity</p> <ul style="list-style-type: none"><li>% White: 61.2%</li><li>% African American: 9.0%</li><li>% Hispanic: 15.0%</li></ul> <p>Diversity Index: 63.4</p> <p>Percent with Bachelor's Degree or higher: 51.0%</p> <p>Percent 16+ unemployed: 3.2%</p>
<p>Primary services offered</p> <ol style="list-style-type: none"><li>1. CSBG services</li><li>2. Utility assistance</li><li>3. Home weatherization</li></ol>	<p>Top five needs</p> <ol style="list-style-type: none"><li>1. Help to make my home more energy efficient (weatherization)</li><li>2. Help with job skills, training &amp; job search</li><li>3. Training and education classes - computer repair, software use, systems management.</li><li>4. Senior outreach and social engagement</li><li>5. Lifestyle - Social opportunities</li></ol>

\*\* (i.e., Percent with income 100% of the Federal Poverty Level or less)

\*Source: CSI's CNA



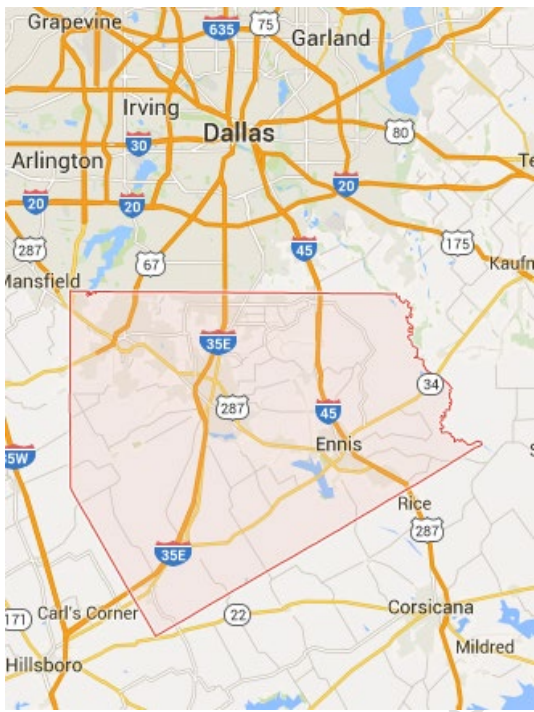
## Denton County

	<p><b>Key facts</b></p> <p>Population: 728,799</p> <p>Median Age: 33.8</p> <p>Median Household Income: \$75,099</p> <p>Percent Living in Poverty**: 8.8%</p> <p><b>Ethnicity</b></p> <ul style="list-style-type: none"><li>% White: 62.5%</li><li>% African American: 8.9%</li><li>% Hispanic: 18.9%</li></ul> <p>Diversity Index: 63.3</p> <p>Percent with Bachelor's Degree or higher: 42.1%</p> <p>Percent 16+ unemployed: 4.3%</p>
<p><b>Primary services offered</b></p> <ol style="list-style-type: none"><li>1. CSBG Services</li><li>2. Utility assistance</li><li>3. Home weatherization</li></ol>	<p><b>Top five needs</b></p> <ol style="list-style-type: none"><li>1. Job skills training</li><li>2. Bilingual education and services</li><li>3. Help to make my home more energy efficient (weatherization)</li><li>4. Energy efficiency training or other information including weatherization</li><li>5. Scholarships and education funds for college</li></ol>

\*\* (i.e., Percent with income 100% of the Federal Poverty Level or less)

\*Source: CSI's CNA

## Ellis County


	<p>Key facts</p> <p>Population: 155,976</p> <p>Median Age: 35.7</p> <p>Median Household Income: \$59,257</p> <p>Percent Living in Poverty**: 11.9%</p> <p>Ethnicity</p> <ul style="list-style-type: none"><li>% White: 64.2%</li><li>% African American: 8.9%</li><li>% Hispanic: 24.6%</li></ul> <p>Diversity Index: 62.6</p> <p>Percent with Bachelor's Degree or higher: 21.9%</p> <p>Percent 16+ unemployed: 3.4%</p>
<p>Primary services offered</p> <ol style="list-style-type: none"><li>1. CSBG Services</li><li>2. Utility assistance</li><li>3. Home weatherization</li><li>4. Transportation</li></ol>	<p>Top five needs</p> <ol style="list-style-type: none"><li>1. Help finding resources in the community</li><li>2. Help finding sources of affordable food</li><li>3. Help to make my home more energy efficient (weatherization)</li><li>4. Programs and activities for seniors</li><li>5. Employment opportunities</li></ol>

\*\* (i.e., Percent with income 100% of the Federal Poverty Level or less)

\*Source: CSI's CNA




## Henderson County

	<p><b>Key facts</b></p> <p>Population: 78,675</p> <p>Median Age: 43.9</p> <p>Median Household Income: \$39,069</p> <p>Percent Living in Poverty**: 18.9%</p> <p><b>Ethnicity</b></p> <ul style="list-style-type: none"><li>% White: 79.4%</li><li>% African American: 6.4%</li><li>% Hispanic: 11.8%</li></ul> <p>Diversity Index: 44.8</p> <p>Percent with Bachelor's Degree or higher: 15.4%</p> <p>Percent 16+ unemployed: 5.7%</p>
<p><b>Primary services offered</b></p> <ol style="list-style-type: none"><li>1. CSBG Services</li><li>2. Utility assistance</li><li>3. Home weatherization</li></ol>	<p><b>Top five needs</b></p> <ol style="list-style-type: none"><li>1. Education - Substance abuse education</li><li>2. Home weatherization</li><li>3. Affordable housing</li><li>4. Access to healthful foods</li><li>5. Utility bill assistance and other direct service and case management services</li></ol>

\*\* (i.e., Percent with income 100% of the Federal Poverty Level or less)

\*Source: CSI's CNA

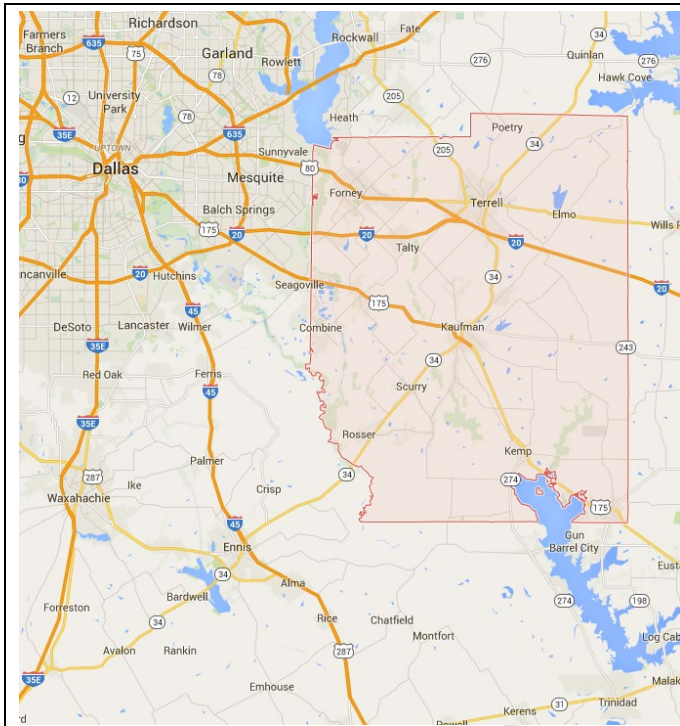
## Hunt County

	<p><b>Key facts</b></p> <p>Population: 87,048</p> <p>Median Age: 38.5</p> <p>Median Household Income: \$44,361</p> <p>Percent Living in Poverty**: 19.9%</p> <p><b>Ethnicity</b></p> <ul style="list-style-type: none"><li>% White: 73.9%</li><li>% African American: 8.0%</li><li>% Hispanic: 14.6%</li></ul> <p>Diversity Index: 51.1</p> <p>Percent with Bachelor's Degree or higher: 17.7%</p> <p>Percent 16+ unemployed: 7.0%</p>
<p><b>Primary services offered</b></p> <ol style="list-style-type: none"><li>1. CSBG Services</li><li>2. Utility assistance</li><li>3. Home weatherization</li></ol>	<p><b>Top five needs</b></p> <ol style="list-style-type: none"><li>1. Availability of housing</li><li>2. Help finding sources of affordable food</li><li>3. Home weatherization</li><li>4. Transportation to services</li><li>5. Help with utility bills</li></ol>

\*\* (i.e., Percent with income 100% of the Federal Poverty Level or less)

\*Source: CSI's CNA

## Kaufman County



### Key facts

Population: 108,568

Median Age: 35.9

Median Household Income: \$61,004

Percent Living in Poverty\*\*: 13.3%

### Ethnicity

% White: 68.0%

% African American: 10.3%

% Hispanic: 18.8%

Diversity Index: 58.7

Percent with Bachelor's Degree or higher: 18.7

Percent 16+ unemployed: 6.0%

### Primary services offered

1. CSBG Services
2. Utility assistance
3. Home weatherization


### Top five needs

1. Availability of housing
2. Home weatherization
3. Help paying rent and utility bills
4. Meals for children
5. Lifestyle - smoking cessation programs

\*\* (i.e., Percent with income 100% of the Federal Poverty Level or less)

\*Source: CSI's CNA

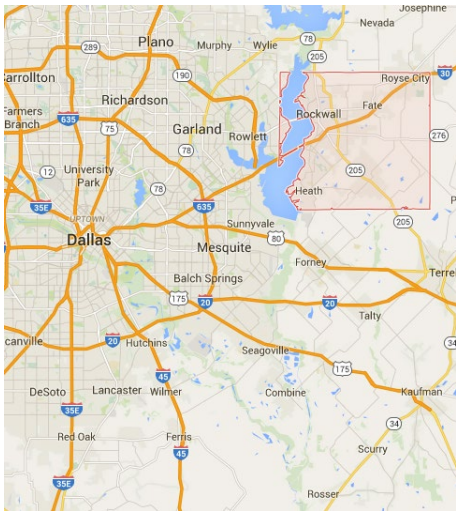
## Navarro County

	<p><b>Key facts</b></p> <p>Population: 48,038 Median Age: 38.1 Median Household Income: \$38,423 Percent Living in Poverty**: 21.1%</p> <p><b>Ethnicity</b></p> <p>% White: 58.4% % African American: 13.3% % Hispanic: 25.0% Diversity Index: 70.8 Percent with Bachelor's Degree or higher: 17.6% Percent 16+ unemployed: 5.9%</p>
<p><b>Primary services offered</b></p> <ol style="list-style-type: none"><li>1. Food assistance</li><li>2. CSBG services</li><li>3. Utility assistance</li><li>4. Home weatherization</li><li>5. Transportation</li></ol>	<p><b>Top five needs</b></p> <ol style="list-style-type: none"><li>1. Help finding child care</li><li>2. Help finding sources of affordable food</li><li>3. Home weatherization Assistance to attend trade or technical school, or college</li><li>4. Help with job skills, training &amp; job search</li><li>5. Employment opportunities</li></ol>

\*\* (i.e., Percent with income 100% of the Federal Poverty Level or less)

\*Source: CSI's CNA

## Rockwall County

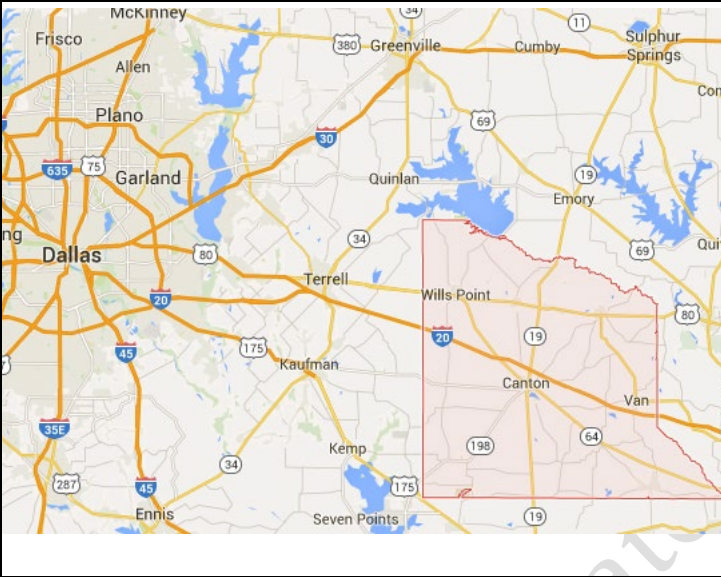
	<p><b>Key facts</b></p> <p>Population: 85,245</p> <p>Median Age: 36.8</p> <p>Median Household Income: \$92,466</p> <p>Percent Living in Poverty**: 5.9%</p> <p><b>Ethnicity</b></p> <ul style="list-style-type: none"><li>% White: 72.8%</li><li>% African American: 5.8%</li><li>% Hispanic: 16.7%</li></ul> <p>Diversity Index: 51.8</p> <p>Percent with Bachelor's Degree or higher: 38.1%</p> <p>Percent 16+ unemployed: 3.2%</p>
<p><b>Primary services offered</b></p> <ol style="list-style-type: none"><li>1. CSBG services</li><li>2. Utility assistance</li><li>3. Home weatherization</li></ol>	<p><b>Top five needs</b></p> <ol style="list-style-type: none"><li>1. Home more energy efficient weatherization / energy efficiency modifications</li><li>2. Employment opportunities; Help finding a job; Job skills training</li><li>3. Relocation services post disaster</li><li>4. Help with utility bills and rent</li><li>5. Lifestyle - Social opportunities</li></ol>

\*\* (i.e., Percent with income 100% of the Federal Poverty Level or less)

\*Source: CSI's CNA



## Van Zandt County

	<p><b>Key facts</b></p> <p>Population: 52,481</p> <p>Median Age: 43.1</p> <p>Median Household Income: \$43,220</p> <p>Percent Living in Poverty**: 16.4%</p> <p><b>Ethnicity</b></p> <ul style="list-style-type: none"> <li>% White: 84.7%</li> <li>% African American: 2.8%</li> <li>% Hispanic: 10.0%</li> </ul> <p>Diversity Index: 35.0</p> <p>Percent with Bachelor's Degree or higher: 14.4%</p> <p>Percent 16+ unemployed: 3.6%</p>
<p><b>Primary services offered</b></p> <ol style="list-style-type: none"> <li>1. CSBG services</li> <li>2. Utility assistance</li> <li>3. Home weatherization</li> </ol>	<p><b>Top five needs</b></p> <ol style="list-style-type: none"> <li>1. Help finding sources of affordable food</li> <li>2. Employment opportunities</li> <li>3. Financial Education/Budgeting Classes/Credit Counseling</li> <li>4. Help to make my home more energy efficient (weatherization)</li> <li>5. Nutrition Education/Healthy Eating Education workshops</li> </ol>

\*\* (i.e., Percent with income 100% of the Federal Poverty Level or less)

\*Source: CSI's CNA

## Appendix D: Summary of Programs, Priorities, Goals, and Objectives – (Program Specific)

<b>Community Transit Service</b>		
<b>Priorities</b>	<b>Goals</b>	<b>Objectives</b>
<b>Priority 1</b> Secure stable funding sources to continue the public transportation system in Ellis and Navarro counties.  <b>Priority 2</b> Expand the public understanding of how a fully implemented regional public transportation system will increase access to transportation for all Ellis and Navarro county citizens.	<b>Goal 1: Ensure Availability of Transit Service to Navarro and Ellis County Residents and Visitors</b>	<ul style="list-style-type: none"> <li>• Provide transit service that meets demand and needs.</li> <li>• Identify the appropriate service area for CTS.</li> <li>• Increase span of service, as appropriate.</li> <li>• Comply with all requirements of the Americans with Disabilities.</li> </ul>
	<b>Goal 2: Enhance local and regional transit connectivity</b>	<ul style="list-style-type: none"> <li>• Coordinate urban and rural transportation networks.</li> <li>• Integrate transit routes and mode connections with corresponding service schedules to facilitate efficient passenger transfer transition.</li> </ul>
	<b>Goal 3: Develop cost effective transit alternatives</b>	<ul style="list-style-type: none"> <li>• Implement an evolutionary process within corridors programmed for CTS development by gradually building up service.</li> <li>• Implement smaller scale transit projects during the TDP (Transit Development Plan) timeframe that will be needed to support large, capital intensive improvement projects in later years.</li> </ul>
	<b>Goal 4: Build institutional and regional capacity</b>	<b>A. Seamless Customer Information Enhancements</b> <ul style="list-style-type: none"> <li>• Phone system enhancements.</li> <li>• On-line and phone reservation system.</li> <li>• Real-time customer information mobile apps.</li> </ul> <b>B. Technology Improvements</b> <ul style="list-style-type: none"> <li>• Asset Management.</li> <li>• Automated Vehicle Locator System.</li> <li>• Demand Response scheduling system.</li> </ul> <b>C. Secure and Stable Funding Sources</b> <ul style="list-style-type: none"> <li>• Public transportation ambassadors and outreach campaign.</li> <li>• Coalitions and partnerships.</li> </ul> <b>D. Capital Enhancements</b> <ul style="list-style-type: none"> <li>• Facility upgrade.</li> </ul>
	<b>Goal 5: Investigate Innovative Approaches to the Provision of Efficient Transit Service</b>	<ul style="list-style-type: none"> <li>• Explore the use of smaller vehicles.</li> <li>• Investigate private funding/operating opportunities.</li> </ul>

## Meals On Wheels

<u>Priorities</u>	<u>Goals</u>	<u>Objectives</u>
<b>Priority 1</b>  Provide a sustainable stream of services to seniors and low income and disabled adults from the age of 21 and higher.	<b>Goal 1: Grow our Volunteer Base</b>	<ul style="list-style-type: none"> <li>• Conduct marketing and information sharing sessions to make the community aware of the opportunities to volunteer for positions as Meals on Wheels drivers, operations assistants, and administrative support staff.</li> <li>• Look for new opportunities to use the rich resources of volunteers to meet our program needs.</li> </ul>
	<b>Goal 2: Recruit New Clients</b>	<ul style="list-style-type: none"> <li>• Build awareness of our services by developing and implementing community outreach strategies to reach underserved and emerging populations within our service areas.</li> <li>• Develop strategies to build understanding of the benefits of the MOW program.</li> <li>• Create administrative processes that facilitate easy access to services for all clients, but especially for new ones in order to encourage participation.</li> </ul>
	<b>Goal 3: Raise our profile within the community and expand our support base</b>	<ul style="list-style-type: none"> <li>• Continue to connect and partner with other organizations and businesses in the community.</li> <li>• Expand the base of financial supporters by using our online giving website (<a href="http://www.csicorsicana.org">www.csicorsicana.org</a>) and other approaches.</li> <li>• Aggressively pursue – where appropriate – grant applications to private foundations.</li> <li>• Encourage a continued strong, supportive role for the board in managing successful fund-raising events.</li> </ul>



Appendix E: ROMA Checklist – *Note: CSI considers this Strategic Plan to be a living document and as required by the requirements set forth will manage the NG process to maintain compliance with the cycle/checklist. This document will be populated and tracked post approval from the Department and agency officially documents progress.*

**ROMA Implementation Checklist – Included as a point of reference and will be updated post approval of OS's 6.1 – 6.5.**

Subrecipient: \_\_\_\_\_

The checklist identifies the five phases of the ROMA cycle (assessment, planning, implementation, achievement of results, and evaluation) and how they are to be used in the *Community Needs Assessment, Strategic Plan, and Community Action Plan*. In the right-hand column, track when the steps were completed. Many of the steps, should be carried out throughout the year.

ROMA CYCLE	Activity	Dates (month/year) when steps were worked on and completed:
ASSESSMENT	Review/revise mission statement	
ASSESSMENT	Review last community needs assessment to determine priority needs.	
ASSESSMENT	Evaluate current program services and determine effectiveness to meet needs (based on recent program performance).	
PLANNING	For the top 5 needs, develop a plan for how they will be addressed. May develop a Logic Model for each need.	

<b>ROMA CYCLE</b>	<b>Activity</b>	<b>Dates (month/year) when steps were worked on and completed:</b>
<b>PLANNING</b>	Based on needs and program evaluation, identified in assessment process, plan the measurable outcomes that will be achieved to meet the needs .	
<b>PLANNING</b>	Identify services and strategies to achieve outcomes.	
<b>PLANNING</b>	Determine outcome indicators (to be used in CAP and SP) and success rate for each.	
<b>PLANNING</b>	Develop system to track services and outcomes and what documentation will be collected and frequency.	
<b>PLANNING</b>	Create or update CAP and SP to include outcomes, strategies, and data collection info.	
<b>IMPLEMENTATION</b>	Implement CAP	
<b>IMPLEMENTATION</b>	Determine frequency to monitor implementation.	

ROMA CYCLE	Activity	Dates (month/year) when steps were worked on and completed:
<b>IMPLEMENTATION</b>	Determine frequency for evaluating progress and report results to board.	
<b>ACHIEVEMENT OF RESULTS</b>	Measure actual results for each outcome.	
<b>IMPLEMENTATION</b>	Implement CAP	
<b>IMPLEMENTATION</b>	Determine frequency to monitor implementation.	
<b>IMPLEMENTATION</b>	Determine frequency for evaluating progress and report results to board.	
<b>ACHIEVEMENT OF RESULTS</b>	Measure actual results for each outcome.	
<b>ACHIEVEMENT OF RESULTS</b>	Submit CSBG IS report to State.	

<b>ROMA CYCLE</b>	<b>Activity</b>	<b>Dates (month/year) when steps were worked on and completed:</b>
<b>EVALUATION</b>	Analyze data; compare with targets developed in planning phase.	
<b>EVALUATION</b>	Review demographics of population served and determine the services they received and consider connection among people, services, and outcomes.	
<b>EVALUATION</b>	Adjust performance goals as needed based on actual performance. Continue and or revise strategies based on performance.	
<b>REASSESSMENT</b>	Review all data from community and agency. Reevaluate the community needs assessment process, make changes if necessary to ensure it follows ROMA framework and guidelines.	
<b>PLANNING</b>	Update CAP Plan. If needed, update Strategic Plan.	

*Adapted from a form created by the Community Action Partnership and Oklahoma Department of Commerce and National Association for State Community Services Programs ROMA Next Generation Center of Excellence.*

## Appendix F: Organizational Standards Checklist

Standard #	Standard	Documents Used to Meet the Standard
1.1	The organization demonstrates low-income individuals' participation in its activities.	(Systematic and Ongoing) Advisory Group Minutes Activity Participation Lists Volunteer Rosters Board Minutes -pre-meeting and packet information
1.2	The organization analyzes information collected directly from low-income individuals as part of the community assessment.	Community Assessment with Appendices Community Forum Summaries Interview Transcripts Back up documentation/data summaries
1.3	The organization has a systematic approach for collecting, analyzing, and reporting customer satisfaction data to the governing board.	Consumer Satisfaction Policy/Procedures Board Committee Minutes Consumer Satisfaction Surveys/Data collection tool and schedule Consumer Satisfaction Report of results to CAA Leadership, Board, and/Broader Community
2.1	The organization has documented or demonstrated partnerships across the community, for specifically identified purposes; partnerships include other anti-poverty organizations in the area.	Partnership Documentation-Agreements; MOU; e-mails Sub-contracts with delegate or partner agencies Strategic Plan Update/Report demonstrating partnerships Coalition Member Lists
2.2	The organization utilizes information gathered from key sectors of the community in assessing needs and resources, during the community assessment process or other times. These sectors would include at minimum: community-based organizations, faith-based organizations, private sector, public sector, and educational institutions.	Community Assessment with Appendices Backup documentation of involvement: surveys, interview transcripts, community or organizational meetings Board/Committee Minutes
2.3	The organization communicates its activities and its results to the community.	Annual Report Media Files of Stories Published Community Event Information Website/Facebook/ Twitter Accounts with regular updates News releases Communication Plan
2.4	The organization documents the number of volunteers and hours mobilized in support of its activities.	Data on number of volunteers and hours provided Board Minutes Documentation of tracking system(s)
3.1	The organization conducted a community assessment and issued a report within the past 3 years.	Dated Community Assessment (some proof of publication of assessment/report)

Standard #	Standard	Documents Used to Meet the Standard
3.2	As part of the community assessment, the organization collects and includes current data specific to poverty and its prevalence related to gender, age, and race/ethnicity for their service area(s).	Community Assessment with Appendices Backup Information including Census and other demographic data
3.3	The organization collects and analyzes both qualitative and quantitative data on its geographic service area(s) in the community assessment.	Community Assessment with Appendices Broader Community Assessment Committee/Team member minutes reflecting analysis Other data collection process on Poverty
3.4	The community assessment includes key findings on the causes and conditions of poverty and the needs of the communities assessed.	Key findings section in Community Assessment Committee /Team member minutes reflecting analysis Other data collection process on poverty
3.5	The governing board formally accepts the completed community assessment.	Community Assessment Board Minutes-pre-board packet information
4.1	The governing board has reviewed the Organization's mission statement within the past 5 years and assured that: 1. the mission addresses poverty; and the Organization's programs and services are in alignment with the mission.	Board minutes, Strategic Plan, Mission statement
4.2	The Organization's Community Action Plan is outcome-based, anti-poverty focused, and ties directly to the Community Assessment.	CAP Plan, Logic Models, Community Assessment
4.3	The Organization's Community Action Plan and Strategic Plan document the continuous use of the full ROMA cycle or comparable system (assessment, planning, implementation, achievement of results, and evaluation). In addition, the Organization documents having used the services of a ROMA-certified trainer (or equivalent) to assist in implementation.	Certified ROMA trainer in the organization, Agreement with certified trainer not within the organization to provide ROMA services, Strategic plan (including appendices), The community action plan (including appendices), Meeting summaries of ROMA trainer participation
4.4	The governing board receives an annual update on the success of specific strategies included in the Community Action plan.	Community action plan update/report, Board or Committee minutes, Board or Committee agenda / premeeting packet
4.5	The Organization has a written succession plan in place for the CEO/ED, approved by the governing board, which contains procedures for covering an emergency/unplanned, short-term absence of 3 months or less, as well as outlines the process for filling a permanent vacancy.	Succession plan/policy, Short term succession plan, Board minutes

Standard #	Standard	Documents Used to Meet the Standard
4.6	An organization-wide risk assessment has been completed within the past 2 years and reported to the governing board.	Risk assessment policy and/or procedures, Board minutes. Completed risk assessment tool, Risk assessment reports
5.1	The Organization's governing board is structured in compliance with the CSBG Act.	Bylaws, Board roster, Board Minutes, related policies and procedures
5.2	The Organization's governing board has written procedures that document a democratic selection process for low-income board members adequate to assure that they are representative of the low-income community.	Board policies and procedures, Board minutes, Bylaws
5.3	The Organization's bylaws have been reviewed by an attorney within the past 5 years.	Bylaws, Board minutes, attorney statement/invoice
5.4	The Organization documents that each governing board member has received a copy of the bylaws within the past two years.	Board pre-meeting materials/packet, bylaws, Board minutes, List of signatures acknowledging receipt
5.5	The Organization's governing board meets in accordance with the frequency and quorum requirements and fills board vacancies as set out in its bylaws.	Bylaws, Board roster, Board Minutes, related policies and procedures
5.6	Each governing board member has signed a conflict of interest policy within the past 2 years.	Conflict of interest policy/procedures, Signed policies/signature list, Board Minutes
5.7	The Organization has a process to provide a structured orientation for governing board members within 6 months of being seated.	Board policy/procedures, Board training materials, Board member acknowledgement/signature
5.8	Governing board members have been provided with training on their duties and responsibilities within the past two years.	Training agendas, training material/handouts, attendee list, board minutes, documentation of training received at conferences/events/webinars
5.9	The Organization's governing board receives programmatic reports at each regular board meeting.	Board pre-meeting materials/packet, Programmatic reports, Board minutes
6.1	The Organization has an agency-wide Strategic Plan in place that has been approved by the governing board within the past 5 years.	Strategic plan, Board minutes, developed checklist of strategic plan elements
6.2	The approved Strategic Plan addresses reduction of poverty, revitalization of low-income communities, and/or empowerment of people with low incomes to become more self-sufficient.	Strategic plan, developed checklist of strategic plan elements
6.3	The approved Strategic Plan contains Family, Agency, and/or Community goals.	Strategic plan
6.4	Customer satisfaction data and customer input, collected as part of the Community Assessment, is included in the strategic planning process.	Strategic plan including appendices, Notes from strategic planning process, Customer satisfaction data/reports, Customer input data/reports

Standard #	Standard	Documents Used to Meet the Standard
6.5	The governing board has received an update(s) on meeting the goals of the Strategic Plan within the past 12 months.	Strategic plan, plan updates/reports, Board pre-meeting materials/packet, Board minutes
7.1	The organization has written personnel policies that have been reviewed by an attorney and approved by the governing board within the past 5 years.	Personnel Policies Board Pre-meeting Materials/Packet Board Minutes Statement/Invoice/In-kind Donation from Attorney Reflecting review
7.2	The organization makes available the employee handbook (or personnel policies in cases without a handbook) to all staff and notifies staff of any changes.	Employee Handbook/Personnel Policies Documentation of Location and Availability of Handbook/Policies Identified Process for Notifying Staff of Updates (may be included in the Handbook/Policy)
7.3	The organization has written job descriptions for all positions, which have been updated within the past 5 years.	Organization Chart/Staff List Job Descriptions Board or Committee Minutes (noting documents have been updated)
7.4	The governing board conducts a performance appraisal of the CEO/executive director within each calendar year.	Board Minutes
7.5	The governing board reviews and approves CEO/executive director compensation within every calendar year.	Board Minutes Executive Director/CEO Contract (if applicable)
7.6	The organization has a policy in place for regular written evaluation of employees by their supervisors.	Evaluation Process/Policy Personnel Policies and Procedures
7.7	The organization has a whistleblower policy that has been approved by the governing board.	whistleblower Policy board Minutes Board Pre-Meeting Materials/Packet
7.8	All staff participate in a new employee orientation within 60 days of hire.	Personnel Policies/Employee Handbook Orientation Materials Sampling of HR/Personnel Files for Documentation of Attendance
7.9	The organization conducts or makes available staff development/training (including ROMA) on an ongoing basis.	Training Plans HR/Personnel Files Documentation of Trainings: Presentations, Evaluations, Attendee Lists Documentation of Attendance at Offsite Training Events/Conferences (what type of training should be offered and used)
8.1	The Organization's annual audit (or audited financial statements) is completed by a Certified Public Accountant on time in accordance with Title 2 of the Code of Federal Regulations, Uniform Administration Requirements, Cost Principles, and Audit Requirement (if applicable) and/or State audit threshold requirements.	Completed Audit



Standard #	Standard	Documents Used to Meet the Standard
8.2	All findings from the prior year's annual audit have been assessed by the organization and addressed where the governing board has deemed it appropriate.	Completed Audit Management Responses to the Audit Board Minutes
8.3	The organization's auditor presents the audit to the governing board.	Completed Audit Board Minutes Board Pre-Meeting Materials/Package
8.4	The governing board formally receives and accepts the audit.	Completed Audit Board Minutes
8.5	The organization has solicited bids for its audit within the past 5 years.	CAA Procurement Policy Board Pre-meeting Materials/Package Documentation of Bid Process including RFP/RFQ, Lists of Vendors Receiving Notice, Proof of any Publication of the Process
8.6	The IRS Form 990 is completed annually and made available to the governing board for review.	IRS Form 990 Board Minutes Board Pre-Meeting Materials/Package Documentation of 990 Distribution to the Board (Mail/E-mail/Link)
8.7	The governing board receives financial reports at each regular meeting that include the following: 1. Organization-wide report on revenue and expenditures that compares budget to actual, categorized by program; and 2. Balance sheet/statement of financial position.	Financial Reports Board Minutes Board pre-Meeting Materials/Package
8.8	All required filings and payments related to payroll withholdings are completed on time.	Payroll Tax Documentation/Filings Retirement Accounts Documentation Insurance Documents (Health, Disability, Flex Accounts) Record of Payments to State, Federal, Insurance and Retirement Accounts
8.9	The governing board annually approves an organization-wide budget.	Agency Wide Budget Board Minutes Board Pre-Meeting Materials/Package
8.10	The fiscal policies have been reviewed by staff within the past 2 years, updated as necessary, with changes approved by the governing board.	Fiscal Policies/Procedures Manual Board Minutes/Committee Minutes Board Pre-Meeting Materials/Packages
8.11	A written procurement policy is in place and has been reviewed by the governing board within the past 5 years.	Procurement Policy Board Minutes Board Pre-Meeting Materials/Package
8.12	The organization documents how it allocates shared costs through an indirect cost rate or through a written cost allocation plan.	Cost Allocation Plan Approved Indirect Cost Rate
8.13	The organization has a written policy in place for record retention and destruction.	Documentation Retention and Destruction Policy

Standard #	Standard	Documents Used to Meet the Standard
9.1	The organization has a system or systems in place to track and report client demographics and services customers receive.	Data System Documentation and/or Direct Observation Reports as Used by Staff, Leadership, Board or Cognizant Funder
9.2	The organization has a system or systems in place to track family, agency, and/or community outcomes.	Data System Documentation and/or Direct Observation Reports as Used by Staff, Leadership, Board or Cognizant Funder NPI Report? Narrative describing data system
9.3	The organization has presented to the governing board for review or action, at least within the past 12 months, an analysis of the agency's outcomes and any operational or strategic program adjustments and improvements identified as necessary.	Strategic Plan National Performance Indicator Reports Board Minutes Board Pre-Meeting Materials/Packets Staff Meetings Minutes
9.4	The organization submits its annual CSBG Information Survey data report and it reflects client demographics and organization-wide outcomes.	IS Data Report Other Data System Reports

## Appendix G: Client Satisfaction Survey Tool, Data Tables, and Charts

### Transit Services



Community Services, Inc.

A Community Action Agency

Date: \_\_\_\_\_

#### CTS TRANSPORTATION CLIENT SATISFACTION SURVEY TOOL

Please take a few minutes to answer the questions below about transportation services you received from Community Transit Service.

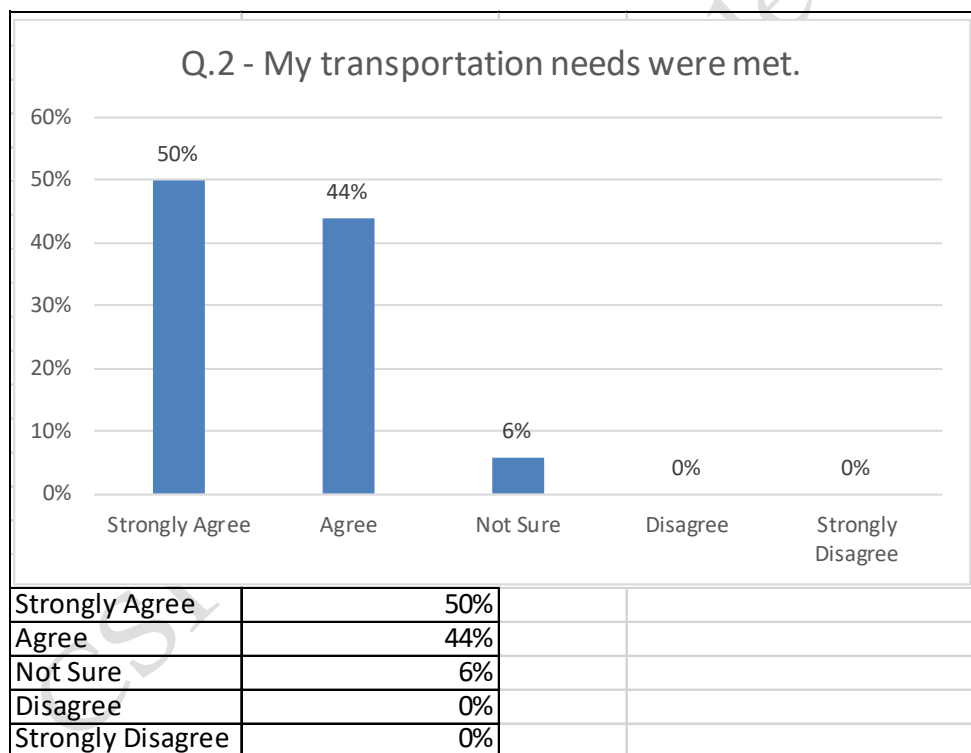
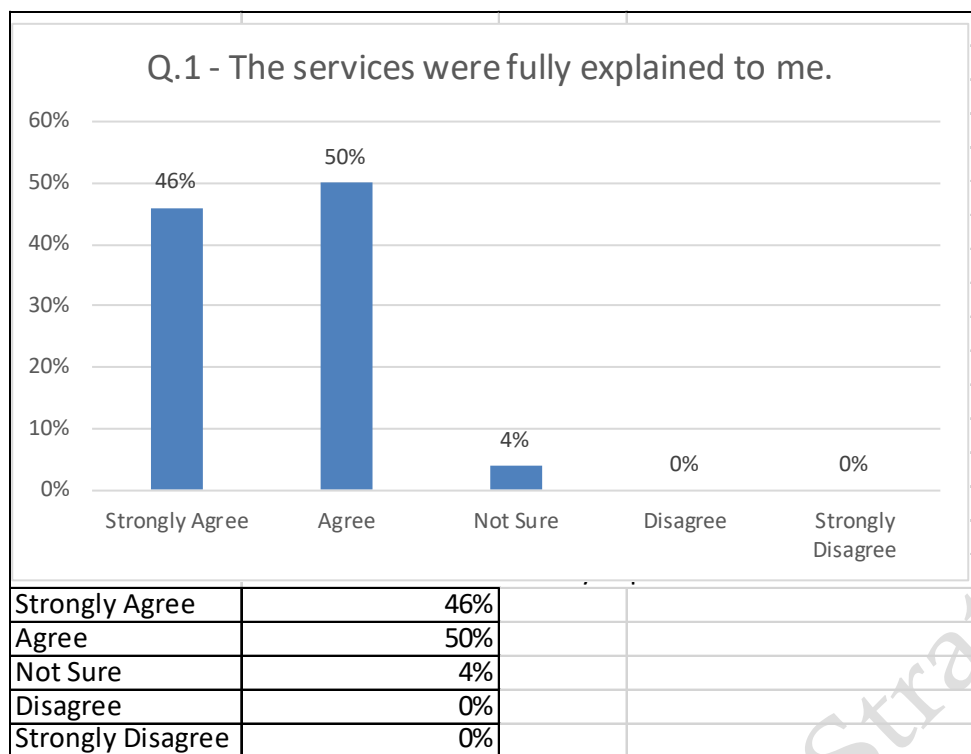
Answering the following questions will help improve our services. Please do not write your name on the survey.

CHECK YOUR RESPONSE:	Strongly Agree	Agree	Not Sure	Disagree	Strongly Agree
The services were explained to me fully					
My transportation needs were met					
The scheduler was polite and courteous					
The driver was courteous and helpful					
The vehicle was clean					
The vehicle was in good condition					
I was satisfied with the services I received					
I was dissatisfied with the services I received					

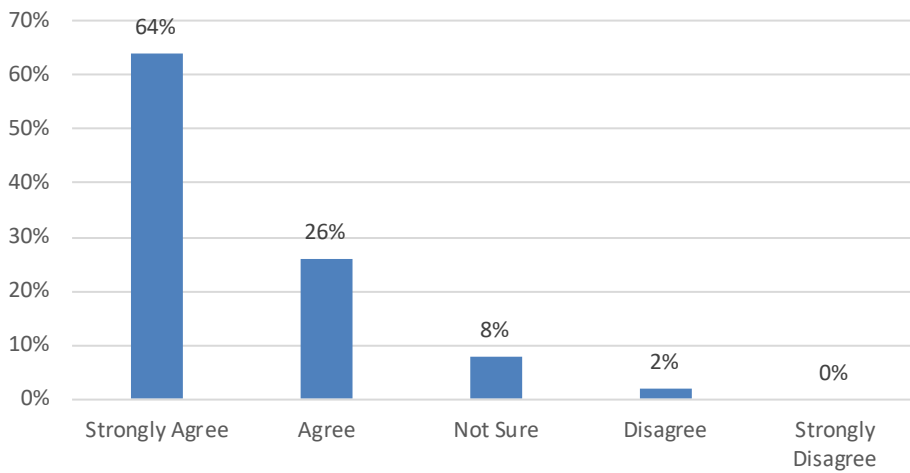
My transportation was for: (check all that apply)	Medical <input type="checkbox"/>	Work <input type="checkbox"/>	Entertainment <input type="checkbox"/>	Shopping <input type="checkbox"/>
---	----------------------------------	-------------------------------	--	-----------------------------------

My transportation was for the county of:	Navarro <input type="checkbox"/>	Ellis <input type="checkbox"/>
--	----------------------------------	--------------------------------

**Note: Sample of tool above used for Transit process – findings follow!!!!**

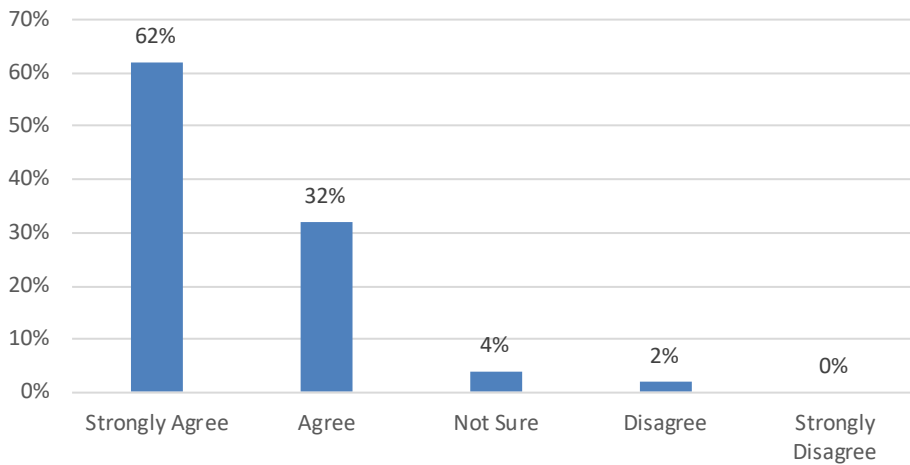


### Q.3 - The scheduler was polite and courteous.

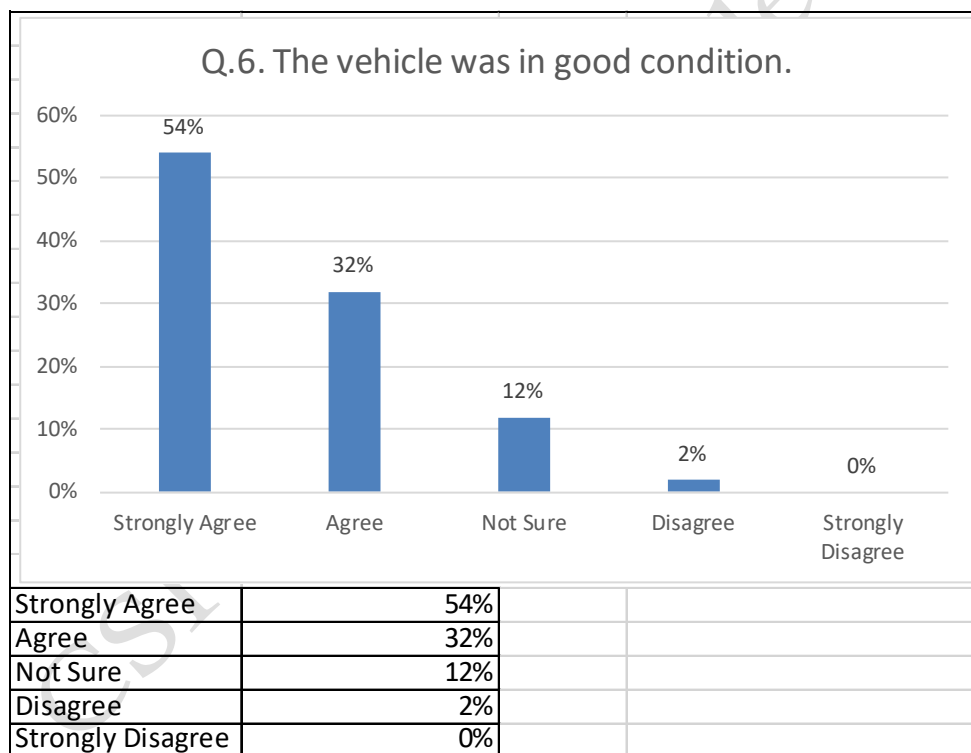
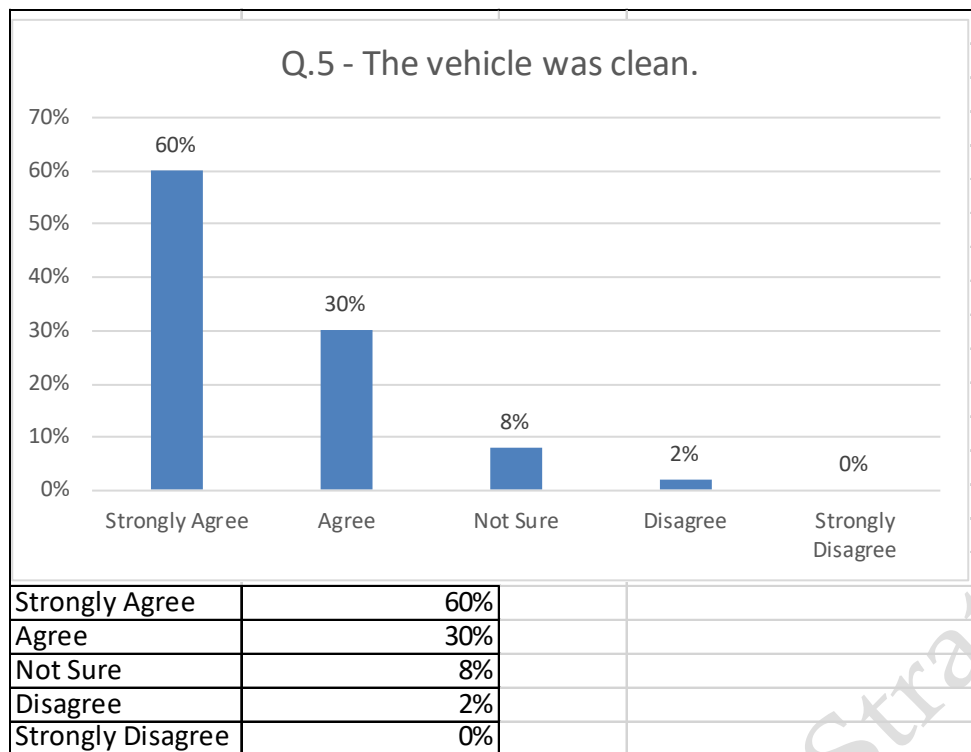


Strongly Agree	64%		
Agree	26%		
Not Sure	8%		
Disagree	2%		
Strongly Disagree	0%		

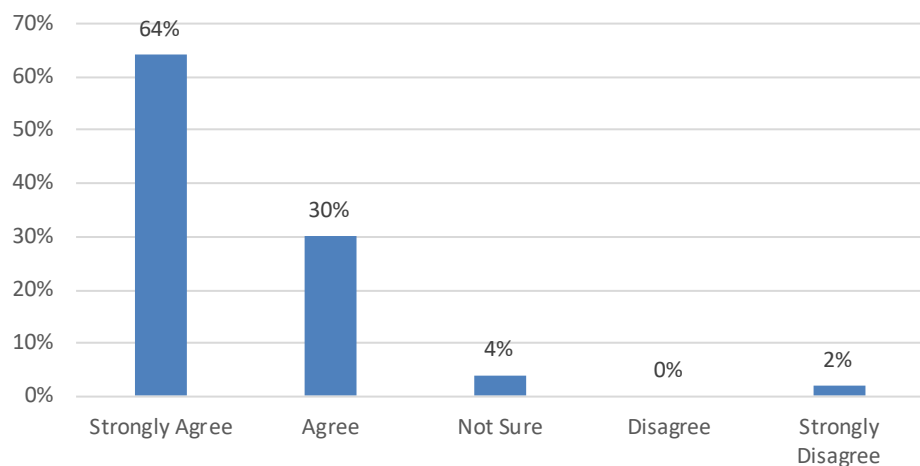
### Q.4 - The driver was courteous and helpful.



Strongly Agree	62%		
Agree	32%		
Not Sure	4%		
Disagree	2%		
Strongly Disagree	0%		

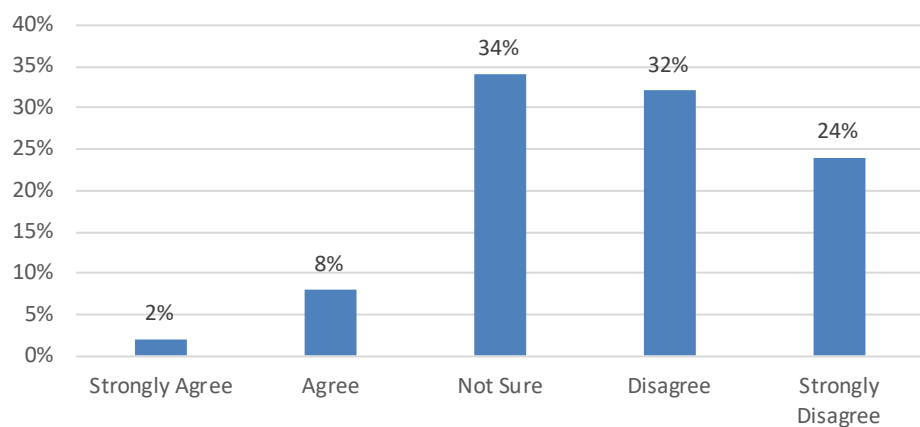


### Q.7 - I was satisfied with the services I received.



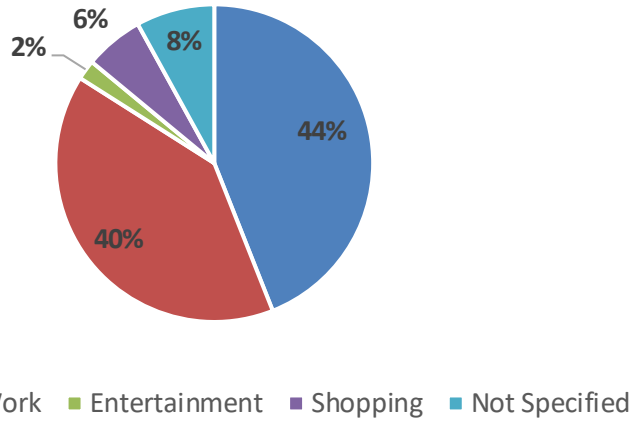
Strongly Agree	64%
Agree	30%
Not Sure	4%
Disagree	0%
Strongly Disagree	2%

### Q.8 - I was dissatisfied with the services I received.



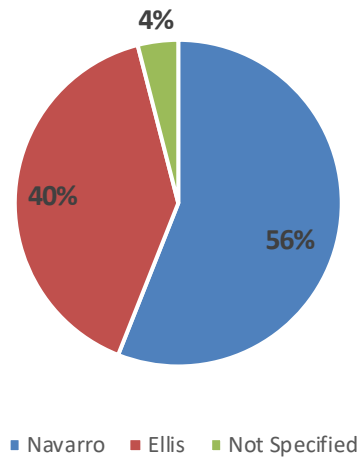
Strongly Agree	2%
Agree	8%
Not Sure	34%
Disagree	32%
Strongly Disagree	24%

Q.9 - My transportation was for:



Medical	44%		
Work	40%		
Entertainment	2%		
Shopping	6%		
Not Specified	8%		

Q.10 - My transportation was for the County of:



Navarro	56%		
Ellis	40%		
Not Specified	4%		



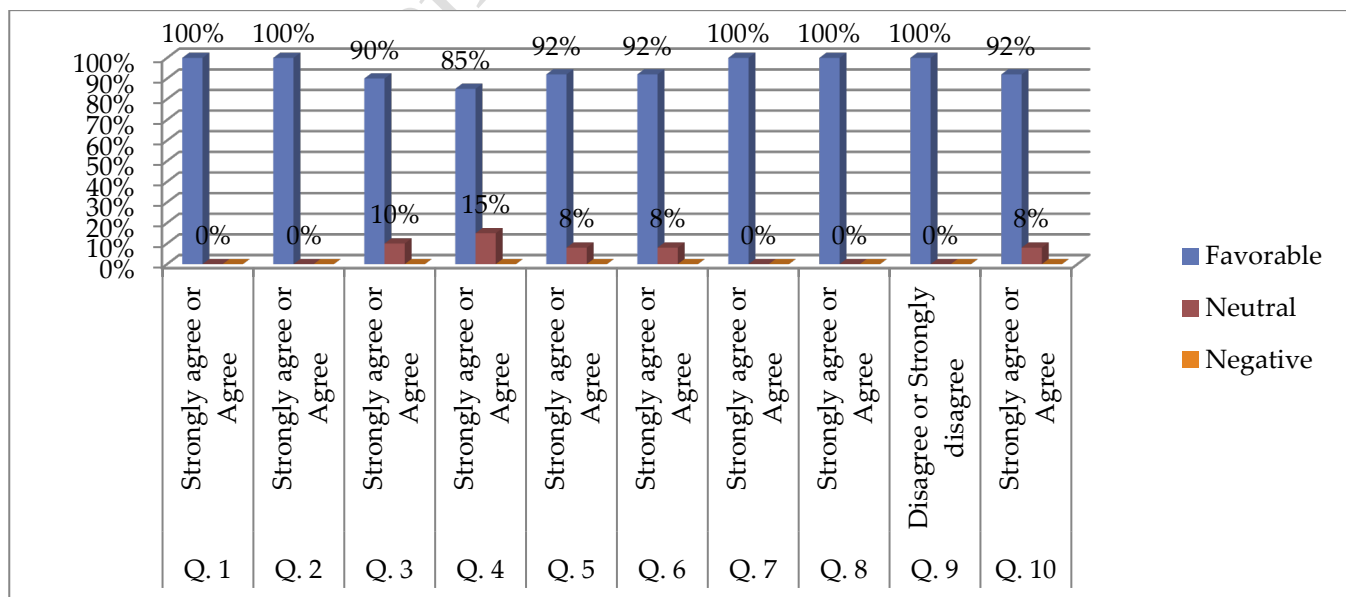
## Community Service Block Grant

### **CSBG Services Customer Satisfaction**

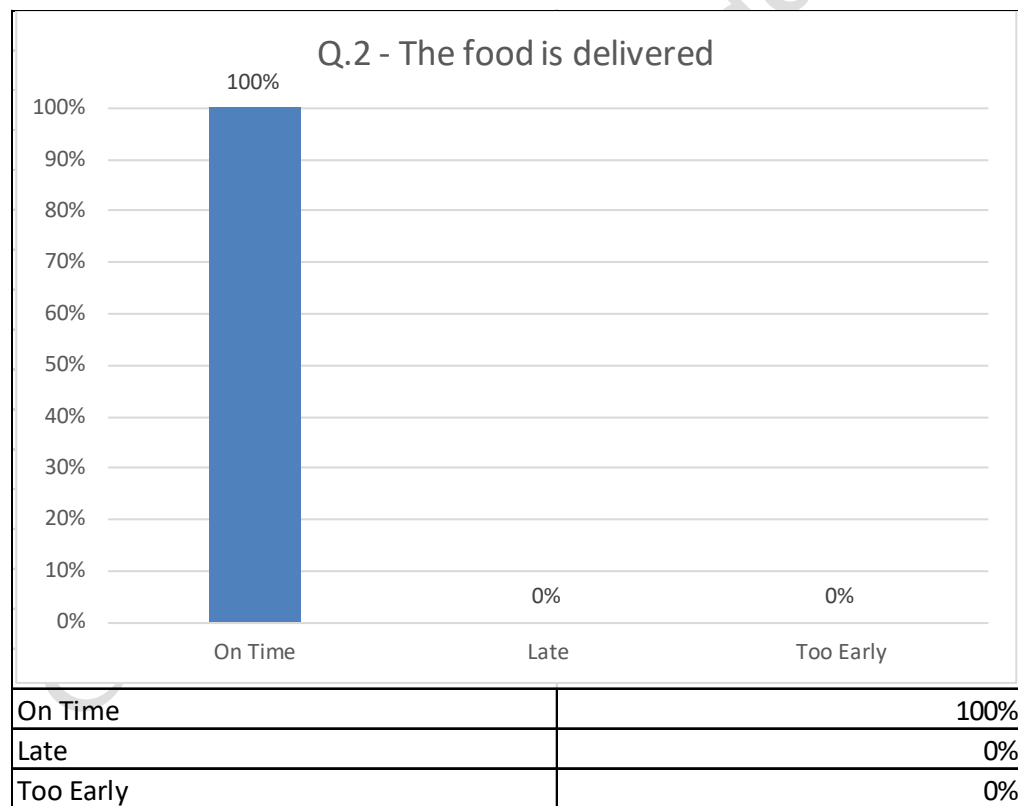
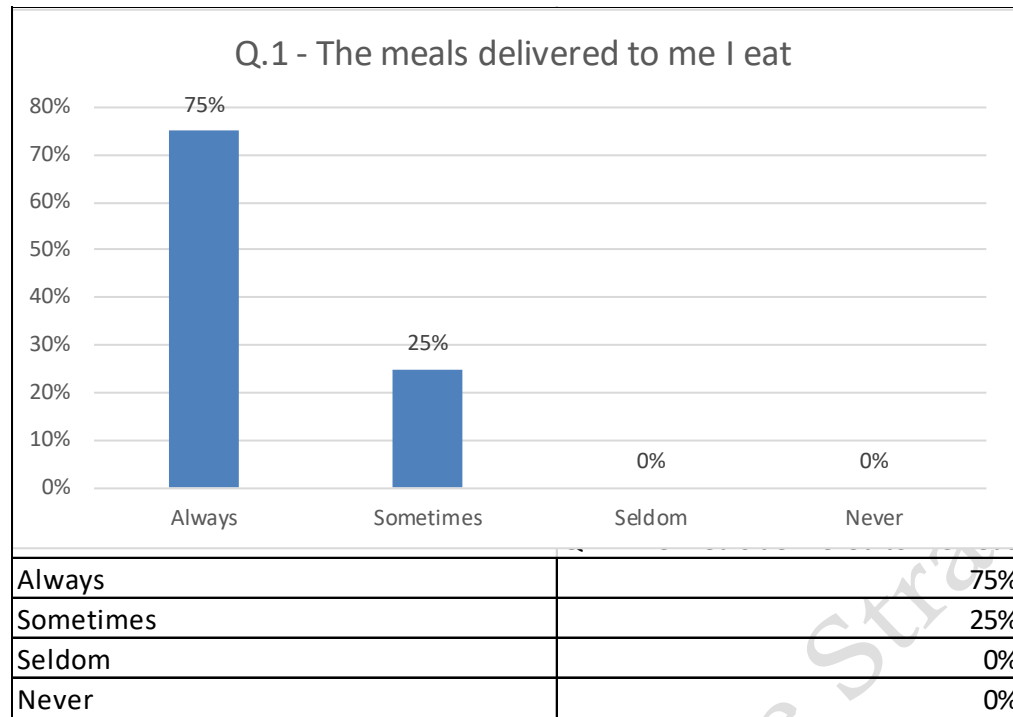
#### **Survey Responses**

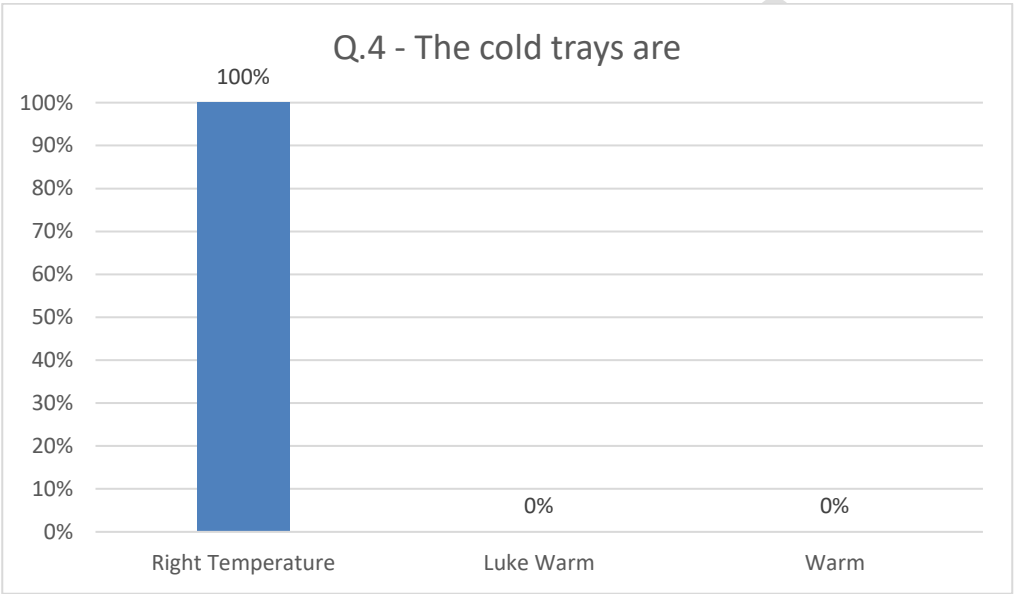
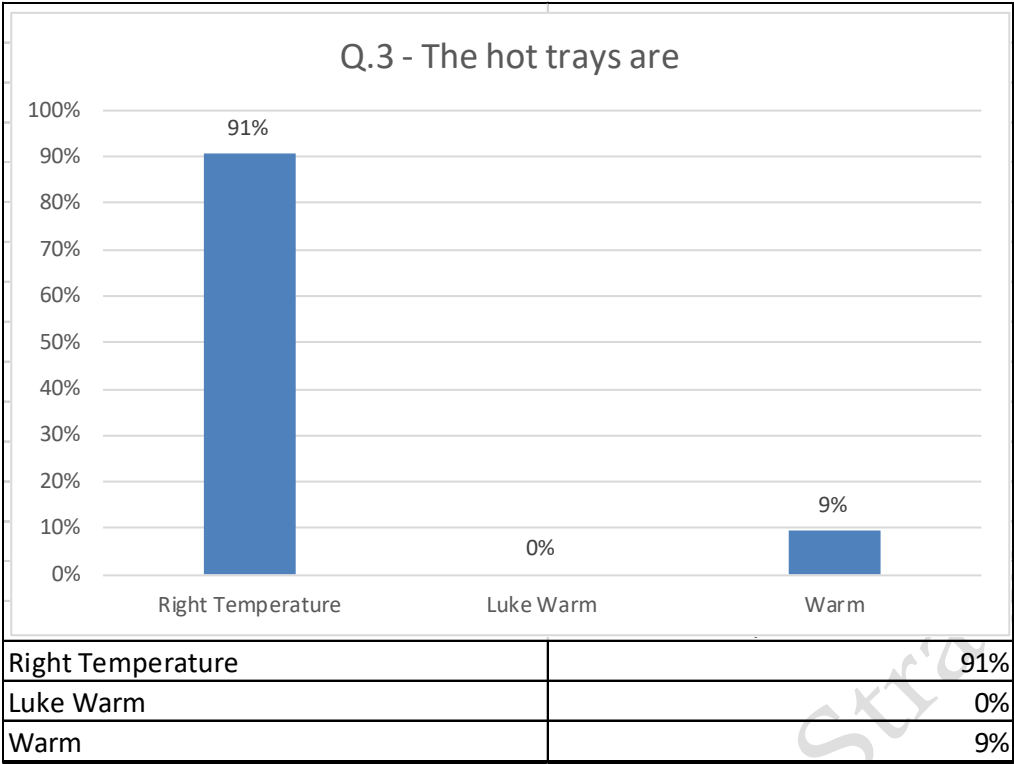
<b><u>Question</u></b>	<b><u>Preferred Response</u></b>	<b><u>Favorable</u></b>	<b><u>Neutral</u></b>	<b><u>Negative</u></b>
Q.1 - The program and my participation in it has been fully explained to me.	Strongly agree or Agree	100%	0%	0%
Q.2 - I understand that I must participate fully in this program (be on time, complete assignments, update documentation, submit current bill).	Strongly agree or Agree	100%	0%	0%
Q.3 - This program has taught me to find services I need.	Strongly agree or Agree	90%	10%	0%
Q.4 - I am better able to provide for myself and my household.	Strongly agree or Agree	85%	15%	0%
Q.5 - This program has taught me better problem-solving skills.	Strongly agree or Agree	92%	8%	0%
Q.6 - I am better able to budget.	Strongly agree or Agree	92%	8%	0%
Q.7 - I am able to speak candidly to my Case Manager.	Strongly agree or Agree	100%	0%	0%
Q.8 - My Case Manager listens to me.	Strongly agree or Agree	100%	0%	0%
Q.9 - My Case Manager is difficult to contact.	Disagree or Strongly disagree	100%	0%	0%
Q.10 - My Case Manager helped me find services I needed.	Strongly agree or Agree	92%	8%	0%

*Note: The table below of findings doesn't show data for negative responses due to outcome – no "Negative" responses reported.*

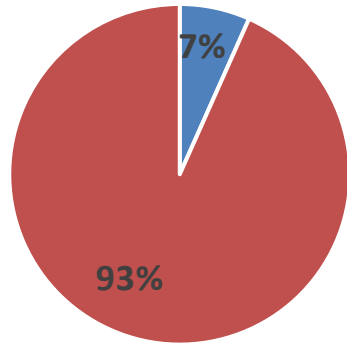


## MAGNET Program / Meals on Wheels



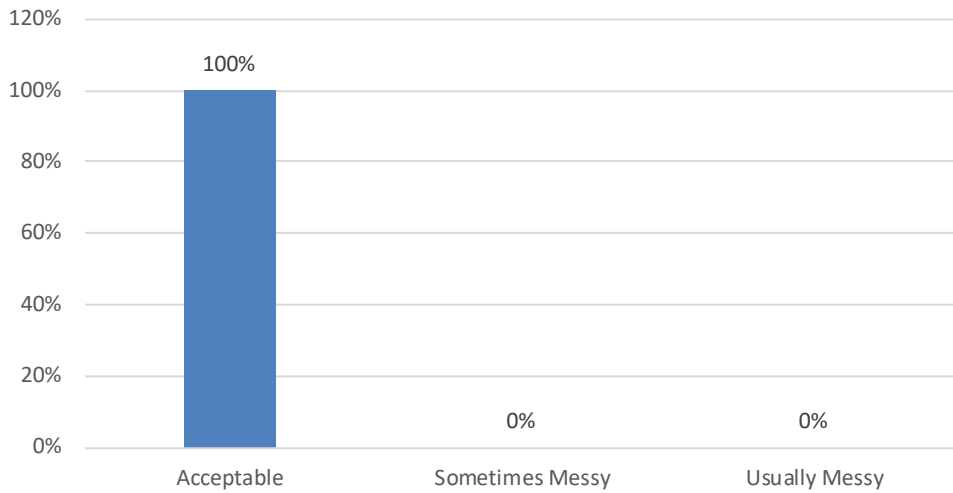


Q.5 - The food containers are



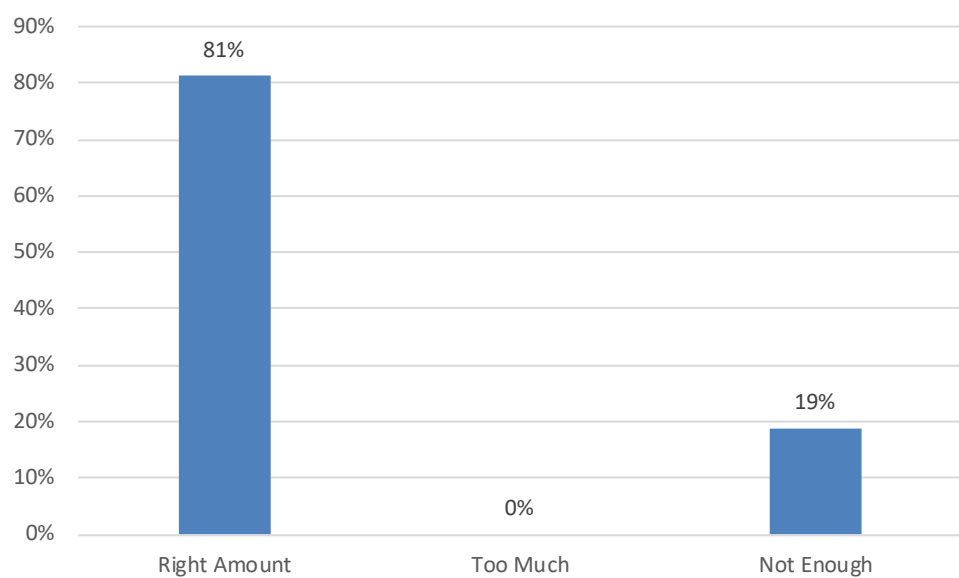
Hard To Open	7%
Easy To Open	93%

Q.6 - The food is packaged



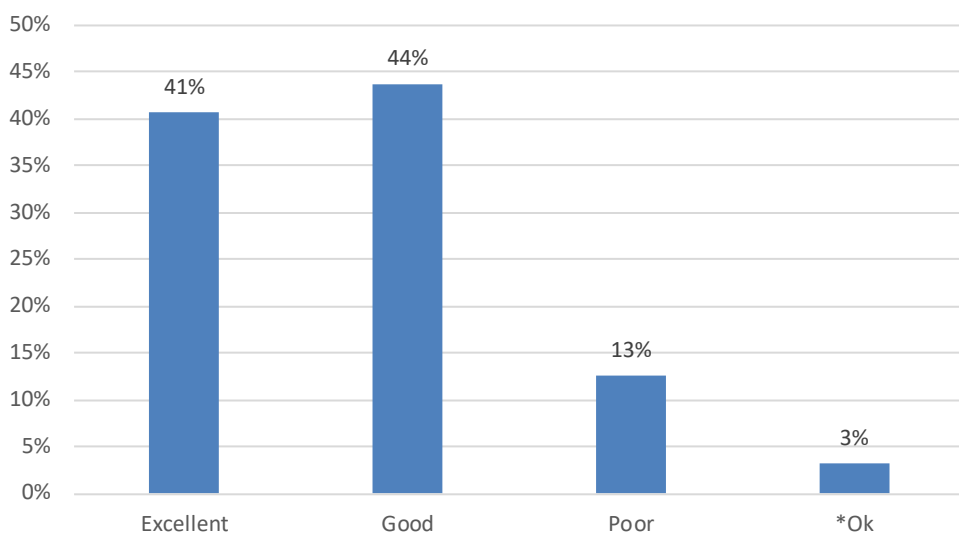
Acceptable	100%
Sometimes Messy	0%
Usually Messy	0%

Q.7 - The amount of food is

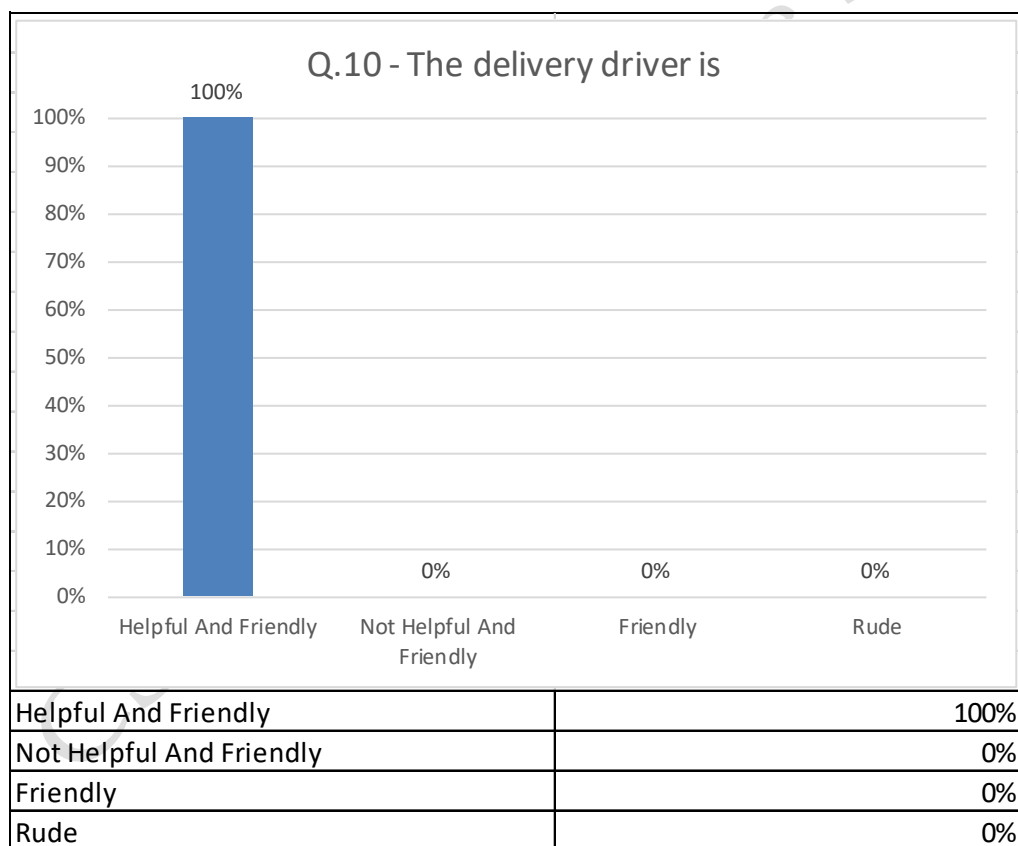
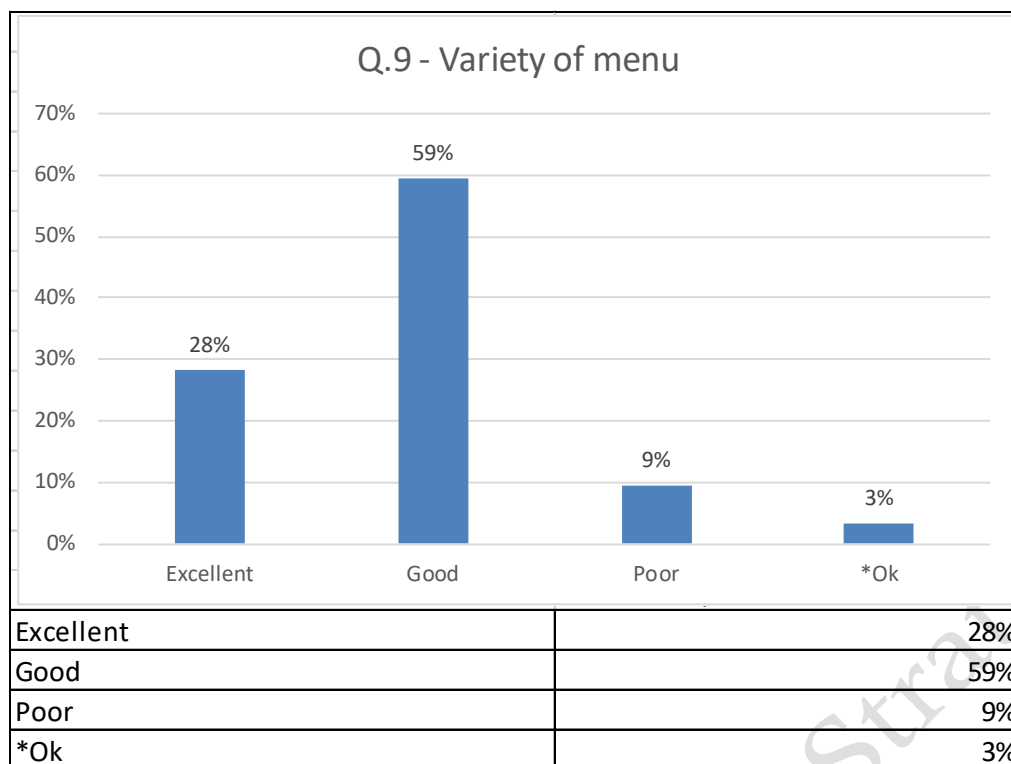


Right Amount	81%
Too Much	0%
Not Enough	19%

Q.8 - Quality of your meals



Excellent	41%
Good	44%
Poor	13%
*Ok	3%



**Appendix H: Attachment L:** *Note: CSI has an immediate and continuous focus on the Goals and Objectives proposed in the FY17 CAP and has a Strategic focus of those outlined and proposed in the FY18 CAP. CSI program staff & management will continue to monitor the status of proposed goals/objectives to ensure complete legal compliance with contract requirements and all related organizational standards. CAP goals and objectives undergird CSBG related activities and nurture the strategic framework outline in the agency's Strategic Plan.*

## Strategic Plan Update

**Subrecipient:** Community Services, Inc.

**Time Period (years) covered by the Strategic Plan:**

PY 16 Strategic Planned Goals	Projected Outcome	Outcome Success Rate	PY 17 Strategic Plan Projected Outcome	Applicable Revisions to Outcome Measure
Continue to offer exemplary existing and new outcome-based programming:				
by transitioning 55 persons out of poverty;	55 out of 124 Target - 55 100%	55 out of 124 100%	56 As of 8/31/2017  20 TOP	No Revisions
by referring unemployed clients to the Texas Workforce Commission, employment agencies, job fairs, and job sites and maintaining documentation and feedback;	40 out of 243 Target - 40 100%	45 out of 243 112.50%	40 187 enrollments 26 outcomes	No Revisions
by assisting case managed clients to create and maintain a monthly budget;	35 out of 78 Target – 35	36 out of 78 102.86%	35 40 enrollments 35 outcomes  118 – Outcome noted in case management notes at end of semester/course	No Revision  N/A

enrolling clients in secondary and vocational schools;	100%	N/A	<b>189 enrollments / 15 outcomes</b>	
	None for 2016		135 – Outcome coded after access of service	
by providing food cards, referrals to food banks, food pantries, and the food stamp office;	None for 2016	N/A	<b>46 enrollments / 46 outcomes</b>	N/A
			80 – Outcome coded after access of service.	
by providing gas cards for medical / employment appointments within set guidelines;	None for 2016	N/A	<b>84 enrollments / 84 outcomes</b>	N/A
			53 – Outcome coded at time of service	
by providing transitional utility assistance less deposits and fees for the current program year;	None in 2016	N/A	<b>57 enrollments / 57 outcomes</b>	N/A
			155 – Outcome coded upon approval of service.	
by providing rental assistance to eligible households following set guidelines.	None for 2016	N/A	<b>126 enrollments / 56 outcomes</b>	N/A

**Instructions:** Populate the goals set in your strategic plan for program years 2016 and 2017. Enter outcomes you projected for each. Based upon your August performance report, what is your current success rate? Indicate the outcomes you projected for PY17 for each goal. Make any applicable revisions to the PY17 targets based upon your data analysis from this year.

**REQUIREMENT-Organizational Standards:** 4.4 The governing board receives an annual update on the success of specific strategies included in the Community Action plan. 6.5 The governing board has received an update(s) on progress meeting the goals of the strategic plan within the past 12 months.



## Appendix I: CNA 2015 Client Surveys & Focus Group Reports

*Note: Documentation follows starting on the next page.*