



# COMMUNITY SERVICES, INC.

*A Community Action Agency*



**MISSION**



**VISION**



**VALUES**

## STRATEGIC PLAN 2023–2028

Approved by Community Services, Inc.  
Board of Directors June 28, 2022

**More Information**  
[www.csicorsicana.org](http://www.csicorsicana.org)



# STRATEGIC PLAN

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## **Executive Summary**

The Community Action Network (CAN) is deeply rooted in the community as a source of support for individuals and families living in poverty. The Promise of Community Action states, “Community Action changes people’s lives, embodies the spirit of hope, improves communities, and makes America a better place to live. We care about the entire community, and we are dedicated to helping people help themselves and each other”. Community Services, Inc. (CSI) is a community action agency serving low-income communities in Ten Texas Counties. CSI rises to the occasion to uplift its community with a team of dedicated and talented staff. Before developing this plan, the Executive Leadership team and the Board of Directors completed a multi-faceted analysis of our agency. This resulted in the formation of a Strategic Planning Committee.

CSI built its strategic priorities around the needs of its service area in alignment with the Results Oriented Management and Accountable (ROMA) cycle. These strategic priorities are pertinent and tailored to all agency programs with periodic reviews over the next five years. Our agency must leverage our unique strengths to overcome barriers or challenges as environmental conditions change. The TEAM approach resonates within our agency, which states, “Together Everyone Achieves More.” This plan serves as a road map for CSI to fulfill its purpose of empowering individuals and families to achieve social and economic stability with intentional community collaborations and expanded resources. CSI utilized insightful information from its 2021 Community Needs Assessment (CNA), agency data, stakeholder interviews, and staff assessment in formulating this strategic plan.

The Strategic Planning Committee identified five strategic priorities from ten strategic issues to drive impact within CSI's ten-county service area. These strategies encompass family, agency, and community goals. This plan emphasizes the implementation of ROMA principles to facilitate continuous improvement.

Goal 1: Organizational Leadership and Growth (Agency)

Goal 2: Program Development and Innovation (Family)

Goal 3: Strategic Partnerships and Advocacy (Agency)

Goal 4: Marketing and Visibility (Agency)

Goal 5: Community Empowerment and Civic Engagement (Community)



This comprehensive strategic plan depicts CSI’s ability to excel in achieving goals as a high-performing agency promoting self-sufficiency for individuals and families, serving as a blueprint for future anti-poverty initiatives on a local, state, and federal level.

A handwritten signature in blue ink, reading 'Daniel Edwards, Sr.'.

Daniel Edwards, Sr., MPA-President/CEO

A handwritten signature in blue ink, reading 'Reverend Dairy Johnson'.

Reverend Dairy Johnson- Board Chair

## **Introduction**

The Community Services Block Grant (CSBG) aims to address the reduction of poverty, revitalize low-income communities, and empower low-income persons to become self-sufficient. The components of this Strategic Plan are reflective of the following Organizational Standards (OS) as mandated by the CSBG Act:

- **OS 4.3-** *The organization's Community Action Plan and Strategic Plan document the continuous use of the full ROMA cycle or comparable system.*
- **OS 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.*
- **OS 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.*
- **OS 6.3-** *The approved Strategic Plan contains family, agency, and/or community goals.*
- **OS 6.4-** *Customer satisfaction data and customer input, collected as part of the community assessment, is included in the Strategic Planning process.*
- **OS 6.5-** *The board has received an update(s) on progress meeting the goals of the Strategic Plan within the past 12 months.*

The strategic plan is an evolving process that will: prioritize needs identified in the Community Needs Assessment (CNA), re-examine the organization's existence and its aspirations for the future, utilize data-driven results to make informed decisions yielding to operational excellence, highlight efforts and determine the allocation of resources, and improve the agency's effectiveness and efficiencies through approved goals, objectives, and strategies. Resources specific to developing a Strategic Plan (located on the TDHCA website) were utilized throughout this process. CSI is committed to conducting frequent reviews of the strategic plan by integrating the Results Oriented Management and Accountability (ROMA) Cycle and pivoting to economic or community changes. The agency's primary focus is to deliver stellar services that drive lasting impact within its ten-county service area.

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## **Strategic Planning Process**

The planning process, facilitated by the Strategic Planning Committee, consisted of frequent in-person and virtual meetings over seven weeks. These meetings commenced on May 5, 2022, and concluded on June 21, 2022. The committee spent about 10 hours, with an average of 1 hour per meeting, deliberating on this plan. The committee solicited feedback from community partners and funders on the perception of the agency, community strengths, and gaps in services. Activities during the scheduled meetings included the following:

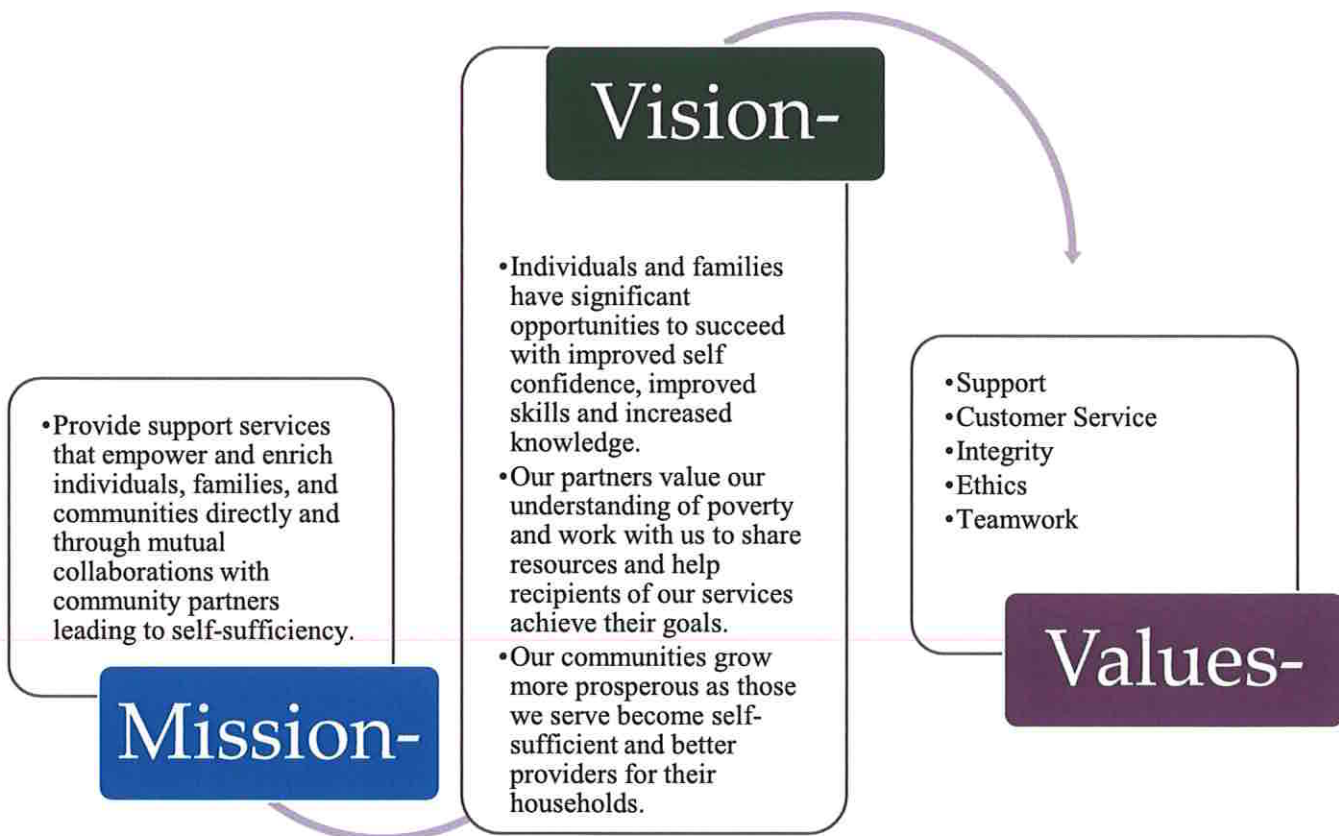
- Review guidance provided by the Texas Department of Housing and Community Affairs (TDHCA).
- Discussion of crucial stakeholders, customer input, and top five needs from the most recent CNA.
- Reflection on the agency's mission statement, successes, challenges, and impact over the past five years.
- Completion of a Strengths, Weaknesses, Opportunities, and Threat (SWOT) Analysis.
- Identification of Specific, Measurable, Achievable, Relevant, and Time-bound (SMART) goals.
- Review of the ROMA cycle and the agency's application in daily operations.
- Assigning Post-Strategic Plan tasks (i.e., press release, implementation of the plan).



## Agency Profile/ History

Founded in 1966 on the premise of the Federal Administration's declaration of the war on poverty, Community Services, Inc. (CSI) planted its roots in Navarro County to meet the needs of low-income individuals and families. Organized as a Community Action Agency (CAA) under the auspices of the Economic Opportunity Act of 1964, CSI is a private 501(c)(3) non-profit organization that has participated in the coordination and mobilization of community-based resources. Over the years, we have grown as an agency offering direct client services in the following counties: Anderson, Collin, Denton, Ellis, Henderson, Hunt, Kaufman, Navarro, Rockwall, and Van Zandt.

CSI manages the following programs: Community Services Block Grant (CSBG), Community Transit Service (CTS), and Meals on Wheels (MOW). CSBG, funded by the Texas Department of Housing and Community Affairs (TDHCA), provides support services such as education support, employment support, rental assistance, utility assistance, financial well-being, health and wellness, nutrition, and transportation resources. Community Transit Service (CTS), funded by the Texas Department of Transportation (TXDOT) and North Central Texas Council of Government (NCTCOG), provides demand response transportation in Ellis and Navarro counties. Meals on Wheels (MOW), funded by the Texas Department of Aging and Disability Services (DADS), Texas Department of Agricultural, and Private Insurance Providers, provides hot, home-delivered meals to age-appropriate individuals who meet DADS requirements for services. CSI has been a tremendous asset to the community with outreach programs to promote health, safety, and education needs.



## WHO WE SERVE...



For FY 2021

\*Community Services, Inc. has served 305 households (unduplicated count) with CSBG funds.

\*CSI engaged with 294 individuals who lacked healthcare, 47 individuals who reported having a disability, 34 senior citizens, and 7 veterans with CSBG funds.

CSI received CARES Act Funding for pandemic relief to families

\* data reflective of services provided with CSBG annual contract.

CSI has made a great impact within its ten-county service area via strategic programming that addresses the causes and conditions of poverty, with the Community Action national goals in foresight:

**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.

## RESOURCES

To maximize impact, CSI has formed strategic partnerships to date with the following organizations:

50	Non-profits
54	For-profits
17	Faith-based organizations
9	Education sector

CSI has two National Certified ROMA Implementers (NCRI) to help the agency with planning, reporting, data analysis and evaluation.



There were 177 hours recorded as volunteer time contributed towards program-related activities.



The Community Transit Service (CTS) program has excelled in operations resulting in 25,107 passenger trips equating to 200,065 miles in travel serving 378 customers (unduplicated count).



The Meals on Wheels (MOW) program has executed prompt delivery of 45,838 meals serving 226 customers (unduplicated count).





CSI utilizes its CSBG funds to address the needs of communities within its service area in the following domains: employment, education/ cognitive development, income, infrastructure/ asset building, housing, health/ social development, and civic engagement/ community involvement. The data below shows the breakdown of the services provided with the CSBG regular contract in FY 2021 (excluded data: services provided with CARES Act funding).



## EDUCATION

**\*55** services reported in the education and cognitive development domain. This includes customers seeking payment for tuition, textbooks, adult literacy class, GED classes, ESL classes, and basic education classes.



## EMPLOYMENT

**\*90** services reported in the employment domain. This includes customers seeking referrals for vocational training, interview skills training, resume development, job readiness training, and payment for employment supplies.



## IMPACT



## HOUSING

**\*601** services reported in the housing domain. This includes customers seeking emergency rent assistance, utility arrears assistance, and payment for emergency shelter.



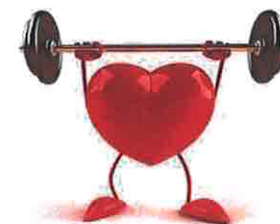
## INCOME

**\*14** services reported in the income and asset building domain. This includes customers whose goals are to maintain a budget, open a savings account, increase assets and net worth, and improve their financial well-being.



## CIVIC ENGAGEMENT

**\*1** service reported in the civic engagement, and community involvement domain. This includes customers whose goal is to increase their leadership skills, improve social networks, and/or tripartite board membership.



## HEALTH

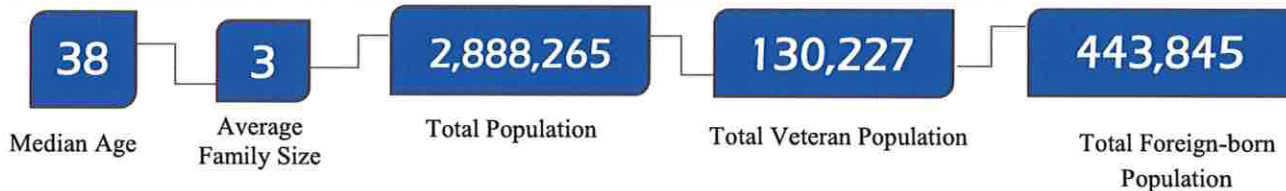
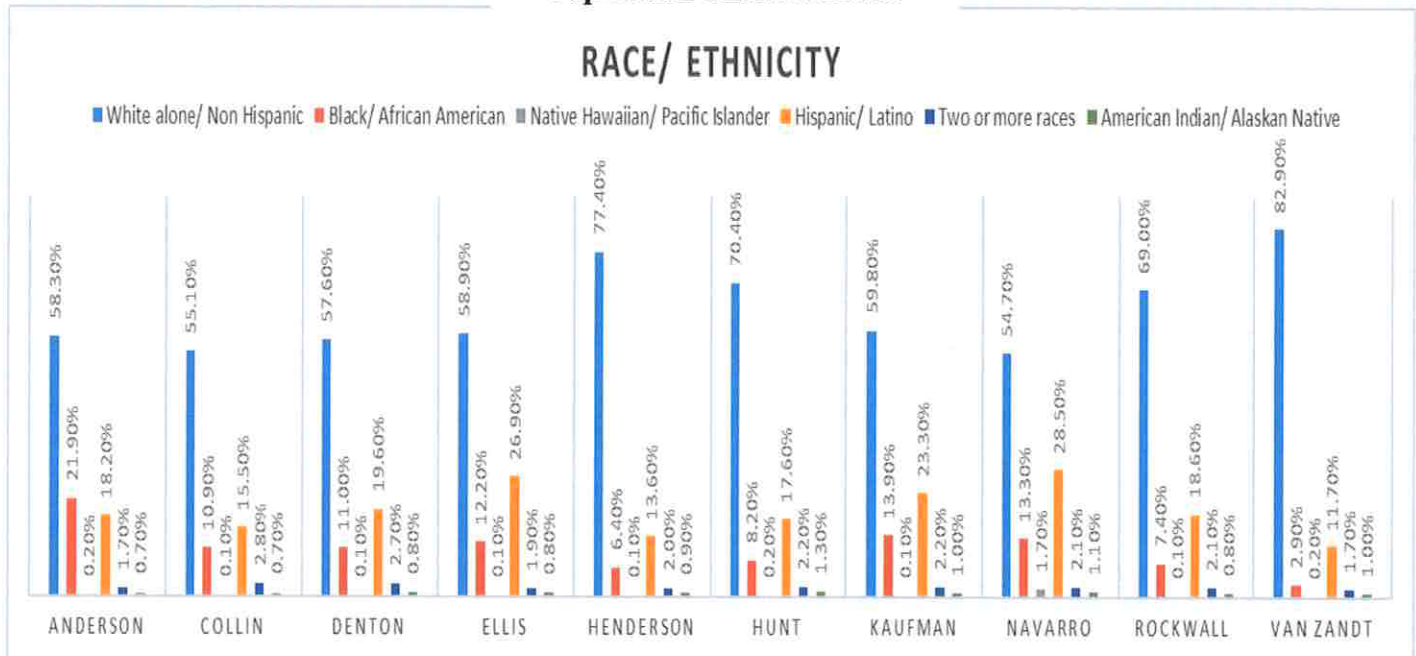
**\*26** services reported in the health and social/behavioral development domain. This includes customers whose goal is to increase or improve their nutritional skills and physical health.

*\* CSI's Annual Report FY 2021 contains adjustments for data in all of the above-listed service domains.*

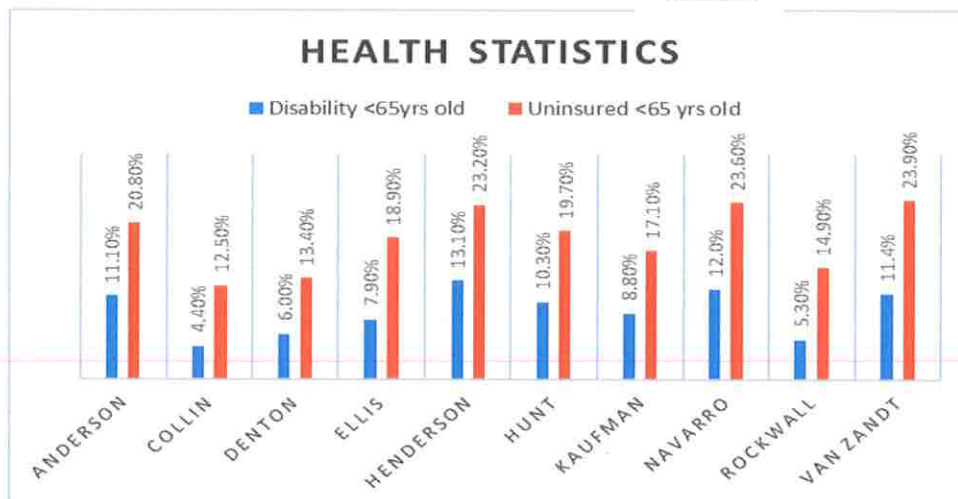
## Community Profile:

The community profile provides an overview of Community Services, Inc.'s ten-county service area. The primary purpose is to provide background knowledge of the overall status of the community.

### Population Characteristics



### Health



**160,039**

**Total Number of Households  
Receiving SNAP Benefits**

### FOOD INSECURITY RATES:

Anderson Co. (19.3%)	Collin Co. (15%)	Denton Co. (15%)	Ellis Co. (14.2%)	Henderson Co. (18.8%)
Hunt Co. (18.7%)	Kaufman Co. (15.8%)	Navarro Co. (17.9%)	Rockwall Co. (12.7%)	Van Zandt Co. (17.3%)



## Income & Poverty

County	Population (Number)	Median Household Income	Poverty Level	Civilians Labor Force	Unemployment Rate
Anderson	58,402	\$45,847	20.9%	41.2%	6%
Collin	1,109,462	\$100,541	6.2%	70.7%	5.5%
Denton	941,647	\$90,354	6.9%	72.3%	5.7%
Ellis	202,678	\$79,834	7.9%	67.5%	5.7%
Henderson	83,667	\$49,469	14.2%	51%	6.4%
Hunt	103,394	\$57,467	12.6%	60.3%	6.2%
Kaufman	157,768	\$72,179	9.2	67%	6.3%
Navarro	53,591	\$47,574	14.8%	60%	5.8%
Rockwall	116,381	\$105,956	4.8%	69%	5.4%
Van Zandt	61,275	\$57,203	12.9%	52.8%	6.0%

## Housing & Transportation

**906,972**

Total Number of  
Households



### Median Gross Rent:

Anderson- \$829

Collin- \$1,428

Denton- \$1,269

Ellis- \$1,104

Henderson- \$803

Hunt- \$952

Kaufman- \$1,087

Navarro- \$806

Rockwall- \$1,472

Van Zandt- \$865

### Median Housing Value:

\$110,000

Anderson

\$337,200

Collin

\$297,100

Denton

\$214,500

Ellis

\$120,700

Henderson

\$135,800

Hunt

\$195,400

Kaufman

\$109,700

Navarro

\$283,000

Rockwall

\$152,200

Van Zandt

### Mean Travel Time To Work:

23.1 minutes

29 minutes

28.6 minutes

30.6 minutes

31.6 minutes

31.2 minutes

36.3 minutes

28.7 minutes

32.6 minutes

36.7 minutes



## Education



**Education Attainment  
per County**

### High School Diplomas Issued:

Anderson: 503

Collin: 12,997

Denton: 9,774

Ellis: 2,355

Henderson: 812

Hunt: 1,062

Kaufman: 1,726

Navarro: 618

Rockwall: 1,373

Van Zandt: 694

### Bachelors' Degree:

Anderson: 6.8%

Collin: 33.2%

Denton: 30.3%

Ellis: 24%

Henderson: 11.5%

Hunt: 12.9%

Kaufman: 13.8%

Navarro: 10.4%

Rockwall: 25.7%

Van Zandt: 11.6%

## **Community Needs Assessment Overview**

CSI conducted a comprehensive Community Needs Assessment (CNA) in 2021. Our agency used quantitative and qualitative data to identify the community's critical issues. During the ten-week assessment period, the CNA team visited thirty cities to conduct forums or focus groups and interviews with key stakeholders (i.e., judges, community leaders, residents, staff, and customers). Integrated into the body of the CNA was the assessment data gathered from the faith-based, community-based, public, private, and education sectors. The Top Five Needs identified in the CNA assisted our agency in developing the Community Action Plan and setting the priorities for this Strategic Plan (SP).

### **Top Five Needs:**



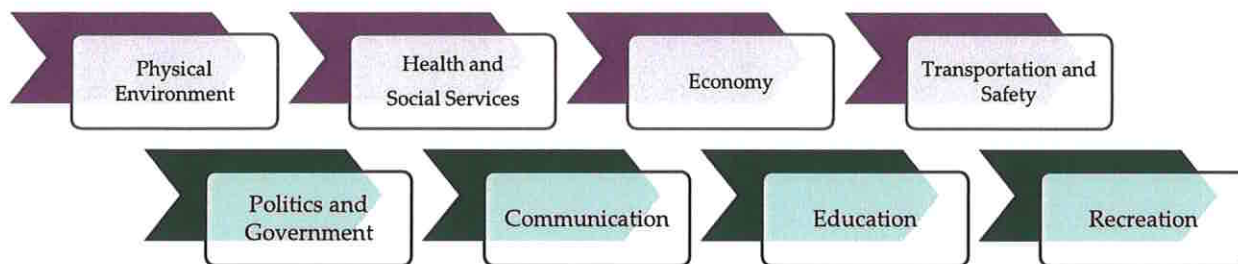
#### **Key Findings:**

- Well-developed public transportation systems were limited or non-existent in rural areas.
- Anderson, Henderson, Hunt, Navarro, and Van Zandt are the top five counties with the highest poverty.
- One-tenth of residents in Anderson county have attained a Bachelor's degree or higher.
- Collin, Denton, and Rockwall counties have the highest education attainment rates.
- Lack of awareness of community resources and access to quality grocery stores, higher wages, and educational opportunities affects any given county's health.
- Poverty is more prevalent in females than males within the service area.
- The poverty percentage amongst Caucasians is significantly lower than any other race/ ethnicity group.
- "Children in Poverty" represents one-fifth of the population in Anderson County.
- On average, 88% of organizations interviewed expressed that they had limited to no knowledge of our community action agency and the services provided to the community.
- According to the U.S. News & World Report L.P. Healthiest Communities Rankings(2021), Collin County is the healthiest with an overall score of 76/100, and Henderson and Hunt counties are conversely the unhealthiest, both with a comprehensive environmental score of 35/100.



## Windshield Survey

Historically used by health professionals, a windshield survey is an informal way of scanning an environment. This is an insightful tool used as supplemental information in resource mapping. This assessment conducted through the windshield of a vehicle allows the observer to become familiar with the community's strengths and risk factors or variables that affect the community's overall health. Data collected during each observation session captures the community's core (i.e., History, Demographics, Ethnicity, Values, and Beliefs) in addition to the following subsystems:



*CSI used this surveying method for its Community Needs Assessment period noting the following observations with sample pictures:*

**Anderson-** Palestine is the most resourceful city within the county; significant infrastructure needs in Montalba.

**Collin-** Diverse colleges; Thriving Businesses and Economy; Overpopulated.

**Denton-** Established Public Transportation system; Honors veteran population.

**Ellis-** High public safety presence; Waxahachie is the most resourceful city within the county.

**Henderson-** Values religious beliefs; outstanding livestock as a source of revenue; family-oriented; older population.

**Hunt-** Limited social services resources; Quinlan city needs significant revitalization.

**Kaufman-** Large retail industry in the City of Terrell; an array of specialty clinics in Kaufman City.

**Navarro-** Historical town with a rich history and limited social services resources; Major Infrastructure Needs.

**Rockwall-** Higher socioeconomic status; limited signage indicating city limits.

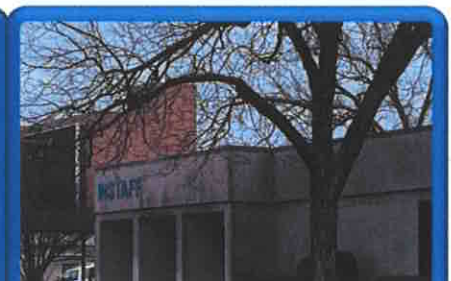
**Van Zandt-** Values religious beliefs; veterans' memorial; older homes; limited Social Services resources.



Palestine, TX (College/ University)



Lewisville, TX (Hospital)



Corsicana, TX (Employment Agency)

*\*Additional pictures and narratives located in CSI's Community Needs Assessment 2021*

## **Stakeholder Interviews**

CSI reviewed various input from multiple groups during the Community Needs Assessment and Strategic Planning period. This group comprises the following: staff members, the Board of Directors, a funder, customers, community partners, residents, and leaders representing the community, faith, public, private and education sectors in our service area. The total number surveyed is 720.

Survey outcomes show diversity in thought; however, one common theme remained (Community Engagement). Interviewees recommended that community providers engage in meaningful discussion about resource mapping and develop an action plan. Having a holistic approach to service delivery, diversified funding sources, strategic partnerships with a streamlined referral system, state and federal buy-in, and community awareness may potentially address the gaps in service provision.

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## **Customer Satisfaction Data and Customer Input**

Satisfaction Surveys disseminated to customers during the Community Needs Assessment period highlighted service delivery and overall program experience. Survey participation was advertised on CSI's Facebook page, LinkedIn, and other social media platforms. Special arrangements were made to address the various barriers presented by survey participants, such as limited reading comprehension, language barriers, and handwriting legibility. Participants were presented with different options to complete the survey. This includes multiple modalities such as Survey Monkey, QR Code, Physical Surveys (English), Physical Surveys (Spanish), Phone Interviews, and in-person dictation. There were five survey collectors for participants using the Survey Monkey modality (online link, Email, Social Media, website, or Manual Data Entry). Customers identified that they received the following services from CSI: Case Management, Education Support, Employment Support, Food Assistance, Gas Assistance, Rental Assistance, and Utility Assistance. The common needs identified in the narrative section of the survey were rental assistance, affordable housing programs, transportation, education, employment, weatherization, food assistance, childcare, etc. Customers stated that CSI exhibited fairness in the assistance process and met their needs via direct client services and referrals; however, there were several deficiencies within the program. The weaknesses identified are the lack of communication, the long turnaround time for approvals, lack of automation in service delivery, minimal advertising, poor visibility within the community, the lengthy application process, and lack of adequate follow-ups.

**Recommendations/ Future Initiatives-** CSI will use the feedback received from its customers to address deficiencies by implementing viable solutions. This involves strategic goal setting such as automating systems, constant programmatic review of service delivery, improved communication, and setting benchmarks.

Customer Satisfaction Data and Input, Stakeholder Interviews, SWOT Analysis, Community Needs Assessment and Agency Data funneled through in the development of CSI's strategic plan as shown in this illustration.

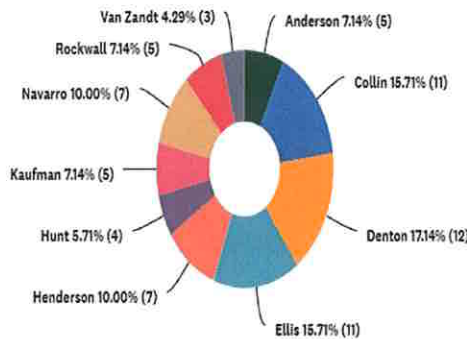




## Customer Satisfaction Data Presentation (i.e., line graphs, bar graphs, pie charts, etc.)

County of Residence:

Answered: 70 Skipped: 0



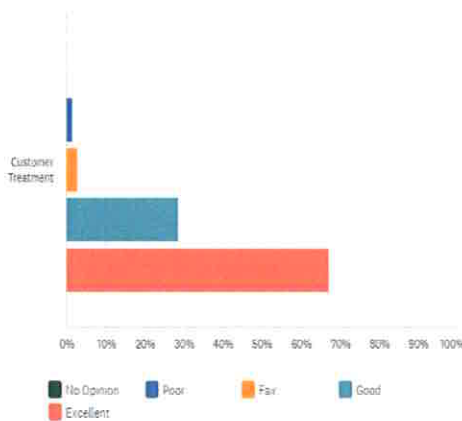
Please provide your feedback to help improve our services and plan future services. Please identify the service(s) received from our agency.

Answered: 70 Skipped: 0



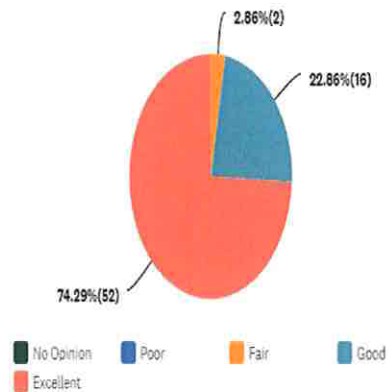
Rate how satisfied you are with the services you received from our agency by rating which best describes your experience: How did the staff treat you?

Answered: 70 Skipped: 0



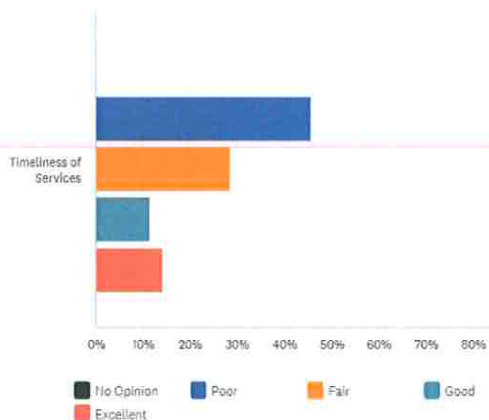
Did staff do what they said they would do to assist you?

Answered: 70 Skipped: 0



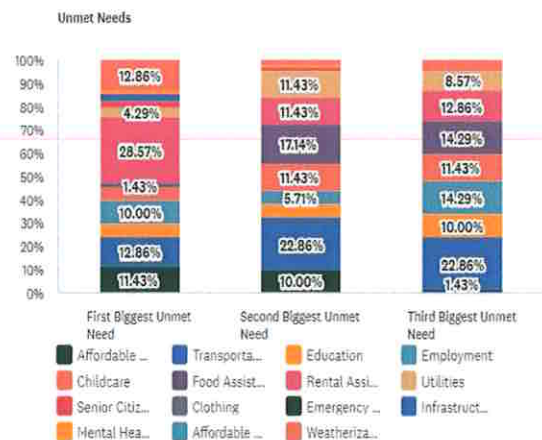
Did staff assist you in a timely manner?

Answered: 70 Skipped: 0



What are the three biggest unmet community needs in your county?

Answered: 70 Skipped: 0



## **Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis**



STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> <li>✓ Eligible Entity Status (CSBG Program).</li> <li>✓ Satellite Offices.</li> <li>✓ Diverse staff and board of directors with talent and expertise in various areas.</li> <li>✓ Ongoing Professional Development available for all staff.</li> <li>✓ 100% compliance with regulatory guidelines.</li> <li>✓ Well-Established agency for over five decades.</li> <li>✓ Great benefits package for staff.</li> <li>✓ Agency has multiple programs and spacing.</li> <li>✓ Employee Recognition via team lunches and awards ceremonies.</li> </ul>	<ul style="list-style-type: none"> <li>✓ Limited unrestricted funds.</li> <li>✓ Staff capacity to manage multiple programs.</li> <li>✓ Staff health vulnerability.</li> <li>✓ Staff Morale (i.e., high turnover rate, internal culture, limited teamwork, working in silos)</li> <li>✓ Tenured staff adapting to technological advancement.</li> <li>✓ Lacking seamless technological integration across the agency.</li> <li>✓ Ability to maintain the entire board for at least one year.</li> <li>✓ Staff burnout due to unbalanced workloads.</li> <li>✓ Low Social Media Presence.</li> </ul>	<ul style="list-style-type: none"> <li>✓ Strengthen Community Partnerships within all five sectors.</li> <li>✓ Rebranding (sustainable social media presence).</li> <li>✓ Gain fundraising support or sponsorships from local, state, and federal agencies.</li> <li>✓ Research new and innovative renewable grants annually.</li> <li>✓ Increase engagement and involvement from Board members.</li> <li>✓ Cross-training and realigning program staff responsibilities to meet the agency's growing needs (avoid burnouts).</li> <li>✓ Enhance personnel policies for quality improvement.</li> </ul>	<ul style="list-style-type: none"> <li>✓ Impacts of the election and potential budget cuts.</li> <li>✓ Federal and state policy change to grant programs.</li> <li>✓ Competition from other non-profit organizations offering similar services.</li> <li>✓ Impacts of Poverty.</li> <li>✓ COVID-19 and other health or economic crisis.</li> <li>✓ Staffing retention and recruitment.</li> </ul>

**SUMMARY:** CSI is a well-established organization that sustained three programs over the past five decades. Applauded for its diverse and talented staff, CSI has maintained organizational standards marked at 100%. Having limited unrestricted funds can hinder the expansion of agency-wide programs and technological advancement. There is an opportunity to form community partnerships and rebrand strategically; however, the impact of the election or federal and state policy changes to grant programs can pose a threat for CSI.



## **Results-Oriented Management and Accountability (ROMA)**

During the early years of the Community Action Network (CAN), many different approaches were taken to depict the success and impact of Community Action Agencies (CAA). ROMA was implemented to ensure that the distribution of federal funds for the block grant program yielded robust results. The journey to establishing an accountability system started in 1993 when Congress passed the Government Performance and Results Act (GPRA). The act, passed in response to a renewed emphasis on accountability, focuses on results, quality service delivery, and customer satisfaction. The Monitoring and Assessment Task Force (MATF), created in 1994, worked strategically to produce a “results-oriented” approach for all CAAs nationally.

The CSBG Act, amended in 1998, mandated implementing a comprehensive performance management system (ROMA). In 2001, Community Action Agencies received guidance from the Office of Community Services (OCS) regarding implementing ROMA on an agency level. The introduction of National Indicators in 2005 was pivotal in depicting CAAs’ Performance. ROMA is an essential system that integrates outcomes or results into a CAA’s administration, management, operation, and evaluation of programs and services.

*The six National ROMA goals initially evolved on the foundation of the MATF Plan (graphic below). The Community Action Network has since focused on three national network goals (graphic on page 16).*



***Graphic: Foundational ROMA Goals***

## ROMA Next Generation



ROMA Next Generation (NG) is a system used for continuous quality improvement. This allows the agency to measure, analyze and communicate performance goals and results. The purpose of ROMA NG is to shift the culture of Community Action agencies from compliance and reporting to continuous learning. This allows the agency to identify its successes and challenges and make informed decisions on initiatives to enhance service delivery yielding sustainable results. ROMA NG, used on a state and federal level, helps identify trends in data, common insurmountable barriers, and resources to deliver comprehensive change.

## Theory of Change Model-

The National Community Action Theory of Change (TOC) is a graphical presentation of the Community Action Network. The integration of this model demonstrates a commitment to accountability for the entire network through the Performance Management Framework while driving change. It portrays the long-term goals, core principles, and capacity of the Community Action Network. The Theory of Change is a logic model that provides a road map or solution to a problem from intervention to impact.





## ROMA Logic Model- CNA Top Five Needs



ROMA Logic Model (Planning and Evaluation)  
Subrecipient: Community Services, Inc. (CSI)  
Time Period (years) covered by the Strategic Plan: 2023-2028

### HOUSING

NEED	SERVICE/ ACTIVITY	OUTCOME	OUTCOME INDICATORS	RESULTS	MEASUREMENT TOOLS	DATA PROCEDURES	FREQUENCY
<b>Ranking # 1- Housing</b> Individuals and families lack resources to maintain housing.	CSI will provide rental assistance and emergency shelter payments, refer individuals and families to local housing authorities for first-time home buyer programs.	Individuals and families obtain resources to maintain housing.	100/115 customers will achieve this outcome equating to an 87% success rating.	(Completed after Implementation and part of the Evaluation of Results)	National Performance Indicators (NPI)-Enrollments and Outcomes, in 90-day budgeting and emergency housing assistance from CSI, referrals to Consumer Credit Counseling services, and rental assistance programs.	Case Managers will collect information during case management follow-up sessions, document results in Shah Database system, and outcome customers in the designated domain.	Data will be collected on a monthly basis. Outcomes will be noted on the monthly performance reports. In addition to the annual report.



ROMA Logic Model (Planning and Evaluation)  
Subrecipient: Community Services, Inc. (CSI)  
Time Period (years) covered by the Strategic Plan: 2023-2028

### EDUCATION

NEED	SERVICE/ ACTIVITY	OUTCOME	OUTCOME INDICATORS	RESULTS	MEASUREMENT TOOLS	DATA PROCEDURES	FREQUENCY
<b>Ranking #2 Education</b> Individuals need further education to become self-sufficient.	CSI will reach out to local ISDs, colleges and institution of higher learning to establish partnerships providing access to information on financial aid, adult education classes, continuing education classes, and coursework. CSI will offer tuition assistance.	Individuals obtain further education.	40/47 customers will achieve this outcome equating to an 85% success rating.	(Completed after Implementation and part of the Evaluation of Results)	National Performance Indicator (NPI)-Enrollments, and Outcomes demonstrating improved basic education, obtaining a recognized credential, certificate, diploma or advanced degree.	Case Managers will collect information during case management follow-up sessions, document results in Shah Database system and outcome customers in the designated domain.	Data will be collected on a monthly basis. Outcomes will be noted on the monthly performance reports. In addition to the annual report.

## ROMA Logic Model- CNA Top Five Needs (Cont.)



### HEALTH

ROMA Logic Model (Planning and Evaluation)  
Subrecipient: Community Services, Inc. (CSI)  
Time Period (years) covered by the Strategic Plan: 2023-2028

NEED	SERVICE/ ACTIVITY	OUTCOME	OUTCOME INDICATORS	RESULTS	MEASUREMENT TOOLS	DATA PROCEDURES	FREQUENCY
Ranking #3 Health and Social Development- Individuals and families need well-being management skills.	Quarterly health fairs will be hosted by CSI at the corporate office in collaboration with local health clinics, YMCAs or gyms (providing free testing services, preventive education and vouchers to physical activity sites).	Individuals obtain well-being management skills.	20/25 customers will achieve this outcome equating to an 80% success rating.	(Completed after Implementation and part of the Evaluation of Results)	National Performance Indicator (NPI)- Enrollments and Outcomes demonstrating individuals with improved physical health and well-being, referrals physical activity sites.	Case Managers will collect information during case management follow-up sessions, document results in Shah Database system and enroll and outcome customers in the designated domain.	Data will be collected on a monthly basis. Outcomes will be noted on the monthly performance reports. In addition to the annual report.




### EMPLOYMENT

ROMA Logic Model (Planning and Evaluation)  
Subrecipient: Community Services, Inc. (CSI)  
Time Period (years) covered by the Strategic Plan: 2023-2028

NEED	SERVICE/ ACTIVITY	OUTCOME	OUTCOME INDICATORS	RESULTS	MEASUREMENT TOOLS	DATA PROCEDURES	FREQUENCY
Ranking #4 Employment Individuals need employment.	CSI will collaborate with job training programs and refer customers to hiring events.	Individuals obtain employment.	26/31 customers will achieve this outcome equating to an 84% success rating.	(Completed after Implementation and part of the Evaluation of Results)	National Performance Indicator (NPI)- Enrollments and Outcomes demonstrating individuals who obtained employment up to a living wage and individuals who obtained employment with a living wage or higher.	Case Managers will collect information during case management follow-up sessions, document results in Shah Database system and enroll and outcome customers in the designated domain.	Data will be collected on a monthly basis. Outcomes will be noted on the monthly performance reports. In addition to the annual report.



## ROMA Logic Model- CNA Top Five Needs (Cont.)

Roma Logic Model (Planning and Evaluation) Subrecipient: Community Services, Inc. (CSI) Time Period (years) covered by the Strategic Plan: 2023-2028							 <b>FOOD</b>
NEED Ranking #5	SERVICE/ ACTIVITY	OUTCOME	OUTCOME INDICATORS	RESULTS	MEASUREMENT TOOLS	DATA PROCEDURES	FREQUENCY
Food Assistance Individuals and families lack food resources.	CSI will provide food card for emergency assistance, refer customers to DHHS to apply for SNAP benefits, register with local Meals on Wheels programs, and develop partnerships with food pantries.	Individuals and families obtain food resources. CSI will obtain community partnerships with food pantries.	32/38 customers will achieve this outcome equating to an 84% success rating.	(Completed after Implementation and part of the Evaluation of Results)	National Performance Indicator (NPI)-Enrollments and Outcomes demonstrating individuals who increased their nutritional skills, improved physical health and well-being, seniors and individuals with disabilities who maintained an independent living situation.	Case Managers will collect information during case management follow-up sessions, document results in Shah Database system and enroll and outcome customers in the designated domain.	Data will be collected on a monthly basis. Outcomes will be noted on the monthly performance reports. In addition to the annual report.

*\*Outcome indicators identified in the ROMA logic model were based on current year targets and will be adjusted based on the annual Community Action Plan (CAP).*

## Integration of ROMA and the Strategic Plan

CSI has integrated the ROMA cycle in the formulation of this strategic plan, evidenced by the following:

**Assessment (Quarterly/ Ongoing)-** The 2023-2028 strategic plan emphasizes gathering and assessing data from the CNA, agency, SWOT analysis, and satisfaction surveys to enhance the customer's experience. This will ensure the integration of effective and efficient practices across the agency. Automating processes, establishing benchmarks, and an agency-wide scorecard or dashboard to incorporate feedback received. Designated agency staff (ROMA-certified Implementers) will continuously collect and review program data to assess the impact of environmental conditions on service delivery. A CSI Triennial Community Needs Assessment (CNA) will be in 2024.

**Planning-** Based on the top five needs identified in our Community Needs Assessment 2021 report, CSI used the ROMA logic model to state the need, service/ activity, outcome, outcome indicators, results (placeholder), measurement tools, data procedures, and frequency. The Shah Software system will track services and outcomes relative to targets (National Performance Indicators) set in the Community Action Plan (CAP). The planning step includes updates or revisions to the CSI's strategic plan and CAP (if necessary). A Quinquennial strategic plan for the agency will be prepared in 2028.

**Implementation-** The agency's ROMA-certified Implementers will be responsible for implementing the strategic plan with coalesced efforts from the strategic planning committee and senior leadership. Program staff will engage in various actions and follow roadmaps to achieve the goals indicated in this plan. This step involves implementing the revised Community Action Plan (if necessary). The CAP applies strategies and services to produce results with linkages to community resources.

**Achievement of Results-** Designated staff will track each strategy's progress and actual results periodically and report to the Board of Directors to fulfill the Organizational Standard category six. The updates will be shared via the distribution of the monthly performance reports, scorecards, success stories, quarterly impact reports, and/or annual report on a needed basis. Quarterly impact reports will be shared externally on CSI's website.

**Evaluation-** CSI will review the depopulation's demographics and identify the services received as single, multiple, or bundled as collected through the Shah Software system. This data analyzed is compared to the benchmarks set in the planning step. Recommendations will be made to the Board of Directors regarding actions to be taken based on the analysis of the results. This involves the continuance of strategies that achieve desired performance goals and the revision or discontinuation of ones that do not achieve desired performance goals.

*\*[The cycle begins again] Reassessment- CSI will reassess and revise plans. In addition, the community needs assessment progress will be reevaluated and changes made (if necessary) to ensure that later assessments align with the ROMA framework and guidelines.*  
*Planning- Update Community Action Plan.*

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## **Strategic Issues:**

The Strategic Planning Committee identified several strategic issues upon reviewing the data findings, environmental scan, SWOT analysis, customer satisfaction, and stakeholder input to develop meaningful goals, objectives, and strategies. These issues include housing insecurity, awareness of community resources, timeliness of service delivery, agency nimbleness to address crises, adapting to change, funding, lack of communication amongst community partners, limited staffing, innovation, and technological advancement. The committee concluded on five priority goals to contribute to anti-poverty efforts within the community categorized on the agency, family, and community levels.

1. Organizational Leadership and Growth (Agency)
2. Program Development and Innovation (Family)
3. Strategic Partnership and Advocacy (Agency)
4. Marketing and Visibility (Agency)
5. Community Empowerment and Civic Engagement (Community)



## **Strategic Goals and Objectives**

### **Goal #1: Organizational Leadership and Growth (Agency)**

*CSI will exude operational excellence by promoting evidence-based practices to enhance the agency's capacity to achieve results.*

#### **Objectives:**

- Increase the agency's revenue sources and develop financially solid partnerships.
- Intensify board of directors and staff engagement in agency activities.
- Improve agency-wide performance in service delivery.

#### **Strategies:**

- Increase the agency's revenue streams via fundraising initiatives, foundation, and corporate grants.
- Engage the staff and board of directors in community outreach efforts and fundraising initiatives (i.e., North Texas Giving Day) and feature successes in an annual impact report.
- Maintain practical governing principles for Organizational Standards compliance.
- Create a board assessment tool or survey and utilize practical results to determine training strategy.
- Implement an agency-wide scorecard to be evaluated quarterly as a metric to determine performance improvement using automated processes. (i.e., conduct SWOT analysis and Knowledge, Skills, and Abilities review with Staff and offer coaching opportunities to address deficiencies during quarterly reviews with team building activities to build staff morale).
- Personnel Policies are revised to include addendums for quality improvement.
- Assess the agency's capacity to manage special projects and hire personnel to fill staffing gaps.
- Review the agency's contingency plan annually to mitigate unforeseen risks or events.

#### **Desired Outcomes:**

- Increased staff and board member engagements during scheduled monthly meetings, agency events, and fundraising activities.
- Staff has enhanced knowledge of Community Action Partnership and other programmatic knowledge and skills leading to career advancement opportunities.
- Reduction of deficiencies in daily operational activities or breakdown in system processes agency-wide.
- CSI will establish a donor base.

#### **Metrics:**

- 100% compliance with Organizational Standards.
- Board of Directors engage in at least two fundraising activities annually as evidenced by donations, planning, or on-site volunteer services.
- At least one CSI staff member becomes a Certified Community Action Professional (CCAP), and National Certified ROMA Implementers (NCRI) certification holders increase over the next five years.
- CSI will raise \$100,000 in unrestricted funds annually.

## **Goal#2: Program Development and Innovation (Family)**

*CSI will focus on the needs of its community as identified in the Community Needs Assessment (CNA) by helping people living in poverty to be economically stable and self-sufficient.*

### **Objectives:**

- Evaluate program goals, workflows, and service targets to address deficiencies in service delivery.
- Enhance the customer experience based on satisfaction data.
- Address the Top Five Needs identified in the Community Needs Assessment.

### **Strategies:**

- Evaluate service delivery during monthly programmatic meetings and training.
- Develop factsheet, service guide, and FAQs to inform customers of agency programs and benefits.
- Survey accessibility via multiple modalities (survey monkey, website, telephonic, email, QR Code, etc.)
- Institute award recognition for customers who “Transitioned Out of Poverty” (TOP) and offer incentives for customers who met their service plan goals and participated in the satisfaction survey.
- Create an alumni network of customers who transitioned out of poverty to track impact, receive testimonials, and encourage participation in community action activities.
- Incorporate innovative solutions to programming accessibility and service delivery (i.e., automated systems to respond to customers’ requests or use an App).
- Conduct intake sessions with customers, enroll and outcome individuals within service domains, provide community resources based on issues identified in the CSI Needs Assessment document or service plan, and document customer engagements with regimented follow-ups in a 90-120 day period.
- Host community resource events (i.e., food drive or holiday basket giveaways, employment boot camps, job training programs, financial wellness resources, affordable housing, transportation, etc.) to address community needs.

### **Desired Outcomes:**

- Customers better understand the different agency programs, obtain necessary resources, and refer other families in need to seek out services to the agency.
- Participation in customer satisfaction surveys documenting positive engagements, resulting in high satisfaction scores.
- Customers transition out of poverty and become self-sufficient.
- Cost-effective and efficient service delivery as evidenced by faster turnaround times.

### **Metrics:**

- Two-Thirds of customers served complete survey with 90% customer satisfaction survey.
- 50 people enrolled in the case management each program year.
- 59 people transitioned out of poverty annually with a 50% sustainability for at least one year.



### **Goal # 3: Strategic Partnerships and Advocacy (Agency)**

*CSI engages with key stakeholders within its communities through advocacy efforts and the development of community partnerships.*

#### **Objectives:**

- Increase partnerships within all five sectors (i.e., education, faith-based, community, private, and public).
- Enhance the agency's involvement in community activities; advocate for low-income persons.
- Bring awareness to unmet community needs and gaps in services.

#### **Strategies:**

- Develop partnerships with local food pantries, health and wellness facilities, financial service providers, transportation, and housing providers to help facilitate access to resources for our customers.
- Solicit feedback on referral services and procedures by implementing partner surveys.
- Participate in city council and coalition meetings across service areas and present information on the community needs, gaps in services, and barriers to access.
- Host forum or "Lunch and Learn" sessions or networking mixers with key stakeholders in all five sectors for resource sharing, advocacy efforts, and distribution of impact reports.
- Attend and engage in community events (i.e., carnivals, community fairs, info. sessions, job fairs).

#### **Desired Outcomes:**

- Participation in partner surveys at the end of each program year to obtain feedback.
- Donation of resources to address customers' needs within service domains.
- Key stakeholder participation in "Lunch and Learn" sessions and extended community reach.

#### **Metrics:**

- 50% increase in community partnerships.
- 75% of community partners complete a satisfaction survey annually.
- Agency receives at least two invitations to participate in community events.
- Agency is invited to host at least two presentations on community needs due to "Lunch and Learn" sessions.

#### **Goal # 4: Marketing and Visibility (Agency)**

*CSI will increase its presence within its service area via social media platforms and various outreach efforts.*

##### **Objectives:**

- Improve the agency's website to be user-friendly, interactive, and informative for key stakeholders (i.e., partners, donors, volunteers, clients, and funder).
- Increase the agency's visibility via marketing and rebranding efforts to create community awareness and establish a solid donor base and recognition plan.

##### **Strategies:**

- Increase social media presence by creating profiles and interactive content on Twitter, Instagram, LinkedIn, and Facebook.
- Encourage staff members to join local community boards and civic organizations to bring awareness to the agency's anti-poverty efforts.
- Review and update current outreach materials on a needed basis with the production of print materials.
- Create infographics and quarterly impact reports on the agency's website and social media platforms.
- Maximize partnerships with key stakeholders (i.e., client, funders, donor) with frequent engagements.
- Institute a resource bank section on the agency website featuring new and re-occurring programs to address community needs (physical copies of the comprehensive guide available upon request).

##### **Desired Outcomes:**

- Increased site visits and social media followers due to revamped engagement initiatives.
- Customers have increased awareness of community resources.

##### **Metrics:**

- 50% increase in followership on all social media platforms.
- 25% increase in unique site visits to the agency website.
- 10% of customer requests received due to outreach efforts.



## **Goal #5: Community Empowerment and Civic Engagement (Community)**

*CSI will empower people living in poverty to be socially altruistic and civically engaged in improving the conditions of the communities in which they live.*

### **Objectives:**

- Empower individuals and families living in poverty to participate in activities to improve community conditions and foster reciprocity.
- Emphasize the importance of individuals and families having a stake in their community.
- Encourage participation in leadership programs.

### **Strategies:**

- “Community Service Day,” where staff provides volunteer opportunities for people living in poverty.
- Organize Quarterly Town Hall meetings to solicit customer input on issues in their community.
- Provide leadership program resources on our agency website and social media platforms to empower low-income persons to engage in solutions to alleviate poverty within their communities.
- Organize local events for community engagement during National Community Action Month (May of each year) for opportunities to volunteer and advocate for low-income persons.
- Inform and encourage customers to participate in leadership programs, community events, and initiatives (i.e., PTA meetings, city council meetings, civic groups, neighborhood clean-up events, and other volunteer opportunities).

### **Desired Outcomes:**

- Persons of low income will have a stake in their community (i.e., civic engagement, volunteerism, leadership program).
- Customers are knowledgeable of ways to improve their community’s conditions by volunteering with habitat for humanity, neighborhood clean-up initiatives, or building projects.
- Shared testimonies of impact due to participation in community events.
- Community conditions are improved.

### **Metrics:**

- 25% of customers have a stake in their community. (i.e., volunteerism)
- 10% of customers function in leadership roles within their community.
- Increase in the number of volunteers who worked with CSI to improve conditions in the community.
- Increase in the number of community initiatives where CSI is represented.

## **Key Performance Indicators**

A fundamental part of the strategic planning process is implementing measures or Key Performance Indicators to track the outcome of the goals, objectives, and strategies written in this plan. This requires the development of action plans, a monitoring plan, and a reporting plan. Action plans create a roadmap for accomplishing each objective, similar to a project management tool or framework. The plan outlines the action steps, staff responsible, required resources, targeted completion date, percent complete, and status explanation. Integrated into the action plan is the monitoring portion (percent complete and status explanation). The National Performance Indicators (NPIs) is an outcome-reporting tool that our agency will use to track the results of outputs. An extension to this reporting tool is the adoption of an agency-wide scorecard or dashboard. The scorecard entails outcomes CSI plans to achieve across its programs, services, and functional units. A scorecard or dashboard presents data and results in a simplified format that will help CSI's leadership team and Board of Directors see the overall success of its programs and operations. The performance-measured data collected is inputted in a spreadsheet format. CSI's National Certified ROMA Implementers (NCRIs) will then compile information and summarize data as a report for the strategic planning committee and Board of Directors during the regularly scheduled board meetings. At the end of each year, CSI will create a poster-size copy of the scorecard and place it on the agency's bulletin board for public viewing by all stakeholders. Integrating this reporting plan into the agency's routine management and daily operations can yield the following deliverables:

- Periodic reflection of the strategic plan at staff and board retreats or scheduled meetings.
- Incorporation of strategic plan objectives into job descriptions and performance reviews.

### ***Purple Graphic: Sample Action Plan***

<b>Objective 1.1: Raise \$30,000 a year by holding two annual fundraisers.</b>					
<b>Performance Measure/ Indicator (s): \$ Amount Raised, # of Fundraisers Held</b>					
<b>Objective Team Leader: Jane Doe</b>					
<b>Action Steps</b>	<b>Resources/Cost</b>	<b>Staff Responsible</b>	<b>Target Date of Completion</b>	<b>% Complete</b>	<b>Status Explanation</b>
Research fundraiser modalities and generate donor list	1 FTE=1 Day	Jane Doe	05/01/2022	100%	Completed
Develop a marketing plan for a social media campaign	1 FTE=10 Days \$500-Printing Costs	Jane Doe	05/11/2022	25%	Designed marketing materials

### ***Blue Graphic: Sample dashboard input spreadsheet***

<b>Goal: 1 Increase agency revenue by 10 % in three years</b>								
<b>Objective 1.1: Raise \$30,000 a year by holding two annual fundraisers.</b>								
<b>Performance Measure</b>	<b>Target</b>	<b>Q1</b>	<b>Q2</b>	<b>Q3</b>	<b>Q4</b>	<b>YTD</b>	<b>DIFFERENCE</b>	<b>% YTD</b>
\$ Amount Raised	\$30,000	0	\$10,000	\$5,000	0	\$15,000	-\$15,000	50%
# of Fundraisers Held	2	0	1	1	0	2	0	100%
<b>Objective 1.1 Outcome Score</b>								<b>75%</b>



## Healthy Communities: Hope for the Future

The World Health Organization defines health as a state of complete physical, mental and social well-being and not simply the absence of disease or infirmity. Our stance as a community action agency is to empower individuals and families living in poverty to overcome, thereby influencing the next generation to be citizens of healthy communities. We hope that the future consists of eliminated health disparities with unlimited access to community resources in which our service area will be adequately equipped with the following: financial institutions, housing developers, local businesses, philanthropy, institutes of education, health care institutions, health care professionals, engaged community members, community organizations, and municipal governments. To add additional context to the data presented in this plan, CSI presents a healthy community model:



## **References**

Community Action Partnership

<http://communityactionpartnership.com>

National Association for State Community Services Programs

<https://nascsp.org>

CSBG Training and Technical Assistance Resource Center

<https://www.csbgta.org>

Strategic Planning for Nonprofits

<https://www.councilofnonprofits.org/tools-resources/strategic-planning-nonprofits>

The Ultimate Guide to Nonprofit Strategic Planning

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[https://www.academia.edu/14574596/UTILIZING A STRENGTHS BASED APPROACH TO IMPLEMENT ROM A THROUGHOUT THE CAA](https://www.academia.edu/14574596/UTILIZING_A_STRENGTHS_BASED_APPROACH_TO_IMPLEMENT_ROMA_THROUGHOUT_THE_CAA)

United States Census Bureau

<https://www.census.gov/quickfacts/>

Center for Disease Control and Prevention

<https://www.cdc.gov/socialdeterminants/about.html>

World Health Organization

<https://www.who.int/data/gho/data/major-themes/health-and-well-being>

Data USA

<https://datausa.io/profile/geo/>



## **Acknowledgments**

A warm appreciation to the entire Community Services, Inc. staff and board of directors, local city officials, community partners, and key stakeholders for their invaluable insight on this strategic plan. The CSI Board of Directors adopted the Community Services, Inc. (CSI) 2023-2028 Strategic Plan on June 28, 2022.

### **Board of Directors**

#### ***Private Sector Representatives:***

Reverend Dairy Johnson- President (Navarro County)  
Lakeshea Brown-Vice President (Ellis County)  
Clara Jo McMillan – Secretary (Navarro County)

#### ***Public Sector Representatives:***

Jeffery C. Enoch, Sr. (Henderson County)  
Pam Corder (Kaufman County)

#### ***Client Sector Representatives:***

Krystal Gergits (Anderson County)  
Bernard Porter- Treasurer (Navarro County)  
LaQuintta D. Simon (Kaufman County)

### **Offices**

#### ***Corporate:***

302 Hospital Drive  
Corsicana, TX 75110

#### ***Satellite:***

306 N. Loop 288  
Suite 105  
Denton, TX 76209

#### ***Helping Hands:***

400 West Rusk Street  
Suite 200  
Rockwall, TX 75087

#### ***Texas Workforce Centers:***

Anderson County (Palestine, TX)  
Collin County (Plano, TX and McKinney, TX)  
Ellis County (Waxahachie, TX)  
Henderson County (Athens, TX)  
Hunt County (Greenville, TX)  
Kaufman County (Terrell, TX)

\*Van Zandt County residents access resources at the workforce center in Henderson County

### **CSI Strategic Planning Workgroup**

#### ***Leadership Team***

Daniel Edwards, Sr., MPA, President/CEO

#### ***Strategic Planning Committee Members***

Bernard Porter- Client Sector Representative  
Pam Corder- Public Sector Representative

#### ***Staff***

Rachel Adetokunbo, MPH, Regional Manager

### **Contact Us:**

Phone: 1-800-831-9929  
903-872-2401

Fax: 903-872-0254

Email: [support@csicorsicana.org](mailto:support@csicorsicana.org)

WEB: <https://www.csicorsicana.org/>

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# COMMUNITY SERVICES, INC.

*"Helping People, Changing Lives"*

## STRATEGIC PLAN 2023–2028

A 501(c)(3) Private Non-Profit Organization