Community Action Council

2024-2028
STRATEGIC PLAN

Office of Sustainability with support by

PEOPLE PINNACLE

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Executive Summary

This document was developed to outline our organization's vision for the next five years, encompassing the period from 2024 to 2028. At the core of this plan is a commitment to enhancing the quality of life for the individuals, families, and communities we serve, including Lexington-Fayette, Bourbon, Harrison, and Nicholas Counties. Community Action Council (CAC) embarked on a rigorous process to ensure that our goals and objectives align with the evolving needs of our communities and are rooted in data-driven insights. To support the agency's work and ensure the success of this strategic plan, CAC enlisted the expertise of the consultants at People Pinnacle. Susan Rogers of People Pinnacle has been pivotal in guiding a process for strategic decision-making, providing invaluable insights, and helping us navigate the complexities of the region's unique challenges and opportunities.

This Strategic Plan will serve as a roadmap for agency-wide planning and is organized into distinct goals, each designed to address critical issues and seize opportunities that will make a lasting impact. CAC embraced a holistic approach to community development, encompassing areas such as education, housing, employment, health, and social services. Over the next five years, the leadership and staff will work tirelessly to achieve the outcomes we have set forth while remaining flexible to the needs of our neighbors and environments.

CAC recognizes the importance of collaboration and engagement with the diverse voices of our community. Therefore, inclusivity and community involvement will be key to the success of the strategic plan.

As we embark on the next five years, CAC remains dedicated to transparency, accountability, and fiscal responsibility. We will continuously monitor and adjust our strategies to adapt to changing circumstances and emerging needs. We look forward to the positive changes this plan will bring to the lives of the individuals and families we serve. Together, we will make our communities even stronger, healthier, and more vibrant.

About Us

Community Action Council is a private, nonprofit organization established in 1965 through President Lyndon Johnson's Economic Opportunity Act. Throughout its history, CAC has provided an extensive array of programs and services aligned with its mission, with particular emphasis on early childhood education (through the federally-funded Head Start programs), workforce readiness training, support for adult education and vocational training, financial literacy education, youth development, housing assistance, including supportive housing and homelessness services, utility assistance and energy efficiency/weatherization, and crisis assistance, such as emergency shelter and food distribution. Annually, CAC works with more than 20,000 individuals and households with low income.

CAC is the designated Community Action Agency for the four central Kentucky counties of Fayette, Bourbon, Harrison, and Nicholas. CAC is also the Head Start and/or Early Head Start grant recipient for Bourbon, Clark, Estill, Fayette, Garrard, Harrison, Jackson, Laurel, Madison, Nicholas, Powell, Rockcastle, and Scott Counties and is the Migrant and Seasonal Head Start (MSHS) grant recipient for the statewide MSHS Network, operating services in Bourbon, Fayette, Harrison, Madison, Pulaski and Warren Counties.

Strategic Planning Team

Strategic Planning Team	
Melissa Tibbs	Director, Office of Sustainability
Sarah Hill	Community Development Specialist
Cara Howell	Planning and Projects Manager
Executive Director and Strategic Leadership Group (SLG)	The SLG, led by Executive Director Sharon Price, comprises the named directors of each departmental office within the organization and members of the Office of the Executive Director. Collectively, this 11-person team has more than 100 years of experience in operating a myriad of anti-poverty programs and services.
Board of Directors	CAC's internal governance structure includes its tripartite Board of Directors, which comprises representatives of the population with low income in its service area, along with members of both the public and private sectors of the

	community. The Board was an essential partner in the development of the Strategic Plan.
Policy Council	As a Head Start grant recipient, CAC's governance structure also includes its Head Start Policy Council. The Policy Council comprises current and former Head Start parents and representatives of the local community. The Policy Council members participated in Strategic Planning activities alongside the Board of Directors during the Strategic Planning Retreat in July 2023.

People Pinnacle

People Pinnacle is a locally based firm specializing in strategic planning, talent management consulting, and leadership development. The firm, which has partnered with CAC since 2016. In that time, People Pinnacle has led many initiatives, including a cultural shift initiative, a business community engagement study, an assessment of the drivers of poverty in rural counties, the establishment of values and competencies, and management and leadership development programs. People Pinnacle has also facilitated the governance board retreats in 2016, 2018, and, most recently, in 2023.

Mission & Vision

Our current **mission** statement, adopted in January 2014 and last reviewed by the Board of Directors in 2023, is as follows: *"Community Action Council prevents, reduces, and eliminates poverty among individuals, families, and communities through direct services and advocacy."*

Our **vision** is *"to end all poverty and ensure that all of our communities are equitable and thriving."*

Community Action Promise

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.

Organizational Standards

The Community Services Block Grant (CSBG) Organizational Standards, developed with input from the entire CSBG network, provide a comprehensive framework to ensure that all community action agencies nationwide can deliver high-quality services for underrepresented communities. As a CSBG-funded entity, CAC is committed to upholding these standards to deliver the highest-quality services possible.

The 58 standards are divided into nine categories. These categories are further subdivided into three thematic groups.

Maximum Feasible Participation	• Consumer Input and Involvement • Community Engagement • Community Assessment
Vision and Directions	• Organizational Leadership • Board Governance • Strategic Planning
Operations and Accountability	• Human Resource Management • Financial Operations and Oversight • Data and Analysis

At a minimum, CAAs must develop strategic plans that align with the following CSBG Organizational Standards, which are assessed on an annual basis:

4.3   *The organization's Community Action plan and strategic plan document the continuous use of the full Results Oriented Management and Accountability (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.*

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.*

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.

6.3   The approved strategic plan contains family, agency, and/or community goals.

6.4   Customer satisfaction data and customer input, collected as part of the community assessment, is included in the strategic planning process.

6.5   The governing board has received an update(s) on the progress meeting the goals of the strategic plan within the past 12 months.

Results Oriented Management and Accountability (ROMA)

ROMA Next Generation (ROMA NG) provides a robust system for continuous quality improvement, enabling CAAs, state agencies, associations, and national partners nationwide to effectively measure and analyze the impact of community service organizations.

CAC has established realistic and measurable (SMART) goals that are informed by and aligned with ROMA goals and performance indicators, addressing needs at the family, agency, and community levels.

This Strategic Plan also aligns with the National Community Action Theory of Change (TOC), outlining three long-term goals and eight core principles of Community Action.

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.

Core Principles

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

Guided by its nationally certified ROMA Trainer and with support from its ROMA Implementer, CAC will utilize the ROMA cycle of assessment, planning, implementation, achievement of results, and evaluation as a framework for continuous improvement.

ROMA Cycle

ASSESSMENT - Annual & Ongoing

- Annual assessment of community needs & assets (October-Apri)
- Monthly program/center continuous improvement reviews of internal data
- Strategic Planning Team continuously collects & reviews internal & external data for community insights.
- SLG bi-weekly meetings to prioritize strategies based on data & program feedback.
- Community assessment results shared annually with governing boards, funding sources, partners and the public

PLANNING - Annual & Ongoing

- Office of Community Services & CAC's ROMA Implementer develop annual National Performance Indicators (NPIs) & updates logic models
- Office of Child Development annually reviews & outlines progress toward Five-Year Goals.
- Agency-wide Annual Plan updated yearly to address emerging or increased needs
- Governing boards approve Annual Plan each year

IMPLEMENTATION - Ongoing

- Workgroups review qualitative & quantitative data, including Customer Satisfaction Surveys, to align with goals & funding source requirements
- Monthly finance meetings for comprehensive review of financial reports & data
- Annual all-staff meeting to discuss agency-level goals, objectives, & strategies
- ROMA Trainer & Implementer aid in implementing the Strategic Plan and Community Action Plan

ROMA Cycle & Resources Model
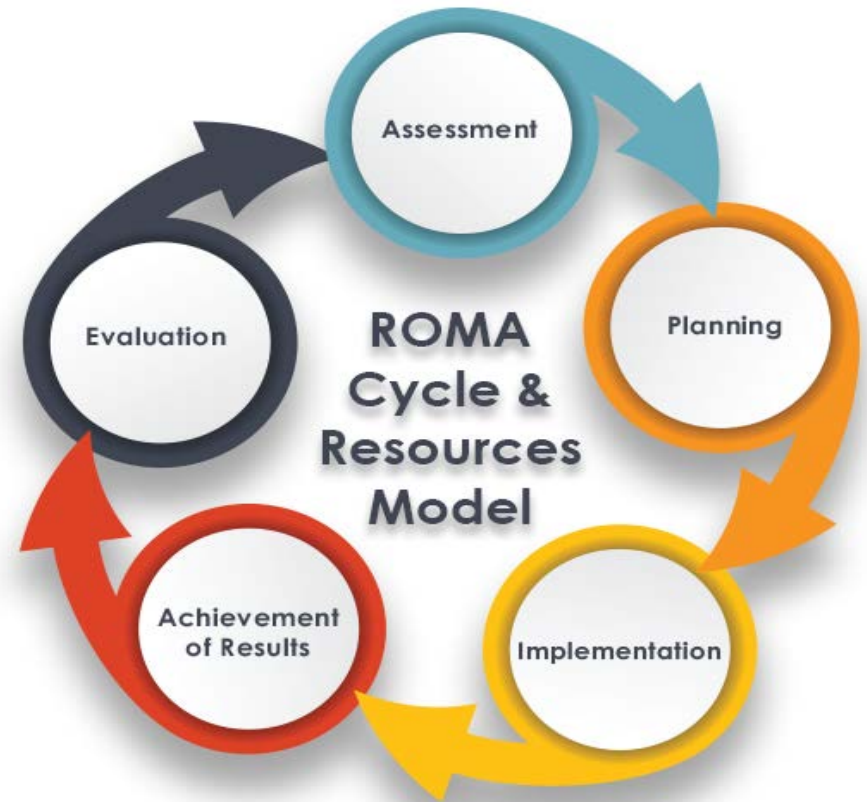
ACHIEVEMENT OF RESULTS - Ongoing

- CAC updates its website & produces digital/print materials to inform the public about the Strategic Plan & agency programs, outcomes, & impacts
- Minimum 10 updates provided to governing boards on progress of the agency's Strategic Plan & initiatives

EVALUATION - Continuous

- SLG meets bi-weekly to review program data
- Departments align goals, targets, & strategies with internal & external changes
- Fiscal department leads a comprehensive monthly review of all financial reports for program budget adherence

Current State Review

CAC conducted a Current State Review to ensure its goals, objectives and strategies were developed through data-driven decision-making. CAC's Office of Sustainability reviewed internal and external data made available over the last five fiscal years (2019-2023) to develop a picture of the evolving economic landscape in the region, the needs of the low-income communities served, and agency operations.

Internal data consisted of budgetary information, community needs assessments conducted with Head Start and CSBG programs, CSBG demographic data, Head Start Program Information Report (PIR) data, customer satisfaction surveys, and program outcome data. External data included the U.S. Census Bureau's five-year American Community Survey data, County Health Rankings and Roadmaps, the Kentucky Center for Statistics, Kids Count Data Center, Bureau of Labor Statistics, the Kentucky Department of Education, the Department of Housing and Urban Development, Find Energy, the Kentucky Housing Corporation, the Urban Institute, the National Alliance on Mental Health Issues, and various news outlets.

Economic Outlook

Data indicate a grim financial outlook for households in CAC's service region. For a one-adult and two-child household, survival required a minimum of $36.90 in Fayette and Bourbon or 204 working hours per week at the minimum wage. In Harrison and Nicholas, the figure was slightly lower, standing at $34.10, or 188 hours per week at minimum wage necessary to make ends meet.

Post-COVID, inflation played a pivotal role despite a somewhat slowed pace in the latter part of 2023. The price of groceries surged by 6.7% between May 2022 and May 2023, though this was a slight reprieve from the previous year's double-digit increases. Restaurant costs also swelled by 8.3%, causing further strain on already stretched budgets.

Debt continues to be a significant concern for Kentucky residents, with a troubling statistic that revealed that 1/3 of households in the Council's four core counties carried debts in collections. Harrison County bears the brunt of this debt, with 44% of its population affected. A staggering 616,000 people across the state were burdened by student loan debt, with an average debt of $33,300 per borrower.

Employment and Educational Landscape

The employment landscape in Kentucky was marked by both challenges and opportunities. Kentucky has the third lowest workforce participation rate in the nation. Roughly **40%** of those CAC serves are not in the workforce. Moreover, an increasing number of jobs demanded advanced training or degrees beyond a high school diploma; however, just over **70%** of the population served have a high school diploma or less and **15-19%** of the population in Bourbon, Lexington-Fayette, Harrison, and Nicholas counties do not have a high school diploma. Nonetheless, Kentucky identified four promising career pathways for the coming decade: healthcare, advanced manufacturing, business, IT, and construction and logistics.

The cost of education has risen significantly in recent years, with college tuition increasing **169%** since 1980. Education trends signaled a shift towards vocational training, with increasing enrollment in construction trades, mechanic and repair trades, and culinary programs, while traditional higher education institutions saw declining enrollment.

Early Childhood Education and childcare costs remained a burden for families, with the average daily cost amounting to **$35.55** in Kentucky. The average yearly cost of childcare in Kentucky is **$8,890** per year – as much or more than a year of college tuition in the state.

Housing Affordability

The quest for affordable housing remained an ongoing struggle. Over **40%** of households statewide (and nearly half of households in Fayette County) are housing-burdened. "Housing-burdened" is a term used to describe a situation in which a household or individual is spending a significant portion of their income on housing costs, such as rent or mortgage payments.

Each year, around 400 affordable housing units vanished in Fayette, exacerbating the crisis. Although the federal Fair Market Rental Value for a modest two-bedroom unit in Kentucky was between **$724** (Nicholas) and **$1,025** (Lexington-Fayette MSA) in 2023, as defined by the Department for Housing and Urban Development (HUD), affordable rent for a full-time minimum wage job stood at **$377**, while for those reliant on SSI, the figure dwindled to **$293**.

Health Care Costs

The cost of healthcare has surged dramatically, with a **115%** increase since 2000, and is further projected to rise by **4.2%** in 2023. The majority of the served population depended on Medicaid or Medicare, while **10%** of the core county population lacked insurance. Provider shortages in rural areas posed significant hurdles, impacting access to preventative care and transportation for residents. Mental healthcare trends painted a somber picture, with **40%** of Kentucky adults reporting symptoms of anxiety and depression. Adverse Childhood Experiences (ACEs) loomed large, affecting 50% of children in the state, particularly with issues like family members struggling with mental health and substance addiction.

Agency Services

At the agency level, CAC has seen an increase in requests for services from higher-income households, elderly and retired individuals, and monolingual Hispanic households. The overwhelming majority of those served by the Council relied on Medicaid and Medicare, and over **40%** were not part of the labor force.

Customer satisfaction ratings fluctuated, with generally high levels of satisfaction but with concerning increases in dissatisfaction. More clients felt that the agency did not improve their family's circumstances, were less inclined to recommend the agency to others, and reported fewer referrals to other programs. Amidst these trends and challenges, significant gaps in local services were conspicuous. These included transportation, childcare deserts in rural areas, a shortage of healthcare providers, re-entry and incarceration services, special needs support, guidance on available benefits and services, and opportunities for asset building.

Agency Capacity

The agency's employment trends indicated high turnover rates, particularly in the field of early childhood education, despite an expected **15%** growth in the need for preschool teachers over the next decade. Additionally, discussions centered on revenue diversification within the agency, involving committees on economic development and social enterprises.

Planning Process

CAC engaged People Pinnacle, LLC, to facilitate the process of developing a five-year strategic plan. Susan Rogers of People Pinnacle worked closely with a strategic planning team, providing the process's leadership, guidance, and coordination.

The process consisted of four primary phases.

Phase 1: Prepare Current State Review

The Strategic Planning Team prepared a review of the current state based on the following research and data:

    a. Industry Trends related to income, housing, employment, childcare, education, healthcare and mental health

    b. Agency Trends related to customer satisfaction, funding, employment and local service gaps

Because CAC has been impacted by the national staffing crisis, People Pinnacle administered a 38-question **employee engagement survey** in July 2023 and conducted seven focus groups with employees, managers, leaders and HR to understand the opportunities to improve employee engagement and retention.

Phase 2: Prepare Preliminary SWOT Analysis

The Strategic Planning Team presented the Current State Review and conducted a Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis with the SLG in July 2023. The results of this SWOT analysis are below:

Internal Strengths	Internal Weaknesses
Knowledgeable and dedicated staff	Staff retention and turnover (21)
Mission-driven and passionate team	Diminished capacity for staff development and support (ex., schedule flexibility, retention interviews, onboarding, accountability for work, burnout) (12)
Commitment to our policies and procedures	Diminished downtime for planning and training (4)
Leadership - Board, SLG and Policy Council	Lack of robust case management services (2)
Growth of budget	Lack of Staffing to address new initiatives (2)
Innovative and analyzing programmatic opportunities regularly	Diminished capacity for (or the ability to) communicate transparently, accurately and timely between SLG and the rest of staff (1)

Matrixed structure	Lack of management training, skills and routines
Diversity	Restrictions related to maintaining facilities and technology security

External Opportunities	External Threats
New streams of funding other than grants (Medicaid billing, unrestricted) (18)	Loss of federal funding (18)
Technology to streamline operations (7)	Competitors offer more support programs for staff (flexibility, alternative schedules, generational differences, etc.) (14)
Large federal grants becoming available to address client needs (ex. Bipartisan Infrastructure Law) (5)	Labor shortage (9)
Programs / initiatives to engage and retain staff (4)	Rising wages in the marketplace (3)
Advocacy (3)	Increased cost of living and cost of goods (3)
Expand awareness through branding	New forms of monitoring and compliance standards (3)
	Competitors offer additional services (ex., medical services) and manager training
	Competitors offer leadership and management training

Phase 3: Engage in Strategic Planning Retreat with the Governance Board

Susan Rogers met with CAC governing body members (including the Board of Directors and Policy Council) during the Governance Board's annual Retreat on July 29, 2023. During the half-day planning session, Susan led a review of the current state review and a discussion of the preliminary SWOT analysis performed by the SLG. The SWOT analysis was enhanced and finalized by the Governance Board. Goal areas that represent the strategic priorities for the Council over the next five years were then identified.

Board Retreat Goal Identification

Below are the goal areas that the Board identified based on the SWOT analysis at the July Board Retreat. The bullets under each goal area are suggested strategic priorities that were categorized to form goal areas. The bullets will be useful to define objectives and strategies.

Staffing
- Develop a plan to attract adequate, qualified staffing (3)
- Staff training and development to retain current and future staff (2)
- Staff retention (2)

- Support leadership (burnout and stress)
- Communication in a timely manner from SLG and staff; clear communication with rationale / expectations

Funding
- Secure unrestricted funding sources (3)
- Prevent loss of funding (2)
- Seek funding that includes full staffing and indirect and other costs

Partnerships
- Expand partnerships (innovative and incentivizing) to bridge the programmatic gap (2)
- Build smart partnerships that enhance rather than duplicate services
- Create community partnerships that enhance and support the Agency's mission

Technology
- Utilize technology for non-human tasks (streamlining)
- Utilize technology available to its maximum extent to benefit staff and streamline processes

Phase 4: Prepare the Strategic Plan

Susan Rogers and representatives of the Strategic Planning Team met with various SLG members to draft goal statements and identify objectives and strategies for each goal. Through these discussions, Advocacy was identified as a strategic priority that should not be left out of the five-year plan. Advocacy was added as a fifth goal, and objectives and strategies were identified. Susan facilitated a final session with the SLG to review the strategic plan and gather feedback. The plan was finalized by the Strategic Planning Team.

The 2024 calendar year will serve as a baseline year and allow the Planning and Projects Manager and SLG to assess post-Covid trends and establish practical performance indicators for certain objectives.

The strategic plan's goals, objectives, and strategies which will advance the agency to meet its mission were presented to and received approval from the Board of Directors at the November 2023 board meeting.

Goals, Objectives, and Strategies

TALENT: Agency-level goal

Goal: Attract, develop, and retain quality staff

Objectives:

- Increase "positive workplace" index score
- Increase "employee engagement" index score
- Increase the "development" index score
- Increase "effective communication" index score
- Ensure 100% of staff receive trainings for a performance management process annually
- Reduce and maintain employee turnover rate at 5% or less annually

Strategies:

1. To track progress through the objectives above, create index scores for:
   - Staff Development
   - Employee Engagement
   - Communication
   - Positive Workplace
2. Update New Employee Orientation (NEO) and onboarding process to limit turnover and increase success of new staff
3. Improve Head Start retention by increasing teacher salaries and analyzing and addressing turnover of staff who are Head Start parents
4. Enhance the performance management process and include stay interviews to improve employee development and increase staff retention
5. Design and implement a manager training program to improve management capabilities, enhance staff performance and development, and strengthen communication.
6. Enhance training and development processes to improve staff performance and retention
7. Expand the employee wellness fund to increase mental health support to staff and reduce burnout
8. Improve access to and adoption of Council policies and procedures
9. Design and implement a Positive Workplace Initiative to enhance the culture and retain staff

FINANCIAL STABILITY: Agency-level goal

Goal: Secure and maximize diverse revenues to support organizational capacity and delivery of services

Objectives:

- ☐ Achieve 100% spend-out of grant funds received annually
- ☐ Achieve diverse funding portfolio of the following by 12/31/2028:
  - X% Unrestricted funding
  - Y% Federal funding
  - Z% State funding
  - T% Local funding
  - U% Corporate / Foundation funding
  - V% Private donor funding
- ☐ Maintain capital outlay reserve of X% of five-year capital outlay plan
- ☐ Increase funding for compensation plan by X% annually, based on funding
- ☐ Increase the annual returns on trust funds by X% annually

Strategies:

1. Implement a consistent electronic requisition process to reduce errors and ensure grant funds are spent
2. Conduct internal facilities assessment / audit to anticipate planned and unplanned costs
3. Create and implement a 5-year capital outlay plan to anticipate and schedule for future capital expenditures
4. Restructure CAC Development Corporation to diversify funding and protect CAC assets
5. Design the fundraising and development plan to increase revenue in relevant categories of funding portfolio and fund compensation plan
6. Increase diversity of partnerships to strengthen funding portfolio
7. Review trust fund levels with bank quarterly

ADVOCACY: Community-level goal

Goal: Maximize advocacy and storytelling efforts to build awareness of the agency and drive community-level change

Objectives:

- Increase the number of engagements/communications with local and state elected officials for the purpose of education and advocacy surrounding the low-income community by X% annually
- Increase the number of shared testimonials by 15% from those positively impacted by the agency, annually
- Increase the number of unearned media hits by 5% annually
- Increase the number of social media followers by at least 10% annually
- Increase the number of unduplicated volunteers by 5% annually
- Increase the number of unique donors by X% annually
- Increase the open and click-through rates of community newsletter by 10% annually

Strategies:

1. Create a comprehensive plan that includes communication, community education, and volunteer recruitment to increase community awareness
2. Develop and implement a process to collect participant and staff stories to document and demonstrate our impact in the community
3. Develop and implement a regular community newsletter to improve community outreach efforts and provide a call to action
4. Utilize a fundraising consultant to increase the number of unique donors
5. Annually host at least one signature event designed for public education or to shape public perception about poverty and its impacts
6. Ensure legislators and representatives are invited to events to heighten their awareness of our impact in the community

PARTNERSHIPS: Family-level goal

Goal: Optimize external partnerships to enhance services and bundle internal services to achieve the agency's mission

Objectives:

- ☐ 100% of participants are screened for multiple services annually
- ☐ XX% of eligible participants receive referrals for at least one other internal or external service / all eligible services annually
- ☐ Increase amount of in-kind by 2% annually

Strategies:

1. Develop a centralized partnership tracking mechanism to create a framework that provides an accurate reflection of how the Agency works in the community
2. Implement cross-department training/documentation to ensure staff are familiar with internal programs that may benefit participants to increase referrals, knowledge of programming and data integrity
3. Implement quarterly cross-check procedures between data management systems to provide accurate participant count and gauge referrals
4. Conduct a cost-benefit analysis of current and future partnership opportunities to assess mission alignment, earning potential, liabilities, etc.
5. Develop and implement processes to:
   - o More effectively capture earned in-kind resources
   - o Enhance in-kind and partnership reporting across all departments

TECHNOLOGY: Agency-level goal

Goal: Utilize technology to ensure data integrity, increase productivity, and improve service delivery

Objectives:

- At least X% of staff report they have the technical resources / tools to do their job.
- At least X% of staff indicate improvement of their skill level in the use of technology to meet Agency and participant needs.
- Reduce the amount of management time correcting data entry errors from X to Y by 12/31/2028.
- Maintain an average score of X on the security post-training quizzes annually.
- Maintain a mean response time of 72 hours for staff-initiated support tickets.

Strategies:

1. Develop and implement Staff Technology Survey to gauge staff's understanding of technology and reduce amount of time correcting errors and entering data
2. Develop and implement training on:
   - security awareness (including post-training quizzes) to minimize cyber threats or fraud
   - tools, applications, and technology to increase productivity and decrease error rates
   - departmental/agency-wide software tools to enhance staff performance
3. Select a shared digital data storage tool and migrate staff's data to increase collaboration and ease of access
4. Implement technology to replace human entry tasks to streamline Agency processes
5. Implement Cisco MFA to enhance cybersecurity across the agency

Strategic Planning Map

COMMUNITY ACTION COUNCIL

2024-2028 Strategic Plan

PARTNERSHIPS

ADVOCACY

FINANCIAL STABILITY

TALENT

TECHNOLOGY

community Action® COUNCIL

TALENT

Attract, develop, and retain quality staff

ADVOCACY

Maximize advocacy and storytelling efforts to build awareness of the agency and drive community-level change

PARTNERSHIPS

Optimize external partnerships to enhance services and bundle internal services to achieve the agency's mission

FINANCIAL STABILITY

Secure and maximize diverse revenues to support organizational capacity and delivery of services

TECHNOLOGY

Utilize technology to ensure data integrity, increase productivity, and improve service delivery

VISION: To ensure that all communities are equitable and thriving.

MISSION: Community Action Council prevents, reduces and eliminates poverty among individuals, families and communities through direct services and advocacy.

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Next Steps/Implementation

The Office of Sustainability (OS) has created a draft Implementation Plan for the 2024-2028 Strategic Plan, to be reviewed and adjusted by the SLG in early 2024 and continuously updated thereafter. Facilitated by the Planning and Projects Manager, an annual review will provide a thorough assessment of progress and SLG's expertise will ensure ongoing assessment, considering project feasibility, agency needs, and overarching goals.

Serving as a roadmap, the Implementation Plan outlines tangible steps, a timeline, and a performance management framework for achieving CAC's strategic goals.

Appendices

Notes on Strategies for Action Planning Purposes:

Staffing Goal-

- Enhance the performance management process and include stay interviews to improve employee development and increase staff retention
- Improve the training and development of staff to improve staff performance and retention
  - o Require staff attend performance / career training annually. Ensure 100% of staff participate in x hours of performance / career training annually.
  - o Consolidate training to a centralized space/location for easy access by all staff
  - o Complete implementation/modules of:
    - Paycom – three-year onboard goal
    - OSHA workers comp
    - FMLA
    - ADA
    - Modules – support data management of staff
- Design and conduct Positive Workplace Initiative to enhance the culture and retain staff
  - o Solidify what the "company culture" is/Communicate what the culture is
  - o Create a Workplace Culture Champions working group ("cheerleaders", internal newsletter, etc.) to help communicate messages and changes
- Develop index scores for:
  - o Positive Workplace
    - Develop and implement an index scoring system (rubric?) that considers:
      - Average employee engagement rating
      - Manager and leadership ratings on employee engagement survey
      - Workplace DEI
      - Number of internal complaints
      - Percentage of wellness fund spend-out
      - Percentage of mental health fund spend-out

- Employee attendance at voluntary events/DEI opportunities
- Number of employee referrals for positions

- Communication
    - Use/Add questions to the Employee Engagement Survey regarding communication to determine index score:
        - On - The agency does a good job of communicating in a timely and transparent way.
        - On - I feel like I have input on the decisions that impact me.
        - On - We collaborate well within my team/department.
        - On - My manager keeps me informed about matters affecting me.
        - On- My manager clearly communicates goals and expectations.
        - I understand how to use the communication and database tools available to me.
        - I can easily access policies and procedures documents for my own reference.
        - If primary language is other than English – I can find the documents that I need in my primary language.
        - I understand the Council's policies and compliance requirements.
- Improve access to and adoption of Council policies and procedures
    - Create an official repository for policies and procedures that removes old versions of documents
    - Ensure access to Council policies and procedures in multiple languages
    - Early Adopters/Peer Learning Working Group - Create a frontline staff workgroup to adopt and "roll out" new policies, procedures, and practices
    - Formalize an internal workgroup for comprehensive policy and compliance review that will meet quarterly or as needed

Addendum: Housing Strategic Plan

Since the onset of COVID-19, CAC's Office of Housing and Homeless Services (OHHS) has quickly taken on many new initiatives to address the public health crisis while continuing to operate many longstanding programs, such as the Weatherization Assistance Program, various urban and rural supportive and permanent housing programs, and the Assertive Street Outreach Program. Given this influx of funding and programming, OHHS sought to develop a comprehensive, housing-focused strategic plan to guide strategic, evidence-based decision-making in the future with support from the Kentucky Housing Corporation.

Summary of Background Data Used to Drive Decision-Making

CAC reviewed internal and external data made available over the last five fiscal years (2019-2023) to develop a picture of the affordable housing landscape in the region, the needs of the low-income communities served, and agency operations.

Internal data consisted of budgetary information, HMIS data, community needs assessments conducted by both Head Start and CSBG programs, an agency-conducted survey of community housing-focused nonprofit organizations, and program outcome data. External data included the US Census Bureau's five-year American Community Survey data, Kentucky Center for Statistics, Kentucky Department of Education, Department of Housing and Urban Development, Find Energy, Kentucky Housing Corporation, local housing authorities, National Low Income Housing Coalition, Office of Affordable Housing (LFUCG), Office of Homelessness Prevention and Intervention (LFUCG), LexEnd Homelessness, State of the Nation's Housing (2023 Harvard report), and various news outlets.

Roughly a third to almost half of households in the area are renters. The median renter household's wage is more than double the minimum wage across nearly all of CAC's core counties. Most households in this range can afford close to $900 in rent per month. Households that are making the median income (between $30,000 and $43,000 per year) can afford between $900 and $1,000 in rent per month. Notably, Nicholas County's numbers fall far below those of all other counties in the core service area.

Households at 50% AMI are considered low-income and can generally afford HUD's Fair Market Rent (FMR) prices, while those at 30% AMI are considered

extremely low-income and cannot afford even a one-bedroom unit at current FMR rates. Beneath the extremely low-income mark are low-wage workers and households relying on Social Security. Two full-time minimum wage jobs are needed to reach efficiency apartment affordability in Fayette County, while households that rely on Social Security cannot afford any unit at FMR prices, even with dual incomes in Fayette County.

The most vulnerable households are at 30% AMI or less. Almost a third of renters are considered extremely low-income, and of those households, more than 80% are housing-burdened and close to 70% are severely housing-burdened. There are only 46 affordable and available units for every 100 ELI households. Generally, the region is losing rental units under $800 and gaining units above $800. More units priced at $1,250 or higher have come online in the last five years than lower-priced options.

Those who are unable to afford rent may look to subsidized housing but often face exceedingly long wait times. Nationally, wait times for public housing can average close to two and half years, but locally, wait times are typically between six and nine months. It's important to note that the most vulnerable populations, seniors and people with disabilities – the same people who make up most extremely low-income households have the fewest number of units dedicated to serving them.

Households that are unable to afford rent may fall into homelessness. Over the last 15 years, homelessness has been on the decline in both the Lexington-Fayette CoC and the Kentucky Balance of State. Since "the great recession" in 2008, family homelessness has dropped significantly, but chronic homelessness increased. In the aftermath of the COVID-19 pandemic and subsequent economic downturn, OHHS staff are reporting increases in homelessness across the board.

In rural communities, homelessness is much harder to see and much more difficult to track. While there are no shelters in CAC's rural counties, Lexington has about 500 emergency shelter and transitional housing beds (70) and around 500 rapid re-housing and supportive housing beds. However, a majority of those beds are dedicated to households without children. In Lexington, 68% of individuals and 72% of families in need of shelter beds can get them. Lexington CoC PIT count data from the last five years indicate that total homelessness has increased 3.5% since before the pandemic. We have seen a 49% increase in

people experiencing first-time homelessness (+899 people) and a 39% increase in people in emergency shelters (+986 people).

A review of services available outside of CAC indicates that there are very few services in our rural counties. This is particularly troublesome for victims of domestic violence, people with disabilities, people with SMI, those suffering with addiction, and anyone who might need more than just a phone number or a ride to Lexington. In Fayette, gaps in services still exist but are less pronounced. Those with the least access to services are seniors, people with disabilities, and people with criminal records.

A survey of housing-focused nonprofits in the region indicates that fellow service providers identify people with chronic mental health conditions, people with substance use disorders, and Hispanic people to be the most challenging to reach; and that people with chronic mental health conditions, people with substance use disorders, and the formerly incarcerated (including sex offenders) as the most challenging to assist. The survey results indicate that the community is most in need of low-barrier shelters, non-congregate shelters, community re-entry services after incarceration, crisis response (emergency payment assistance, eviction assistance, landlord negotiation), subsidized housing for the elderly and disabled, and ongoing case management.

People with lived experience of homelessness indicated that existing shelters cannot properly accommodate people with mental health conditions, disabilities, or personal mobility issues. Additionally, the lack of flexibility among some shelters regarding entry requirements and limitations is problematic. People with lived experience noted difficulties with communication both with and between agencies and relevant public services. Transportation and transitions to new housing situations can be particularly challenging.

Weatherization is an important piece of keeping housing stability and maintaining affordable housing stock, especially for our seniors. Homes across the board are more likely to be deferred from the Weatherization Assistance Program than completed. The majority of completions and deferrals are made in Fayette County. While rural counties make up less than 20% of homes completed, they account for more than 1/3 of our deferrals. In the last five fiscal years, 78 homes have been completed through WAP and 117 have been deferred.

Overall, CAC has increased the number of people provided with services from 106 adults in 2018-2019 to over 1,000 in the last five years.

PROGRAMMING

Goal: Address the social determinants of health by providing participant services that strengthen economic and housing stability

Objectives:
- Increase the percentage of participants exiting homelessness from XX% to XX% by DATE
- Increase the percentage of participants who exit housing and homelessness services into permanent housing destinations from XX% to XX% by DATE
- Raise the percentage of participants whose total income increases during their participation in services from XX% to XX% by DATE
- Decrease the percentage of deferrals made by the Weatherization Assistance Program from XX% to XX% by DATE

Strategies:
1. Conduct a housing community assessment to understand existing and emerging community housing needs and determine prioritization of services by the Agency
2. Develop and enhance strategic partnerships to reduce barriers to economic and housing stability
3. Review and discuss data in HMIS on quarterly basis to measure progress regarding objectives
4. Identify housing resources to address home repair needs to reduce deferrals in Weatherization Assistance Program
5. Develop and provide a community resource guide to assist participants in maintaining housing stability
6. Connect participants to mainstream resources to increase participant income

TALENT

Goal: Recruit, develop, support, and retain a highly engaged, diverse, and empathetic housing team

Objectives:

- Maintain/Increase client service rating at XX on Customer Satisfaction Survey (focus on empathy and engagement)
- Maintain/Increase the "development" index score for housing and homelessness staff on the Employee Engagement Survey from XX to XX by DATE as measured by the statements:
  - I receive feedback on my work that helps me develop and grow.
  - My manager coaches me to develop my skills and abilities.
  - I believe I have the opportunity for personal development and growth at Community Action Council.
- Maintain/Increase the percentage of diverse staff from XX to XX by DATE - - as measured by lived experience, racial/ethic diversity, language, age, LGBTQ+ representation, etc.
- Maintain/Increase the "support" index score for housing and homelessness staff on the Employee Engagement Survey from XX to XX by DATE as measured by the statements:
  - My manager treats me with respect.
  - I have positive relationships with others at the agency.
  - We collaborate well within my team/department.
  - My manager recognizes me for a job well done.
  - Community Action Council values me.

Strategies:

1. Revamp and conduct Customer Satisfaction Survey to measure staff member engagement and empathy
2. Increase diversity of team to strengthen understanding of lived experiences and enhance staff engagement
3. Enhance employees' interpersonal and case management skills to improve relationships with participants and improve outcomes
4. Train managers on team building, respecting employees, providing feedback, coaching employees and conducting career conversations to develop and support staff and build positive relationships within housing team
5. Conduct a process for managers to meet quarterly with employees to discuss performance and development to develop and support staff

FINANCIAL

Goal: Maximize financial resources to meet participant and community housing needs

Objectives:
- ☐ Achieve 90% spend out of all housing and homeless services grant awards received annually by DATE
- ☐ Increase utilization rates from XX beds and XX units to XX beds and XX units by DATE
- ☐ Retain 100% of renewable grant funds (by DATE?) (annually?)
- ☐ Increase the diversification of revenue sources so that non-federal funds comprise XX% of the total OHHS budget by DATE

Strategies:
1. Develop contingency plan to minimize risk of losing access to eLOCCS to ensure timely draws
2. Implement bi-monthly process to review grant spend out status to ensure achievement of objectives
3. Expand housing-related development efforts (grants/fundraising) to diversify and maximize housing revenue
4. Stabilize staffing to increase utilization rates and retain grant funds

VISIBILITY

Goal: Raise the visibility of housing and homelessness services to increase understanding and advocacy around low-income housing needs

Objectives:

- Raise the visibility index score from X to Y by DATE (see last page for example of score sheet)
- Visibility Success Metrics (baseline will be established)
  - Increase in the number of requests for comment on housing matters (establishing ourselves as experts/community education)
  - Increase in the number of intra-agency referrals to OHHS (increase in staff education on services)
  - Increase in the number of likes on housing-related social media posts (public and staff being educated on subject matter)
  - Increase in the number of people attending housing-related events/discussions (public and staff being educated)
  - Increase in the number of landlords requesting information/services (landlord education about services)

Strategies:

1. Create a Housing communications team to generate ideas for content to raise visibility of housing and homelessness services
2. Update the Agency Communication Plan to improve visibility of housing and homelessness services
3. Create a tracking system/schedule to measure success