

# Tallatoona CAP – Strategic Plan – Executive Summary – Final



Tallatoona Community Action Partnership, Inc.

## MISSION

To assist individuals and families acquire useful skills and knowledge, gain new opportunities, and achieve self-sufficiency.

## SLOGAN

- Helping Families Take Their Lead

## WHO SERVED

- At-risk individuals and families, primarily low-income, in Bartow, Cobb, Douglas, Floyd, Gordon, Haralson, Paulding and Polk counties. At-risk: vulnerable to homelessness, hunger, poverty, abuse and/or neglect.

## LONG TERM VISION

*What will be different at Tallatoona CAP and for those served in 10 or more years?*

- The place to go where children are prepared and succeed in school, families have livable wages jobs and are less reliant on government resources, and volunteering in the community from accessing our integrated and comprehensive services and partners. These programs are delivered by board, staff and volunteers all committed to transformation for families and communities in consolidated and efficient facilities we own and do not rent.

## VALUES

- Transparency
- Humility
- Enterprising - Empowering
- Team play
- Integrity
- Innovation

## BALANCED SCORECARD 5-YEAR STRATEGIC PRIORITIES

1. Mission: Evidenced based and best practices services, better coordinated and more comprehensive along with more community partnerships that all support family and children in their progression toward self-sufficiency.

2. Fund Development/Finance: Diversified and sustainable pool of funding with more unrestricted funds, and best practices financial accounting and controls
3. Organizational Capital: Supported, retained and cross trained staff progressing on their self-sufficiency; governance board with fully committed members from each county served, and more use of volunteers throughout the organization
4. Internal Process: Well branded as the key to getting people who desire out of poverty with consolidated and more cost effective facilities, utilizing technology better and operating more like a nonprofit with an entrepreneurial spirit

### 3 – YEAR STRATEGIC OBJECTIVES

#### **Mission- Services Objectives**

- 1.1. Developed childhood achievement zones that prepares all children for kindergarten and supports their family in their education with expand education services from 0-5, including Early Head Start, extended hours and aftercare.
- 1.2. Provided a proper safety net for families including utility help, weatherization, supplemental financial aid; and holistic case management for referral to food, affordable housing, health and transportation.
- 1.3. Created the Family Academy - comprehensive workforce development, life skills, asset building and financial empowerment for families, primarily those served in HeadStart.
- 1.4. Expanded impact (if resources available) in Cobb County from partnering with existing County work for integrated programs, including TCAP providing CSBG and weatherization programs; and Board members from Cobb.
- 1.5. Served more in leadership and as a convener in needed counties for improved collaboration among organizations serving those in poverty, addressing both emergency and self-sufficiency needs, and especially in workforce development and HeadStart.

#### **Fund Development/Finance Objectives**

- 2.1. Expanded annual budget from a more diversified funding stream with 2% from non-government funding, including contributions, and earned income and fee for services.
- 2.2. Enhanced and transparent financial controls and reporting with ongoing assessment of expenses, budget analysis for cost effectiveness and reducing duplication with single point of entry.
- 2.3. Developed a pool of unrestricted funds to provide limited amount of emergency financial assistance for those served, initially families in HeadStart (or 2 Generation) program.

#### **Organizational Capital Objectives**

- 3.1. Reduced staff turnover and well developed staff with enhanced teamwork and coordination across programs via enhanced staff recognition, support, training/development, and compensation, and improved internal communication.
- 3.2. Better engaged, supportive and informed governance board in all counties served, including from Cobb County, with needed expertise and relationships, less involved in operations, and more involved in being an Ambassador for all of TCAP and in seeking needed resources.

- 3.3. Enhanced capacity for volunteers resulting in increased use throughout the organization, including AmeriCorps, volunteers for the utility program and Head Start, and clients giving back to the community through volunteering.
- 3.4. Branded for client self-sufficiency successes, especially among key community leaders/politicians, colleges and school systems, and businesses; through more formal marketing, including re-examining the name, and communicating outcomes and success stories; more community interaction by board and staff, and participation in community coalitions to address/solve poverty.

### Internal Process Objectives

- 4.1. Maximized operational efficiency and effectiveness through better program coordination and referrals to partners, template leases for centers that seek to co-locate both HeadStart and HRDC in safer and more convenient locations for clients; and consolidated administrative offices (with program serving capacity) that is owned and not rented by the agency.
- 4.2. Enhanced use of technology including for program integration, allow for more time to be spent on direct contact with clients, and improved online capacity for clients (including Headstart students) to access services and computer labs in each center.
- 4.3. Expanded partnerships to meet more client and staff needs, including: key businesses for jobs for clients and support the agency; colleges for training; and other nonprofits (including Habitat for Humanity, Action Ministries, MUST Ministries, Meals on Wheels, Food Banks, etc.) to meet emergency and transitional food and shelter needs.
- 4.4. Enhanced outcomes and metrics evaluation, including tracking long-term outcomes of children served and their families and meeting organizational standards and ROMA outcomes.

<b>PROGRAM AND OPERATIONAL OUTCOMES</b>
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Overall: Goal is self-sufficiency for those served to have basic life needs in a continuum moving away from reliance on outside support and toward financial stability.

### Program

#### Outputs

- Number of clients in all programs
  - Number of low-income clients (at or below poverty line)
- Number of clients per county and % of population in each county served by TCAP
- Number of individuals who receive emergency fuel or utility payments funded by LIHEAP or other public and private funding sources
- Amount of LIHEAP funds distributed
- Number of students in HeadStart and Early Start
- Number/percentage of clients with GED
- Number of corporate partners
- Number of homes weatherized
- Percentage of clients accessing more than 1 TCAP service
- Number of services provided by partners

Short-Term

- Number/percentage of clients accessing eligible benefits (total amount of benefits realized)
- Number/percentage of clients hired
- Ability of clients to access supportive services
- Client satisfaction (clients and employers) via survey
- Shorten time from participant intake to getting a job
- The number of families who report they have become more stable through services of the CAA or through referrals for service

Intermediate

- Basic needs
  - Housing (less than 30% of income)
  - Food security
  - Transportation
  - Health/Safety
- Percentage of clients living above poverty
- Number of individuals who obtained skills/competencies required for employment
- Number of children HeadStart students who improved school readiness
- Number of families who report a decrease in reliance on cash assistance or public benefits

Long-term

- High school graduation rate of HeadStart students
- Number of college degrees from HeadStart students
- Number/percentage of clients still employed after 90 days and 1 year
- Number of clients with livable wage jobs ( $\geq$  \$13 per hour)<sup>1</sup>
- More skilled and committed workforce - The number of parents and other adults who obtained skills/competencies required for family functioning
- Able to self-manage their careers – have the tools to advance in their careers
- ROI for public dollars= amount of public dollars saved by clients not reliant on government funds
- Number of clients who own their own business
- Number of clients that volunteer and/or donate in the community

**Operational**

- Number of Organizational Standards met
- Program ratio (percentage of annual funds spent on programs/services)

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<sup>1</sup> Larger size families will require more than \$13 per hour as a livable wage

- Total annual funds raised
- Total number of donors, including major donors
- Percentage of resources from individuals, corporations and foundations, and government sources
- Number of volunteers and volunteer hours
- Percentage of board members that donate
- Total amount of board giving
- Number of social media mentions and followers, website hits and media mentions
- Staff retention ratio
- Staff, volunteers and board have skills required to achieve results

## ANNUAL GOALS FOR FY 2016

*Top priority goals in italics.*

### **Mission:**

- Develop an Alumni program to serve as case studies of success and to support volunteering.
- Enhance expectations and accountability from clients – client to be partner in their growth and development.
- Develop the plan for the comprehensive Family Academy, initially improving coordination of CBGB programs with families in the HeadStart program.
- Develop a GED assistance program at the Head Start facilities.
- Enhance job readiness and partnership with employers for increased workforce development opportunities, initially identify key companies and learn their employment needs.
- Expand Weatherization program into Fulton County for 1 year, including negotiating with GEFA, then conduct a full analysis on sustainability and continuation of the entire program.
- Meet with Cobb County government leadership to recruit Cobb board members and explore expanded impact from TCAP in Cobb County.
- Develop a VITA Tax program that offers free tax preparation services to low and moderate-income families to help them avoid costly income tax preparation fees and ensure eligible tax credits.
- Establish Early HeadStart in eight Day care sites, including adding staff capacity and providing training for their staff; while creating an incubator for enhancing capacity at other day care facilities.
- Begin to take a more leadership role by convening a community meeting in each county to review the plan, advocate for key needs of those served and seek solutions to challenges/barriers, including transportation and childcare.

### **Fund Development/Finance**

- Develop a plan for a signature event that is educational for clients, builds community awareness and raises unrestricted funds.
- Develop a Resource tree in each county, starting with Board member resources.

- Contract out Grant writing for foundation funding to bring in \$100,000, including funding for unrestricted program funds for self-sufficiency programs, needed technology/infrastructure enhancements, internal capacity for development and communications, and develop more defined formal process for and expand the amount of the supplemental reserve fund to properly address financial aid for client and staff emergencies.
- Explore fees for services, such as weatherization inspections for builders and homeowners.
- Continue to educate Board on nonprofit accounting and finances.

### **Organizational Capacity**

- Create an Annual Report with program outcomes and client success stories, initially identify participant success stories from at least 5 participants, then identify key stakeholders to communicate successes and initially send the Annual Report.
- Expand PR including articles in local newspapers and spots on local television communicating new Executive Director, a new plan, and strong desire to improve relationships in all communities served.
- Develop a marketing plan and develop initial marketing materials- brochure and talking points/elevator speech.
- Recruit Board representation from all counties, focusing on Gordon (all board members to visit Gordon County), Floyd and Cobb County – inform counties of the board member expectations and needed expertise, especially marketing.
- Enhance board effectiveness thru developing an effective committee structure, initially with Facilities, Program, and Public/Government Relations Committees then a Fundraising Committee; and each committee to develop its annual goals.
- Expand social media and its frequency, initially on Facebook.
- Enhance board involvement in community awareness and relations, including meeting with commissioners and other county leadership in each county to identify county needs, establish needed partnerships and communicate future board member expectations.
- Hire a Development/Communication Coordinator to improve external communication and marketing, and then fundraising.
- Develop a more formal volunteer program with volunteer training to expand volunteer opportunities, initially in utility payment program; along with a plan to hire a Volunteer coordinator in 2017.
- Enhance staff capacity by enhancing staff development and training, including creating a personal development plan for each that involves some cross-training.
- Conduct a compensation review to enhance overall benefits and pay, especially for direct care staff, and also communicate true cost of all benefits to all employees.
- Enhance staff support, including more recognition and thanking staff, and better support their personal challenges with access to TCAP services and referring agencies.

### **Internal Processes**

- Develop and implement a template for satellites with a template for leases (move to 1 year leases) that begin to co-locate HeadStart and CDBG, and safe and convenient locations.
- Enhance HRDC and Headstart program coordination via better educating staff on available resources, developing common outcomes and client plans of action across both programs, and

creating an interdepartmental team of HRDC Coordinators and Family Advocates to coordinate plans for at least 50% of TCAP Headstart families (conduct monthly meetings).

- Continue to work toward consolidated Administrative offices to reduce rent, and also explore co-locating Bartow County client programs.
- Enhance LIHEAP program delivery efficiency, including utilizing more volunteers and technology, to provide more unrestricted funds for self-sufficiency programs.
- Enhance technology for integration of programs and to decrease paperwork for staff, initially implement EasyTrac database required by government funders.
- Develop a plan and seek funding to create computer labs in each center.
- Develop a formal partnership with Action Ministries, MUST Ministries, Meals on Wheels and Food Banks (thru Atlanta Community Food Bank) to better meet healthy food needs of those served.
- Develop more comprehensive partnerships (and MOUs) in each county to collectively better address client's top challenges, barriers and emergencies to self-sufficiency (i.e. childcare and transportation).
- Enhance relationships with colleges and technical schools for workforce development, including addressing skills gap needed by local businesses.

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## Appendix: Situation Analysis Summary Report

### **What is your desired Vision for Tallatoona CAP 5 years from now (what will be different, including outcomes for those served)?**

- Tallatoona CAP is a household name in the counties served through communicating success stories, more community interaction, and participation in community coalitions to address/solve poverty
- More impact – more people served, year round achieving goals from better coordinated and seamless services, including more comprehensive and better case management, more follow-up with clients so they do not backslide; and adding Early Head Start.
- Diversification of funding especially increased unrestricted funds
- Consolidated facilities – owned and not rented, and upgraded Head Start Facilities located close to those most in need.
- More staff and volunteers, and an active governance board with full committed members from each county served
- More business-like - better analyze and evaluate programs with updated data

### **What are Tallatoona CAP's internal strengths?**

- Current programs, including HeadStart program with improved child outcomes, community service success stories in getting and maintaining jobs, and weatherization program with large waiting lists,
- Dedicated and committed employees with a strong knowledge base and many years of service and new Executive Director with a good vision
- Long history and well branded programs
- Good case management and referral to other service providers and collaboration/support with parents to meet children needs
- Good contacts and partners in the community
- Strong financial controls, financial policies and procedures
- Culture – family oriented and love what they do, and are accessible and welcoming to clients
- Board with lot of passion, and know their communities well, especially those in need
- Improving teamwork among the management team

### **What are Tallatoona CAP's areas needing improvement?**

- Better coordination and communication among programs, along with Improving trust among staff, among board and among staff and board
- Programs are branded but not the organization – get out in community more and communicate successes
- Increase the funding resources, especially more unrestricted funds



- Board development, including clarity on roles/responsibilities, more involved in governance, especially community relations, and less involved in operations
- More staff recognition and appreciation, then compensation; and more effective staff training/development
- Increase client self-sufficiency impact, including increased attendance among children in all counties
- Continue to improve HeadStart facilities and cut down on rental building costs – explore capital campaign to own facilities
- Improved relationship with each county served, initially Gordon and then Floyd.
- Thinking outside of the box – improve ability to change and do new things
- Better use of technology so staff spends more time with clients and less in paperwork
- Reduce rules, policies and ‘red tape’

**What do you think are the greatest external opportunities facing Tallatoona CAP now and in the future**

- Broaden community awareness of the program, initially on client success stories.
- Reaching out/partnering with churches and other organizations for client emergency needs - food and shelter
- Community wide private /profitpartnerships, similar to Bartow
- Funding opportunities, including foundation and individual giving, and capital funding
- Expanded use of volunteers throughout the organization
- Popularity of Early Childhood Education and self-sufficiency programs
- Improved DFCS relationships and partnerships – varies from county to county

**What do you think are the greatest external challenges facing Tallatoona CAP now and in the future**

- Budget cuts and funder challenges - often requiring the organization to be too reactive
- Developing positive community awareness and relationships - community only remembers the negative press
- Lack of employment opportunities and barriers to employment including, addiction issues, lack of trained consumers to meet current jobs, transportation and criminal backgrounds
- Increasing emergency client needs, including food and housing
- Expansive geography served with different needs and politics in each county
- Client lack of access to technology – digital divide
- Increasing funder and legislative expectations for self-sufficiency client outcomes.
- Retaining the right staff for the right job, and keeping the moral up with the staff.
- Increasing competition for funding, board and volunteers

**What do you see as the top three strategic issues facing Tallatoona CAP?**

- Improving relationships, communication and trust among staff, and among board, and among board and staff.

- Coordinating current programs better while developing a future program mix and partnerships that provides access to address short term client challenges but achieves more long-term self-sufficiency outcomes.
- Improving community relations in all 8 counties, and then branding and household name for self-sufficiency (more than HeadStart and HRDC).
- Consolidated administrative and enhancing center facilities to be owned and not rented to reduce costs.
- Revenue diversified and more beyond public funds, including more philanthropic funding, to more proactively address clients' needs and develop reserves
- Retaining, expanding and further supporting and developing staff for more self-sufficiency client outcomes.
- Building on Board commitment by improving Board of Directors effectiveness, along with increasing use of volunteers throughout the organization.
- Developing a structure, infrastructure and culture to become more like a traditional nonprofit organization and less reliant on government funding

**How, if any, should the Board change to best serve the mission of Tallatoona CAP?**

- Fill the empty spots on the board and keep a full board.
- A working, dedicated and knowledgeable board that works together - forget about the past and move forward
- Committees meeting and productive
- Open to new ideas
- Term limits
- Better prepared for meetings and to ask good questions.