



COMMUNITY SERVICES AGENCY

***Serving the communities of
Mountain View,
Los Altos and
Los Altos Hills***

2008-2011 STRATEGIC PLAN

Approved March 27, 2008

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Los Altos Hills***

Mission

We are the community's safety net, providing critical support services that preserve and promote stability, self-reliance and dignity.

Vision

All residents of the communities we serve should have the support and resources they need to have hope and a path to a better quality of life. We empower our clients to be more independent as we meet their unique needs through effective case management and various programs and services that fill the gaps for critical basic needs. This will be accomplished through dynamic collaborations with other organizations that connect our clients with the services they require. We seek to engage people in our community as volunteers, donors and advocates, connecting with those in need to make a better community for all.

Core Values

Dignity

We care about the people we serve. We treat our clients, our community and ourselves with compassion, respect and dignity.

Financial Responsibility

We ensure adequate resources to meet daily and long-term organizational needs and use public resources effectively and efficiently.

Cultural Competency and Diversity

We work to understand, reflect and honor the diversity of our community in our board, staff, volunteers, processes and work.

Community and Relationships

We nurture collaborative ongoing relationships with each other, our clients, our stakeholders, and others in our community who can render assistance to our clients.

Integrity

We operate in all respects with honesty, openness, and transparency.

Teamwork

We believe in cooperating with others towards a common goal, valuing the differing viewpoints of all concerned.

Excellence

We provide services and programs of the highest quality and integrity

INTRODUCTION

The Community Services Agency is a 50-year old organization, which has successfully served its community by providing a host of vital social services for residents of Mountain View, Los Altos and Los Altos Hills. The organization provides a safety net so independence and self-sufficiency can be restored and maintained for all clients regardless of age or circumstance. Currently CSA offers 13 different programs and services to address the needs of individuals, children and families who are the working poor, low-income, elderly, homeless, and at-risk of being homeless. Our programs are geared towards food, shelter and other basic needs. Anchored by a highly engaged 18-member Board of Directors and a 20+ staff that includes a number of long-time members, and a history of strategic planning and goal achievement, CSA is an effective nonprofit organization providing critical services to its community.

From this position of institutional strength, the CSA Board and the staff sought to assess our strategic position and to develop organizational goals for the next several years. Early in the process, the board and staff identified a number of key issues and questions this plan should address and what we hoped to achieve through the process. We agreed the plan should have measurable goals and objectives. It should cover a three-year period. Most importantly, it should be a living document – one that we can refer to often for guidance, and not one that is written and filed away. If it provides clear guidance during periodic planning and budgeting processes then it will be an indication that it is achieving its goals.

The preparation of this document was primarily the responsibility of the Strategic Planning Committee, which consisted of four senior staff members and three members of the Board. However, the contents of the document were developed through a collaboration of the Committee, the entire CSA staff, and the full Board. Strategic Planning Consultant Nancy Ragey facilitated the process. The following were the major steps of our process:

- The Board and staff provided a list of critical issues that we felt needed to be addressed by the plan.
- Keeping these issues in mind, we engaged in a robust data gathering process that included review of all relevant documents from the last five years (client statistics, board meeting minutes, program descriptions, marketing materials, fund development data, budgets and audits, etc.) and a series of interviews with 40 stakeholders representing different constituents (board members, staff members, clients, government representatives from Los Altos, Los Altos Hills, and Mountain View, leaders of safety net organizations, foundation funders and individual donors).
- The gathered data was analyzed and presented to the Board and senior staff during a two-day retreat in October 2007. At that time, the Board revisited and revised the mission statement, created a set of values for CSA and began to articulate a future vision. Finally, the board identified key strategies for the next three years.
- The data and outcomes from that meeting were then presented to the staff for input. The staff and strategic planning committee defined a set of goals and objectives to make the strategies operational, and then created financial model(s) to illustrate and guide budgeting based on different scenarios.

- The last step in the process was to design a set of metrics by which the board and staff could regularly measure progress towards the strategic priorities and ultimately, the impact on our clients and community.

The new set of priorities and goals represent the consensus vision for CSA and its work. These strategic goals will help the staff and Board assess the continuing progress and impacts of the organization and will also provide a framework for all types of organizational decision-making.

The extraordinary level of cooperation ensures that the plan is “owned” by everyone, and all are responsible for executing it. We are confident that it will be a good guide for CSA as we take on new challenges and reach new heights.

We’d like to thank all the members of the staff, the Board of Directors and our stakeholders who contributed to this plan.

We would also like to acknowledge the David & Lucile Packard Foundation for generously supporting our planning process.

Strategic Planning Committee:

Vera Baum, Chair, Strategic Planning Committee

Carol Olson, President, Board of Directors

Kathleen Lynch, Board Member

Tom Myers, Executive Director

Maureen Wadiak, Associate Director

Jim Boin, Development Director

Marvin Sabado, Director of Finance and Operations

Nancy Ragey, Planning Facilitator

STRATEGIC POSITION

Below is a summary of CSA's strategic position, based on data gathering activities described above and presented to the Board of Directors and staff in October 2007.

- ✓ CSA has built a strong, positive reputation for serving the community and delivering quality programs that meet a vital community need. The organization has a clearly articulated set of core competencies and well-defined program scope, which includes services to seniors, low-income individuals and families, and the homeless.
- ✓ Most constituents do not consider CSA's work "cutting edge" and there is a sense among stakeholders that there is community fatigue in trying to solve problems of poverty.
- ✓ CSA has strong organizational values of providing service in ways that enable clients to retain or restore their dignity and hope. These values extend to other stakeholders such as staff, board, volunteers and community members.
- ✓ CSA has seen a leveling off in client numbers since a spike in 2003-2004. In FY07, CSA served a total of 5000+ clients. In FY07, the organization redesigned its homeless program and as a result, has decreased the cost of serving homeless clients by nearly \$6,000 and has increased the number of homeless clients served by over 100. The average cost of serving a client at CSA is approximately \$600 with senior case management the most expensive endeavor (\$1,117 per client) and the senior nutrition program the least expensive (\$122 per client).
- ✓ The external environment is a mixed bag for CSA. There was an improving local economy, which offered opportunities and threats to the organization and the clients they serve, but at this time there has been an economic downturn nationally that may lead to a recession. The demographics of CSA's service area are shifting. There is a growing senior population and the needs of clients within that population have grown more complex. There continues to be an increase in the immigrant population along with changing federal and state policies that impact them. There is limited access to healthcare for many CSA clients and the future of universal healthcare insurance is unclear at present. Governments (city, county, state, federal) continue to experience shrinking revenues and increasing demands.
- ✓ CSA has a variety of strong collaborations and partnerships with government and other nonprofit organizations. There are several nonprofits interested in starting or expanding their collaboration with CSA.
- ✓ CSA has a strong management team and staff. The executive staff is highly skilled, communicative, knowledgeable and experienced. The Program and administrative staff is passionate, committed, and hard working. There is minimal staff turnover, which is unusual among social service organizations. However, the current staff is running at capacity and there is no capacity to take on new or expanded programs and activities at this time without additional staff.

- ✓ CSA has a committed and competent Board of Directors. There is a strong working relationship between the board and the executive director. The board feels it needs to continue to expand its membership, drawing in additional new skills, viewpoints and networks. The Board would like to strengthen the nominating and recruitment process to ensure diversity and fit. Significant demands are made on board members, which may limit the type of people who can commit to serving on the board.
- ✓ CSA does not have strong visibility and positioning among some key constituents and the general public; communications and visibility were identified as a weak areas. CSA invests only minimally in marketing and visibility activities and has not had dedicated marketing staff.
- ✓ CSA is in a strong financial position, with a strong mix of revenue sources, which helps to create a solid financial base for the organization. The principal areas of revenue are government and foundations grants, corporate gifts, special event revenue, individual gifts and in-kind contributions. There is increasing competition for financial resources among nonprofits. The organization does have a cash reserve equal to one year of operating expenses to mitigate risk.
- ✓ There is a strong steady base of individual donors. Given the strength and longevity of the organization, it would appear CSA has an opportunity to significantly increase its individual contributions. However, to take advantage of this opportunity, CSA would need to increase the role of the board in fundraising and strengthen the systems that support individual fundraising activities.
- ✓ CSA owns its own facility, a strength of the organization. However, there are several deferred maintenance issues, which creates significant additional work for staff. The space as currently configured is at maximum capacity.

STRATEGIC PRIORITIES: 2008-2011

CSA has developed four strategic priorities to guide the organization in the next three years. These priorities build on the organization's considerable strengths and accomplishments while addressing issues that may create challenges for the organization in serving our clients and community, fulfilling our mission and achieving our vision. The four priorities are:

Strategic Priority #1

Expand and enhance case management services.

Strategic Priority #2:

Create greater visibility for CSA in our community.

Strategic Priority #3:

Increase contributed revenue.

Strategic Priority #4:

Identify and address facility needs.

In order to ensure implementation of this plan and any necessary midcourse corrections, CSA will annually revisit the goals and objectives, outcomes of the strategies, and the internal and external environment. Goals in this plan are intended to be achieved over the three-year period; objectives are shorter term (one to two years). The plan purposely set objectives for the first two years of the plan; subsequent objectives will be developed during the annual review and based on results.

The following pages describe the rationale, strategy, goals, objectives and outcome measures for each of these strategic priorities.

GOALS AND OBJECTIVES

Strategic Priority #1: Expand and enhance case management services.

Rationale and Strategy: In order to promote stability, self-reliance and hope among our clients, CSA is committed to more deeply understanding the needs of clients and expanding services to meet their needs. To achieve this, we will implement a new case management strategy for Emergency Assistance clients, evaluate our existing case management services provided to our homeless and senior clients and expand and/or adjust based on the evaluation findings, explore programs and strategies that enable clients to achieve greater financial stability, and adjust existing services and referrals. To ensure the impact of existing and expanded services, CSA will increase our efforts to measure the short and long term impact of our programs and services.

Three-year goals:

Goal A: Expand our case management services, including offering this service to emergency assistance clients initially and expanding to other programs in subsequent years.

Goal B: Recalibrate our emergency assistance program

Goal C: Provide opportunities to clients to increase their financial stability.

Measures: Use of our services (increase or decrease)¹
The degree to which our clients have a stronger sense of well-being as a result of our services²
The level of understanding we have about each client³
Number of services the client uses based on referrals (increase or decrease)
Number of programs offered (increase or decrease)
Increase in client financial assets and annual income

¹ This includes measuring if Emergency Assistance clients would seek emergency services more than once in a 12-month period

² Conduct pre-post surveys with EA clients receiving case management; also identify and survey a control group not receiving case management

³ One measure is thickness of client file

Year	Goal	Objective	Responsible Party/Parties	Costs/Resources required	Completed
Year 1	Goal A: Case Management	Create criteria and measures for pilot program for Emergency Assistance client participation ⁴	Associate Director and Staff	Money Staff for case management Survey design & implementation Consulting fees	
		Establish pilot case management for 8-10 EA clients ⁵	Associate Director and Staff	Expense Neutral	
		Evaluate case management pilot program and determine next steps	Board of Directors	Expense Neutral	
		Create a baseline for the number of client referrals and measure over time in order to understand the efficiency and impact of case management strategy ⁶	Staff	Technology, staffing, organization culture issues, Consulting fees	
		Enhance evaluation tools for all programs that allow us to better document client needs and measure impact of our work	Staff	Infrastructure growth, database, staff training	
Year 1	Goal B: Emergency assistance	Create strategies to increase discretionary funds to meet client needs	Staff and Board of Directors	Planning expense neutral; Expenses will be incurred for increased assistance	

⁴ Conduct a survey annually among all EA clients to determine interest in case management program

⁵ ID opportunities and leverage current collaborations in delivering intensive case management

⁶ Work towards a countywide standard for counting clients

Year	Goal	Objective	Responsible Party/Parties	Costs/Resources required	Completed
Year 1	Goal C: Financial stability for clients	Define and map current landscape of programs that might lead to greater financial stability for our clients including but not limited to asset development, job training, education and ESL; identify gaps CSA may need to fill.	Associate Director and Staff	Staff	
		Enhance our information and referral capabilities and track impact on clients	Associate Director and Staff	Technology	
		Educate and conduct training for staff and board about financial asset development for low-income families; evaluate CSA's capacity to pursue this programmatic work	Associate Director and Staff	Training	
		Evaluate client interest in participating in asset development program	Associate Director and Staff	Expense neutral	
		Track clients through intensive case management	Associate Director and Staff	Expense Neutral	
		Consider and approve as appropriate implementation recommendations	Board of Directors	Staff (new or existing)	
		Identify and build relationships with potential nonprofit and government partners	Associate Director and Staff Board of Directors	Expense Neutral	

Year	Goal	Objective	Responsible Party/Parties	Costs/Resources required	Completed
Year 2	Goal A: case mgt	Evaluate the case management for Alpha Omega program and recommend program improvements	Staff and Board of Directors	Staff time Potentially additional staff	
		Evaluate the case management for senior program and recommend program improvements	Staff and Board of Directors	Staff time Potentially additional staff	
Year 2	Goal C: Financial Stability	Implement board approved recommendations and from year one financial stability findings.	Associate Director and Staff	Staff	
		Develop programs that cannot or are not met within the community based on gaps identified during mapping of financial stability programs.	Associate Director and Staff	Program costs Staff (new)	

Strategic priority #2: Create greater visibility for CSA in our community.

Rationale and Strategy: in order to serve more people, fully leverage our existing programs and resources, and increase financial and other support for CSA, the organization will invest resources in increasing and improving our marketing efforts and coordinate and leverage these activities with fund development efforts.

Three-year goal:

Goal: Increase name recognition and understanding of CSA's work among key public entities

- Measures:
- Total resources invested in marketing (staff, hard costs)
 - Working marketing plan
 - Coordinated tracking of marketing outcomes
 - Number of media mentions
 - Number of speaking engagements

Year	Goal	Objective	Responsible Party/Parties	Costs/Resources required	Completed
Year 1	Goal: Visibility	Create cohesive consistent collateral materials ⁷	Staff and Marketing Committee	Printed materials Staff (new)	
		Create an annual marketing plan that coordinates with fund development plan ⁸	Staff, Fund Development Committee, Finance Committee, Marketing Committee	Staff (new) Materials	

⁷ This will result in new and updated materials

⁸ The marketing and fund development committees should incorporate marketing and development into one cohesive plan, carefully delineating roles of board committees

Year	Goal	Objective	Responsible Party/Parties	Costs/Resources required	Completed
Year 1	Goal: visibility	Reorganize the marketing function and clarify roles of board and staff ⁹	Marketing Committee and Staff	Staffing Training Consultant fees	
		Create financial strategy for supporting marketing efforts	Marketing Committee and Staff, with Board of Directors approval	Money	
		Establish a strategy for connecting board members with local elected officials and other community leaders	Marketing Committee	Expense neutral	
		Explore the possibility of a low-cost community-wide poll to set baseline for awareness and understanding about CSA in partnership with other nonprofit organizations.	Staff Marketing Committee	Survey cost	

⁹ Consolidate the marketing work; determine how best to increase our capacity to do speaking engagements

Strategic Priority #3: Increase contributed revenue

Rationale and Strategy: In order to fully meet our strategic priorities and attain the necessary additional financial resources, CSA will increase its efforts to cultivate and steward the support of individual donors. To realize an overall increase in contributed revenue, CSA must sustain the current level of support from local government and foundations; this will require additional attention to relationships with staff and elected officials.

Three-year goal:

Goal: Increase contributed revenue primarily through a focus on individual donors.

- Measures:
- Increased number of donors/households
 - Increased number of new/continuing contacts with potential donors
 - Increased number of increased gifts
 - Increased total revenue – contributed and earned
 - Stability and continuity in the donor base (size of gift, number of repeat donors)
 - Number of multi-year gifts

Year	Goal	Objective	Responsible Party/Parties	Costs/Resources required	Completed
Year 1	Goal: Increase contributed income	Implement a structure for donor entry and cultivation	Development Director, Fund Development and Marketing Committees, and Staff	Staff and board time, training costs, events, printing and postage	
		Create active advocacy program directed to local government and foundations to sustain current funding levels ¹⁰	Development Director, Fund Development Committee and Staff	Time, primarily from board members	
		Reduce the amount of time board spends on event planning and production by establishing an event subcommittee of the Fund Development Committee and reallocate board member time to support individual fundraising model ¹¹	Board Chair and Executive Director	Increased staff time on events, possible event planner costs	

¹⁰ Address the current environment of giving to “new” organizations

¹¹ Fund development committee to spend less than 50% of time on events, increase board time available for other fund development activities.

Year	Goal	Objective	Responsible Party/Parties	Costs/Resources required	Completed
Year 2	Goal: Increase contributed income	Explore establishing an endowment ¹²	Executive Director, Finance Committee and Board of Directors	Board and staff time, training costs, attorney fees	
		Explore creating a planned giving program ¹³	Development Director and Fund Development Committee	Board and staff time, training costs, consultants, attorney fees	

¹² Make a “go/no go” decision about establishing an endowment at the end of the study period and budget appropriately

¹³ Make a “go/no go” decision about establishing a planned giving campaign at the end of the study period and budget appropriately.

Strategic Priority #4: Address CSA’s short and long term facilities needs.

Rationale and Strategy: As CSA implements the strategies in our strategic plan, it will become necessary to expand and reconfigure our work and program space. We may also need to identify ancillary space to support some of our seasonal programs (e.g., Holiday Sharing). In order to effectively and efficiently address short and long-term space needs, CSA will undertake a review and planning process, resulting in a comprehensive space plan that will be implemented during the three years of this plan.

Three-year goal

Goal: Identify facility needs and implement a plan to address them.

Measures: Staff has adequate and appropriate workspace
 Increased storage space
 Identification of potential satellite space for programs

Year	Goal	Objective	Responsible Party/Parties	Costs/Resources required	Completed
Year 1	Goal: Facilities	Evaluate current space needs and address immediate needs	Director of Finance and Operations and Staff	Corporate/other space planners Staff survey of needs and desires	
		Develop a master space plan, including costs, timeline for implementation, and preliminary plans for gathering necessary resources ¹⁴	Director of Finance and Operations and Staff	Staff time Board and former board members links to resources (financial and other) Architect	
		Explore possible expansion at current site or optional sites in our service area ¹⁵	Director of Finance and Operations and Staff	Staff time Board and former board members links to resources (financial and other)	
Year 2	Goal: Facilities	Implement recommendations from year one work	Director of Finance and Operations and Staff	Space rental costs	

¹⁴ Webcor is always interested in doing a makeover for CSA

¹⁵ Consider impact on holiday sharing program