



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

Mountain View • Los Altos • Los Altos Hills

**Community Services Agency of Mountain View, Los Altos and Los Altos Hills
 Strategic Plan Fiscal Years ending 2017, 2018 and 2019**

Approved by majority vote by the board of directors, January 28, 2016

Our Vision	A future wherein all residents of the communities we serve have the support and resources to see a better future for themselves and a path to a better quality of life.
Our Mission	We are the community's safety net, providing critical support services that preserve and promote stability, self-reliance and dignity.
Who We Are	CSA, in existence since 1957, is anchored by a professional staff of 24, a highly engaged 19-member Board of Directors, more than 600 volunteers, strong community partnerships, and hundreds of local residents and organizations that contribute money, goods, and services to directly benefit disadvantaged neighbors.
Who We Serve	Elderly, low-income, and homeless residents of the communities of Mountain View, Los Altos, and Los Altos Hills.
Our Programs and Services	<p>CSA accomplishes its mission in three ways:</p> <ul style="list-style-type: none"> • Emergency Assistance including food and financial aid; • Homeless Services including comprehensive case management; and • Senior Services including nutrition services, transportation, shopping assistance and case management.
Our Strategic Priorities: 2016-2019	<ul style="list-style-type: none"> • Evaluate and test, if warranted, expanding and redefining client eligibility to help meet the needs of people in the community. • Reimagine and reinvent services to meet changing client needs and circumstances. • Strengthen and enhance CSA's brand and marketing efforts to increase community support and understanding of CSA's work. • Invest in staff, board and infrastructure to provide effective and efficient services.

Strategic Plan Fiscal Years ending 2017, 2018 and 2019

Section I: Executive Summary

1. Plan context and background
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CONTEXT: A TIME OF RAPID AND EXTRAORDINARY CHANGE

“We are seeing a massive dislocation of low-income individuals.”

Tom Myers, CSA Executive Director
January 2016

Silicon Valley is at the epicenter of the national conversation about income equality and the vanishing middle class. For CSA’s clients, that inequality, combined with the high cost of living, results in four acute challenges:

- Decrease in affordable housing and an increase in homelessness;
- Lack of accessible transportation and increasing traffic congestion;
- Food insecurity; and
- Complex health and social needs associated with aging for those on a fixed income.

With this context in mind and to continue to have the highest impact on its clients and community, CSA re-examined every area of the organization during this strategic planning process. It scrutinized everything from its mission, services and business model to service delivery, staffing and organizational structure. The following questions guided the planning discussion:

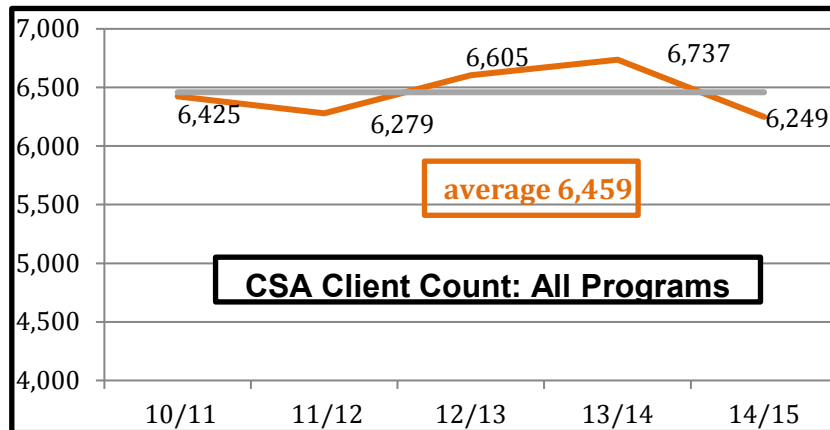
- What services will have a positive impact on low-income individuals, families, seniors and homeless people?
- Should eligibility for services be redefined by income levels or geographical location?
- Where (in office or in field), how (use of technology to improve delivery), and when (service hours and days of week to improve accessibility to services) should services be provided?

CSA BACKGROUND AND SUCCESSES

The Community Services Agency (CSA) has been providing a safety net for elderly, low-income, and homeless residents of Mountain View, Los Altos, and Los Altos Hills since 1957. As a local agency, CSA understands the unique needs of its clients and community, and evolves its services to address critical issues. Services include a food and nutrition center, financial assistance, and case management, constituting a safety net that enables clients to regain independence and self-sufficiency regardless of age or circumstance. CSA is anchored by a professional staff of 24, a

highly engaged 19-member Board of Directors, more than 600 volunteers, strong community partnerships, and hundreds of local residents and organizations that donate money, goods, and services to directly benefit disadvantaged neighbors.

Five-Year CSA Client Trends¹



While recovery from the 2008 recession has been slow and prolonged, CSA's overall client numbers began leveling off 5 years ago, as depicted in the chart to the right.

The fact remains that over 6,000 people in northern Santa Clara County need CSA safety-net programs to make ends meet and the challenges they face have never been greater.

Rental Costs Out of Reach

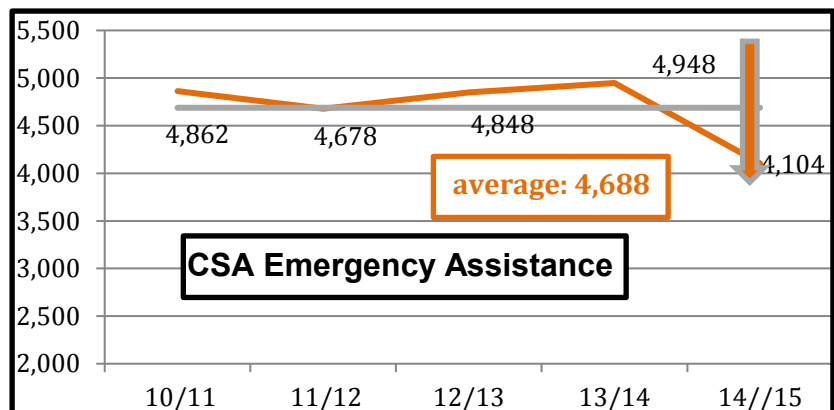
With the current economic boom in Silicon Valley, low-income individuals and families in all age groups struggle more than ever to make ends meet as housing costs and rents continue to rise dramatically.² Decision-makers – government, corporations, and nonprofits – are all grappling with the housing crisis.

	3Q2013	3Q2014	3Q2015	% change over 2 years
AVERAGE	\$2,345	\$2,581	\$2,829	17%
Studio	\$1,639	\$1,850	\$2,003	18%
1 bd 1 bth	\$2,148	\$2,399	\$2,619	18%
2 bd 1 bth	\$2,339	\$2,525	\$2,711	14%
2 bd 2 bth	\$2,923	\$3,180	\$3,571	18%
3 bd 2 bth	\$3,397	\$3,701	\$3,854	12%

Change in Mountain View Rents 2013 to 2015

Inside the Numbers

Emergency Assistance: Until one year ago (2014-15), the number of people seeking emergency assistance from CSA remained relatively constant. In 2014-15, there was a significant drop (18%) in Emergency Assistance clients. This drop may be due in part to an improving economy. However, a deeper analysis of client trends over the five-year period revealed 20% of CSA Emergency Assistance clients have moved out of the area, even though the client count remained steady. This data indicates that many new people were in need of assistance. The drop in the last year suggests we

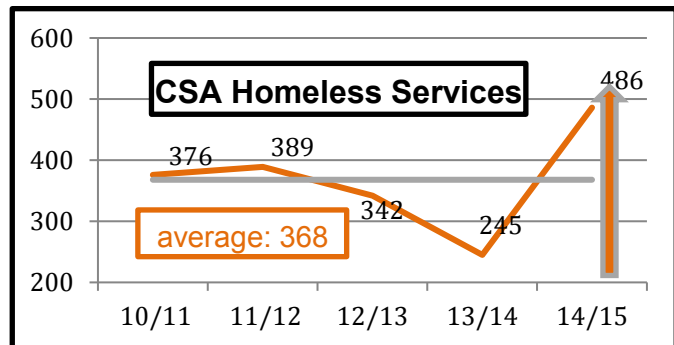


¹ Data source: CSA internal client tracking data

² Data source: City of Mountain View Council Study Session, 12/1/2015, ATT 3 - RealFacts Data.pdf
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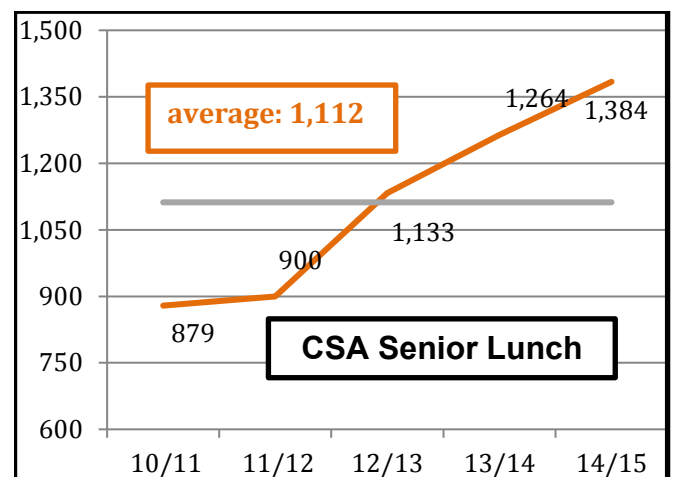
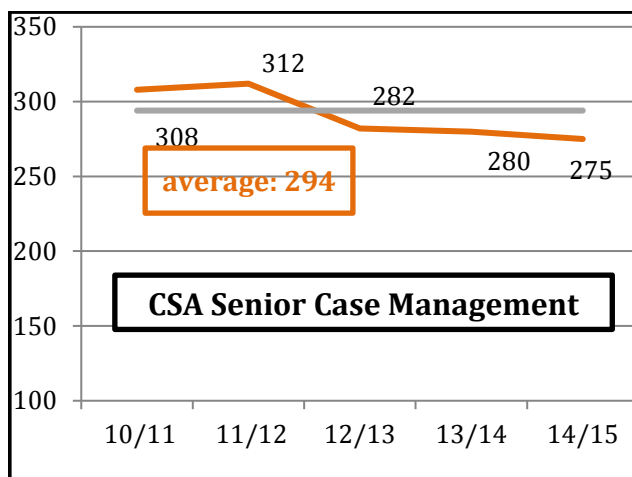
may have reached the tipping point of more low-income individuals and families leaving the area or becoming homeless due to **high housing costs and low-wages**.

Homeless Services: Again, the trend was looking good until last fiscal year when the number of homeless clients increased by almost 100%. Of the individuals charted here, sixty-eight (14%) are employed, with another 58 (12%) living in their car.



Senior Services: While the population of Mountain View, Los Altos and Los Altos Hills is aging, our Senior Services program client count remains level, not for lack of need, but rather for lack of staff and funding to handle increased caseloads. The acute issues being faced by seniors as they live longer adds to the time required for case management.

Senior Lunch & Nutrition Program: As indicated, there is a steady increase in the number of seniors coming to the Mountain View Senior Center for lunch.



During data gathering, clients identified the lack of public or reliable transportation options and traffic congestion as among their greatest challenges, in addition to the cost of housing and the lack of affordable housing. Health and food insecurity were also daily concerns.

CSA knows that while the current environment is one of rapid and extraordinary change, basic human needs have not and do not change. Solutions to affordable housing, accessible food and healthcare will always be necessary to sustain a healthy, diverse workforce and community. CSA must continue to innovate and work in partnership with others to achieve a thriving community

A BOLD FUTURE VISION

Based on community conditions, and with input from key stakeholders including clients, funders and community leaders, Board and staff reached consensus that while CSA now considers itself to be a safety net organization, its ultimate business is **client stabilization**. As a result, CSA will embrace a bold future vision for what it does, how it delivers services, and the role it plays in the community, to increase its impact on clients and community. CSA's future vision:

<u>Now</u>	<u>Future Vision</u>
Safety net: clients short-term challenges are addressed	Stabilization: clients are stable and able to make decisions and choices for the long term
Services delivered primarily at headquarters office in Mountain View	Services delivered at a redesigned headquarters and satellite offices, and through mobile service delivery
Processes primarily manual	Processes primarily utilizing technology
Agency primarily neutral and behind the scenes in advocating for clients	Agency provides a strong public voice and advocacy for clients
Social service sector and government partnerships	Broader nonprofit, government and corporate partnerships
Discrete program departments	Cross functional program teams with specialists supporting all case workers
Limited case management	Expanded case management provided to clients over a longer period
Serving residents in MV, LA, LAH	Serving residents and workers in MV, LA, LAH

Achieving this future vision will involve **risk taking and bold experimentation**. CSA will need to embrace change and new ways of doing business. CSA will ask more of its clients and at the same time, provide greater support for them to stabilize and improve their lives. Success will require broader community engagement and increased financial support.

This strategic plan was developed with an extraordinary level of cooperation between the Board and staff, resulting in a shared sense of responsibility for its implementation and success. CSA is grateful to all the members of the staff, the Board of Directors and its stakeholders who contributed to this plan and thankfully acknowledges Google for generously supporting the planning process.

Strategic Planning Committee

Darelda Medina, Director and Co-Chair
Tom Smith, Director
Cathy Lazarus, Director
Eugene Fram, Director
Walter Rau, Director
Deepak Sharma, Director

Tom Myers, Executive Director and Co-Chair
Maureen Wadiak, Associate Director
Jim Boin, Development Director
Marvin Sabado, Director of Finance and Operations
Nancy Ragey, Planning Facilitator

COMMUNITY SERVICES AGENCY

Mission

CSA is the safety net for the communities of Mountain View, Los Altos, and Los Altos Hills, providing critical support services that preserve and promote stability, self-reliance and dignity.

Vision

A future wherein all residents of the communities we serve have the support and resources to see a better future for themselves and a path to a better quality of life. CSA empowers clients to be more independent, addressing their unique needs through effective case management, programs and services that fill gaps in critical basic needs. CSA supplements its resources by collaborating with other organizations to provide clients with additional services they require. CSA engages people in our community as volunteers, donors and advocates, to meet the challenges of 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.

Impact: We work to achieve meaningful measurable results that stabilize and improve the lives of our clients.

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 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.

STRATEGIC PRIORITIES: 2016-17 THROUGH 2018-19

Based on conditions found in the internal and external environment (see complete summary in Appendix B), CSA 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 challenges. The four priorities are:

Strategic Priority #1:

Evaluate and test, if warranted, expanding and redefining client eligibility to help meet the needs of people in the community.

Strategic Priority #2:

Reimagine and reinvent services to meet changing client needs and circumstances.

Strategic Priority #3:

Strengthen and enhance CSA's brand and marketing efforts to increase community support and understanding of CSA's work.

Strategic Priority #4:

Invest in staff, board and infrastructure to provide effective and efficient services.

The plan describes the rationale, strategy, goals, objectives and outcome measures for each of the strategic priorities. Goals in the plan are intended to be achieved over the three-year period, while objectives are shorter term (one to two years). The plan purposely sets objectives for the first two years of the plan; subsequent objectives will be developed during the annual review process and based on results.

To ensure implementation of this plan and to make any necessary midcourse corrections required in a particularly volatile external environment, CSA staff and board will annually revisit the internal and external environment, the plan's goals and objectives, and outcomes of the strategies.

PRIORITIES, RATIONALE, STRATEGY AND GOALS

Strategic Priority #1: Evaluate and test, if warranted, expanding and redefining client eligibility to help meet the needs of people in our community.

Rationale and Strategy: Over the past several years, there has been a dramatic shift in the community and the challenges faced by CSA's client population. The Emergency Assistance Program experienced a significant 17% drop in clients over the last five years. While there has been a drop in the number of Emergency Assistance clients, the number of homeless clients doubled between 2013-14 and 2014-15.

To address the changes in the environment and best serve elderly, low-income and homeless people, over the next three years CSA will examine client eligibility criteria and test the impact of expanding that criteria. CSA will focus on two dimensions: residency and income eligibility. For residency, CSA will experiment with serving people who work, but do not live in the current service area. For income eligibility, implications of raising the ceiling to address the impact of extreme rents will be evaluated. CSA will work collaboratively with other community organizations in Santa Clara County to examine and modernize the safety net system.

Three-year Goals:

A. Achieve stronger client outcomes for stabilization.

Success metrics:

- *Impact: Percentage of clients able to attain and sustain stability*
- *Impact: Number of clients served*

B. Serve a larger number of people who are part of CSA's community through redesign and testing of eligibility criteria.

Success metrics:

- *Process: Diversity of clients CSA serves successfully*
- *Impact: Percentage of eligible clients able to attain and sustain stability*
- *Impact: Number of clients belonging to expanded criteria*

C. Redesign the Santa Clara County Emergency Assistance Network system through leading and collaborating with other emergency assistance organizations and nonprofits serving low-income clients.

Success metrics:

- *Process: Level of client satisfaction in seeking and receiving services that are timely and effective*
- *Impact: Reduction in Emergency Assistance Network service gaps in the County*

Strategic Priority #2: Reimagine and reinvent services to meet changing client needs and circumstances.

Rationale and Strategy: Changes in the external environment require CSA to rethink its service delivery system, including how and when people access services. With more Emergency Assistance clients working longer hours, and often multiple jobs, the agency will consider a shift in hours to accommodate the need. With advances in technology, there are likely opportunities to increase efficiencies intake and communication.

Over the next three years, CSA will test and adopt new ways of more effectively delivering services to clients through experimentation and constant program improvement. CSA will innovate, plan, pilot, evaluate, refine and scale when appropriate.

Three-year Goals:

A. Invest in technology to improve efficiency for clients and staff.

Success metrics:

- *Process: Level of client satisfaction*
- *Process: Number of new technologies adopted*
- *Impact: Number of clients served*

B. Alter hours and services to offer greater flexibility for clients.

Success metrics:

- *Process: Level of client satisfaction*
- *Process: Number of clients served during shifted hours*
- *Impact: Number of clients served*

C. Develop key partnerships with likely and unlikely partners to meet the complex needs of clients.

Success metrics:

- *Process: Level of client satisfaction*
- *Process: Number of new key partnerships*

Strategic Priority #3: Strengthen and enhance CSA's brand and marketing efforts to increase community support and understanding of CSA's work.

Rationale and Strategy: Input from key stakeholders gathered during this planning process suggests more must be done to raise the visibility of CSA and create greater clarity about its work and impact. CSA must also determine how best to become a stronger public advocate for clients, raising awareness and increasing understanding about the challenges low-income families and individuals face in the community. Finally, community support and investment in CSA and the people it serves must increase.

In order to achieve greater awareness, investment will be made in professional services to re-design and implement an ongoing robust marketing and communication program. Investment opportunities will be offered to donors and funders who share a commitment to improving the lives of CSA clients and are willing to make transformational gifts to implement strategies in this plan.

Three-year Goals:

- A. Strengthen and create greater awareness of CSA³ among specific key constituents and activate their support of CSA.

Success metrics:

- *Process: Number of people within targeted key constituents who participate in one or more CSA event(s) or desired action(s)*
- *Process: CSA mentions in social media and local events attended by targeted key constituents*
- *Impact: Increase in brand awareness of CSA in the community (aided and unaided awareness)*
- *Impact: Percentage increase and retention rates in number of people in CSA's "loyalty loop" (community members who become volunteers, volunteers who become donors, donors who increase donations)*
- *Impact: Percentage increase of donations from businesses in local community*

- B. Increase the number and effectiveness of board members and other stakeholders who advocate and fundraise on behalf of CSA.

Success metrics:

- *Process: Increase the number of board members willing to devote time to fundraising/building donor and community relationships*
- *Impact: Growth in total number of individual donors and the amount they give*
- *Impact: Increase in donor retention*
- *Impact: Number of new or re-engaged donors*

Strategic Priority #4: Invest in staff, board and infrastructure to provide effective and efficient services.

Rationale and Strategy: To meet the growing and complex needs of existing and potential new clients, CSA must ensure adequate staff with the necessary skills and expertise, who are organized for maximum effectiveness and efficiency. Similarly, board members will need to be recruited with the breadth of necessary skills, interests and expertise to advance CSA. The Board's structure and operations must align with the goals of the strategic plan, along with best

³ See appendix C for initial list of key constituents
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practices in governance and support. Finally, consideration will be given to how CSA utilizes its building, technology and other internal assets to most effectively serve clients and deliver on the mission.

Early on in plan implementation, CSA will review existing staff structure to breakdown department silos that may inhibit efficiency in serving clients. Specialists will be hired as funding permits who can work across departments to support the needs of clients and case managers in areas such as housing or transportation. Staff morale and communication are especially critical during times of change, requiring investment of time and resources to ensure everyone is moving forward together in implementing the strategic plan. Work schedules will be examined and opportunities identified to provide for flexibility that lead to better client service and staff morale. There are critical investments that must be made in infrastructure, particularly in technology and facilities. Over the course of this plan, consideration will be made to changes to CSA's headquarters, along with offering services offsite, to optimize organizational performance and the client experience and impact. Finally, the Board will use the strategic plan to drive its recruitment efforts and operations.

Three-year Goals:

- A. Achieve a staff structure and work environment that includes cross-functional teams, an adequate number of specialists, and support structures and activities that maximize operational efficiency, effectiveness and staff satisfaction.

Success metrics:

- *Process: Percentage of staff who report high satisfaction with the work environment*
- *Impact: Increase in the number of clients who report high satisfaction with their client experience*

- B. Achieve a diverse board with skills to support CSA's mission and strategic plan goals.

Success metrics:

- *Process: Percentage of board members who report high satisfaction with board experience, including ability to make an impact on CSA's work*
- *Process: Level of engagement of board members in CSA's fundraising and advocacy*
- *Process: Board skill inventory demonstrates CSA has the right board members*

- C. Optimize technology and facilities to support CSA goals and client needs.

Success metrics:

- *Process: Ongoing evaluation of technology demonstrates increased efficiency*
- *Process: Improve organizational effectiveness through evaluation and updating of technology*