CoAction™

STRATEGIC PLAN 2025

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About CoAction

Since 1965, CoAction has been helping people and changing lives in northwest Indiana. CoAction is an independent, non-profit organization that provides valuable services and assistance to individuals and families, most of whom are low-income. People experiencing financial hardship find opportunities, resources, and respect at CoAction.

As a member of the National Community Action Partnership, CoAction follows The Promise of Community Action to: “Change people’s lives, embody the spirit of hope, improve communities and make America a better place to live. We care about the entire community, and we are dedicated to helping people help themselves and each other.”

Service Area

CoAction serves Hoosiers in Jasper, Lake, Newton, and Porter counties.

Their extended service area includes La Porte, Pulaski, and Starke Counties.

Current Programs

Housing

- Affordable Rentals
- Permanent Supportive Housing
- Housing Choice Vouchers
- Home Modifications & Energy Efficiency Improvements
- Housing Counseling

Financial Stability

- Utility Assistance
- Matched Savings Accounts
- Free Tax Preparation
- Small Dollar Loans
- Financial Education and Coaching

Older Adults & Persons with Disabilities

- Aging & Disability Resource Center
- In-Home Services
- Nutrition
- Senior Companions
- Ombudsman

Nutrition

- Supplemental Nutrition Assistance for Women, Infants, & Children (WIC)
- Senior Center Meals

Executive Summary

CoAction is a recipient of the Community Service Block Grant (CSBG), which requires Community Action Agencies to develop strategic plans every five years. Requirements for this strategic plan are outlined in the Indiana Community Action Agency CSBG Monitoring Tool Kit. This strategic plan was prepared by facilitators at the Indiana Community Action Poverty Institute. The plan utilized input from board members, staff members and leadership, community members, and other relevant key stakeholders. It is intended to guide CoAction's work over the next five years to improve the economic security and well-being of low-income Hoosiers in its service area.

Data and strategies used in this plan were sourced from surveys, community forms, and a planning retreat. The data collected was reviewed during the strategic planning retreat and taken into consideration during the follow-up planning session. During the planning retreat, internal strengths and growth areas as well as external opportunities and threats (S-GA-O-T), priorities, goals, and strategies were established. The follow-up planning session was conducted with the leadership team to determine what strategies would be used to meet the agency's goals. The Planning Guide was developed to assist the leadership team in evaluating and updating the plan over the next five years.

Through the development of this strategic plan, the agency created the following broad goals:

- support clients in housing stability,
- expand opportunities for clients to receive food assistance,
- reduce transportation barriers through new and expanded partnerships,
- create pathways to stable employment,
- enhance the social and physical needs of older adults and their caregivers,
- improve clients' financial stability,
- and strengthen the reputation, stability, and effectiveness of CoAction.

Strategies that support these goals and meet the needs of the community, families and the agency were also brainstormed and narrowed down by the agency's leadership team. The goals and strategies the team developed seek to reduce poverty, revitalize low-income communities, and empower people with low incomes to become more self-sufficient. CoAction will do this by addressing challenges through comprehensive services, support, and education.

Plan Upkeep

The board of directors approved the plan on 12-10-2024 and the following individuals are responsible guiding the monitoring and maintenance of this strategic plan.

Board Chair: Jeanne Wease

CEO: Jen Trowbridge,

Staff: Jennifer Malone, Chief Services Officer

Regular Updates: Discuss and review the plans set for during the year. Discuss any changes that may impede on your current plans and take steps to revise your plans.

Review, Revise, and Approve: Evaluate the plan yearly, during the second half of the year, and begin planning for the next year. Update the plan if necessary.

Methodology

CoAction began their strategic planning process in October 2024 and completed their planning period in November 2024. During the strategic planning process, facilitators from the Indiana Community Action Poverty Institute engaged with community members, clients, staff, leadership and board members. The facilitators initially administered a board and staff survey, as well as conducted community forums. The data collected was combined with previous reports to develop a planning retreat. The retreat was a one-day event. After the retreat, facilitators reviewed data and further refined goals and strategies. They then met with the leadership team to determine what strategies to implement to meet the goals set. Below is a detailed description of the planning process, data reviewed, and development of goals and strategies.

Using feedback gathered from members of the community, staff, and board surveys (170 community members, 49 staff and 7 board participants), two community forums (12 participants), a planning retreat (14 staff and 2 board participants), CoAction:

- Reviewed their 2024 Community Needs Assessment, Annual Report, and board and staff survey data, with a focus on poverty data, customer satisfaction data, client statements, and top community needs.
- Utilized service area data and conducted a Strengths, Growth Areas, Opportunities, and Threats (SGAOT) Analysis: The group discussed basic information pertaining to CoAction's strengths, growth areas, opportunities, and threats at both the internal and external levels. Priority Areas emerged from this discussion.
- Proposed strategies to address community, family, and agency needs, and prioritized them according to their potential impact, feasibility, and need: The group developed a vision of what it wants to see in five years due to its community needs and priority areas.
- Developed strategic goals and results for which CoAction can aim: The group outlined broad, overarching themes that set the focus for change over the next five years due to its community needs and priority areas.
- Created a focused implementation plan for year one. Finally, the leadership team established goals, clarified strategies, and detailed actions to achieve all goals established for the first year of the plan. The team agreed upon follow-up steps for each subsequent year of planning.

Key Data Sources

Data used during the strategic planning process came from various sources. CoAction's 2024 community needs assessment was used during the retreat to review poverty and community needs data. Board and staff surveys were used to understand the internal and external needs of the agency. The community needs assessment customer satisfaction data and community forum data were also reviewed as key external and data sources.

The following is representative of the types of data retreat participants and the leadership team used to develop this strategic plan.

Demographics of Population for Whom Poverty Status is Determined[1]

	Service Area	Jasper	Lake	Newton	Porter
POPULATION					
Total	707,296	32,362	491,833	13,585	169,516
AGE					
Under 5 years	39,800	1,823	28,587	745	8,645
5 to 17 years	122,040	5,751	85,830	2,123	28,336
18 to 34 years	145,678	6,136	102,416	2,590	34,536
35 to 64 years	279,975	12,838	192,304	5,568	69,265
65 years and over	119,803	5,814	82,696	2,559	28,734
GENDER					
Male	347,344	16,272	239,832	6,999	84,241
Female	359,952	16,090	252,001	6,586	85,275
RACE/ETHNICITY					
White alone	477,378	29,091	288,980	12,420	146,887
Black or African American alone	121,197	261	114,199	148	6,589
American Indian and Alaska Native alone	1,807	19	1,603	*	175
Asian alone	9,746	34	7,379	33	2,300
Native Hawaiian and Other Pacific Islander alone	148	0	129	0	19
Some other race alone	45,694	884	41,331	285	3,194
Two or more races	51,326	2,073	38,212	689	10,352
Hispanic or Latino origin (of any race)	121,036	2,130	99,554	1,013	18,339

Source: U.S. Census Bureau, 2018-2022 American Community Survey 5-Year Estimates

Poverty Data

Poverty Rates by County

Jasper	Lake	Newton	Porter
7.5%	14.7%	12.6%	9.3%

Source: U.S. Census Bureau, 2018-2022 American Community Survey 5-Year Estimates

Service Area Poverty Rates

	Number in Poverty	% in Poverty	State % in Poverty
Total Population	92,315	13.1%	12.3%
Male	40,039	11.5%	11.1%
Female	52,276	14.5%	13.5%
Under 5	8,207	20.6%	18.4%
5 to 17	23,248	19.0%	15.3%
18 to 34	21,224	14.6%	15.8%
35 to 64	29,672	10.6%	9.7%
65+	9,964	8.3%	8.1%
White	40,225	8.4%	10.1%
Black	33,081	27.3%	25.1%
American Indian / Alaska Native	303	16.8%	17.2%
Asian	1,507	15.5%	14.8%
Native Hawaiian / Pacific Islander	*	*	14.2%
Other	9,701	21.2%	19.9%
Two or More Races	7,498	14.6%	17.3%
Hispanic / Latino	19,370	16.0%	18.3%

Source: U.S. Census Bureau, 2018-2022 American Community Survey 5-Year Estimates

[1] In addition to questions about race/ethnicity, the Census Bureau asks individuals if they identify as Hispanic/Latino or not Hispanic/Latino.

Top Five Community Needs

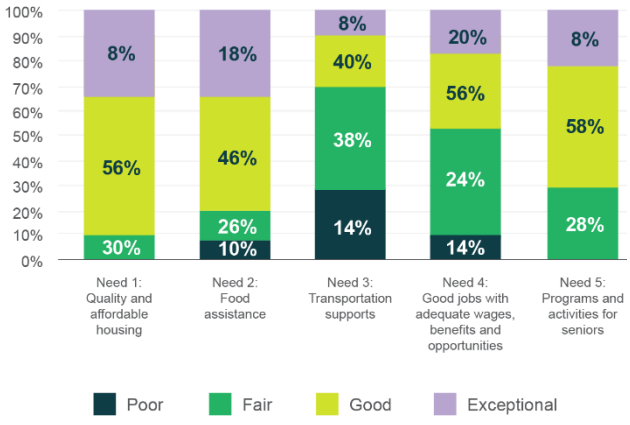
The following top five needs were identified based on client responses, as identified in CoAction's 2024 Community Needs Assessment. They are listed in order from greatest to least.

	Comparison of the Top 5 Needs Identified on Current and Previous Surveys	
	2024 CNA	**2021 CNA**
1	*Quality and affordable housing*	*Good jobs with adequate wages, benefits and opportunities*
2	*Food assistance*	*Programs for youth*
3	*Transportation support*	*Programs for seniors*
4	*Good jobs with adequate wages, benefits and opportunities*	*Budgeting classes and/or credit counseling/repair*
5	*Programs for seniors*	*Tied: Legal services, help to make homes energy efficient, job search support*

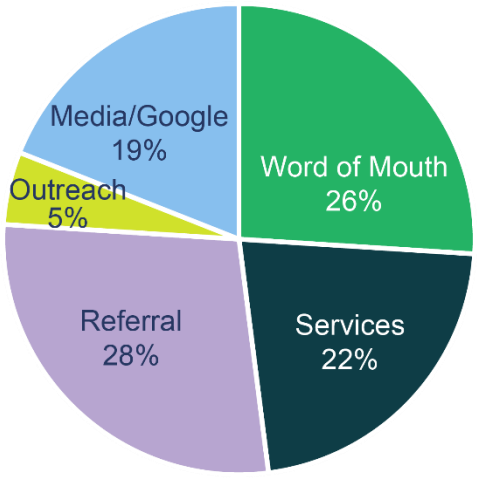
Survey Data

Community members were asked one wish they had for their community. Their responses are compiled below in a word cloud with the word size representing the frequency of the word's use.

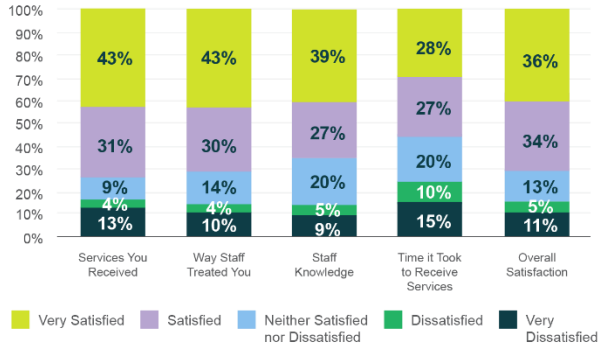
How well does COACTION currently engage in programming or practices that help meet top community needs?



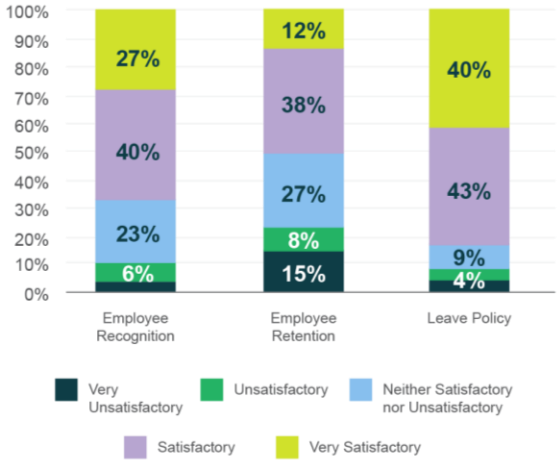
How did people learn about COACTION?



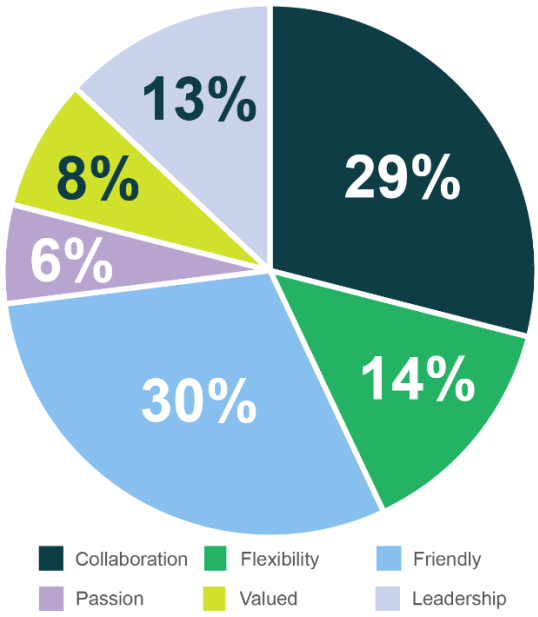
Customer Satisfaction:
Rank your satisfaction with the following



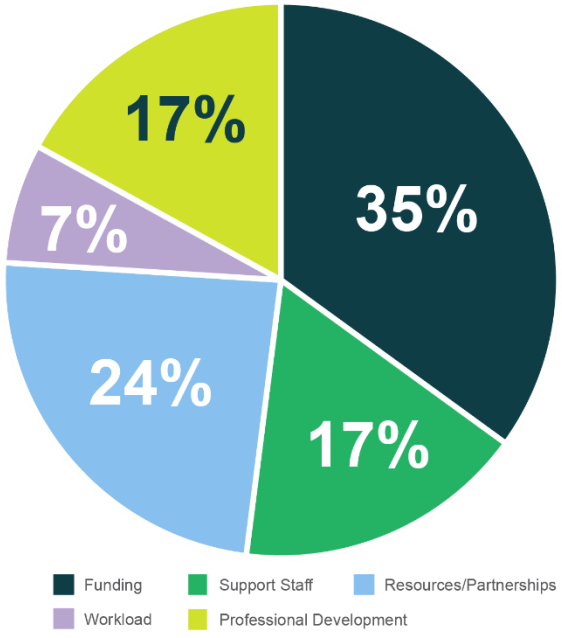
Employee satisfaction:
Rank your satisfaction with the following



What do you like about the work culture?



What support or resources would help you better do your job?



S-GA-O-T

Below, CoAction's strengths, growth areas, opportunities, and threats are summarized with the data source indicated in parentheses beside it. Some areas came from multiple sources.

STRENGTHS	GROWTH AREAS
• Motivated, purpose-driven, and talented board (board survey) • Dedicated, passionate staff and leadership, "you can feel the effort" (board survey) • Current efforts to meet housing, food, and senior needs (board survey) • Successful collaborations and partnerships (board survey, staff survey) • High expectations (board survey) • Staff respectfulness and knowledgeability with clients (customer survey) • Housing services, food assistance, senior supports (client survey, staff survey) • Open to all (staff survey) • Collaboration across programs (staff survey) • Merger with Housing Opportunities (staff survey) • "We are family," positive culture (staff survey) • Workplace flexibility and paid leave (staff survey)	• Responsiveness to customer requests (board survey, community forum, customer survey) • Community visibility and identity (board survey, customer survey) • Empathy / respectful treatment (community forum, customer survey) • The "route" of obtaining help when a client has multiple needs (board survey) • Expectations of subcontractors (board survey) • Timeliness of services (customer survey, staff survey, community forum) • Home repair supports, transportation needs, good jobs, day services for seniors (customer survey, staff survey, community forum) • More training and staffing (staff survey) • Caring too much (staff survey) • Employee benefits (staff survey) • Office locations (staff survey, community forum) • Staff turnover (staff survey) • Job training, especially for felons (community forum) • Senior programming (community forum)
OPPORTUNITIES	**THREATS**
• "Data to support new programs (community needs assessment, customer survey) • Partnership opportunities including faith communities and food banks (board survey, staff survey) • Low Income Housing Tax Credit funding (board survey) • Idea "pollination" / unique approaches from other locales (board survey) • Technology (staff survey) • Individual Development Account program (staff survey) • Community funding opportunities (staff survey) • Interns (staff survey) • Climate/environmental funding/programs (staff survey) • Strong trade schools and colleges (staff survey)	• "Dependence on grant funding / government budgets (board survey) • Changes to federal program requirements and lack of input (board survey, staff survey) • Client and partner past experiences (board survey, community forums) • Growing senior population (board survey) • Timeliness and availability of government services (board survey, customer survey) • Age/quality of existing housing (customer survey) • Poverty guidelines not aligned to need / rising costs (customer survey) • Contradictory information / communication (staff survey) • Cyber-attacks / AI / scams - both of agency and community (staff survey) • Landlords not accepting Housing Choice Vouchers (community forum)

Core Messages

The Vision of CoAction
CoAction envisions the people of Northwest Indiana flourishing regardless of income, ability, or age.

The Mission of CoAction
People experiencing financial hardship find opportunities, resources, and respect at CoAction.

Values
We care about everybody.
We keep our commitments.
We believe people act with positive intentions.
We are committed to helping others succeed.

Priority Areas

In response to the data reviewed in the strategic planning retreat, CoAction identified the following priority areas:

- ***Key Priority: Housing Access and Stability***
  - ***Goal:*** *Support Clients in Housing Stability*
- ***Key Priority: Food Access***
  - ***Goal:*** Expand Opportunities for Clients to Receive Food Assistance
- ***Key Priority: Address Senior Needs***
  - ***Goal:*** *Enhance the Social and Physical Needs of Older Adults and their Caregivers*
- ***Key Priority: Stable Employment***
  - ***Goal:*** *Create Pathways to Stable Employment*
- ***Key Priority: Address Financial Stability***
  - ***Goal:*** *Improve the Financial Capacity of Low Income People*
- ***Key Priority: Transportation Needs***
  - ***Goal:*** *Reduce Transportation Barriers Through New and Expanded Partnerships*
- ***Key Priority: Agency Sustainability***
  - ***Goal:*** *Strengthen the Reputation, Stability, and Effectiveness of the Agency*

Goals & Key Strategies

Goal	Key Strategic Plans	Category	Connection to Poverty Reduction and Self-Sufficiency	Results
Support Clients in Housing Stability	• Add supportive services to affordable rentals to assist with transitions • Create a landlord engagement program • Provide affordable housing that is co-located with services for seniors and families needing other services, childcare, healthcare, adult day service, etc. • Enhance the homeownership pipeline (we build houses, provide housing counseling, provide matched savings (IDA), ongoing housing counseling)	Family	Building the capacity of landlords and clients to obtain and maintain affordable housing will help families become more self-sufficient.	Clients are able to use vouchers more quickly and decrease loss More clients transition into home ownership More clients transition into fair market rate Fewer clients return to homelessness
Expand Opportunities for Clients to Receive Food Assistance	• Identify a food delivery solution for people with limited food access • Continue fresh produce program • Evaluate the needs and benefits of food lockers at CoAction locations • Explore partnerships to community gardens to expand access to healthy foods	Family, Agency	Developing new partnerships to expand food assistance will increase CoAction's capacity to meet clients' needs, and families will become more self-sufficiency.	Increase access to food Decrease the number of days clients report hunger
Reduce Transportation Barriers Through New and Expanded Partnerships	• Deepen partnerships with other agencies that provide transportation and start a fill the empty seats • Explore funding opportunities with rideshare entities and emergency transportation • Link mobile services to other agencies providing mobile service vehicles (United Way, Regional Health Systems, etc.)	Family, Agency	Investing in new and deeper partnerships to remove barriers to transportation will increase CoAction's capacity to meet clients' needs, and families will become more self-sufficiency.	Increase funding to transportation providers Increase in the amount of rides given to target population The demand for transportation will decrease if services are provided in the neighborhood

Create Pathways to Stable Employment	• Create an intern-to-employee pipeline program • Expand referrals to employment organizations • Decrease barriers to employment • Grow Savings Match Program for people earning education Hire a grant writer	Family, Agency	Creating employment opportunities and decreasing barriers to employment expands CoAction's capacity to develop pathways to employment and increase self-sufficiency for families.	Convert interns to permanent staff Increase referrals to employment organizations Expand programs that impact job stability Increase number of people earning certifications and degrees
Enhance the Social and Physical Needs of Older Adults and their Caregivers	• Expand the older adult companion program • Expand older adult congregate site • Bolster caregiver support (groups, education, resources, sitters, self-care)	Community, Family	Expanding older adult programs and supporting caregivers improves the social, emotional, and physical conditions that CoAction's clients' live in and strengthens families and other supportive systems.	Decrease rates of depression and isolation No waitlist for companion care/decrease time on list Increase the amount of clients staying in their homes Decrease caregiver burnout, and increase caregiver self-care
Improve Clients' Financial Stability	• Offer and refer people to credit repair and debt management programs • Provide tax education (what are taxes, how do they work)	Family, Agency	Offering financial education increases CoAction's capacity to ensure that clients become self-sufficient.	Increase client knowledge of financial wellness Clients increase in savings, credit score, and financial stability
Strengthen the Reputation, Stability, and Effectiveness of CoAction	• Ensure services are timely and tailored for the desired impact • Partner with inspired and high-achieving collaborators • Transform social services through innovative technological solutions • Create sustainable expansion & a balanced portfolio • Increase agency advertisement throughout service areas • Develop DEI education, training, and practices	Community, Family, Agency	Creating a culture of stability, efficiency, and inclusivity increases CoAction's capacity to change the conditions that people live so the most vulnerable populations, can be more self-sufficient	Include clients in presenting their lived experiences Client satisfaction improves Staff satisfaction improves CoAction serves more clients

Year 1 to 5 Goals & Action Plan

Goal 1: Support Clients in Housing Stability						
Measurable Outcome(s) *What will change and who will be impacted?*	**Strategic/Activities** *Identify the scope of activities.*	**Timeline** *When will the steps occur?*	**Resources Needed** *What is needed and available to conduct the identified strategies?*	**Evaluation Measures** *How do you know what happened?*	**Staff Responsible**	**Progress**
Reduce evictions among tenants receiving services.	Add supportive services to affordable rentals to assist with transitions		*Available:* *Needed:*			
Increase the number of landlords participating in the program.	Landlord engagement program		*Available:* *Needed:*			
Increase the number of affordable housing units developed.	Provide affordable housing that is co-located with services for seniors and families needing other services, childcare, healthcare, adult day service, etc.		*Available:* *Needed:*			
Increase financial literacy among program participants.	Homeownership pipeline (we build houses, provide housing counseling, provide matched savings (IDA), Ongoing housing counseling)		*Available:* *Needed:*			

Goal 2: Expand Opportunities for Clients to Receive Food Assistance

Measurable Outcome(s) *What will change and who will be impacted?*	**Strategic/Activities** *Identify the scope of activities.*	**Timeline** *When will the steps occur?*	**Resources Needed** *What is needed and available to conduct the identified strategies?*	**Evaluation Measures** *How do you know what happened?*	**Staff Responsible**	**Progress**
Increase number of individuals served through the food delivery system.	Identify a food delivery solution for people with limited food access		*Available:* *Needed:*			
Increase the total volume of fresh produce distributed annually.	Continue fresh produce program		*Available:* *Needed:*			
Establish food lockers on at least one site.	Evaluate the needs and benefits of food lockers at CoAction locations		*Available:* *Needed:*			
Measure number of participants involved in gardening activities.	Explore partnerships to community gardens to expand access to healthy foods		*Available:* *Needed:*			

Goal 3: Reduce Transportation Barriers Through New and Expanded Partnerships						
Measurable Outcome(s) *What will change and who will be impacted?*	**Strategic/Activities** *Identify the scope of activities.*	**Timeline** *When will the steps occur?*	**Resources Needed** *What is needed and available to conduct the identified strategies?*	**Evaluation Measures** *How do you know what happened?*	**Staff Responsible**	**Progress**
Grow the number of partnerships to at least 15 in the counties we serve.	Deepen partnerships with other agencies that provide transportation and explore a fill the empty seats option. Explore funding opportunities with rideshare entities and emergency transportation		*Available:* *Needed:*			
Create at least three mobile locations, on-site, where people do not have to travel outside of their local neighborhoods	Link mobile services to other agencies providing mobile service vehicles (United Way, Regional Health Systems, etc.)		*Available:* *Needed:*			

Goal 4: Create Pathways to Stable Employment

Measurable Outcome(s) *What will change and who will be impacted?*	**Strategic/Activities** *Identify the scope of activities.*	**Timeline** *When will the steps occur?*	**Resources Needed** *What is needed and available to conduct the identified strategies?*	**Evaluation Measures** *How do you know what happened?*	**Staff Responsible**	**Progress**
Number of interns served will increase from 0 to 5 annually.	Create an intern to employee pipeline program		*Available:* *Needed:*			
Increase the number of referrals to employment organizations by 10%.	Expand referrals to employment organizations		*Available:* *Needed:*			
Survey results will demonstrate that support services help with employment stability.	Decrease barriers to employment		*Available:* *Needed:*			
Number of individuals in the Savings Match Program will grow annually to reach full funding capacity.	Grow Savings Match Program for people earning education		*Available:* *Needed:*			

Goal 5: Enhance the Social and Physical Needs of Older Adults and their Caregivers						
Measurable Outcome(s) *What will change and who will be impacted?*	**Strategic/Activities** *Identify the scope of activities.*	**Timeline** *When will the steps occur?*	**Resources Needed** *What is needed and available to conduct the identified strategies?*	**Evaluation Measures** *How do you know what happened?*	**Staff Responsible**	**Progress**
Number of Senior Companions grows 10% annually.	Expand the older adult companion program		*Available:* *Needed:*			
A 5% increase in attendance and participation at congregate sites.	Expand older adult congregate site		*Available:* *Needed:*			
Serve at least 100 Caregivers at an Annual Retreat. **Initiate a new caregiver support program**	Caregiver support (groups, education, resources, sitters, self-care)		*Available:* *Needed:*			

Goal 6: Improve the Financial Capacity of Low Income People or Improve Clients Financial Stability						
Measurable Outcome(s) *What will change and who will be impacted?*	**Strategic/Activities** *Identify the scope of activities.*	**Timeline** *When will the steps occur?*	**Resources Needed** *What is needed and available to conduct the identified strategies?*	**Evaluation Measures** *How do you know what happened?*	**Staff Responsible**	**Progress**
150 people enroll in finance management – debt management – credit education programs.	Offer and refer people to credit repair and debt management programs		*Available:* *Needed:*			
Tax education provided in all counties in which the VITA program serves.	Tax education (what are taxes, how do they work)		*Available:* *Needed:*			

Goal 7: Strengthen the Reputation, Stability, and Effectiveness of CoAction						
Measurable Outcome(s) *What will change and who will be impacted?*	**Strategic/Activities** *Identify the scope of activities.*	**Timeline** *When will the steps occur?*	**Resources Needed** *What is needed and available to conduct the identified strategies?*	**Evaluation Measures** *How do you know what happened?*	**Staff Responsible**	**Progress**
Enhance team skills and knowledge measured by bi-annual survey results (2024 compared to 2026 compared to 2028)	Inspired and high-achieving staff Develop DEI education, training, and practices		*Available:* *Needed:*			
User-friendly technology will be implemented with the change of at least three systems (dashboards, electronic signature, Share Point, etc.) **We will use dashboards to track program performance. Additionally, utilization reports will be generated within 2 weeks of month close for better program implementation.**	Transform social services through innovative technological solutions Services are timely and tailored for the desired impact		*Available:* *Needed:*			
CoAction will acquire more discretionary funds that allow for quality enhancements and better program delivery through fundraising, investment accounts, or other means.	Create sustainable expansion & a balanced portfolio		*Available:* *Needed:*			

Example Quick Goal Overview

Goal 1: Support Clients in Housing Stability													
		Q1 2025			Q2 2025			Q3 2025			Q4 2025		
Results		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
	Strategic activities												
	Progress												
	Strategic activities												
	Progress												

Goal 2: Expand Opportunities for Clients to Receive Food Assistance													
		Q1 2025			Q2 2025			Q3 2025			Q4 2025		
Results		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
	Strategic activities												
	Progress												
	Strategic activities												
	Progress												

Goal 3: Reduce Transportation Barriers Through New and Expanded Partnerships													
		Q1 2025			Q2 2025			Q3 2025			Q4 2025		
Results		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
	Strategic activities												
	Progress												
	Strategic activities												
	Progress												

Goal 4: Create Pathways to Stable Employment													
		Q1 2025			Q2 2025			Q3 2025			Q4 2025		
Results		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
	Strategic activities												
	Progress												
	Strategic activities												
	Progress												

Goal 5: Enhance the Social and Physical Needs of Older Adults and their Caregivers													
		Q1 2025			Q2 2025			Q3 2025			Q4 2025		
Results		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
	Strategic activities												
	Progress												
	Strategic activities												
	Progress												

Goal 6: Improve the Financial Capacity of Low Income People or Improve Clients Financial Stability													
		Q1 2025			Q2 2025			Q3 2025			Q4 2025		
Results		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
	Strategic activities												
	Progress												
	Strategic activities												
	Progress												

Goal 7: Strengthen the Reputation, Stability, and Effectiveness of CoAction													
		Q1 2025			Q2 2025			Q3 2025			Q4 2025		
Results		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
	Strategic activities												
	Progress												
	Strategic activities												
	Progress												

Appendix A: Strategic Planning Agenda

COACTION'S STRATEGIC PLANNING AGENDA

Wednesday, October 30, 2024

9:30 a.m.-4:00 p.m.

1. Introductions
2. Vision & Mission Development
3. The Lay of the Land: Review of the Community Needs Assessment
    - *Year in Review*
    - *Who is Experiencing Poverty*
    - *Top 5 Needs*
    - *Wish for Community*
4. Review Agency Feedback
5. S.G.A.O.T Analysis
6. Strategic Doing: Goal Setting
    - *Priority Areas*
    - *High Impact Feasibility Chart*
7. Set Key Plans, Responsibilities, & Next Steps
    - *Results: SMART Goals*
8. Final Review of the Vision & Mission

Today Consider:

*Where are we **NOW**?*

*Where do we want to **BE** in 5 years?*

***HOW** do we get there?*

Specific **M**easurable **A**chievable **R**elevant **T**ime-bound Goals

Appendix B: Community Forum Questions

1. What is one thing you like about your community and one that could be better?
2. CoAction is a part of Community Action. Community Action has a goal to end poverty by being responsive to community needs. CoAction recently conducted a community needs assessment, and here are the top 5 needs in your community. Need 1: Quality and affordable housing Need 2: Food assistance Need 3: Transportation support Need 4: Good jobs with adequate wages, benefits and opportunities Need 5: Programs and services for older adults. How can each of these needs be better addressed? Need 1: Quality and affordable housing Need 2: Food assistance Need 3: Transportation support Need 4: Good jobs with adequate wages, benefits and opportunities Need 5: Programs and services for older adults
3. What organizations, people or other things could keep CoAction from meeting their goals?
4. What organizations, people or other things are happening that might assist them in meeting their new goals?
5. Additionally, are there any ways that you or someone you know have struggled with financial well-being that you want this agency to be aware of as they think of their goals for the next 5 years?
6. Is there anything else you want to share that you'd like CoAction to know about?

Appendix C: Staff Survey

1. What is your role at CoAction?
   Volunteer Staff Management/Supervisor Upper Management/Senior Leadership
2. How long have you worked at CAP of Northwest Indiana?
   <1 year 1-5 years 5-9 years 10-20 years >20+ years
3. What program do you work with? (check all that apply)
   Asset development and preservation (foreclosure counseling, homeownership counseling, micro loan, etc.) Childcare (child development fund enrollment, head start, early head start, etc.) Coaching/education/skills (family development program) Energy assistance (energy assistance, weatherization, etc.) Family support/parenting (healthy families, parent education/involvement program, etc.) Food/nutrition services (WIC, etc.) Housing (low-income rentals, housing choice vouchers, senior rental housing, etc.) Other (please specify)
4. The Agency's 2023 Community Needs Assessment identified the following as top community needs. How well does CoAction currently engage in programming or practices that help meet these needs? Poor Fair Good Exceptional Need 1: Quality and affordable housing Need 2: Food assistance Need 3: Transportation support Need 4: Good jobs with adequate wages, benefits and opportunities Need 5: Programs and services for older adults
5. Are there programs, services, or practices you would like to see launched?
6. Are there programs, services, or practices you think need to be discontinued or modified? Please provide details about how the program could be modified.
   Poor Fair Good Exceptional
   Flexibility Immediacy Coordination
7. Community Action Agencies promote self-sufficiency utilizing three key assets: flexibility of funding and services, immediacy to quickly target appropriate situations and stabilize families, and coordination that integrates resources in combination to solve community and individual problems. How well is CoAction meeting the following assets?
   Poor Fair Good Exceptional
8. How well does the Agency utilize community partnerships?
   Poor Fair Good Exceptional
9. What are the Agency's strengths?
10. What are the Agency's weaknesses?
11. What current or future opportunities in the community or state should CoAction be taking advantage of?
12. What current or future threats in the community or state should CoAction consider as it plans for the next 5 years?

Appendix D: Board Survey

1. What motivated you to serve on CAP of Northwest Indiana's board?
2. What strengths do you bring to the board?
3. Have you served on other boards? Yes No
4. If yes, how does this board compare to other boards you have served on:
   Poor Fair Good Exceptional
5. If anything, what would you change/add to the vision statement? Poor Fair Good Exceptional
   Need 1: Quality and affordable housing Need 2: Food assistance
   Need 3: Transportation support Need 4: Good jobs with adequate wages, benefits, and opportunities to advance Need 5: Programs for older adults
6. The Agency's 2024 Community Needs Assessment identified the following as top community needs. To what extent does CoAction currently engage in programming or practices that help meet these needs?
7. Rank from greatest to least, which of these community needs would you most like to see the Agency grow its capacity? Quality and affordable housing, Food assistance, Transportation support, Good jobs with adequate wages, benefits, and opportunities, Programs for older adults
8. Please rate the Agency's current capacity:
9. What are CoAction's greatest assets?
10. What are CoAction's greatest liabilities?
11. What current or future opportunities in the community or state should CoAction Indiana be taking advantage of?
12. What current or future threats in the community or state should CoAction consider as it plans for the next 3 years?
13. Visualize a wildly successful anti-poverty agency, how does it look, feel, function?

Appendix E. Client Survey

1. What county do you live in?
2. Your age group: 18-24 25-34 35-49 50-64 65-69 70+
3. Your gender: Male Female Non-Binary Prefer not to say
4. Your race: White / Caucasian Black / African American American Indian or Alaskan Native Asian Native Hawaiian or Other Pacific Islander Two or More Races Prefer not to say Other
5. Do you identify as: Hispanic Latino Spanish Origin Not Hispanic Latino, or Spanish Origin Prefer Not to Say
6. Have you used or requested services from CoAction? Yes No
7. How did you learn about CoAction?
8. What services have you used? Check all that apply. Housing (Affordable rentals, supportive housing, housing choice voucher, utility assistance, energy efficiency, or housing counseling) Financial stability (matched savings account, tax preparation, small dollar loans, or financial education and coaching) Older adults and persons with disabilities (aging & disability resources center, in-home services, senior companions, or ombudsman) Women, Infants, and Children (WIC) Senior center meals or nutrition Other (please specify)
9. How satisfied were you with the: services you received, way staff treated you, staff knowledge, time it took to receive services, overall satisfaction Very Dissatisfied Dissatisfied Neither Satisfied nor Dissatisfied Satisfied Very Satisfied
10. Is there a service you wish this agency had, but does not?
11. What long term goals do you think CoAction should prioritize in the next 5 years?
12. Are there ways that you or someone you know have struggled with financial well-being that you want this agency to be aware of as they think of their goals for the next 5 years?
13. Please share anything else you would like us to know about this agency and their services.
14. What is one wish you have for your community?
15. Is there anything else that you would like to tell us about your community?