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## 1. Executive Summary

The Worcester Community Action Council, Inc. (WCAC) is the federally-designated community action agency for Central MA, serving more than 75,000 people annually in Worcester and 45 surrounding towns through a variety of economic self-sufficiency and emergency programs: Job & Education Center (JEC) (HiSET, Work Readiness, YouthWorks Year-Round and Summer Jobs), Family Development (Head Start/Early Head Start and Healthy Families of Southern Worcester County), Nutrition (SNAP), Asset Development initiatives (Financial Literacy, free tax preparation, and micro-lending), and Energy Assistance (Fuel, Weatherization, Appliance Management, and Heating Emergency Assistance Retrofit). The agency's mission of "Helping people move to economic self-sufficiency through programs, partnerships, and advocacy" has guided its work for over 52 years. The agency was founded in 1965 under President Lyndon B. Johnson's War on Poverty and the Economic Opportunity Act.

As a designated community action agency, WCAC is required to complete a comprehensive community and internal needs assessment every three years, resulting in a strategic plan outlining clear strategies that align with its mission. WCAC began this process in July 2016 by convening an internal team comprised of the Executive Director, the Chief Strategy Officer, the Director of Planning, and an experienced consultant who had previously worked on the agency's 2014-2017 strategic plan. A Steering Committee was formed to include staff and the Program Committee and Executive Committee of the Board of Directors.

The internal team first identified an approach and design for the Community and Internal Needs Assessment. The assessment completed in 2014 collected a wide variety of information from a broad array of sources within the communities of Worcester and South Worcester County. WCAC learned that top needs had not changed significantly: housing, food assistance, education, energy, and jobs. With this knowledge, the team felt strongly these needs again would not have changed within the last three years and resources were best spent on a more in-depth 2017 assessment. Questions were designed to extract information about how clients felt specific programs were helpful to them and their level of satisfaction with ample room for qualitative responses. WCAC knows the agency would benefit from a service integration approach and therefore, additional questions explored this need in both client and staff surveys relative to the staff's level of knowledge about other WCAC programs, whether referrals are made consistently, and what other services clients feel they need to access. In addition, specific questions related to the integration of financial capability services were designed to validate WCAC's confidence that financial education is a key ingredient to moving out of poverty.

Through surveys, focus groups, and interviews along with client, staff, Board, and community input, WCAC identified needs on three levels; individuals and families, the community, and the organization. WCAC found that individuals and families have needs relative to access. Clients need to access services in their own language at locations they can travel to when use of a vehicle or public transportation is not possible. The need for transportation to work, school, and health appointments, particularly in the communities of Southbridge and Webster, were heard repeatedly by both staff and clients. Full-day options for child care in Southbridge are needed so that parents can secure stable employment. Clients and staff clearly note increased awareness of the broad range of WCAC programs is needed internally; information gathered from low-income individuals within the community showed increased awareness is needed externally. Staff need training in order to make appropriate referrals and increase use of multiple programs across the agency. In addition, clients and non-clients from the low-income community showed a strong interest in building their financial capabilities.

Emerging community concerns include the retirement of long-time nonprofit leaders and the need for succession planning. In addition, a need for collaborative service models and communication mechanisms among these multiple initiatives, for example, workforce development efforts, is of much need. Complementing this was the finding Worcester indeed has cooperative partners in the nonprofit sector who are interested in innovation and reflect the cultural diversity of the City.

Capacity-building needs included streamlined systems with less reliance on paper processes, building diversity among the Board and within hiring processes, as well as succession planning.

A review of WCAC's mission statement was determined as a priority by the Board and as such, several Board members, along with staff, participated in guided discussions. Following valuable conversations around poverty, the meaning of economic self-sufficiency, and the use of empowering words to elevate clients, the senior leadership team decided the mission statement remains relevant to WCAC's current work and plans for the future.

WCAC's vision for the next three years is to enhance responsiveness to clients through a continuum of holistic services with tailored access and expanded workforce development opportunities. WCAC envisions the organization as a leader and partner in community dialogues around poverty issues. Staff and Board leadership will be strengthened, internal systems will be refined for efficiency and impact within administration and programs, and the agency's financial capacity will continue to grow.

WCAC's work in FY2018-2020 will center around four priority goals: enhancing revenue options, deepening community leadership and advocacy on poverty, integrating services internally, and improving service accessibility.

Three strategic directions will guide implementation: impacting lives responsively, engaging in community leadership, and enhancing effective operations. Service integration and access will be addressed by cross-training all staff about the agency's full array of programs available to clients, researching available translation services, exploring opportunities for bringing WCAC Worcester programs to South County sites, and designing a system for streamlined client intake and referrals. Early education and care programs will expand services through the addition of a site in Webster, MA. Youth employment and workforce development programs will continue to grow through closer collaborations with community partners, building career pathway models, and pipelines to jobs within the private sector. Asset development programming will expand to South County programs and fully integrate within all WCAC programs. WCAC will convene local conversations around poverty, ensure key staff leaders are cross-trained and succession plans are in place, and meet the diversity needs at all levels from staff to Board. Internal systems will be streamlined by exploring options for paperless hiring and benefits enrollment processes. Funding streams will be diversified through increased private revenue and a decreased reliance on state and federal funding.

WCAC strives to be non-duplicative in its work within the community. The agency is proud of its longstanding partnerships with other area organizations and collaborates on many initiatives. Referrals are made to partners when appropriate, resulting in the best possible service for low-income families.

WCAC looks forward to implementing the culmination of this valuable process and its results. The plan is a fluid document and will continue as a work in progress. The agency will be responsive to local needs, funding availability, and opportunities on the horizon over the next three years.

## 2. Board Authorization

WCAC's Board of Directors was presented with a detailed, specific overview of the 2018-2020 Community Needs Assessment/Strategic Plan at its June 12, 2017 Annual Meeting. The full Board voted to approve the Plan. A copy of the signed approval is included in Appendix B.

## 3. Agency Description

In 1965 President Lyndon B. Johnson's landmark Economic Opportunity Act established Community Action Programs. A Community Action Program was defined as a program "... which provides services, assistance, and other activities of sufficient scope and size to give promise of progress toward elimination of poverty or a cause or causes of poverty through developing employment opportunities, improving human performance, motivation, and productivity, or bettering the conditions under which people live, learn, and work."

WCAC was founded by then City Manager Francis McGrath, Bishop Timothy Harrington, and local business leaders Connie Turner, Charles Butler, and others. The City of Worcester was a very different place when WCAC was born in 1965 with a far less diverse population and a very different economy. The willingness to reach out to lower-income families was truly impressive. Local leaders could have easily ignored the issue of poverty as it was not a prominent concern in the City at that time. The establishment of WCAC demonstrated a sensitivity to low-income individuals before it was a political or cultural necessity. Today, WCAC is one of 23 Community Action Agencies in the Commonwealth of Massachusetts and 1,100 nationwide.

WCAC serves more than 75,000 people annually in Worcester and 45 neighboring communities through a variety of education, employment, and emergency programs: Job & Education Center (JEC) (HiSET, work readiness, and youth employment), Family Development (Head Start/Early Head Start and Healthy Families of Southern Worcester County), Nutrition (SNAP), Asset Development initiatives (financial literacy, free tax preparation, and micro-lending), and Energy Assistance (Low Income Home Energy Assistance Program, Weatherization, Appliance Management, and Heating Emergency Assistance Retrofit).

WCAC is headquartered in the historic Denholm Building in downtown Worcester, 484 Main Street, with two family development satellite programs located in Southbridge.

WCAC formerly operated three Head Start/Early Head Start sites in Southbridge, Spencer and Oxford, MA. The January 2015 record snow fall and icy conditions caused an emergency evacuation and ultimate closure of the Oxford facility. Following two years of temporary locations and the ultimate transfer of all children to the Southbridge site while WCAC continued to diligently seek a new, long-term location, the agency was able to sign a lease for a location in Webster, the second highest area of need for services after Southbridge. The new site will be located at 116 School Street in the heart of Webster and within walking distance for many of the local families. Renovation will begin in the fall of 2017 with an anticipated opening in Winter 2019.

The issues of poverty, unemployment and underemployment, which WCAC works to address, can be daunting and overwhelming, however, through strategic planning and thus strategic investment, WCAC has managed to maintain a strong position as a responsive service provider within the community. Credit is due to each of the four executive directors WCAC has had in its 52 year history, working closely alongside the dedicated leadership of hundreds of Board volunteers.

#### 4. Mission Statement

**“Helping people move to economic self-sufficiency through programs, partnerships, and advocacy.”**

WCAC’s mission statement was first reviewed on February 21, 2017 with the full Board of Directors. There was enough interest from Directors to form a small task group to review further and make a recommendation to the Board for approval. The task group met on March 9, 2017 and again on April 6, 2017. Discussions included whether it would be important to include the word poverty within the statement, whether partnering with people rather than helping people would be a more empowering statement, and the importance of creating opportunities for people. The group agreed economic self-sufficiency should remain within the statement as it is truly the core of WCAC’s work. After the two meetings, the group was unable to make a recommendation. WCAC’s senior leadership team continued the discussion on April 25, 2017 and decided at this time, no changes were necessary. The hours of conversation were very valuable, particularly around the definition of poverty and its relevance in today’s political climate. Through discussion, this served as an opportunity for Directors to delve further into WCAC’s programs and further develop positive working relationships with WCAC staff. On June 12, 2017, the Chief Strategy Officer reported to the Board that no changes were made.

#### 5. Vision Statement

In 2020, WCAC hopes to see the following elements in place:

- A continuum of holistic services
- Tailored access to services
- Enhanced responsiveness to clients
- Expanded WCAC education, communication and awareness
- Expanded workforce development
- Leadership in community dialogues
- Strengthened Staff and Board Leadership
- Refined systems for efficiency and impact within administration and programs
- Grown financial capacity

#### 6. Community Profile

WCAC’s designated Community Service Block Grant (CSBG) area at this time is limited to the City of Worcester, however, programs serve residents of 45 additional communities: Auburn, Blackstone, Boylston, Brimfield, Brookfield, Charlton, Clinton, Douglas, Dudley, East Brookfield, Hardwick, Holden, Holland, Hopedale, Hubbardston, Grafton, Leicester, Mendon, Milford, Millbury, Millville, Monson, New Braintree, North Brookfield, Northborough, Northbridge, Palmer, Oakham, Oxford, Paxton, Rutland, Shrewsbury, Southbridge, Spencer, Sterling, Sturbridge, Sutton, Upton, Uxbridge, Wales, Warren, Webster, West Boylston, West Brookfield, and Westborough. Head Start/Early Head Start serve 22 communities in Southern Worcester County, with a focus on East Brookfield, Leicester, Millbury, Oxford, Southbridge, Spencer and Webster. Healthy Families of Southern Worcester County serves 17 towns/communities and their villages: Brimfield, Brookfield, Charlton, Dudley, East Brookfield, Holland, Monson, North Brookfield, Oxford, Palmer, Southbridge, Spencer, Sturbridge, Wales, Warren, Webster, and West Brookfield.

Selected census data, including population demographics, poverty rates, employment and educational attainment for all communities served by WCAC are included in Appendix C.

Worcester is the second most populous city in New England after Boston and is located approximately 40 miles west of Boston, 50 miles east of Springfield and 40 miles north of Providence. The Central Massachusetts region is unique in that it hosts a large urban core surrounded by many small towns and rural farming communities. While Worcester's estimated 2015 population according to the American Fact Finder is 183,362, 58% of the other 45 communities in WCAC's service area have a population under 10,000, with the average population of those 45 communities being 10,056.<sup>1</sup>

In a 2014 report released by the Worcester Regional Chamber of Commerce, *Worcester Regional Economic Competitiveness Outlook*, it was noted between 2000 and 2010, Worcester experienced greater population growth (4.9%) than Boston (1.0%) and Massachusetts (3.1%) and a higher rate (1.9%) of growth in families than Boston (1%) and Massachusetts (1.7%). This report also noted in 2010, nearly 25% of Worcester's workforce was age 15 to 24, 84% of the workforce had greater than a high school education, and 30% had a bachelor's degree or higher.<sup>2</sup>

**Employment:** Regarding workforce trends, manufacturing is a strong sector with 31,279 employees across Worcester County and nearly 10,000 in the City of Worcester (as of 2010). Education and Healthcare sectors grew by 35.5% between 2000 and 2010 in the City of Worcester and by 2010, represented the single largest employment base in the City with 28,956 employees and 71,277 across Worcester County. The Professional, Scientific and Technical sector also grew by 32.6%.<sup>3</sup>

In 2017, Clark University conducted a study for the Worcester Jobs Fund (created to bring a direct benefit to Worcester residents in the form of jobs, job training and related services), and released the report results, *Analysis of Worcester's Youth Employment Sector*. The report reviews the national context for youth employment, provides a rationale for a differentiated approach to youth workforce development based on best practice literature, describes Worcester's youth population and the local youth labor market, presents findings from an inventory of Worcester youth employment programs, and offers recommendations on ways to develop a comprehensive, differentiated youth employment system for young people ages 14-24 based on an analysis of the data.

Among its findings, the study concluded that "there are some significant gaps in the youth employment sector. For example, private sector involvement is limited; pathways to an appropriate postsecondary education track is not clear after youth complete their "first job" experience; there are limited training, credentialing, and apprenticeship opportunities for disconnected youth that lead to living wage career options; systems to monitor and evaluate local labor market trends, programmatic efforts and youth's individual progress are largely missing; questions were raised about whether youth see summer employment as 'real jobs' and whether they are authentic work experiences."<sup>4</sup> The report also noted that while the City is rich in partners, there are some key actors who are not currently at the Worcester Youth Jobs Task Force table.

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<sup>1</sup> <https://factfinder.census.gov/faces/nav/jsf/pages/index.xhtml>

<sup>2</sup> <https://www.worcesterchamber.org/wp-content/uploads/2014/10/Worcester-Regional-Competitiveness-Outlook-FINAL.pdf>

<sup>3</sup> [http://lmi2.detma.org/lmi/LAUS\\_town\\_index.asp](http://lmi2.detma.org/lmi/LAUS_town_index.asp)

<sup>4</sup> <http://commons.clarku.edu/mosakowskiinstitute/68/>

**Transportation:** While employment opportunities may be thriving in the area for a significant part of the population, there are a number of barriers for WCAC clients to accessing those benefits, with one of the greatest being transportation. The number one reason identified by clients for having difficulty accessing services at WCAC and also other services that would be helpful is transportation. A 2014 report released by the Massachusetts Department of Transportation (DOT) and prepared by the Central MA Regional Planning Commission (CMRPC) begins with the summary: "Transportation is one of the basic needs of life that allows people to access services that they need or desire, as well as employment locations, recreation areas and healthcare facilities. While the primary mode of transportation for most residents in the Worcester area is the automobile, there is a significant population in southern and central Worcester County that is unable to transport themselves by automobile due to age, disability, or economic circumstances. The majority of these individuals rely on transportation services provided either by private transportation providers (e.g. taxi companies), the Worcester Regional Transit Authority (WRTA) or human service transportation providers. With the costs of providing these services ever increasing, coordination among the various transportation providers in Southern Worcester County is needed to provide more efficient and interconnected transportation services."<sup>5</sup> Although various small transportation alternatives have piloted in Southern Worcester County (SCM Elderbus, Readybus) this need continues with limited progress.

**Education:** Worcester is home to nine colleges and universities with six more in neighboring communities. According to the City's website<sup>6</sup>, 38% of all jobs in the City are in the education and medical fields. Even with such access to advanced education options, statistics do not support the use of these facilities by Worcester's population, as 45.58% of residents have only a high school education or less. The State average is 35.62%. Again, Southbridge ranks lowest with 62.5%, followed by Webster at 52.92%.<sup>7</sup>

The Worcester Public School District has a total of 45 schools: 34 elementary schools, four middle/junior high schools, and seven secondary schools. Total enrollment for the 2016-2017 school year was 25,479, an increase of approximately 8.5% since 2010. There are also 25 private schools in Worcester.<sup>8</sup>

The charts below show a comparison between the Worcester Public School District and Massachusetts' public schools for the 2016-2017 school year. A major challenge for the Worcester Public School District is the high percentage of students classified as high needs, meaning they belong to at least one of the following individual subgroups: students with disabilities, English language learners (ELL) or former ELL, or low-income students (eligible for free/reduced price school lunch).<sup>9</sup>

Demographics -

	State Average	Worcester Public Schools
White	61.3%	31.1%
African American	8.9%	15.4%
Asian	6.7%	7.4%
Hispanic	19.4%	41.8%
Native American	0.2%	0.2%
Native Hawaiian, Pacific Islander	0.1%	0.0%
Multi-Race, Non-Hispanic	3.4%	4.1%

<sup>5</sup> [https://www.massdot.state.ma.us/Portals/12/docs/InfoHub/CHST\\_plan0614.pdf](https://www.massdot.state.ma.us/Portals/12/docs/InfoHub/CHST_plan0614.pdf)

<sup>6</sup> <http://www.worcesterma.gov/>

<sup>7</sup> <https://factfinder.census.gov/faces/nav/jsf/pages/index.xhtml>

<sup>8</sup> <http://profiles.doe.mass.edu/general/general.aspx?topNavID=1&leftNavId=100&orgcode=03480000&orgtypecode=5>

<sup>9</sup> <http://profiles.doe.mass.edu/general/general.aspx?topNavID=1&leftNavId=100&orgcode=03480000&orgtypecode=5>

## Selected Characteristics -

	State Average	Worcester Public Schools
First Language Not English	20.1%	53.5%
English Language Learner	9.5%	34.2%
Student with Disabilities	17.4%	18.8%
High Needs	45.2%	76.3%
Economically Disadvantaged	30.2%	57.2%

**Health:** WCAC's 2015-2017 Community Profile referenced the Greater Worcester Regional Community Health Improvement Plan (CHIP) which was released in 2013 and referenced several major challenges related to health care service access for more vulnerable populations, including, but not limited to transportation limitations, long wait times, cultural competence of providers, and a lack of coordination of care for low-income residents.

The CHIP was updated in 2015/2016 with the City of Worcester Division of Public Health as the lead agency of the Central MA Regional Health Alliance, in partnership with UMass Memorial and Fallon Health.<sup>10</sup> The report sought to answer questions relative to the health status of seven specific communities in the Greater Worcester area. The assessment revealed a number of priorities the community needs to address in order to best improve public health. Priority areas for action include:

- Eliminate institutional racism
- Prevent and reduce substance use disorder and associated stigma
- Create a well-coordinated, respectful, and culturally responsive environment that encourages prevention of chronic disease, reduction of infant mortality, and access to quality comprehensive care for all
- Foster a community responsive to the mental health needs of all populations, considerate of all ages and cultures, and resilient to changing environments and demographics
- Provide all residents with opportunities to engage in meaningful work with living wages and healthy, safe, and family-friendly working conditions
- Enhance the capacity of health and social services agencies to provide culturally-responsive and culturally-appropriate services
- Ensure that all people have equal access to healthful foods by supporting investment in the growth, sale, and preparation of healthy foods
- Improve health through safe, equitable access to opportunities for physical activity, with special emphasis on youth, vulnerable, and underserved populations
- Ensure that all residents regardless of age, race, ethnicity, class, gender, identity, sexual orientation, housing situation, family status, or religion will feel safe, secure, respected and live a life free from violence.

**Crime:** In a March 21, 2017 report to the Worcester City Council<sup>11</sup>, Worcester Police Chief Steven M. Sargent reported a downward trend in a variety of categories, including violent and property crimes, compared to the average for the previous five years. The report also noted fewer arrests in 2016 than in any of the other previous five years; the 5,964 arrests made in 2016 were 4.64% less than in 2015 (6,254 arrests) and 16.52%

<sup>10</sup> <http://www.worcesterma.gov/ocm/public-health/community-health/chip-cha>

<sup>11</sup> <http://www.worcesterma.gov/agendas-minutes/city-council/2017/20170321.htm>

less than the previous five-year average of 7,144. The number of incidents (136,343) reported to police in 2016 was 4.64% higher than the previous year (130,298) and 6.75% higher than the previous five-year average (127,716) and were attributed to more patrol-initiated calls. The report also noted fewer shooting incidents (16.3% decrease) and victims (25% decrease) in 2016 compared to the previous year and the 30 shooting victims in 2016 was the lowest number since 2012, when there were 24. In comparison, there were 40 shooting victims in 2015 and 47 in 2014. When comparing violent crime statistics from 2014 to 2016, there was a 31.5% reduction in shooting incidents and 36% decrease in shooting victims. While the number of homicides (8) in 2016 remained the same as the previous year, it was one less than the past five-year average of nine. In other crime categories, the report showed a decrease in the number of stabbings and slashings in 2016: 112, compared to 114 in 2015.

At this same meeting, the City Manager attributed the downward trend in crime and arrests to the effective relationships the Police Department has built with the community and programs that have been initiated to prevent crimes. He cited the newly developed Crisis Intervention Team and Program for Addiction Recovery as programs that are making a difference. These units within the Police Department focus on connecting individuals with services and treatment rather than incarceration.

**Income:** As reported in WCAC’s previous Community Needs Assessment/Strategic Plan, income inequality is a persistent issue for many residents of Central Massachusetts. According to data from the American Fact Finder (and included in Appendix C), the overall poverty rate in Worcester County is 11.8%, only slightly above the state rate of 11.6%. However, if we look at specific locations, the City of Worcester, for example, is 22.4%, Southbridge is 16.9% and Webster is 15.5%.

Considering overall poverty, gender, age and race statistics as compared to the state, Worcester County is quite comparable. However, when we again consider Worcester, Southbridge and Webster, the numbers are significantly higher, reinforcing the need for service concentration and location in these communities.

	Massachusetts State Average	Worcester County	City of Worcester	Southbridge	Webster
<b>Poverty</b>					
Poverty Rate	11.60%	11.80%	22.40%	16.9%	15.5%
Male	10.3%	10.5%	21.1%	13.3%	13.2%
Female	12.8%	13.0%	23.7%	20.2%	17.4%
Families in Poverty	8.2%	8.4%	17.2%	13.4%	11.9%
Married Couple Families	3.2%	3.4%	8.3%	4.7%	3.8%
Families w/ Female Householder	25.5%	26.3%	34.3%	31.9%	30.5%
Child Poverty Rate (persons under 18)	15.2%	15.7%	31.5%	23.5%	29.6%
Ages 18-34	15.1%	15.0%	25.2%	18.9%	17.3%
Ages 35-64	8.7%	8.8%	17.7%	13.2%	11.4%
Seniors in Poverty (persons over 65)	9.2%	9.3%	14.7%	13.6%	6.0%
White alone	9.0%	10.7%	20.9%	12.4%	11.8%
Black or African American alone	22.0%	23.0%	23.5%	13.8%	39.6%
American Indian and Alaska Native alone	22.9%	N	28.2%	43.3%	-
Asian alone	14.6%	18.4%	20.3%	9.1%	17.7%
Native Hawaiian and Other Pacific Island alone	22.4%	N	5.1%	-	-
Some other race alone	31.7%	20.7%	35.1%	36.2%	55.2%
Two or more races	19.5%	19.9%	33.2%	18.7%	33.2%
Hispanic/Latino (of any race)	29.3%	31.8%	38.2%	28.6%	29.6%
White alone, not Hispanic or Latino	7.8%	8.7%	16.6%	10.7%	12.2%
Households Receiving SNAP	12.5%	12.7%	22.3%	16.3%	19.8%

There are also substantial disparities within the region in terms of median household income. Upton boasts the highest median household income at \$112,917 and Southbridge the lowest at \$42,550. The median household income for Worcester County is \$65,313. Eleven cities/towns served by WCAC are below this level: Worcester, Brookfield, Clinton, Hardwick, Palmer, Spencer, Wales, Warren, Webster, West Brookfield, and Southbridge.<sup>12</sup>

## 7. Community and Internal Assessment Process

WCAC began the community and internal assessment process in July 2016 with discussions of the internal planning team comprised of the Executive Director, Chief Strategy Officer, and Director of Planning. This group determined it would be beneficial to re-contract with the previous Strategic Planning Consultant, Nancy Jackson of Gammy Bird Consulting, and began those discussions in July 2016, with a contract executed on October 28, 2016. Senior Agency staff held a 'brainstorming session' on July 26, 2016 to discuss the planning process, the 'voices'/stakeholders to involve, and to plan the timeline.

On August 23, 2016, the Executive Director presented an introduction of the Strategic Planning process to the Program Committee of the Board of Directors. The Program Committee, along with the Executive Committee of the Board, formed the Strategic Planning Steering Committee. A follow-up meeting was held on October 12, 2016 to provide additional details and prepare for an introduction of the process to the full Board of Directors at its October 17 meeting. Minutes of these meetings are included in Appendix D.

### Data Collection

In November 2016, data collection began and continued through March 2017. Surveys were disseminated to program clients (Fuel Assistance and Energy, Head Start/Early Head Start, Healthy Families, Job & Education Center, and SNAP clients), Head Start Policy Council, WCAC Staff, Agency Board of Directors, and non-WCAC clients from the low-income community at two partner organizations. The surveys are included in Appendix E.

In all, 660 surveys were completed and results are included throughout this report and the Appendices. Of the total surveys, 529 were completed by low- to moderate-income individuals: Fuel and Energy clients (200), Healthy Families (24), Head Start/Early Head Start (137), JEC (31), Head Start Policy Council (10) and non-WCAC clients (36). Head Start families were also provided with a second survey focused on financial literacy and 91 chose to respond. Of the remaining 131, 115 were staff surveys and 16 were from the Board of Directors. (Please note: many WCAC staff meet the definition of low- to moderate-income).

**Staff Surveys:** Staff surveys were provided both in hard copy and on-line. 115 of 120 employees responded. The surveys included a number of questions asking staff to rate specific items relative to the agency overall (its respect and being known in the community, diversity of staff, the environment, fiscal responsibility, etc.), staffing (numbers, internal communication, opportunities for learning, inclusion in decision-making, etc.), services provided (appropriate to meet client needs, intake and referral processes, etc.), and other areas. Surveys also included a number of open-ended questions where staff was invited to offer feedback or recommendations for improvement to services, identifying and addressing new trends and gaps in service, and trainings needed. Overall, staff was quite supportive and offered many concrete creative suggestions for

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<sup>12</sup> <https://factfinder.census.gov/faces/nav/jsf/pages/index.xhtml>

moving forward.

**Client Surveys:** Surveys were made available in English, Spanish, Vietnamese and Arabic. 392 WCAC client surveys were completed (137 Head Start/Early Head Start, 31 from the Job & Education Center, and 200 Fuel Assistance and Energy Programs, and 24 from Healthy Families). WCAC client surveys included questions related to customer satisfaction, including ample space for written comments.

**Non-Client Surveys:** In addition to surveys distributed to low-income individuals who are established as WCAC clients, surveys were completed by 36 non-WCAC low-income individuals. These surveys were disseminated at Ascentria Care Alliance in Worcester and at the Kennedy-Donovan Center/South Central Early Intervention Program of Southbridge. Questions were related to the services individuals' access, where they access the service, what prevents them from accessing services, and their awareness and use of WCAC services.

**Board of Directors Surveys:** Sixteen of the then-seated Board Members completed the brief survey which listed seventeen conditions or services to be rated that they were either proud of, concerned, neither proud nor concerned or didn't know. Examples of the conditions or services include the agency's credibility among clients, development strategies, program results, the quality of staff and operations, Board engagement, succession planning, and inclusiveness and diversity of staff and Board. The survey also provided an opportunity for additional comments.

**Policy Council Surveys:** Ten Head Start/Early Head Start Policy Council members completed the survey which asked a series of questions regarding what the HS/EHS program does well, any concerns about the program, recommendations for enhancement/change, community needs not being addressed, and where they would like to see the program in three years.

**Staff Focus Group:** A meeting was held at St. Joseph's Parish Center in Auburn, MA on January 6, 2017 for a large group of staff representing all WCAC programs, including Managers, Directors, direct service staff and the Executive Director. The meeting was facilitated by Nancy Jackson of Gammy Bird Consulting, WCAC's CARSP Consultant. After a review of staff survey results, the opening exercise involved attendees breaking into smaller groups to identify trends and best practices in working with people of low- to moderate-income, and then to categorize them as "on the horizon", "emerging", "cresting", or "undertow/out to sea". The full meeting summary can be found in Appendix G.

A **Community Representative Focus Group** was held on February 7, 2017 at Unum, a large insurance company, in downtown Worcester with 14 representatives from the fields of higher education, workforce development, the faith community, health and mental health care, community foundations, law, architecture, government/diversity and inclusion, youth services, and housing. Attendees included three Board members representing their businesses/clients and two members of the Steering Committee. The meeting was led by the Strategic Planning Consultant and began with the question "What are the forces of change and areas of innovation that impact the safety-net for people who live in or near poverty in Central Massachusetts?" Participants brainstormed various responses and then categorized them as "emerging/on the horizon", "swelling", "cresting" and "undertow and out to sea". Notes from this meeting can be found in Appendix G.

**Key Stakeholder Interviews:** WCAC's Executive Director interviewed nine local leaders, including the Superintendent of the Worcester Public Schools and Acting Superintendent of the Webster Public Schools,

President of the Worcester Regional Chamber of Commerce, CEO of the Center for Living and Working, Worcester’s Commissioner of Health and Human Services, Worcester’s City Manager, and leaders of a local Health Foundation and Worcester Interfaith, a faith-based organization. A summary of these conversations is included in Appendix H.

**COMMUNITY SECTOR INVOLVEMENT**

	<b>Community - Based</b>	<b>Faith-Based</b>	<b>Private Sector</b>	<b>Public Sector</b>	<b>Educational Institutions</b>	<b>Other</b>
<b>Community Focus Group</b>	*Worcester Community Connections Coalition of You, Inc. * Family Health Center * Main South Community Development Corporation * Health Foundation of Central MA * Community Legal Aide	*Worcester Interfaith	*Lamoureux Pagano Associates	* City of Worcester * Central MA Workforce Investment Board * Workforce Central Career Center	*Quinsigamond Community College	* WCAC Executive Director, Director of Planning
<b>Staff Focus Group</b>						* WCAC Staff
<b>Key Stakeholder Interviews</b>	* Greater Worcester Community Foundation * Worcester Regional Chamber of Commerce * Center for Living and Working	* Belmont A.M.E. Zion Church	* Sodexo, Inc. * Hanover Insurance * Imperial Distributors * UMASS / Memorial Healthcare	*Commissioner of Health & Human Services – City of Worcester * Worcester City Manager	*Superintendent Worcester Public Schools * Acting Superintendent, Webster Public Schools	
<b>Surveys</b>	* Clients of Ascentria Care Alliance and Kennedy-Donovan Center/South Central Early Intervention * WCAC Staff, Board of Directors, and Policy Council					*WCAC Client Surveys: Fuel & Energy, JEC, Head Start /Early Head Start, and Healthy Families

### 8. Key Findings: Community Assessment

When one researches “causes of poverty”, the same contributors generally are found: lack of jobs, insufficient educational opportunities, poor housing options, and healthcare difficulties. According to a 2016 report included in Commonwealth Insights, a publication of the Massachusetts Nonprofit Network<sup>13</sup>, a look at County unemployment rates shows a clear relationship between unemployment and poverty. As included in the census chart in Appendix C, the Massachusetts unemployment rate as of March 2017 was 3.9%, with Worcester County at 4.1% and the City of Worcester at 4.3%. Southbridge has the highest rate of WCAC’s communities served at 6.0%, followed closely by Webster at 5.1%.

The report also references the link between dropout rates and child poverty. The Massachusetts poverty rate for children under 18 is 15.2%, with Worcester County at 15.7%. The City of Worcester’s rate is 31.5%. Following closely behind Worcester is Webster at 29.6% and Southbridge at 23.5%.<sup>14</sup> Adding in educational attainment, we see the following:

	Child Poverty Rate (under age 18)	No High School Diploma
<b>Massachusetts State Average</b>	15.2%	10.2%
<b>Worcester County</b>	15.7%	10.2%
<b>City of Worcester</b>	31.5%	15.8%
<b>Southbridge</b>	23.5%	22.2%
<b>Webster</b>	29.6%	16.4%

This same report and others point to the expansion of job growth policies and opportunities as a universal means of addressing poverty and also uses the Gateway Cities initiative as a model practice. Gateway Cities are targeted areas which have lagged economically and now receive state-administered development incentives to include workforce programs and creative local partnerships. The Massachusetts Institute for a New Commonwealth (MassINC) website (<https://massinc.org/>) lists 26 Gateway Cities in the Commonwealth, of which one is in WCAC’s service area: the City of Worcester.

Findings included in this section are determined through an analysis of a staff survey and focus group, agency Board of Director survey and meetings, a Head Start/Early Head Start Policy Council survey, low-income community surveys from both WCAC and non-agency clients, and community focus group. The following trends emerged: transportation is a wide-spread need in the communities of Worcester, Southbridge, and Webster and has an impact on a families’ ability to secure employment, attend college courses, and ensure children’s access to quality child care programming; child care, particularly full day programs to support working parents, is of great need, and is largely not affordable; a desire to increase personal finance knowledge was found across all WCAC programs with the need to address poor credit standing out among other components, including household budgeting, saving, and accessing tax credits; increased employment

<sup>13</sup> <http://massnonprofitnet.org/wp-content/uploads/2016/05/MNN-CommonwealthInsights-2e.pdf>

<sup>14</sup> <https://factfinder.census.gov/faces/nav/jsf/pages/index.xhtml>

opportunities for young people, as well as preparation for employment; and lastly, key stakeholders in the community cited a need for increased collaboration and communication among initiatives through WCAC's leadership and known ability to convene partners.

WCAC identified six top individual/family level and community level needs. These are summarized in the chart below, organized by CSBG Expenditure Domains:

<b>CSBG Expenditure Domains</b>	<b>Top Needs: Individual and Family</b>	<b>Top Needs: Community</b>
<b>Employment Services</b>	<b>Youth employment</b>	
<b>Education &amp; Cognitive Development</b>	<b>Full day child care , especially in Southbridge</b>	
<b>Income &amp; Asset Building Services</b>	<b>Financial literacy and credit building/repair</b>	
<b>Services Supporting Multiple Domains</b>	<b>Access to services in client's own language</b>	<b>Transportation, especially in Southbridge and Webster</b>  <b>Leadership, convening, and collaboration among poverty initiatives</b>

Below is a summary of all individual/family level and community level needs and trends that emerged from the assessment, organized by source:

### Individual/Family Needs

<u>Source: Staff Focus Group</u> <ul style="list-style-type: none"> <li>Access to services in client's language</li> <li>Transportation to services/service accessibility</li> <li>Expansion: of locations, hours, space to be more 'client-centered'</li> </ul>	<u>Source: Staff Surveys</u> <ul style="list-style-type: none"> <li>Translation services</li> <li>Parking (at Denholm location)</li> <li>Transportation</li> <li>Childcare services</li> </ul>	<u>Source: Community Focus Group</u> <ul style="list-style-type: none"> <li>Living wage jobs</li> <li>Youth underprepared for post-secondary education</li> <li>American dream no longer possible</li> </ul>	<u>Source: Policy Council Surveys</u> <ul style="list-style-type: none"> <li>Daycare for younger children</li> <li>Capacity to serve more children</li> <li>More full-day classrooms</li> <li>Transportation</li> </ul>
<u>Source: Fuel/Energy Client Surveys</u> <ul style="list-style-type: none"> <li>More information re: other WCAC services</li> <li>Better access for persons with disabilities /</li> </ul>	<u>Source: JEC Client Surveys</u> <ul style="list-style-type: none"> <li>Financial literacy</li> <li>Childcare</li> <li>Transportation</li> <li>Increased hours for WCAC to be open</li> </ul>	<u>Source: Health Families Client Surveys</u> <ul style="list-style-type: none"> <li>Financial Literacy / tax preparation</li> <li>Transportation</li> </ul>	<u>Source: Head Start/Early Head Start Client Surveys</u> <ul style="list-style-type: none"> <li>Transportation</li> <li>More full-day classrooms</li> <li>Help with credit repair</li> </ul>

health issues – better parking / transportation			<ul style="list-style-type: none"> <li>• Childcare</li> <li>• Budgeting</li> </ul>
<u>Source: Non-WCAC Client Surveys</u> <ul style="list-style-type: none"> <li>• Childcare</li> <li>• Don't know about WCAC services</li> </ul>	<u>Source: Business Leader Interviews</u> <ul style="list-style-type: none"> <li>• Soft-skill development</li> <li>• Interview skills</li> <li>• Assistance with on-line job application process</li> </ul>	<u>Source: Other Key Stakeholder Interviews</u> <ul style="list-style-type: none"> <li>• More Early Education and Care services</li> <li>• Outpost WCAC services</li> <li>• Year-round opportunities for employment and training</li> <li>• Youth shadowing / apprenticeships / mentoring</li> <li>• Increase in homeless youth</li> </ul>	

### Community Needs

<u>Source: Staff Focus Group</u> <ul style="list-style-type: none"> <li>• Lack of alternative transportation services</li> </ul>	<u>Source: Staff Surveys</u> <ul style="list-style-type: none"> <li>• Lack of alternative transportation services</li> </ul>	<u>Source: Community Focus Group</u> <ul style="list-style-type: none"> <li>• Integrated health and mental health services</li> <li>• Embracing the Gig economy</li> <li>• Thinking collectively, beyond institutions</li> </ul>	<u>Source: Other Key Stakeholder Interviews</u> <ul style="list-style-type: none"> <li>• Provide in-service training to staff at other agencies, interfaith groups, etc. regarding WCAC services</li> </ul>
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The following community strengths were considered in the development of WCAC's strategies to meet the top six needs:

### Community Strengths

<u>Source: Community Focus Group</u> <ul style="list-style-type: none"> <li>• Police and community engagement</li> <li>• Awareness of importance of early childhood education</li> <li>• Quality services / cooperative partners</li> <li>• Interest in innovation</li> <li>• Cultural diversity (emergence of multi-cultural leaders)</li> </ul>	<u>Source: Other Key Stakeholder Interviews</u> <ul style="list-style-type: none"> <li>• Worcester continues to build-up Recreation Worcester and year-round youth programs</li> </ul>
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## 9. Key Findings: Internal Assessment

Feedback regarding the agency needs and strengths was almost 100% positive with similar agency-focused needs identified relative to the community and individual/family areas previously discussed; transportation, childcare, lack of information about other WCAC programs, and program hours.

Regarding overall financial state, WCAC has a long-standing record of sound fiscal management and clean audit histories and the recent FY2016 audit continues that tradition. WCAC's Audit/Finance and Executive Committees of the Board provide in-depth oversight to the annual budget, independent audit process, and provide finance training for the full Board and Head Start/Early Head Start Policy Council members. These

Committees also review monthly financial reports, grant spending, and budget updates at each meeting.

A summary of the top needs is below:

Organization Top Needs
<ul style="list-style-type: none"> <li>▪ <b>Streamline intake and paper-based systems</b></li> <li>▪ <b>Building access at Worcester location</b></li> <li>▪ <b>Continue to build Board diversity</b></li> <li>▪ <b>Opportunities for stronger collaboration within WCAC</b></li> <li>▪ <b>Continue succession planning</b></li> </ul>

A summary of all Agency findings is below:

### Agency Strengths

<u>Source: Staff Focus Group</u> <ul style="list-style-type: none"> <li>• Communication</li> <li>• Training opportunities</li> </ul>	<u>Source: Staff Surveys</u> <ul style="list-style-type: none"> <li>• Teamwork</li> <li>• WCAC is a good place to work</li> <li>• Respect</li> <li>• Pride for what we do</li> </ul>	<u>Source: Community Focus Group</u> <ul style="list-style-type: none"> <li>• Ability to take leadership role</li> <li>• Credibility as a group convener</li> </ul>	<u>Source: Policy Council Surveys</u> <ul style="list-style-type: none"> <li>• Head Start's outreach and communication</li> <li>• Head Start's service delivery and assessing needs</li> </ul>
<u>Source: Fuel/Energy Client Surveys</u> <ul style="list-style-type: none"> <li>• Access to SNAP</li> <li>• Help paying bills</li> </ul>	<u>Source: JEC Client Surveys</u> <ul style="list-style-type: none"> <li>• Helpful staff</li> <li>• Referrals to other WCAC programs and partner agencies</li> </ul>	<u>Source: Health Families Client Surveys</u> <ul style="list-style-type: none"> <li>• Helpful staff that provide information</li> </ul>	<u>Source: Head Start/Early Head Start Client Surveys</u> <ul style="list-style-type: none"> <li>• Helpful teachers and staff</li> <li>• Communication with families</li> <li>• Caring / attentive / one-on-one attention</li> <li>• The education the children receive</li> </ul>
<u>Source: WCAC Board of Directors Survey</u> <ul style="list-style-type: none"> <li>• Program Results</li> <li>• Credibility among funders/partners</li> <li>• Programs addressing current community needs</li> <li>• Quality of staff, operations, and services</li> </ul>		<u>Source: Other Key Stakeholder Interviews</u> <ul style="list-style-type: none"> <li>• Strong reputation, including workforce development</li> <li>• Collaborations with other agencies (ex: Center for Living and Working uses WCAC for fuel assistance, SNAP, and tax preparation)</li> <li>• Great partner with the City of Worcester (especially youth violence efforts)</li> <li>• New location for Head Start in Webster</li> </ul>	

### Agency Needs

<p><b>Source: Staff Focus Group</b></p> <ul style="list-style-type: none"> <li>Rectify inefficient intake, paper-based systems</li> <li>Better parking/access</li> <li>Staff orientation / un-siloing</li> <li>Space related to safety – layout, public access</li> <li>Tablets for home visits</li> </ul>	<p><b>Source: Staff Surveys</b></p> <ul style="list-style-type: none"> <li>Better accessibility to the Denholm building</li> <li>Increased visibility and satellite sites</li> <li>Increased communication between departments and management</li> <li>An IT mechanism to make cross-service referrals</li> </ul>	<p><b>Source: Other Key Stakeholder Interviews</b></p> <ul style="list-style-type: none"> <li>Potential for stronger collaboration with Worcester Public Schools (ex: Head Start and vouchers, JEC, HiSET, referrals for families)</li> <li>Look to best practices re: workforce development re: employer ‘pain points’, soft skills, listen, adapt and deliver</li> <li>Better communication with faith community re: youth employment</li> <li>Professional development, resource sharing with Webster Public Schools</li> </ul>
<p><b>Source: WCAC Board of Directors Survey</b></p> <ul style="list-style-type: none"> <li>Succession planning</li> <li>Board engagement</li> <li>Diversity of Board and staff</li> </ul>		

## 10. Strategic Three Year Goals

### Strategy Sessions

WCAC purposefully planned an intensive and inclusive series of brainstorming sessions and conversations with staff and the Board of Directors in the process of setting goals, priorities, and strategies. As this is a best practice, WCAC ensured these sessions were a strong component of the strategic planning process. Beginning with the agency’s Senior Management Team, needs identified from focus groups, surveys, and interviews were examined, clarifying questions asked, and strategies formed to meet needs. Next, Board members and the Strategic Planning Steering Committee were asked to add and provide feedback on the strategies developed by the Senior Management Team. Finally, Program Managers were asked how programs will meet the new priority goals through the development of two-year indicators of success and one-year accomplishments. A timeline of activities is summarized below:

- Senior WCAC staff members met March 28, 2017 to review key findings from the needs assessment data and begin setting strategies for the next three years.
- Building from the March 28, 2017 session, the Steering Committee met on April 5, 2017 to review key findings, identify current realities, threats, and opportunities, and to set priorities. Board members, including those from the Executive Committee, were in attendance.
- WCAC’s full Board of Directors participated in a strategy session led by Nancy Jackson. Indicators for success at the two-year benchmark were determined.
- WCAC Senior staff and members from the Steering Committee met on May 9, 2017 to further develop strategies incorporating Board input. Program Managers attended to assist in breaking out indicators and accomplishments by program.
- The Steering Committee convened on June 7, 2017 and discussed the mission statement review and

the final plan summary in preparation for presentation to the full Board and Policy Council on June 12, 2017.

Notes from each of these meetings are included in Appendix I.

Results from the process evolved into a structure of four priority goals to address individual/family, community, and agency level needs across the agency as summarized in the Key Findings section. More specific goals can be found in Section 11.

- **Enhance revenue options**
- **Deepen community leadership and advocacy on poverty**
- **Integrate services internally**
- **Improve service accessibility**

WCAC's priorities will be implemented within a framework of three over-arching strategic directions to strengthen how services are organized, integrated across divisions, delivered in a coordinated and effective manner to the community, and how they impact the agency's performance overall. WCAC will use these strategic outcome-focused directions to report out to the community, stakeholders, and the Board of Directors in a more meaningful way.

### **Strategic Direction 1: Impacting Lives Responsively**

WCAC's first strategy will focus on service integration and access to services. WCAC will embrace the well-known practice of "meeting clients where they are" through a holistic approach to service delivery. Holistic services from emergency food assistance and heating assistance that stabilize families to workforce and asset development that help families build for the long term, as well as essential wrap-around supports provided along this continuum, will result in economically self-sufficient families. An intake system that allows for holistic assessment and referrals to internal programs, as well as to external partner agencies, will streamline the processes for both staff and clients. Integrating the agency's 20 plus and growing programs will ensure clients receive all the services needed they qualify for without making multiple trips to the agency for different programming.

### **Strategic Direction 2: Engaging in Community Leadership**

WCAC's second strategy will focus on its role as an important community leader in two areas; external community leadership and internal agency leadership. Through its vast networks, WCAC will bring new and core partners to the table, raising awareness of poverty issues and creating a solutions-focused forum. Internally, WCAC will develop skilled future leaders that reflect the diverse cultural needs of the community.

### **Strategic Direction 3: Enhancing Effective Operations**

The third strategy will focus on agency-level capacity building. Internal systems will be assessed for the capacity to be streamlined, including simplifying forms and moving toward paperless processes related to hiring and access to employee benefits information. Funding will be diversified to increase private revenue and decrease reliance on state and federal support. Targeted fundraising plans will focus on building a new Head Start site in the Town of Webster, thus bringing a much-needed service to a town with a high poverty rate.

### Service Delivery System

WCAC delivers services through twenty and growing emergency and self-sufficiency programs. The agency is proud of its extensive partnerships in the community and recognition as a leader in workforce development, particularly its niche for youth employment. The agency operates with a staff of 87 full-time and 23 part-time employees. It was very apparent from the client surveys in the community needs assessment that WCAC's dedicated direct service staff is an agency strength. The senior management team is comprised of the Executive Director, Chief Operating Officer, Chief Financial Officer, Chief Strategy Officer, the Directors of Planning, Development, the JEC, Energy Resource, and Head Start/Early Head Start. The senior team meets weekly and a team of Program Managers meet every other month to provide program updates, receive agency updates, and attend training. Interns from Worcester's network of colleges assist with research, grant writing, and observe first-hand WCAC's program in action. Volunteers are an integral component for the VITA program and Head Start program, preparing tax returns and volunteering in classrooms. The Board of Directors meet six times per year, every other month and the Executive Committee meets six times per year in the alternating months. Board members participate in four subcommittees to include Program, Personnel, Audit and Finance, and Fundraising.

Below is a summary of the agency's service delivery system through programming, organized by CSBG Expenditure Domain:

#### CSBG Expenditure Domain: Employment Services

Program	Description
Youth Employment Seminar (YES)	Work readiness skills training for youth ages 16-24 with case management and job placement assistance.
YouthWorks	Year-round and summer jobs for income-eligible youth ages 16-21. Provides participants with work readiness training, work-based learning plan tools, and case management.
Start Our Success	Provides summer and after school jobs for highly at-risk youth ages 17-24 referred through the Worcester Police Department.
Safe & Successful Youth Initiative	Work readiness skill building and job placement assistance for youth highly at-risk for gang involvement.
Comprehensive Antigang Strategies & Programs (CAGS)	Provides subsidized after school jobs for at-risk youth residing in Eastside Worcester neighborhoods, as well as work readiness training and follow-up services.
JobOne	Provides employer engagement and acts as a hub for matching youth to employers.
Working Cities Challenge	WCAC is the lead organization working collaboratively with a core group of partners to improve the food sector economy within the City of Worcester.
Health Care Jobs Pipeline	Certified Nursing Assistant and Home Health Aide training for Black/African American and Latina women who are unemployed and disconnected from the workforce. Training "pipelines" into jobs with intensive case management support.
Secure Jobs Initiative	Work readiness skills building, job placement assistance, and case management support for homeless individuals and families.

**CSBG Expenditure Domain: Education & Cognitive Development Services**

Program	Description
Project Excel	HiSET preparation and work readiness skills training for 16-24 year-old at-risk youth who have dropped out of high school.
WINGS	HiSET preparation, work readiness skills training, and career pathways programming for 16-24 year-old at-risk youth who have dropped out of high school.
Head Start	A center-based preschool program serving low-income children ages 2.9 through 5 years with school readiness, health and nutrition services, and parent programs.
Early Head Start	A home-based program for expectant women and infants and toddlers. Staff provides home visits and facilitate socialization groups.

**CSBG Expenditure Domain: Housing Services**

Program	Description
Fuel Assistance	Administer federally funded LIHEAP (Low-Income Home Energy Assistance Program), adding private funds to help reduce client's energy burden. Staff accepts applications through outreach, mail, and face-to-face interviews and, after certifying applications, pays vendors directly.
Energy Efficiency (includes HEARTWAP, AMPS, DOE WAP)	Provide energy efficiency education and installations to low-income clients (tenants or owners) including full weatherization, heating system repair/replacement, and replacement of inefficient lighting and appliances using federal and utility company funding.

**CSBG Expenditure Domain: Health & Social/Behavioral Development**

Program	Description
Healthy Families of Southern Worcester County	Home visiting program for first-time parents from pregnancy through their child's third birthday providing parenting support, education, and community referrals.

**CSBG Expenditure Domain: Income & Asset Building Services**

Program	Description
Volunteer Income Tax Assistance (VITA)	Provides free income tax preparation to low and moderate income individuals and families; volunteers are trained and IRS-certified to prepare tax returns
Axuda	Small and interest-free loans provided to WCAC staff and clients with short-term financial needs. Microloans cover expenses, such as home repairs, car repairs, housing security deposits, child care, or text books.
SNAP	Assists income-eligible community members to enroll or recertify for SNAP benefits to purchase nutritional food for their families.

## Linkages

Relationship building is one of WCAC's core strategies to strengthen the community and families and the services clients access.

Currently, WCAC has strong ties to the higher education institutions in the City of Worcester through the Higher Education Consortium of Central Massachusetts, as well as the Massachusetts Education & Career Opportunities, Inc. (MassEdCO). Quinsigamond Community College (QCC) is an important partner in WCAC's workforce development efforts as the training partner responsible for providing culinary arts and health care certificate programs. These complement WCAC's work readiness programming and allow clients to be pipelined into jobs immediately following certification.

As a leading organization in workforce development, WCAC was invited to join the Central MA Regional Workforce Innovation and Opportunity Act (WIOA) Partner Planning efforts. WCAC will participate in several subcommittees to assist with service integration across WIOA-funded and community-based partners that have shared customers. The Central MA Workforce Investment Board (CMWIB) and the Central MA region are recognized for their forward-thinking approach to this new state mandate per WIOA regulations, as well as their initiative early on to form a committed planning group. WCAC is proud to be a partner of this innovative collaborative.

Several workforce development partners in the City began collaborating in FY 2017 around specific career pathway grant opportunities. WCAC will work strategically with the CMWIB to continue the development of this core group and explore further funding opportunities to build on the career pathways and job pipelines model. These partners include the Central MA Housing Alliance (CMHA), Veteran's, Inc., Worcester Community Connections Coalition and the Worcester Connections Family Resource Center of YOU, Inc., and Ascentria Care Alliance.

WCAC works with a dedicated coalition of partners focused on growing youth employment within the City of Worcester. These partners include the CMWIB, the City of Worcester City Manager's Office and its Youth Opportunities Office, the Worcester Regional Chamber of Commerce, Clark University, Worcester Youth Center, Central MA Youth Jobs Coalition, the Boys & Girls Club of Worcester, Pernet Family Health Services, the Regional Environmental Council, and the Worcester Public Schools. WCAC is a lead partner in the group's effort to ensure a collaborative approach to youth workforce development across the City and to build a strong future for youth employment. In addition, WCAC co-chairs youth employment efforts for the City's Worcester Youth Violence Prevention Initiative.

WCAC is well-aware of the "Cliff Effect" related to workforce development efforts. The "Cliff" refers to a loss of public benefits when an individual begins to increase their income. Small increases in hourly wage can cause a large decrease in the public benefits that families rely on most. The agency's strategy is to be informed, take action early on, and collaborate with other partners. WCAC is co-leading a local effort with the Worcester Community Connections Coalition and the Worcester Connections Family Resource Center of YOU, Inc. to conduct regular meetings around the issue, as well as working with the On Solid Ground Coalition at the state level.

Although not noted as a large issue within the Community Needs Assessment, youth homelessness continues to be a critical factor in the health and well-being of the young adults WCAC's JEC serves each day. WCAC

continues its active partnership in the local Compass Network spearheaded by LUK, Inc., that offers resource sharing and training for youth worker staff. WCAC participates in an annual youth homelessness point in time count, as well as making supporting referrals to LUK, Inc.

WCAC is a member of the Central Massachusetts Regional Coordinating Council (RCC), a forum for all persons interested in transportation, including those providing the service. The RCC meets monthly or as needed to discuss and recommend improved transportation. Transportation was found to be of tremendous need across all WCAC programs. As such, WCAC will remain informed, seek increased connections with the Worcester Regional Transit Authority (WRTA), and think strategically about alternative methods of providing transportation to clients, such as the provision of gas cards and taxi vouchers.

Local financial institutions donate funding and offer in-kind goods and services to strengthen programs and agency capacity building. Local banks and credit unions participate in financial literacy workshops for customers and support the agency with funding to expand opportunities for the individuals and families served. WCAC will grow its current partnership with Southbridge and Webster-located banks and credit unions to expand the Volunteer Income Tax Assistance (VITA) program to Head Start and Healthy Families programs, as well as for a new Head Start site scheduled to be built in Webster in FY 2018.

WCAC's Chief Strategy Officer joined a local Self-Sufficiency Coalition of providers led by the Worcester Community Connections Coalition and the Worcester Connections Family Resource Center of YOU, Inc. The group will conduct two forums in FY 2018 aimed at arming providers across the City with the information needed to help clients through the "front doors" or in other words, the first step in the referral process.

WCAC will increase access to services for all clients. Increased marketing and outreach will occur for the agency's Fuel Assistance and Energy Programs. To do so, connections will be strengthened with local agencies, such as the Department of Transitional Assistance, Ascentria Care Alliance, and the Massachusetts Rehabilitation Commission. WCAC staff will provide targeted trainings, information, updated materials, and staff information tables at events.

WCAC is participating in a community-wide conversation, led by UMASS Memorial Health Care, to involve social service agencies in the design of referral processes between health care systems and access to mental health, emergency food assistance, housing, and other wrap-around services. WCAC is mindful of the social determinants of health and will participate in these planning efforts when appropriate.

WCAC is exploring a regional approach to service delivery with its community action agency counterparts in Central MA. This may include collaborative approaches, such as shared administration, applying for funding, or expansion efforts to ensure unity across the region.

The WCAC Executive Director is affiliated with and serves on several boards and associations: Denholm Condominium Association, Trustee; Worcester Business Development Council, Chair; Worcester Research Bureau, Board Member; Central MA Workforce Investment Board, Board Member; Greater Worcester Community Foundation, Corporator; MA Task Force on Poverty, Member; United Way Service Executives, Member; and MASSCAP, Vice Chair of Executive Committee. WCAC's Chief Strategy Officer and Director of Planning participates in MASSCAP's Planners' Community of Practice (CoP) and the Service Integration CoP; the Chief Operating Officer participates in the Human Resources CoP; the Chief Financial Officer participates in the Finance CoP; and the Energy Director participates in Massachusetts Energy Directors Association

(MEDA) and the Worcester Rotary Club.

## Funding Strategy

**Diversification:** The agency will continue to build its funding base leveraged by CSBG dollars. WCAC intends to apply for CSBG Special Projects funds to support service delivery in Southbridge. WCAC intends to diversify funding by supplementing the funding base with private revenues and other grant sources. For several years, staff has utilized Donor Snap, a donor tracking database, with excellent results. The agency will build upon this by purchasing donor prospecting software to broaden its current base of private funders and foundations beyond those historically relied upon.

**Multi-year Funding:** Multi-year funding requests will be at the forefront of WCAC's strategy for sustained programming to limited-income households. This strategy will support programming for asset development and workforce development initiatives. Relationships with local donors known for funding larger requests, banks, and larger national foundations will be cultivated. WCAC's partners will be invited to apply alongside WCAC for initiative coordination. WCAC is the lead partner in the City of Worcester for year-round and summer youth employment. Local employers will be asked to sponsor the cost of one to two youth jobs over a three year period. WCAC will work collaboratively with the Worcester Regional Chamber of Commerce to open doors and secure commitments. WCAC will seek to collaborate with the City's youth programming, including the coordination of funder requests for support of jobs.

**Relationship Building:** WCAC will plan a series of "Leadership Conversations" with key funders, donors, and partners to strengthen awareness of WCAC's tremendous programming, its leadership niche in the community, and antipoverty efforts. Individual conversations will build and strengthen long-term relationships so that when funding becomes available, reviewers are already knowledgeable about WCAC and the agency can be positioned well for favorable consideration.

**Endowment:** WCAC's Board Audit and Finance Subcommittee and Executive Committee have recommended exploring endowment and investment options. This will continue as a strategy into the next three years.

**Capital Campaign:** Within FY2018-2020, WCAC will conduct a needs assessment of its facilities in both the Worcester and Southbridge locations. Technology, flooring, heating and cooling systems, and safety and security will all be analyzed through generous in-kind support from National Grid. Given the current construction and future revitalization plans for downtown Worcester, WCAC's location within the Denholm building will be assessed for a "good fit" to meet client and accessibility needs. WCAC's Executive Director is beginning her first term as Board Chair of the Worcester Business Development Corporation and as such, is involved in the numerous downtown development projects underway and is well-aware of future plans.

A funding plan for new Head Start classrooms in the Town of Webster, as well as an approved location, are moving forward at the time of this writing with an anticipated opening in early winter 2018/2019. In FY 2018, a capital campaign will commence to include soliciting strategic major donors. It is expected the campaign will continue for one year.

**Board Fundraising Subcommittee:** During FY 2017, the Board's Fundraising Subcommittee was revitalized and began by introducing a second annual appeal in the spring of each year, while continuing to open doors with major donors and growing WCAC's two signature events, the annual Action Heroes Awards and a

fundraiser and holiday performance with the Hanover Theatre. The Subcommittee will also help to increase Board engagement in agency fundraising efforts.

**Events:** The tradition of the annual Action Heroes event will continue over the next three years with goals for increased sponsorships and attendance. In FY 2017, the event was held at a larger venue as a breakfast rather than the historical evening event. Feedback was positive, thus a breakfast event will continue and local partners or “heroes” will receive awards. During the next three years, staff will discuss and possibly begin planning for a larger 55<sup>th</sup> anniversary event to celebrate the agency and its many partners. In year three, WCAC will explore program-specific fundraising events for its Job and Education Center and Head Start/Early Head Start and Healthy Families programs, possibly kicking off with an event to celebrate a new Head Start location in Webster.

**Asset Development Programming:** WCAC’s most critical asset development program, the Volunteer Income Tax Assistance (VITA) program, will continue to be supported through the agency’s partnership with MASSCAP to ensure a state-wide approach to secure Internal Revenue Service (IRS) funding. This will support four VITA sites within the City of Worcester: WCAC, Plumley Village East, Main South CDC, and Worcester State University. Based on a two-year successful pilot site located in Southbridge through the agency’s Healthy Families of Southern Worcester County program, WCAC will expand free tax preparation to Head Start and Early Head Start in FY 2018. Both Cornerstone Bank and Southbridge Credit Union are on board to provide volunteers and funding. The strategy is to build relationships with the volunteers so that the program has well-trained and knowledgeable human capital, as well as multi-year funding to ensure sustainability for years to come.

## Service Gaps

**Housing:** Unlike several other MA community action agencies, WCAC does not provide housing services. Rather, DHCD’s housing funding is funneled through to other Worcester and Central MA organizations. WCAC recognizes these organizations have great expertise in the complicated world of housing and do this work well. As such, WCAC’s primary housing partner is CMHA and has been for many years. WCAC subcontracts with CMHA to provide referrals of homeless families to the state-funded Secure Jobs Initiative program. Most recently, CMHA has come to the table around workforce development grant opportunities. WCAC will continue this partnership to ensure homeless families receive the much-needed opportunities for self-sufficiency.

**Translation Services:** Worcester is one of the Commonwealth’s resettlement communities. The number of immigrants, refugees, and asylees grows steadily each year, along with the demand for services. As noted in the Community Needs Assessment, the need to access services in one’s own language is important to ensure high quality customer service and to meet needs. WCAC will continue to build strategic alliances with Ascentria Care Alliance and its Language Bank to develop a comprehensive system for translation services.

**Hunger:** Poverty cannot be discussed without addressing hunger needs. WCAC provides on-site Supplemental Nutrition Assistance Program (SNAP) application assistance to WCAC clients or others in the community. For example, clients who apply for LIHEAP benefits can also apply or recertify for SNAP benefits in one location. WCAC participates in the newly-formed Central MA SNAP Coalition to remain apprised of policy changes, DTA updates, and make connections with other emergency food assistance organizations.

**Transportation:** In addition to being a barrier to accessing employment, healthcare and other needs, lack of transportation can also impact overall social-emotional health and other basic needs. For example: Healthy

Families of Southern Worcester County serves many single mothers in remote areas who are unable to socialize with and learn from other mothers because they cannot get to events at central locations. Head Start/Early Head Start's 2016-17 program self-assessment noted the program needs to explore more transportation options for families. Head Start currently transports 49 children from the towns of Dudley, Oxford and Webster approximately 10 miles or 45 minutes each way to the Southbridge Head Start location. This has been very burdensome for the children and their parents; parents are unable to fully participate in the Head Start experience or be involved in classroom activities and parent meetings. Picking up a sick child from the program is also a hardship.

WCAC acknowledges the importance of easing transportation barriers for clients to access services, as well as to work, keep medical appointments, and a myriad of other needs. WCAC will approach this tremendous need for transportation in a collaborative approach with local and regional partners. The agency participates in community conversations, led by Ascentria Care Alliance, with a group of providers committed to serving the refugee and low-income populations. This group has set an agenda to address public transportation barriers with the WRTA. An initial meeting with WRTA leadership is planned for Summer 2017.

### 11. Specific Objectives

The charts below demonstrate the connectivity between the identified top needs, specific goals as a subset of the four Priority Goals from Section 10, and objectives. All are organized by CSBG Expenditure Domain, level of need and strategy, and plan for accomplishing in Years one through three.

**CSBG Expenditure Domain: Employment**

	Goals	Individual/Family Level Objectives	Community Level Objectives	Agency Level Objectives
<b>Individual/Family Need:</b>  Youth Employment	Increase opportunities for subsidized and unsubsidized employment for young people  Prepare youth to be successful in the workplace	<b>Year 1:</b> <ul style="list-style-type: none"> <li>▪ Assess, learn, and understand employer needs</li> </ul> <b>Year2:</b> <ul style="list-style-type: none"> <li>▪ Pilot a youth employment registry for 100 youth.</li> <li>▪ Utilize Job1 program for marketing and matching 75 youth to jobs; employers with youth within all JEC programs</li> </ul>	<b>Year 1:</b> <ul style="list-style-type: none"> <li>▪ Convene a series of City-wide coordinating meetings</li> <li>▪ Research one staffing agency model; share results City-wide</li> </ul> <b>Year3:</b> <ul style="list-style-type: none"> <li>▪ In collaboration with the CMWIB and the local Chamber of Commerce, Implement a City-wide and employer-recognized work readiness</li> </ul>	<b>Year 2:</b> <ul style="list-style-type: none"> <li>▪ Retool and strengthen internal advisory boards; expand community business partners</li> <li>▪ Increase private revenue to fund short-term job opportunities for youth</li> </ul>

			credential for youth to increase opportunities for employment	
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**CSBG Expenditure Domain: Education & Cognitive Development**

	Goals	Individual/Family Level Objectives	Community Level Objectives	Agency Level Objectives
<b>Individual/Family Need:</b>  Full-day child care, especially in Southbridge	Increase opportunities for high-quality full-day child care to support working families	<b>Year 1:</b> <ul style="list-style-type: none"> <li>Research State-funded vouchers to expand capacity for full-day care within the Head Start program</li> <li>Assess current Head Start site facilities and capacity for full-day classrooms</li> </ul> <b>Year2:</b> <ul style="list-style-type: none"> <li>Open a new Head Start site in the Town of Webster for 71 children, 2 half-day classrooms, and 2 full-day, school-year classrooms</li> </ul>	<b>Year 1:</b> <ul style="list-style-type: none"> <li>Explore opportunities for coordination with Worcester Public Schools</li> </ul>	<b>Year 2:</b> <ul style="list-style-type: none"> <li>Research funding prospects/increase private revenue to fill gaps in summer Head Start programming</li> </ul>

**CSBG Expenditure Domain: Income & Asset Building Services**

	Goals	Individual/Family Level Objectives	Community Level Objectives	Agency Level Objectives
<b>Individual/Family Need:</b>  Financial literacy and credit building/repair	Expand and integrate financial literacy programming across all WCAC programs	<b>Year 1:</b> <ul style="list-style-type: none"> <li>Expand the Axuda program (micro-lending) from staff participants to include 15 clients</li> <li>Research and identify a coaching model and available</li> </ul>	<b>Year 1:</b> <ul style="list-style-type: none"> <li>Pending application to the Health Foundation of Central MA, implement a Bank On Worcester County program in Worcester and Southbridge</li> </ul>	<b>Years 1-3:</b> <ul style="list-style-type: none"> <li>Increase private revenue to support expansion where CSBG funds cannot be utilized in South Worcester County</li> </ul>

		<p>trainers for implementation in Year 2</p> <ul style="list-style-type: none"> <li>75% of Head Start staff trained in a financial education curriculum to strengthen their abilities to provide families with financial management education</li> </ul> <p><b>Year 2:</b></p> <ul style="list-style-type: none"> <li>75% of JEC staff trained in a coaching model to strengthen abilities to deliver financial management information to clients in a coaching format</li> </ul>	<p><b>Years 1-3:</b></p> <ul style="list-style-type: none"> <li>Increase and foster partnerships with banks and credit unions in South Worcester County to develop a consistent volunteer base for expansion of VITA to Head Start families</li> <li>Explore additional opportunities for Bank On Worcester County program model with local banks and funders</li> </ul>	
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**CSBG Expenditure Domain: Services Supporting Multiple Domains**

	<b>Goals</b>	<b>Individual/Family Level Objectives</b>	<b>Community Level Objectives</b>	<b>Agency Level Objectives</b>
<p><b>Individual/Family Need:</b></p> <p>Language Access</p>	<p>Increase access to services in client's primary language through availability of professional translation</p>	<p><b>Year 1:</b></p> <ul style="list-style-type: none"> <li>Expand translation services through research of providers; identify contractor; implement across programs</li> </ul>	<p><b>Year 1:</b></p> <ul style="list-style-type: none"> <li>Develop MOU with immigrant and refugee resettlement organizations</li> </ul>	<p><b>Year 1:</b></p> <ul style="list-style-type: none"> <li>Learn more about gaps in client access to WCAC relative to culture and language</li> </ul>
<p><b>Community Level Needs:</b></p> <p>Transportation, especially in Southbridge and Webster</p> <p>Leadership, convening, and collaboration among poverty initiatives</p>	<p>Increase access to services by reducing barriers to transportation</p> <p>Through community conversations, work to create a shared vision to address poverty</p>	<p><b>Year 1:</b></p> <ul style="list-style-type: none"> <li>Assess WCAC programming provided in Worcester that can be offered at South Worcester County WCAC sites</li> </ul> <p><b>Year 2:</b></p> <ul style="list-style-type: none"> <li>By Year 2, have one satellite office set-up and piloted at WCAC Southbridge sites</li> </ul>	<p><b>Year 1:</b></p> <ul style="list-style-type: none"> <li>Establish a work group to organize a speakers series/forum on poverty</li> </ul> <p><b>Year 2:</b></p> <ul style="list-style-type: none"> <li>Convene a diverse representation of community partners to attend speakers series/forums</li> </ul>	<p><b>Years 1-3:</b></p> <ul style="list-style-type: none"> <li>Increase private revenue to support satellite sites where CSBG funds cannot be utilized in South Worcester County</li> <li>Create Board and staff succession plans for internal key managers to build leadership capacity that</li> </ul>

		and key partner sites to decrease barriers to transportation to Worcester		contributes to the community and the organization
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**Agency Capacity Building**

	Goals	Individual/Family Level Objectives	Community Level Objectives	Agency Level Objectives
<p><b>Agency Needs:</b></p> <p>Streamline intake and paper-based systems</p> <p>Building access</p> <p>Continue to build Board diversity</p> <p>Opportunities for stronger collaboration within WCAC</p> <p>Continue succession planning</p>	<p>Streamline employee access to information</p> <p>Increase the number of clients that access multiple programs within the agency</p> <p>Incorporate diversity needs into Board and staff hiring and succession planning</p>	<p><b>Year 1:</b></p> <ul style="list-style-type: none"> <li>▪ Both Head Start/Early Head Start and Healthy Families staff and clients participate regularly in events and trainings through a shared yearly event calendar and holding joint meetings</li> <li>▪ Increase awareness in targeted communities of Southbridge and Webster of LIHEAP and Energy programs</li> <li>▪ Increase referrals to LIHEAP and Energy programs internally and externally</li> </ul>		<p><b>Year 1:</b></p> <ul style="list-style-type: none"> <li>▪ Assess current intake and paper-based systems and develop a plan</li> <li>▪ Utilize payroll system for access to benefits information; train users</li> <li>▪ Agency client database developer to assess data bridging capabilities and costs</li> <li>▪ Conduct a facilities assessment of all WCAC sites with a focus on access</li> <li>▪ Cross-train all agency staff in internal programs with a tangible curriculum; hold new-hire orientations consistently</li> <li>▪ Review and update emergency succession plans</li> </ul> <p><b>Year 2:</b></p> <ul style="list-style-type: none"> <li>▪ Enroll employees into health benefits online</li> </ul>

				<ul style="list-style-type: none"> <li>▪ Develop a plan for incorporating diversity needs into Board recruitment</li> <li>▪ Incorporate succession and cross-training plans for key leaders into professional development and goal-setting</li> <li>▪ Provide shadowing and mentoring opportunities for identified key leaders</li> </ul> <p><b>Year 3:</b></p> <ul style="list-style-type: none"> <li>▪ 50% of agency programs will utilize upgraded agency client database regularly for tracking referrals and as a case management tool</li> </ul>
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**12. Plan Monitoring and Reporting**

Planning Department staff will meet with individual program departments in August 2017 to carefully integrate strategies into the 2018 Community Action Plan (CAP). As such, Program Managers will have a solid understanding of the strategies and feel ownership for progressing toward outcomes. In addition to the CAP, detailed workplans will be created for each department and specific programs to be used not only for internal monitoring by Planning staff, but for use as a tool for Program Managers to realize their progress and make adjustments as necessary.

The Program Committee of the Board will take a significant role in the ongoing monitoring of the CARSP. The committee will review mid-year outcomes and final outcomes in years one, two, and three with a final review of the cumulative three years in FY 2020. Following each mid-year and end-of-year review, the Committee will present progress and its feedback about the progress to the full Board twice per year. Feedback from both the Committee and the Board will be considered by Planning staff, communicated to Program Managers, and incorporated into implementation.

Monitoring Activity	Key Date	Person Responsible
<ul style="list-style-type: none"> <li>▪ Develop yearly CAPs with Program Managers.</li> </ul>	August 2017, 2018, and 2019	Chief Strategy Officer, Director of Planning
<ul style="list-style-type: none"> <li>▪ Review mid-year progress with Board Program Subcommittee.</li> </ul>	April 2018, 2019, and 2020	Chief Strategy Officer, Director of Planning
<ul style="list-style-type: none"> <li>▪ Present progress to the full Board</li> </ul>	June 2018, 2019, and 2020	Program Committee Co-Chair, Chief Strategy Officer
<ul style="list-style-type: none"> <li>▪ Review end-of-year progress with Board Program Subcommittee</li> </ul>	October 2018, 2019, and 2020	Chief Strategy Officer, Director of Planning

The CARSP document will remain fluid so as to incorporate new and emerging barriers for clients, challenges in the political climate within the next three years, and new trends and opportunities. With careful monitoring and an eye on the future, WCAC's CARSP will be fully implemented, resulting in a stronger network to address poverty and opportunities for thousands of those living in or near poverty to not only stabilize their lives, but to move to a bright, healthy future.