



**COMMUNITY ACTION
PARTNERSHIP**
ORANGE COUNTY

2022-2027 STRATEGIC PLAN

Adopted on 3-23-22

Prepared By:
CAP OC Planning Department



OPENING REMARKS

Dear Friends,

As President and CEO of Community Action Partnership of Orange County (CAP OC), I am pleased to share with you our new 2022-2027 Strategic Plan. Our development process has evolved over the last several years, while we adapted to the COVID-19 pandemic to address immediate needs and keep our doors open. In early 2018, I joined CAP OC as President and CEO, and immediately began a multi-year process to improve our brand recognition within Orange County. An important first step was to invest in a complete make-over through a rebranding process. This rebranding included a new logo, website, vision statement, and mission statement. It was followed by the development and completion of our first ever Theory of Change in early 2021.

I myself grew up in poverty, living in public housing, and raised in a household where education was stressed. I know the personal trauma of working through issues of inadequate housing, inferior schools, and barriers for success. Having a personal support system in place and being constantly reminded of the importance of an education, I set myself on a path out of poverty. At CAP OC we are implementing a Whole Family Approach, as we work with families to move them out of poverty in two generations. Our employees are working together to develop a Diversity, Equity, and Inclusion Plan for implementation within CAP OC, and to bring these principals of racial equity and environmental justice into our implementation strategies for what we can accomplish over the next five years.

Our new 2022 -2027 Strategic Plan works towards having CAP OC deliver on outcomes and better address the needs of the communities we serve. Our most recent 2021 Community Needs Assessment was among our most comprehensive ever, despite it being done during a pandemic. It provides guidance on what we should be addressing over the next five years. While setting goals that can be accomplished over the next five years, we will not lose sight of the need to continue to meet immediate needs of those we serve, while integrating our provision of health and human services.

The 2022 – 2027 Strategic Plan has a strong focus on workforce development, financial empowerment, and affordable housing in response to our 2021 Community Needs Assessment, as a continuation of our 2020, 2021, and 2022 workplans in response to the pandemic.



WE SEEK TO END AND PREVENT POVERTY BY STABILIZING, SUSTAINING AND EMPOWERING PEOPLE WITH THE RESOURCES THEY NEED WHEN THEY NEED THEM. BY FORGING STRATEGIC PARTNERSHIPS, WE FORM A POWERFUL FORCE TO IMPROVE OUR COMMUNITY.

This Strategic Plan is a living document; our official guide in what we do over the next five years. Our vision is strong, and our mission to seek to end and prevent poverty by stabilizing, sustaining, and empowering people with the resources they need when they need is more important than ever before.

With Gratitude and In Service,

Gregory C. Scott

President and CEO
Community Action Partnership of Orange County



WE SEE GENERATIONS OF HEALTHY COMMUNITIES
WHERE POVERTY CEASES TO EXIST.



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EXECUTIVE SUMMARY

Community Action Partnership of Orange County (CAP OC) has developed its new 2022-2027 Strategic Plan to guide the agency for the next five years, acting as a blueprint for implementing changes that will incrementally accomplish the agency's mission and goals. As in previous years, this strategic plan is the result of a rigorous process to understand the most pressing needs in the community and seeks to implement new strategies for how we intend to move individuals and families out of poverty in Orange County. In the process, our agency is moving toward becoming a more resilient organization, implementing a new whole family approach model for addressing the unique needs of individuals and families, and becoming a leader in poverty-related issues in Orange County.

As we continue to provide services during each wave of the COVID-19 pandemic, our agency remains as committed as ever in the fight against poverty. This new strategic plan reflects this commitment with a strong focus on workforce development, equity, investments in human capital, low income housing, community resiliency, and a new approach in how we move families out of poverty while empowering the communities we serve. The result is four strategic drivers:

1. Economic Mobility and Innovation
2. Family and Youth Empowerment
3. Health and Community Resilience
4. Organizational Capacity and Brand Awareness

Phase 1- Assessment and Analysis

The first step in developing this strategic plan was to complete an assessment and analysis of the current conditions of poverty in Orange County, including our recently completed 2021 Community Needs Assessment, a Strength, Weakness, Opportunity, Threat (SWOT) analysis, establishing a local theory of change, and utilizing the Results Oriented Management and Accountability (ROMA) cycle to track our progress in achieving our goals. This phase is ultimately focused on a review of existing data and best practices that support the foundation for the goals identified during this five-year period.

In 2018, CAP OC took the first step of a new strategic planning process by starting to identify the agency's goals and objectives reflecting the vision of our new President and CEO, Gregory C. Scott. In parallel, CAP OC implemented an agency-wide rebranding process that ultimately resulted in the renewal of our Vision and Mission statements and a complete transformation of the agency's marketing and branding materials. This allowed us to reintroduce CAP OC to the wider community with our new branded identity.

In 2021, our agency adopted our first ever Local Theory of Change (TOC) to understand how the agency can better empower the communities we serve and develop more effective strategies for ending poverty in Orange County. This process engaged CAP OC staff, Agency senior management team, and Agency Board Members resulting in nine (9) strategies identified as the means to move our participants out of poverty:

- Alleviate Hunger
- Promote Financial Stability
- Prevent Homelessness
- Pursue Civic and Community Engagement
- Establish Economic Stability
- Provide Education Opportunities and Youth Empowerment
- Support Individual and Community Resilience
- Promote Racial Equity and Social and Environmental Justice
- Create Workforce and Development Opportunities

The result was a visual representation of how the agency makes connections between the different identified needs of the communities we serve and identifies the strategies needed to move our participants out of poverty.

During this time period, our agency also conducted an external assessment to understand the direct needs of the community in our 2021 Community Needs Assessment (CNA). The ultimate aim of this needs assessment was to provide our agency with a clear outlook on current immediate and long-term needs of OC's low-income communities. We actively engaged community residents through online surveys, virtual community meetings, and social media.

These activities were conducted during the COVID-19 pandemic and demonstrated our agency's ability to pivot from traditional outreach strategies to outreach activities and events on virtual platforms. The result was a comprehensive needs assessment to be used as guidance in addressing the most pressing needs affecting Orange County and in the development of this strategic plan.

Phase 2- Strategic Planning Sessions

The development of this 2022-2027 Strategic Plan included a number of strategic planning sessions that took place among staff, department managers and directors, and our Board of Directors. These sessions resulted in reviewing what was achieved in the previous 2017-2022 Strategic Plan and the goals that could be achieved within this next five-year period. This crucial step required engagement across all levels of the organization and was key in establishing the strategic drivers and goals identified in this strategic plan.

Integral to these conversations was a focus on the issue of equity and how the agency can commit to advancing diversity, equity, and inclusion in the work we do. CAP OC's commitment to a diverse, equitable and inclusive environment means engaging staff and community members with education, training, open dialogues, and investing in policies and practices to "walk the walk." This new equity lens also means implementing equitable policies and practices in our organization, so that increased capacity exists to address pressing issues in the communities we serve. This new equity perspective and our Whole Family Approach for moving individuals and families out of poverty are central themes that drive our new strategic drivers and goals.

Phase 3- Documenting the Plan

Lastly, the culmination of this strategic planning process is documenting the development of this 2022-2027 Strategic Plan. Information gathered from the strategic planning sessions were considered and documented for guiding and assessing our work for the next five years. This plan was reviewed by agency directors, executive leadership, and presented for approval to the CAP OC Board of Directors in March 2022.

As a working document, the 2022-2027 Strategic Plan will require strong commitment by our agency to act on proposed goals, monitor the execution of said goals, and evaluate the agency's impact over time. This document sets out the process for identifying our implementation strategies and how we intend to assess our progress during this five-year period. This new strategic plan embarks upon a new era equipped with new tools that help shape our important work for future years to come. This plan provides a framework for making agency-level decisions, setting priorities, and most effectively allocates resources to best work toward our agency's goals. CAP OC remains committed to eliminating poverty, and as such, has invested resources in ensuring that we generate strategic solutions in moving individuals and families out of poverty and empowering our communities.

This is where poverty ends.

I. ABOUT US

A. INTRODUCTION

Since 1965, CAP OC has worked tirelessly to address the root causes of poverty and advocate for change through systemic reforms, social justice, and racial equity. We live and work in the neighborhoods we so passionately serve—coming together from all backgrounds and experiences to stabilize, sustain and empower individuals and families so they may build stronger communities. The promise of Community Action Agencies is to change people’s lives, embodying the spirit of hope, and improving communities to make America a better place to live. The daunting challenges brought on by the COVID-19 pandemic sparked CAP OC into designing innovative ways for us to empower communities. We are in the process of integrating a Whole Family Approach, transforming from single-issue solutions to comprehensive, multigenerational services agency aimed at giving our participants the tools to change themselves and their community.



This document outlines the issues that our agency currently faces as well as our plan to address the needs of our participants over the next five years. A major influence on this Strategic Plan has been the agency’s recently completed 2021 Community Needs Assessment (CNA). The findings presented in the CNA provides an overview of the challenges faced by low-income communities, identifies unmet needs, and provides direction as to the potential programs and strategies the agency can undertake in the future.

As in the previous five-year Strategic Plan, this document reflects the efforts of our agency in formulating our goals for organizational implementation. It also weighs impact strategies for empowering and transforming the communities we serve. The information listed in this plan offers a deeper understanding of our new approaches. This involves taking a different approach of how we look at our system of equity and a new Whole Family Approach in the work we do.

B. ORGANIZATIONAL STANDARDS

The CSBG Organizational Standards are a comprehensive set of standards developed with input from the entire CSBG Network. As a recipient of CSBG funding, CAP OC is committed to ensuring that we are held to these standards and assessed on an annual basis.

The following Organizational Standards are assessed annually that relate to the strategic planning process that include annual evaluations:

:

- Standard 4.4: The governing board receives an annual update on the success of specific strategies included in the Community Action plan.
- Standard 6.1: The organization has an agency-wide strategic plan in place that has been approved by the governing board within the past 5 years.
- Standard 6.2 – The approved strategic plan addresses reduction of poverty, revitalization of low-income communities, and/or empowerment of people with low incomes to become more self-sufficient.
- Standard 6.3 - The goals approved strategic plan contains family, agency, and/or community.
- Standard 6.4 – Customer satisfaction data and customer input, collected as part of the community assessment, is included in the strategic planning process.
- Standard 6.5: The governing board has received an update(s) on progress meeting the goals of the strategic plan within the past 12 months.

The 2022-2027 Strategic Plan is comprised of six sections:

- About Us: In this section, information is presented to provide a general understanding of CAP OC, including current services and programs, and notes recent organizational accomplishments.
- Methods & Approach: This section outlines the methods and the approach to the strategic planning process through each phase of development.
- Landscape Analysis: In this section, the current reality for County of Orange residents is described as well as what issues CAP OC faces as an organization, including internal strengths and areas to improve, external opportunities and threats.
- Strategic Drivers and Goals: This section describes our goals that the organization embraces.
- Implementation Strategies: This section will focus on how we will implement strategies to be able to achieve our goals.
- Assessment and Evaluation: This section describes how the organization will measure and evaluate our progress toward reaching our set milestones.

THIS IS WHERE POVERTY ENDS



C. A REBRANDED CAP OC

In 2018, Gregory C. Scott took the reigns as President and CEO and under his leadership, CAP OC has increased the number of individuals served, expanded its programs and partnerships, and built an E.P.I.C. (Excellence, Proactiveness, Innovation and Collaboration) culture amongst its staff and is currently in the process of implementing a Whole Family Approach. A passionate visionary agent for change, Mr. Scott quickly understood upon his first week in office that the organization faced an identity problem.

Despite its reach into the county's most urgent social issues, the agency faced multiple challenges from a branding perspective. Each service operated under its separate identity and as one agency out of a network of over 1000 Community Action Agencies, CAP OC did not have a identity of distinction.

To address this issue, in mid-2019 the agency embarked on a process to identify a vendor that would have the expertise of marketing and branding from the agency's perspective. The agency interviewed three different marketing companies with the intent to rebrand and refresh the organization's identity and website. Reveille, a local company, was ultimately selected for its successful history of helping 'wake-up' brands. After an extensive interview, they restated the agency's needs and goals as agreed upon.

The vendor updated the agency's logo to fall in line with the new language, look and feel of the agency's new brand. The 'huggy heart' logo, which is an identifying symbol for many Community Action Agencies through the network, was modernized to keep it in line with the fonts and lines of the new brand.

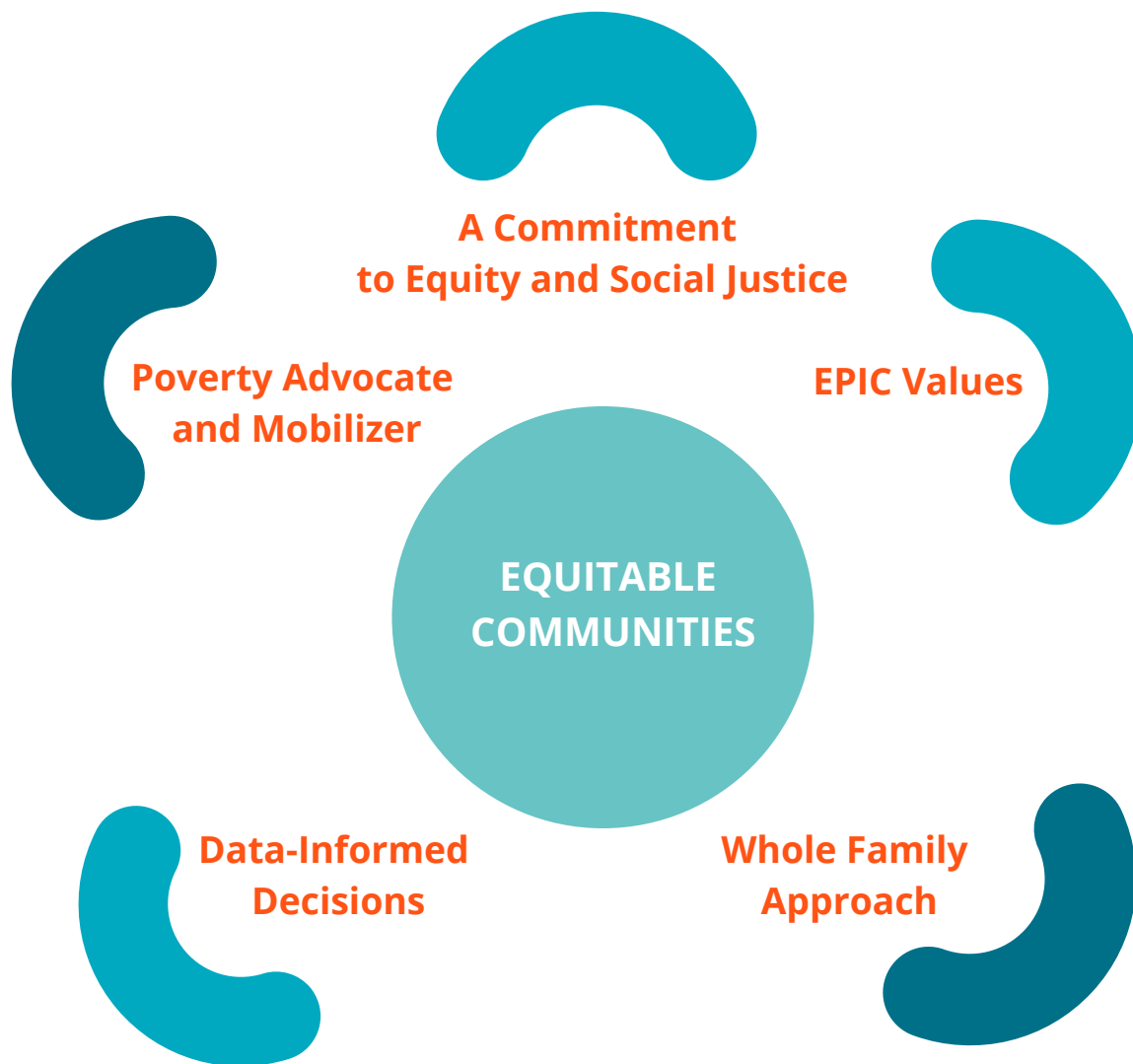
The OC Food Bank's logo was revised and brought in alignment with the core organizational branding. The Weatherization and Family Resource Centers were given sub-logos, which aligned with the new brand.

This process helped CAP OC reintroduce itself to the community as a unified and innovative agency that provides an array of services to eliminate poverty in Orange County, stabilizing individual and families, sustaining their progress and empowering communities.

D. THE CAP OC EQUITY LEVERS

The CAP OC Equity Levers focus on driving change within and outside of CAP OC to create more equitable opportunities and close disparities wherever they may exist. Access to a prosperous future remains out of reach for too many individuals and families. It is our belief that we must understand and address the underlying social determinants of poverty that hinder progress.

We can create more inclusive communities and equitable outcomes when we challenge practices based on racism, sexism, and other forms of discrimination. We must be change agents in the fight for equity and strive to build communities where everyone has access to resources, opportunities, and on-going support to thrive.



We see our equity levers as ways that will transform the way we work that impacts our service delivery and programmatic outcomes. A successful implementation of this plan will depend on understanding how these levers will be used to bring about the desired outcomes and achievement of our milestones during this five-year period. Our levers include the following:

1. **A Commitment to Equity and Social Justice**- Our work to advance diversity, equity, and inclusion is a central tenet to build and empower equitable communities.
2. **EPIC Values**- Our guiding principles that shape and influence the way we fulfill our mission. We embody Excellence, Proactiveness, Innovation, and Collaboration as we make our decisions and carry out our actions every day.
3. **Whole Family Approach**- Our approach to ending poverty centers on empowering individuals and families through early learning, adult education, family strengthening and career pathways and opportunities. Our family-centered coaches provide wraparound care including goal building and progress tracking to ensure the needs of individuals and families are met.
4. **Data-Informed Decisions**- The voices of our community matter. We actively listen to their concerns and needs to drive the right services for our participants success. CAP OC seeks to be a data-informed agency in 5 years and beyond.
5. **Poverty Advocate and Mobilizer**- We become leaders in poverty-related issues in Orange County by forming strategic partnerships and serving as a local leader on local and regional issues.





i. A Commitment to Equity and Social Justice

CAP OC is committed to advancing diversity, equity, and inclusion as a central tenet in the work we do in the coming years. This equity lever reaffirms our commitment to building and empowering equitable communities by addressing the root causes of poverty through systemic reforms, social and environmental justice, and racial equity.

We acknowledge the pervasive and lasting impact of systematic, institutional, and structural racism that continues to influence every facet of American life. CAP OC recognizes that improving the quality of life for everyone in the community means that the agency needs to focus on removing barriers to historically marginalized communities. This includes addressing policies, practices, and belief systems that have historically served the haves, while disenfranchising the have nots. It is only when we are intentional in these efforts that we can begin to remove the barriers to community members most affected by them and allow everyone to thrive.

Findings from our recently completed 2021 Community Needs Assessment reveal the effects of racial discrimination on Orange County residents. The 19-question survey assessed the overall needs of OC residents from the impacts of COVID-19, to access to food and healthcare, and also assessing whether someone has experienced discrimination. Our survey results revealed that almost half of those surveyed felt that they faced discrimination while looking for a job and 64% of respondents expressed that they faced discrimination when looking for housing options. These numbers are striking especially given that 70% of respondents identified with a race other than white, with Hispanic, Latino, or Spanish making up the largest group at 43%. This data is crucial as we begin to assess the impacts of systemic racism in the workplace, education, housing, and in other sectors of society.

There is wide body of academic research that also assesses the impact of systemic racism on communities of color. According to data from the National Equity Atlas, the Los Angeles-Long Beach-Santa Ana Region (which includes areas in Orange County) has a Racial Equity Index ranking of 54, ranking 109th out of 150 regions represented in the data pool.

The index score of 54, which captures data surrounding overall prosperity and racial gaps in nine different indicators (including median wages, unemployment, poverty, educational attainment, disconnected youth, school poverty, air pollution exposure, commute time, and rent burden), marks a slight decrease from a 2010 score of 55 and an increase from the score of 47 that the region received in 2000. Orange County is home to a diverse range of communities in Southern California, and in the United States. It is important to examine any variances in the quality of life enjoyed by different groups within Orange County, especially as they disproportionately affect communities of color.

To address these disparities, in 2021 CAP OC formed a Diversity, Equity, and Inclusion (DEI) Committee focused on advancing these efforts internally and externally. This interdepartmental committee has an intentional focus on equity which is integral to the organization’s mission and vision. CAP OC’s commitment to a diverse, equitable and inclusive environment means engaging in education, training, open dialogues, and investing in policies and practices to “walk the walk.”

This new focus on equity also means implementing equitable policies and practices in our organization, so that increased capacity exists to address pressing issues in the communities we serve. An equity perspective and our whole family approach are central themes that drive our new goals for this 2022-2027 strategic plan. As a working document, the 2022-2027 Strategic Plan will ensure that equity is remains a central focus of our agency’s proposed goals and evaluate the agency’s progress over time.



ii. EPIC Values

CAP OC created EPIC in 2018 as a guiding principle to help shape and influence the way we fulfill our mission. EPIC values strengthen collaborations amongst CAP OC departments and staff to help empower one another to better serve our community. These EPIC values guide us as we make our decisions and carry out our actions every day.

Excellence - We expect and deliver only the best for our Participants, Team Members, Partners and Stakeholders by assessing and enhancing our programs, driving transformational changes, and staying connected to the voice of communities. We set the standards.

Proactiveness - We strive to eradicate poverty with meaningful passion by taking initiative, serving with dignity and respect. We lead, execute and educate until the needs of our underserved community no longer exists.

Innovation - We challenge prevailing assumptions about issues of poverty by leading and transforming our industry, sharing ideas and increasing our educational capacity.

Collaboration - We go above and beyond to ensure we actively encourage each other, our Partners and our Participants by serving as brand ambassadors, maintaining a professional and safe work environment, cultivating mutual success and upholding the EPIC culture.





iii. Whole Family Approach

Community Action believes in the promise that every family should have access to the opportunity for success. Strong families are the foundation for healthier communities. Families can play a key role in ending poverty in Orange County. Our Whole Family Approach is a framework aimed at empowering individuals, youth, and families with the tools they need allowing them to set their own goals and achieve long-term change and stability. By addressing the root causes that perpetuate poverty such as poor education and employment readiness, we are able to empower people to find their way out of poverty and into vibrant communities.

In 2020, our agency began to look at our programs and to integrate them to include a family-led strategy, the Whole Family Approach model. The Whole Family Approach provides adults and children with the tools they need to set goals, create plans and achieve those goals together. This approach has proven effective in improving the family's economic and social wellbeing, carrying with it the potential to break the cycle of intergenerational poverty.

We will continue to integrate the Whole Family Approach in addressing long-term generational poverty by utilizing all the resources CAP OC has to offer to empower children, youth, adults, and seniors with the tools they need to reach their goals. Each family group is different, has unique needs and will need a variety of services.

- Comprehensive services
- Integrated strategies
- Client-empowered
- Community-centered

CAP OC has a roadmap for integrating the Whole Family Approach which includes training, discussion, and committee-focused work that will ultimately guide the work we do for the next five years and beyond. It is also major focus of our agency's new goals and milestones included in this five-year strategic plan.





iv. Data-Informed Decisions

Data-Informed Decisions as an Equity Lever demonstrates how CAP OC is evolving to become a data driven agency to create more equitable opportunities and to close disparities where they exist for the communities we serve. Our use of data that will move us towards achievement of the 20222 – 2027 Strategic Plan Goals are leveraged from three major sources: Published secondary data; CAP OC primary outreach data collection; and our own CSBG required data collection related to demographics, service counts, assessments, and outcomes. Since the approval of our last Strategic Plan 2017 – 2022, CAP OC has conducted Community Needs Assessments in 2017, 2019, and 2021.

A major difference in these Community Needs Assessments has been the availability of ARC/GIS based data in 2021 that shows disparities in the disadvantaged communities we serve as mapped in the Social Equity Index, the Health Equity Improvement Zones Index, and other mapping tools. It is our ability to address these disparities over the next 5 years that sets in motion our resolve from our Diversity, Equity, and Inclusion statement for what we intend to accomplish both internally at CAP OC and in Orange County. In the last 5 years we have learned the power of data and its implications in the delivery of services to the community, identifying gaps in services, and understanding the demographic make-up of the communities we serve.

When the federal Office of Community Services (OCS) in the Health and Human Services Department (HHS) mandated in 2016 that all CAP agencies change their data collection methods to better track demographics, service counts, and outcomes, it required major changes at CAP OC for these ROMA Next Generation requirements. Due to higher level of expectations on data collection, CAP OC had to set aside Access and Excel databases that were being used to collect data at our Family Resource Centers, and to implement an SQL database for participant intake and data collection. State of California Community Service Department (CSD) expectations as to what was required for data collection for Utility Assistance and Weatherization was implemented even earlier in CAP OC's Energy and Environment Department.

CAP OC as multi-service anti-poverty agency has evolved over the last 5 years, and additional changes would be expected to implement the Strategic Goals set out in this plan. Our data needs were different in 2017 when we went through a competitive RFP process for a CSBG optimized software database to comply with ROMA Next-Gen requirements. During the development of this Strategic Plan, CAP OC has been looking towards the data requirements for the next five years. CAP OC intends to strengthen our data management tracking tools and will focus in becoming a data-informed organization.





v. Poverty Advocate and Mobilizer

CAP OC is committed to ending poverty in Orange County.

For more than 50 years, our agency has been a trusted resource for helping people find their way out of poverty. As an anti-poverty leader in Orange County, we seek to expand and strengthen our strategic partnerships to address systemic inequalities and work together on local and regional poverty-related issues. This is why becoming a poverty advocate and mobilizer is absolutely crucial in the work we do in the next five years.

In 2021, CAP OC demonstrated their dedication to ending poverty by providing all employees with a living wage because to be an anti-poverty leader you must “walk the talk”. A living wage ensures that while our employees are helping the community thrive, they are not struggling to make ends meet especially as we face rising rents and inflation.

This new change has been fiercely advocated by our President and CEO, Mr. Gregory C. Scott. Mr. Scott has said, “We must work to ensure that our own internal community of staff members are provided living wages in order to deliver on our promises in the most effective and impactful way. Thus, we made the shift to ensure all of our employees were paid a living wage. I did not hesitate. It felt right and in line with our mission.”

CAP OC will continue to be a champion for living wages in Orange County through advocacy, collaboration, and strategic partnerships.

Additionally, to understand how poverty is impacting communities in Orange County, CAP OC would like to hold a Poverty Summit. This summit will allow us to connect to local community-based organizations, the public and private sector, and community members to address the most pressing needs affecting the Orange County community. A convening like this will allow us to see how we can collaborate with various stakeholders in developing solutions and pursuing common goals.



An example of how CAP OC is actively working with stakeholder groups to achieve common goals and solutions is the formation of the OC Hunger Alliance. In late 2017, three of Orange County's largest anti-hunger organizations - CAP OC's OC Food Bank, Second Harvest Food Bank of Orange County, and Abound Food Care - formed the OC Hunger Alliance to strategically combat hunger in Orange County together. These three partners committed to shared philosophies, resources, and strategies.

This collaboration set the scene for a coordinated response to the COVID-19 pandemic as food assistance skyrocketed and led to securing \$9 million from the County of Orange for the purchase of emergency food.

Furthermore, the OC Hunger Alliance is leading efforts to increase participation in the Supplemental Nutrition Assistance Program (SNAP) in Orange County. Orange County has one of the lowest enrollment rates in comparison to other counties in Southern California. SNAP is America's largest anti-hunger program and utilizing it is as well as county-wide collaborative efforts are important to move the needle on hunger.



E. BUILDING BLOCKS

Building blocks are needed to sustain agency operations and manage its growth. These blocks have been identified as being integral to the agency's day-to-day operations, improving our current infrastructure, and looking for investments in how we improve efficiencies across the agency. We are committed to making investments to our programmatic and operational initiatives.



Building Succession Plans and Ensuring Business Continuity: Being prepared for change starts from within. Our strategy for replacement planning or passing on leadership roles begins with identifying and developing new, potential leaders who can move into leadership roles when they become vacant. A CAP OC Business Continuity Plan will also equip us with the ability to be prepared for any given disaster and how to mobilize emergency services and mitigate any service disruptions.

Environmental, Social and Governance (ESG): Think globally act locally. We are invested into building high standards for maximum results while keeping our business carbon footprint small. This also means increasing transparency of our organizational practices and work of the CAP OC Board of Directors while providing a platform for our low-income stakeholders to communicate how we can continuously do better so we can be better.

Improving Agency Operations & Board Engagement: We're stacking up while engaging up. Our strategy has us working long term towards future certification in the National Community Action Partnership's (NCAP) Pathway's to Excellence national improvement and certification program and plans for increasing Board of Directors active engagement in areas of interest, training, and greater understanding of Community Action and our Theory of Change.

Interdepartmental Coordination: Seamless access to coordinated care. We are working to improve service coordination that increases access for participants to achieving greater success while also improving collaboration between agency service departments and a staff understanding of the Whole Family Approach.

Employee Training & Professional Development: Creating promotable employees and strengthening internal talent. We believe that our growth strategy should include plans for helping employees put their career plan into effect. Our plan is to support staff to develop and reach career plan milestones and make use of ongoing learning opportunities as part of annual professional development goals

Technology and System Upgrade and Information Sharing: Improvements and new technology platforms. The pandemic has given rise to new and more efficient ways of doing business. We want to continue this momentum by investing into an upgraded agency client management system that helps case management and easy use of mobile platforms for intake. We also want to look into necessary connections between existing systems to better document a whole picture of each family's situation that enables the right set of goals and services for their success. We are implementing a new centralized phone system in addition to training all agency staff on the Whole Family Approach working with participants and using success coaching throughout the agency.





F. HOW THE COVID-19 PANDEMIC IMPACTED AGENCY SUSTAINABILITY AND PREPAREDNESS

CAP OC remains a critical resource for underserved communities as we deliver key services and promote policies that support the well-being and economic resilience of low-income communities. Our role has become even more critical in the current pandemic as the spread of the coronavirus and the many efforts to slow it are impacting communities. There are a number of lessons learned during the pandemic that the agency can continue to apply within the next five years. The COVID-19 pandemic placed significant strains on our internal and external work environments. We quickly assembled a virtual cohort of community and low-income stakeholders to learn, understand and discuss unprecedented demands of basic needs. We examined how best to provide services safely during a pandemic and continued to monitor updates from federal and state guidance.

In June 2020, we launched our COVID-19 Recovery and Resiliency Plan. The Plan provided guidance to all CAP OC staff, volunteers and partners of its operating sites. Many staff transitioned to telecommuting, some staff were reassigned to other service departments with high service demands and all onsite essential workers were instructed on safety procedures for regulated contact with the public.

The waves of pandemic activities involved increasing our services to address the immediate needs of those simply trying to survive, accommodating thousands more people at our Food Bank, Diaper Bank and Family Resource Centers. Our programs that could be conducted remotely were transitioned to an online format. Our Low Income Home Energy Assistance Program (LIHEAP) for Utility Assistance pivoted from primarily receiving paper-based intake to transitioning to online intake. Our Economic Empowerment services leveraged the use of Facebook Live to create a 30-minute program every day in English and Spanish. We continued to case manage our families participating in the Healthy Relationships program. We worked with our clients to understand the Zoom platform, and we even saw participation increase during the pandemic. We remained agile as we learned new ways of connecting resources and services to participants.





Our OC Food Bank was deemed to be an essential service. We found ourselves developing new policies and procedures for the safe packing of our 25,000 Senior Food Boxes, reassigning staff to help with ramping up to provide emergency food, in addition to maintaining our standard distribution of senior food boxes. In the midst of these activities, we lost many of our individual and corporate volunteers, and thus had to rebuild our corps of volunteers. Critical to this effort was the software platform, Volunteer Hub, that provided an opportunity for us to market and manage our one time and long-term volunteers.

As we continue providing services during a pandemic, we must continue to pivot by reflecting upon lessons learned and best practices to help us plan out future service delivery needs and adaptations. This includes an examination of service operations, disaster preparedness, succession planning as part of a CAP OC Business Continuity Plan. The plan will help to ensure we remain in a state of “readiness” that continues to equip staff with the ability to mitigate service disruptions. We also phased staff back incrementally into onsite locations while other staff continued working remote. As assessment of physical workspace, onsite staff, remote staff will be compared to the needs of service delivery to determine spacing needs and working environments that best support efficient and sustainable operations.

In addition to service delivery needs assessments, agency operations are examining practices inherent to working through a pandemic to determine new policies and methods for conducting business such in the case with an improved case management system, time tracking and human resources system. We have learned how to provide services remotely while remaining engaged with our participants. We’ve educated our participants on new and faster methods of receiving services by connecting them online. Together we forge ahead in our ability to prosper amidst a continued pandemic.

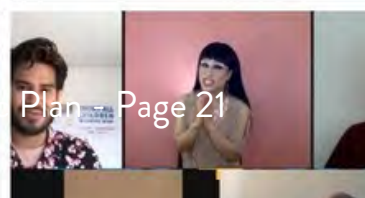
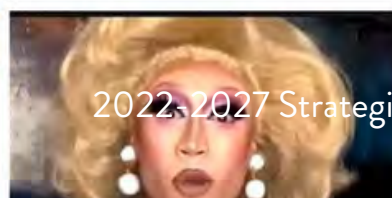
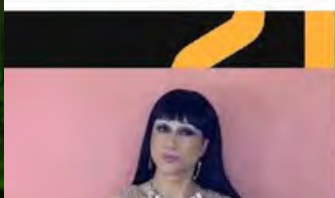
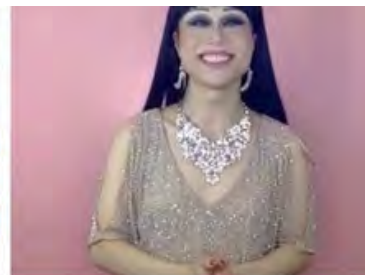
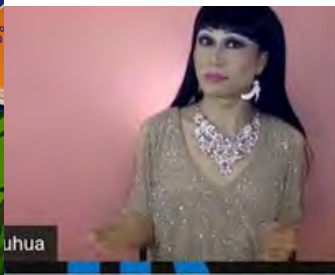


G. HOW THE 2020 CENSUS STRENGTHENED OUR COMMUNITY ENGAGEMENT APPROACH

When the COVID-19 pandemic hit, we immediately felt its impact and had to pivot our outreach activities to ensure that we continued to serve as many individuals as possible. Having received significant grant funding for Census 2020 outreach and to ensure Hard-To-Count (HTC) populations in Orange County were counted, our outreach strategies required much innovation, creativity, and adaptation. The lessons learned in 2020 are to be leveraged in our new strategic plan.



CAP OC's original community outreach tactics consisted of attending community events (small and large), presentations, disseminating Census branded collateral and marketing material, and leveraging social media (Facebook, Instagram, and Twitter) and local media (such as radio, print and online newspapers). As a result of the COVID-19 pandemic, most tactics became virtual for the safety and health of the staff and community. In-person strategies turned into phone and text banking, live streaming virtual events on Facebook and YouTube (using StreamYard, an online studio), a bigger push on social media, utilizing local media, disseminating Census branded collateral and marketing material through essential services/programs, and Census Car Caravans.



The various strategies used during the Census 2020 demonstrated new and underutilized approaches that our agency can take to reach underserved communities, community partners and other stakeholder groups. As part of this process, we have gained a wider understanding on how to more effectively engage our communities, including, but not limited to:

Collaboration - Success relies on your collaborative space. It is important to know what organizations are operating within any given geographical area or what partnering agencies you can leverage.

Leveraging Resources- Resources within CAP OC are not unlimited. Inter-departmental coordination is important and underway; however, more is necessary to maximize our existing reach. In addition, consider partnering with the many nonprofit organizations that utilize our services and easily extend your outreach in that avenue.

Be Creative and Be Adaptable - This cannot be overstated, especially when challenges arise, use your team's creativity and adaptability to the max. An optimal strategy to carry forward utilizes both traditional and virtual outreach. Social media and virtual outreach will continue to grow, but we cannot forget that many underserved communities most likely do not have continual access to these avenues.

The Local Level is Key - It is important to remember who the trusted messengers are in the community – one could be a parent, a family member, a friend, a neighbor, the local supermarket or even a child. We rely on these trusted messengers to encourage and motivate those around them to be engaged. Our outreach must reflect these streams of communication and we must reach them.

¡CARAVANA DEL CENSO DE SANTA ANA!

Viernes 29 de mayo



GET MOVING FOR THE CENSUS!





H. THE ESTABLISHMENT OF A NEW WORKFORCE DEVELOPMENT PROGRAM

In 2020, CAP OC received \$3.8 million in federal CARES funding to help our community during the pandemic allowing us to create new programs such as our new Workforce Development Program. This new program is highly structured and follows a coaching model to empower transitional aged youths to build resiliency, self-efficacy, and employment skills to excel in the workplace. It had been decades since CAP OC had provided any formal workplace development program.

The program also seeks to be a connection point between other organizations within Orange County, providing resources for the best outcomes for Orange County residents. Workshops are provided to participants of the program to cultivate hard/soft skills, and social awareness. Throughout 2021, the CAP OC Workforce Development team has conducted sessions on stress management in the workplace, intersectionality/identity building, EQ (communication, conflicting resolution, and active listening), as well as traditional hard skills development sessions including: interview skills, resume building, and job search.

Staff's goal towards developing and implementing this program includes focusing on blending both aspects of coaching and case management. Case management components include: monthly meetings, establishing short-term/long-term goals, referrals to community resources, and job search services. Coaching aspects include reframing personal narratives, collaborating with individuals and/or in group settings to determine next steps, while conducting workshops through set curriculum and providing feedback.

CAP OC's Workforce Development program's focus is to become a resource hub for individuals to have easy access of resources in: mental health, housing, utilities, food, work attire, childcare, transportation, legal assistance, pathways to higher education, etc. Our five-year strategy will look to elevate individuals through workforce advancement, opportunities for a livable wage, and holistic service delivery establishing healthy living.



II. METHODS AND APPROACH

To develop this strategic plan, a three-phased approach was used which included: Phase 1- Assessment and Analysis; Phase 2- Strategic Planning Sessions; Phase 3- Documenting the Plan. These phases occurred primarily between 2020-2021.

Phase 1- Assessment and Analysis

Phase 1 involved a review of data for strategic planning purposes. Information such as a SWOT analysis were considered. This was combined with data and findings coming from our recently completed 2021 Community Needs Assessment, implementation of our Theory of Change.

Phase 1

Phase 2- Strategic Planning Sessions

Between 2020-2021, a number of strategic planning sessions took place among staff, department managers and directors, and our Board of Directors. Recently identified EPIC goals were discussed, in addition to milestones and strategies for future implementation of these goals were identified.

Phase 2

Phase 3- Documenting the Plan

Information gathering from the strategic planning sessions were considered and documented in the strategic planning document. The draft plan was reviewed by agency directors, executive leadership, and finally approved by the Board of Directors

Phase 3

In December 2016, CAP OC adopted its first ever long-range Strategic Plan for the period of 2017 – 2022. It reflected the Community Needs Assessment completed in June 2015, and an annual assessment of its existing programs. Previously, CAP OC considered its adopted Community Action Plan, prepared every other year as a three-year strategic plan. Two major themes stood out for improvement in 2016: increasing the use of technology and establishing a coordinated care model.

As the new President and CEO, Gregory C. Scott determined after his first six months that a new vision and a long-range ten-year strategic plan was needed that would take into account the 2017 Community Needs Assessment. One that could serve as on-going guideposts for what needed to be accomplished.

From September 2018 to December 2018, CAP OC embarked on a comprehensive strategic planning process to be able to solicit input from staff on a 10-year strategic vision plan. The first strategic planning session in September 2018 included all agency Directors and Managers agency-wide that addressed the following:

- Economic Empowerment
- Environmental Justice
- Food Insecurity
- Homelessness and Affordable Housing
- Pathways to Prosperity
- Social Justice

This was followed by individual department meetings facilitated by the Planning Department. Over the next two years, this draft plan evolved with many meetings of CAP OC senior staff, departmental meetings, and discussions with Board leadership resulting in many revisions, and changes in approach.

Major themes that emerged from these strategic planning sessions and a ROMA approach was a need for the agency to be more client-driven, integration of services and technology, opportunities for staff development, investments in communication technology, and the need for services to be more integrated across the agency. Thus, by fall 2019, the Strategic Plan draft reflected objectives that addressed the following major goals:

Goal #1– Environmental Justice and Health Equity

Goal #2– Food Insecurity and Improved Health

Goal #3 – Economic & Financial Empowerment

Goal #4 – Strengthen Families and Communities

Goal #5– Safe and Affordable Housing and Ending Homelessness

Goal #6– Organizational Capacity

As work was concluding on the rebranding of CAP OC, the world was dealing with the first pandemic since 1918 resulting in a lockdown of the United States and California economy causing major layoffs and disruption in daily activities. CAP OC moved its non-food bank work force to a remote status, while the Food Bank was overwhelmed with the immediate need to provide emergency food and rebuild its volunteer base. This resulted in major changes in how CAP OC provided services, and created additional needs of those being served by CAP OC. The agency prepared an amendment to its existing Community Needs Assessment that reflected the impact of the COVID-19 pandemic and received \$3.8 million in new CSBG funds to help Orange County during the height of the pandemic, and to better position those we serve to live with temporary and permanent impacts of COVID-19 and its various mutations.

The new Strategic Plan process had envisioned the development and insertion of CAP OC's first-ever Theory of Change as a graphic logic model in how CAP OC works to create pathways to prosperity. Specifically, CAP OC's Theory of Change was to be our visual articulation of our beliefs and strategies for ending poverty in our communities we serve. Thus, in spring 2020, CAP OC retained consultants to work with the agency in developing a Theory of Change that incorporated a Whole Family Approach to bring those we served out of poverty in two generations. As we began this process involving the entire agency, new vision and mission statements were created and reviewed with the agency Board of Directors and integrated into the Theory of Change.

The Whole Family Approach was to be our underlying approach in addressing long-term generational poverty by utilizing all the resources of CAP OC through our Success Coaches to empower adults, seniors, youth, and children with the tools they need to make plans and reach goals.

With the completion of the Theory of Change in spring 2021, the Planning Department resumed work on the Strategic Plan. However, a decision was made in fall 2021, that the plan should be for a five-year period (2022 – 2027), since the pandemic had made the world much more unpredictable. Of significant importance to the development of the Strategic Plan was the completion of the 2021 Community Needs Assessment that included listening sessions with those we serve along with the Agency Board and staff. The Board approved the Community Needs Assessment in June 2021.

Agency staff brought the draft 2022 - 2027 Strategic Plan to the Agency Board Programs and Planning Committee several times during fall 2021 for feedback on the goals that were under development. Senior management team also reviewed various drafts of the strategic plan resulting in what is now reflected in this plan, including measurable milestones. A draft of the entire Strategic Plan was considered by the Programs and Planning Committee at a special December 2021 meeting along with the annual assessment of existing programs. A final version of the Strategic Plan 2022-2027 was presented to the Programs and Planning Committee and the Agency's Board of Directors for final review and approval in January 2022.

An almost final draft of the Strategic Plan was shared with the CAP OC management team on March 1, 2022 for additional input which is reflected in the version that was brought to the Board of Directors in March 2022 for review and approval. Prior to that meeting, the Programs and Planning Board Committee had the opportunity to review and discuss the revised goals and milestones.



III. LANDSCAPE ANALYSIS

In this section, we provide a situational analysis of Orange County including a description of the County and its residents, as well as the issues CAP OC is facing as an organization, including internal strengths and areas to improve, external opportunities and threats. CAP OC has and will continue to identify opportunities to expand its services to reach more communities in Orange County. This situational analysis includes a review of these communities' various needs which is reflected in our recently completed 2021 Community Needs Assessment.

Orange County is located in the Los Angeles Metropolitan in Southern California featuring over 790 square miles of land and 157 square miles of coastline. This makes Orange County one of the smaller counties in Southern California by area as it comprises just 0.5% of California's land area. Orange County is bordered by Los Angeles to the north and San Diego County to the southeast, including some of the most beautiful beaches in California.

Demographics

Although Orange County is one of the smaller counties within California by area, it is densely populated with an estimated population of 3,175,130 according to the most recent US Census Data. This percent population change from 2010 to 2021 of 6.06% places Orange County as the fourth largest county in California.

Orange County is densely populated with over 4,000 people per square mile compared to 2,527 people per square mile seen in Los Angeles County, making it one of the most densely populated counties in Southern California.

Orange County is equally populated by men (49.3%) and women (50.7%). However, poverty is not distributed equally among men and women with the female poverty rate at 11.78% compared to a 9.92% poverty rate seen among the male population. This follows a trend that is not only observed among CAP OC's service demographics, but also seen throughout the state and nation's female poverty rates that remain consistently higher than the male poverty rate.

Orange County is racially and ethnically diverse with the largest ethnic groups being White (40%), Latino (35%), and Asian (22%). Orange County is populated by 2.1% African American, 1% American Indian, and 0.4% Native Hawaiian and other Pacific Islander. The Asian population has seen a dramatic 31.1% growth within Orange County. The diversity of Orange County can be highlighted through the 46.6% of households in Orange County who speak a non-English language at home.

Orange County has a median household income of \$98,086 compared to the California median household income of \$82,565. However, when taking the cost of living into account, 7.9% of Orange County families continue to live below the federal poverty level. The highest concentration of poverty is seen in Anaheim, Garden Grove, Santa Ana, Westminster, and Midway City which is highly populated by Hispanics. Poverty is disproportionately affects the Latino and female populations.





A. 2021 COMMUNITY NEEDS ASSESSMENT

Every two years, CAP OC establishes a two-year Community Action Plan (CAP) that identifies the goals for the agency during that time frame and provides a roadmap for the next two years. The CAP aims to evaluate the needs of the community in order to develop a plan to provide individuals and families in poverty the services that they need. Along with the CAP, the agency also carries out a thorough Community Needs Assessment (CNA) to recognize the causes and conditions of poverty in order to identify strategies that mitigate issues of poverty. Our 2021 Community Needs Assessment reaffirms our commitment to our mission. It allows our agency to:

- Understand emerging and ongoing needs of low-income individuals and families
- Identify causes and conditions of poverty in our community
- Identify community assets and resources
- Educate community members and leaders about the needs identified
- Build strategic partnerships to address these emerging needs.

Findings

The 2021 CNA findings revealed the needs of the community as issues that needed to be addressed, also known as the issue domains. A domain is used by the national Community Action Network to evaluate the indicators of performance of individuals and their families. CAP OC used the issue domains found to determine which issues should be addressed within each domain. The issue domains identified the needs, its causes and conditions, and community resources and assets. These needs are then chosen based on the analysis of data resulting from various surveys, meetings, and databases that determine the six issue domains.



The 2021 CNA presents the issue domains through rankings based on its importance. Below is a list of the identified needs of the issue domains for further clarification on each section.



1) Health

- There is a lack of access to affordable health insurance and healthcare in the community, negatively affecting the physical and mental health of community members. (Community Level)
- Families and individuals struggle with access to nutritious food on a regular basis. (Family and Individual Level)



2) Housing

- Families and individuals struggle to access affordable housing due to high rent, mortgage, and utility bills. (Family, Individual, and Community Level)



3) Employment

- There is a lack of living wage jobs in the community. (Community Level)
- Families and individuals lack access to the job training and education they desire. (Family and Individual Level)
- There is a lack of accessible childcare resources in the community. (Community Level)



4) Finance

- Families and individuals struggle to save money for the future or pay debts. (Family and Individual Level)
- Families and individuals lack financial literacy knowledge. (Family and Individual Level)



5) Education:

- Families and individuals struggle to access resources to succeed in school and improve academic performance. (Family and Individual Level)
- There is a lack of community resources for Orange County students to succeed in educational opportunities beyond high school. (Community Level)



6) Community Involvement:

- Community members lack access to reliable high-speed internet connection. (Community Level)
- Families and individuals face barriers to accessing safe recreational and volunteer activities.(Family and Individual Level)

CAP OC understands that the process of identifying community needs so that we can match our strategies to address these needs, must be systematic and purposeful. It begins with understanding the community, by creating a community profile, and then moving through through the ROMA Cycle: -- analyzing what you know, -- establishing priorities -- making decisions regarding identifying strategies (advocacy, service, etc.), -- developing a comprehensive plan for operations that will lead to results -- implementing the plan and observing results. The Results Oriented Management and Accountability (ROMA) in this next strategic plan section shows how our agency utilizes this outcomes-based model as part of our community needs assessment and strategic planning process.



B. RESULTS ORIENTED MANAGEMENT AND ACCOUNTABILITY (ROMA)

Community Action Agencies like CAP OC embrace an outcomes-based model to undertake a number of ROMA actions that focus on results-oriented management and accountability (i.e., ROMA implementation). ROMA principles include:

- Assessing poverty needs and conditions within the community.
- Identifying specific improvements, or results, to be achieved among people with low incomes and communities in which they live.
- Organizing and implementing programs, services, and strategies within the agency and partnering organizations, to achieve anticipated results.

In 2020, CAP OC staff began ROMA training and education by enrolling in the ROMA Trainer Certification Program. Using ROMA techniques, CAP OC developed its Theory of Change and assumptions that play a vital part in guiding strategic priorities for the agency. Our ROMA practices aim to improve low-income individuals' and families' capacity for self-sufficiency.



C. DEVELOPING OUR LOCAL THEORY OF CHANGE

CAP OC's Local Theory of Change is our visual articulation of our beliefs and strategies for ending poverty in the communities we serve. The adoption of our Local Theory of Change utilized a participatory process intended to get feedback from CAP OC staff, the management team, and Board Members. The first step in creating the Theory of Change was to identify what our assumptions were about poverty, the causes and conditions at the local level, and where we fit in responding to these challenges. Then we considered the connections between identified needs, population served, outcomes that are possible given our services/programs and capacity.

One of the things our agency set out to do as part of this process was to begin to think about our own assumptions about poverty. Here is a list of those assumptions:

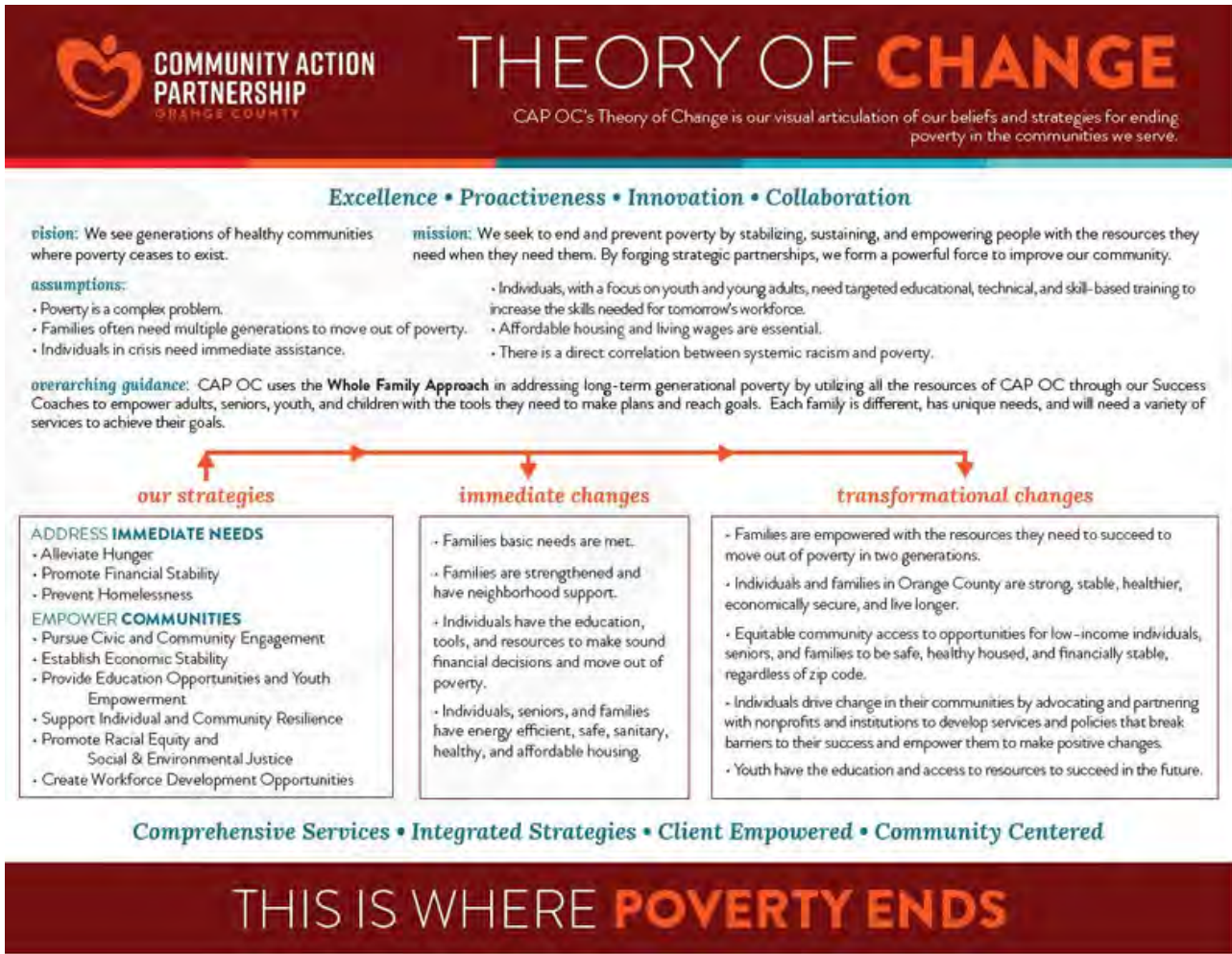
- Poverty is a complex problem.
- Families often need multiple generations to move out of poverty.
- Individuals in crisis need immediate assistance.
- Affordable housing and living wages are essential.
- Individuals, with a focus on youth and young adults, need targeted educational, technical, and skill-based training to increase the skills needed for tomorrow's workforce.
- There is a direct correlation between systemic racism and poverty.



After identifying our agency’s assumptions, we were able to identify the underlying conditions that need to exist for planned change to occur. Out of this process, nine (9) strategies were identified as the means to move our participants out of poverty:

- Alleviate Hunger
- Promote Financial Stability
- Prevent Homelessness
- Pursue Civic and Community Engagement
- Establish Economic Stability
- Provide Education Opportunities and Youth Empowerment
- Support Individual and Community Resilience
- Promote Racial Equity and Social and Environmental Justice
- Create Workforce and Development Opportunities

Please see appendices section of this plan to view the full Theory of Change visual graphic.



IV. STRATEGIC DRIVERS AND GOALS

Community Action Partnership of Orange County continues its mission to eradicate poverty. This five - year strategic plan includes four strategic drivers, Economic Mobility and Innovation, Family and Youth Empowerment, Health and Community Resilience, and Organizational Capacity and Brand Awareness. Each strategic driving element holds a group of five-year primary goals; designed to move efforts to successful completion.

Four Strategic Drivers:

1. **Economic Mobility and Innovation** includes programs and services in workforce development, financial security, entrepreneurship, and affordable housing as well as increasing assets and wealth.
2. **Family and Youth Empowerment** includes programs and services in civic engagement, leadership, and education to achieve individual goals. It involves ensuring racial equity and social justice.
3. **Health and Community Resilience** involves our work in ensuring food security, responding to immediate needs, providing healthier homes, and building strong communities.
4. **Organizational Capacity and Brand Awareness** ensures that CAP OC expands its branding, fundraising and its place in the community as the region's anti-poverty leader, while having a strong infrastructure, updated technology and data systems, and innovative capacity building with a social justice and equity lens.



Strategic Driver #1 - Economic Mobility and Innovation

Economic Mobility and Innovation includes programs and services in workforce development, financial security, entrepreneurship, and affordable housing as well as increasing assets and wealth.

STRATEGIC GOALS:

1. Develop and implement an entrepreneurial education program that reaches 250 participants.

Why – Today’s work standards and expectations are shifting to self-empowered income. Our focus on entrepreneurialism ensures we provide our participants with the relevant earning skills.

2. Place 100 individuals and/or families into affordable housing, including homeless individuals into permanent housing.

Why – Low-income housing is paramount. Homelessness has reached record highs; when families have the stability of a home, they are more likely to contribute to the economy successfully.

3. Expand financial programs resulting in savings resources of \$400 or more for 50% of the families who receive empowerment services.

Why – Statistics show that financial education and at least \$400 in emergency savings indicate that families are on the path to financial stability.

4. Develop a workforce and career development model that meets the market needs of high demand sectors by expanding our workforce development impact by 600 program graduates.

Why – Showing youth a school to career path and upskilling adults to transition to new jobs allows the community to be ready for the current and future employment markets.

Strategic Driver #2 - Family and Youth Empowerment

Family and Youth Empowerment includes programs and services in civic engagement, leadership, and education to achieve individual goals. It involves ensuring racial equity and social justice.

STRATEGIC GOALS:

1. Place 100 program youth into one or more civic engagement activities by increasing foundational civic, academic/education, social emotional (including social activities), mental well-being, and financial knowledge of youth served by 50%.

Why – Research conducted by the Forum for Youth Development (forumfyi.org) has shown that when youth are exposed to and participate in civic engagement, it lowers the likelihood of risky behaviors, leads to future civic engagement, increases academic achievement, and positive attitudes about schoolwork. In addition, active involvement with community-based help initiatives positively affects interpersonal relationships and social development. It makes youth more likely to help their peers, act kindly towards each other, and appreciate cultural diversity.

2. Increase the overall leadership, entrepreneurial, and living-wage employment skill levels of our teen participants by 50% or more.

Why – There are several paths out of poverty, and we want to ensure we are exposing and preparing our students to options. Our programs are designed to provide that upon completion, the social and academic knowledge will enhance their continuing education and increase the likelihood of earning living wages into adulthood.

3. Move 50% of the families that receive empowerment services along the Crisis-to-Thriving scale, addressing trauma/mental health, equity roadblocks that curb access to assistance programs, and working with social justice partnerships that help eliminate barriers.

Why – Moving families out of crisis situations to stabilization allows them to focus on the future.

Strategic Driver #3 - Health and Community Resilience

Health and Community Resilience involves our work in ensuring food security, responding to immediate needs, providing healthier homes, and building strong communities.

STRATEGIC GOALS:

1. Operate a Healthy Homes program that integrates the Whole Family Approach and serves 25% of the Health Equity Improvement Zones surrounding our four program delivery centers.

Why – Making improvements to a home can also result in important health improvements. The National Center for Healthy Housing have helped to create the evidence base showing the effect of housing improvements (also known as interventions) on health status including both immediate and long-term health, levels of contaminants in the indoor environment, and housing durability.

2. Invest \$1 million strengthening the infrastructure of CAP OC supported agencies to increase food safety and quality of food provided.

Why – If partner agencies have better equipment and storage facilities, they can serve their participants in safety, updated environments, and focus on increasing the quality of the food they can accept and distribute.

3. Through collaboration with our nutrition insecurity partners, increase Cal Fresh (SNAP) enrollment by 10%.

Why – Often, families may not know what is available to help them get through times of need. Increased knowledge of Cal Fresh ensures those funds don't go untapped and helps expand our reach to the community.

4. Maintain current Diaper Bank funding levels and increase the reach of Diaper Bank distribution, which would include increasing diaper access on our mobile food trolley Clementine.

Why – We'd like to ensure that no family has to choose between diapers and basic necessities like food and housing. Our Diaper Bank program continues to fulfill a critical need in the lives of low-income individuals and families in Orange County.

Strategic Driver #4 - Organizational Capacity and Brand Awareness

Organizational Capacity and Brand Awareness ensures that CAP OC expands its branding, fundraising and its place in the community as the region's anti-poverty leader, while having a strong infrastructure, updated technology and data systems, and innovative capacity building with a social justice and equity lens.

STRATEGIC GOALS:

1. Increase CAP OC private fundraising by 50% through individual and corporate donors.

Why – In order to meet the goals described in our Strategic Plan, we can only reach these goals with financial support that is less restrictive and focused on the driving elements.

2. Launch a Capital Campaign to raise a minimum of \$30 million.

Why – To explore centralized campus opportunities, the agency must have additional capital funds to look at property acquisition and moving costs to better integrate services. In order to meet the goals described in our Strategic Plan, we can only reach these goals with financial support that is less restrictive and focused on the driving elements.

3. Be recognized as the County's leading anti-poverty agency by demonstrating increased brand awareness, media coverage, and legislative advocacy.

Why – As the agency integrates services and focuses on strategic driving elements, positioning itself in this manner directs participants, increases fundraising and expand the agency's marketing reach.

4. Install appropriate systems in 2022 and then demonstrate improved program data tracking capacity with all departments providing input and tracking common outcomes over the remaining Plan years.

Why – More and more, funders are requiring increased data to match outcome narratives and the agency is stronger when it has the ability to show cross-departmental integrated service utilization to assist participants.

V. IMPLEMENTATION STRATEGIES

In early 2022, the CAP OC management team will meet to identify potential strategies for moving towards achievement of the goals and milestones set out in this plan. The appendices section of this report includes an exhibit showing the success of CAP OC completing almost every single recommended implementation strategies from the Strategic Plan 2017 - 2022 adopted in December 2016.

Suggested implementation strategies will include a deeper understanding of feasible steps towards achieving each overarching goal. The milestones contained within each overarching goal are to be supported by suggested implementation strategies which help to shape overall progress. Implementation strategies are expected to be cumulatively adjusted as needed as to ensure the overarching goal is successfully satisfied. Our progress related to these implementation strategies will be reviewed on an annual basis.



VI. ASSESSMENT AND EVALUATION

Agency progress towards achieving each goal and the milestones will be reviewed and evaluated on a semi-annual basis. Using a strategic scorecard evaluation process, overarching goals will be assessed and graded as to measure the degree of progress made. As progress is made towards the overarching goal, milestones will be assessed and evaluated to determine if any adjustments are needed.

The evaluation process will be led by the Agency's Planning Department and monitored by the Board's Programs and Planning Committee to determine progress of strategic initiatives. This Strategic Plan is a dynamic document that will be closely monitored as to ensure that objectives and milestones are reached and will be revisited midway for a complete evaluation of progress. Driving the potential amendment process will be the results of the 2023 and the 2025 Community Needs Assessments.



ACKNOWLEDGMENTS

CAP OC would like to thank everyone who contributed to the completion of this 2022-2027 Strategic Plan!

A special thanks to the following people for their time, guidance, and tremendous work:

- CAP OC's Board of Directors, especially our Board Chair Alberta Christy and Chair of the Programs and Planning Committee, Joshua R. Mino
- Our President & CEO, Gregory C. Scott
- CAP OC's Executive Leadership Council
- CAP OC's Philanthropy Department
- CAP OC's Senior Leadership Team and Managers
- CAP OC's Planning Department AmeriCorps Fellow, Adam Levy
- CAP OC's Planning Department, Curtis Gibbs, Alexander Caro, Carolyn Coleman, Yesenia Hernandez, and Jaime Dadabhoy
- CAP OC's Planning Interns: Samera R. Raqueno, Hannah Cho, Elise Kim, John Bermudez, Christine Nguyen, Roberto Jr. Canela, Nathaniel Rosas, Jamie Mendez, and Kristen Johansson

VII. APPENDICES

Strategic Plan 2017-2022 Priority Goals & Objectives: Final Assessment

Strategies for Achieving Priority Goals & Objectives: Strategic Plan 2017-2022

CAP OC's 2021 Programs

Strength, Weakness, Opportunity, Threat (SWOT) Analysis

Local Theory of Change

CAP OC's Volunteering Philosophy

History of CAP OC

Strategic Plan 2017-2022 Priority Goals & Objectives 2017-2022: Final Assessment

Status as of December 22, 2021

Organizational Standard 6.5: The governing board has received an update(s) on progress meeting the goals of the strategic plan within the past 12 months.

The following are CAP OC'S Strategic Priority Goals & Objectives 2017-2022 as approved by the CAP OC Board in December 2016.

Goal #1 Energy & Environmental Stewardship

Goal #2 Alleviate Hunger

Goal #3 Create Financial Stability

Goal #4 Strengthen Families and Build Safe & Healthy Communities

Goal #5 Organizational Capacity

In early 2021, Agency staff prepared in compliance with Organizational Standards a status report as to how we did relative to each specific short- and long-term objective for each of the five goals from the 2017-2022 Strategic Plan. The following is a status update as of December 22, 2021.

Goal #1 Energy & Environmental Stewardship

Improve housing conditions, reduce energy burdens for low-income households, and make a measurable impact that reduces greenhouse gases in the environment.

1. Objective (Short-Term): Work to make existing energy programs more comprehensive, efficient, cost-effective and easily accessible, setting the stage to expand our influence and services to other counties in Southern California.

The Energy and Environmental Services Department is the #1 Local Service Provider in CA.

In 2021, CAP OC's EES Department continued to provide essential services to the residents of Orange County during the on-going COVID-19 pandemic.

- Our UA office opened.
- Our Call Center remained on-line for three languages (English, Spanish, Vietnamese) Monday through Friday 8am to 5pm remotely.
- We continued to provide Utility Assistance applications via mail, on-line application, or application pick-up outside our lobby doors.

CAP OC fully spent out:

- CARES – LIHEAP contract of \$1,690,228, which focused on Utility Assistance and Weatherization.
- American Rescue Plan Act (ARPA-LIHEAP) 2021 contract of \$7,051,643, which focused on Utility Assistance and Weatherization.

2. Objective (Long-Term): Expand our existing environmental programs, including water conservation, and implementing new sustainable energy efficiency programs that increase parity with current green and energy efficient programs offered to the mainstream public.

In 2021, our EES Department obtained the Low Income Household Water Assistance Program (LIHWAP) to provide water utility assistance. It is set to officially launch in 2022.

In addition, through the new program Disbursement Assistance Program (DAP) Solar, EES Staff were able to get trained and certified in solar design and installation through SunPower.

During 2021, our EES department continued its virtual program through the Energy Savings Assistance (ESA) Program with Southern California Edison (SCE) along with an ESA program with Southern California Gas Company (SoCalGas).

Goal #2 Alleviate Hunger

Reduce food insecurity/ hunger and provide healthier food options for low-income families by increasing food availability.

1. Objective (Short-Term): Improve the quality of services provided to OC Food Bank agencies and the community through evaluation, technical assistance, and civic engagement.

The Diaper Bank secured additional funding for an additional 3 years (2021-2024) from the State of California.

In 2021, started a CalFresh collaborative with the County of Orange, Orange County Department of Education, and Second Harvest Food Bank to increase CalFresh enrollment in Orange County for 1) Seniors enrolled in Medical and 2) Families with children.

During this five-year period, CAP OC secured approval to serve an additional 1,300 people each month through our CSFP senior food box program increasing distribution from 24,000 boxes per month to 25,500. However, due to the COVID-19 pandemic, it affected our ability to maintain that distribution amount resulting in a decrease back to approximately 24,000 in late 2021.

The Food Bank continued to operate through the COVID-19 crisis.

Enhanced service included:

- Providing home bound deliveries: Jan – Aug delivered on average 400 boxes a month, Sept onward delivered 100 boxes a month.
- Implemented a texting software to ease communication with CSFP participants.
- Started converting Clementine's engine to a newer engine to become CARB compliant.
- Completing the process in 2021 to implement a new software platform for management of the senior food box program, and setting in motion the process to implement a software-based inventory management program in 2022.

2. Objective (Long-Term): Increase the food distributed through the Donated Food Program by 50% over the next five years (900,000 additional pounds each year, totaling an increase of 4.5 million pounds in year 5).

CAP OC began to meet this goal in 2019, and then greatly exceeded the goal in 2020 and 2021.

In 2019, CAP OC distributed 21 million pounds of food. Due to COVID-19 requiring us to address immediate needs with the help of USDA and increased contributions, CAP OC distributed 66 million pounds of food in 2020. Current projections for 2021 indicate exceeding 40 million pounds of food. We do not anticipate sustaining that level of increased food distribution once community needs and resources normalize.

Goal #3 Create Financial Stability

Reduce food insecurity/ hunger and provide healthier food options for low-income families by increasing food availability.

1. Objective (Short-Term): Maintain and improve existing financial stability programs; including increased investments in the use of technology.

Due to the COVID-19 pandemic, CAP OC moved to provide financial empowerment classes online in 2020 and has continued this into 2022. Programs are live and archived. The Financial Empowerment Facebook page posts at least once a week a video/ image/ resource/ lives, etc.

In addition, Financial Empowerment provided staff for the Santa Ana Rental Assistance program (98 families with \$147,000), the new CARES ESG program in Garden Grove (25 families with \$75,000), a Wells Fargo funded pandemic relief program (89 families with \$30,000), partners in the United Way pandemic relief program (292 families with \$146,000), ESFP CARES rental assistance (\$35,000), and most recently staffing the new Mobile FRC financial assistance program in Anaheim (150 families with \$75,000).

We began a CARES Homeless Prevention Program (150 families with \$450,000) in January 2021.

2. Objective (Long-Term): Develop a CAP OC workforce development program focused on education, job placement, and skill development for clients to achieve a living wage and escape poverty.

Workforce Development Program was launched in June 2021 funded by CARES to support with job placement, mentorship, supportive services, and follow-up and maintenance plans. In the first 8 weeks of the program, 90 participants were enrolled into the program.

Working with First 5 OC and funded by CARES, the Early Childhood Providers program was launched in February 2021 to support 25 early childcare programs that have struggled due to COVID-19 with business development.

Goal #4 Strengthen Families and Build Safe & Healthy Communities

Improve neighborhood safety, living conditions, and civic participation by coordinating, integrating, and focusing CAP OC services.

1. Objective (Short-Term): Assess, maintain, and support existing client services at the three Centers, while expanding and improving services which are supportive of existing or new partnerships.

CAP OC received 3-years of FaCT funding for El Modena and Anaheim Independencia (services- case management, clinical counseling, domestic violence, parenting and information and referral services) and an additional service, to specifically assist welfare families to stabilize their housing situation was added to Anaheim. During this time period, Anaheim FRC started receiving FaCT funding for the first time. Southwest Community Center became a third FRC for CAP OC in the fall 2019 and is looking to add youth programs in 2022.

Opened the Centers (AIFRC & ELMO) to provide the Summer Camp program to 20 kids at each site.

CAP OC's new County of Orange funded Housing Navigation and Sustainability program housed at SWCC has helped on average 9-12 participants a month in 2021. The contract is set to be funded by CalOptima in 2022.

Part of EDI Task Force supporting childcare for La Habra, Anaheim, and Garden Grove. Using CARES funding in 2021, partnered with First Five, to help rebuild childcare (See Financial Empowerment section).

2. Objective (Long-Term): Institutionalize the partnerships and programs developed in the federally funded Partnerships to Improve Community Health and other funders for promoting nutrition, healthy drink, and active transportation for a healthy lifestyle for Orange County disadvantaged communities.

Challenged by the COVID-19 pandemic, impacted nutrition and physical activity services in La Habra and Anaheim, contract ended December 2020. CAP OC was awarded a new contract from the County of Orange for the CalFresh Healthy Living Program for the City of Anaheim in fall 2021.

CAP OC in early 2021 officially launched programming to improve health using youth led programming in Santa Ana, Anaheim, and Orange to reduce drug use and abuse and begin to heal the damage of punitive War on Drugs policies using various media and art - part of a Statewide Elevate Youth Initiative. Hosted youth listening sessions. In addition, continued resident lead efforts to reduce vaping in La Habra through the creation of a La Habra Teens Against Vaping coalition.

Goal #5 Build Organizational Capacity

Increase CAP OC's economic and operational efficiency by providing stable funding, while updating and /or securing new facilities, equipment, technology, and resources.

1. Objective (Short-Term): Increase agency cash reserves for six months of operating liquidity, invest in new trucks for the OC Food Bank, and commit resources for organizational development of the Board and staff through development and training.

Cash Reserves:

The Board has discretionarily designated \$1,500,000 of the Agency's net assets for the purpose of covering the expenses of dissolution or the acquisition of real property. Cash balances were consistent during the strategic plan period.

Organizational Development and Training:

CARES funding was allocated for Staff Professional Development allowing HR to develop a training plan.

The training plan determined the following trainings:

1. Quarterly Communication & Cultural Diversity (DEI training was provided to staff in 2021)
2. CPR/AED/First Aid (1st part conducted in 2021, pending 2nd part of course)
3. Active Shooter (Provided in 2021)
4. Earthquake Safety

5. Food Handling
6. Strength Finders & Train the Trainer session
7. Handling Mentally Unstable Clients/ Participants (Mental Health First Aid) Part 1
8. Mental Health Challenges Training Communication De-escalation Part 2
9. De-escalation Tense and Emotional Situations
10. Leadership Skills – Managing Remotely, Prioritizing, etc. (New Manager Training) ONGOING
11. CAP OC Programs/ Success Coaches
12. Client Management System – Shah
13. Service Excellence with Limited Resources
14. Communication Styles
15. Engaging Employees/ Collaboration
16. Process Efficiency
17. Budgets and Financial Tracking
18. Computer Programs/ Applications

Going forward, HR would like to embark on training needs analysis for all employees with input from both the employee’s manager and the employee. A board variety of training tools will need to be utilized moving forward as there is not a dedicated Training Department within CAP OC. The variety can include seminars, in-person lead training, webinars, a Learning Management System (LMS), outside training resources like OneOC, LinkedIn Learning, SHRM, etc.

2. Objective (Short-Term): Increase Fund Development giving goals by 10% annually to fund on-going cash needs of the Organization and on-going costs to maintain and upgrade existing programs and facilities.

2020 was a record year for the Philanthropy Department due to the COVID-19 pandemic.

In 2021, the Philanthropy department operated with a Grants Manager and Grant coordinator and is set to exceed \$4 million in donations.

In late 2021, the agency added the ability to accept cryptocurrency donations and received its first cryptocurrency donation.

3. Objective (Long-Term): Acquire ownership or explore lease options of a warehouse with increased office space and analyze the need for satellite distribution facilities.

Warehouse Facilities:

- The agency’s board and executive committee continue to work on potential solutions for renewing the existing lease that expires in Jan 2023 or finding a new location.

Satellite Office Space:

- Office space was acquired for CPSD and EES at the Orangewood site (a half mile from headquarters).

4. Objective (Short & Long-Term): Establish a coordinated care model at CAP OC to decrease the likelihood of a crisis situation (housing, food, and utility) faced by our clients and that directly links as many client services as possible to a single point of entry or coordinated service delivery system, including partner agencies, resulting in an improved system of service delivery for better client outcomes.

Coordinated Care Model:

In 2021 the Success Coaches program launched using a Coordinated Care Model as part of the Whole Family Approach. Through individualized coaching services, participants identify and set both short term and long-term goals and develop strategies to meet those goals. Success Coaches worked with Seniors that were recruited from our CSFP program. In addition, each Center (AIFRC, ELMO & SWCC) will have a Success Coach work with 10-12 families per site. Staff are finishing their training to start working with families in 2022.

In 2021 CAP OC developed and continued to integrate the following services: such as the EES Weatherization crew accompanying CPSD Financial Empowerment staff on a site visit to a ESG Homeless Prevention participant (HP provides rent, FE classes, housing plan) homes to verify that they can also qualify for utility assistance and weatherization services, or an FE class to participants in the utility assistance program. Staff have been able to help participants who attend the classes with other services like the UW Pandemic Relief \$500 gift card.

Coordinated Service Delivery System:

CAP OC continued to increase the utilization of a single participant data system, Shah, to track multiple services. With the addition, of an online intake portal on the new CAP OC website in late 2020, CAP OC continues to provide integrated services for new and existing participants. EES continues to conduct online intake process for Utility Assistance. As part of this process, there is the opportunity to understand other services that CAP OC can provide.

Theory of Change:

In 2021, Agency staff with the assistance of ROMA consultants completed the development of a Theory of Change. It is included in the 2022-2027 Strategic Plan.

Strategies for Achieving Priority Goals & Objectives: Strategic Plan 2017-2022

Status Review as of December 2021

Goal #1 Energy & Environmental Stewardship

Improve housing conditions, reduce energy burdens for low-income households, and make a measurable impact that reduces greenhouse gas emissions.

- Objective (Short-Term): Work to make existing energy programs more comprehensive, efficient, cost-effective and easily accessible, setting the stage to expand our influence and services to other counties in Southern California.**

Strategies for Achieving Priority Goals & Objectives: 2017-2022

Strategies:	Level (Community, Individual, Agency, Family)	Progress (Jan. 2019)	Progress (Dec. 2020)	Progress (Dec. 2021)
• Achieve greater efficiency by streamlining operations, moving toward a paper-less office, and developing an online intake form.	Agency	In Progress	Completed	Completed
• Use a sub-contractor model when delivering services.	Agency	Completed	Completed	Completed
• Continue to update and improve the use of technology.	Agency	In Progress	In Progress	In Progress
• Increase staff training and educational opportunities to maintain the best service possible to our clients.	Agency	In Progress	In Progress	In Progress
• Work with our clients to attain self-sufficiency.	Agency, Community, Family	In Progress	In Progress	In Progress
• Respond to Request for Proposals (RFPs) or Notices of Funding Availability (NOFA) to increase and expand services within our mission.	Agency	In Progress	In Progress	In Progress
• Leverage our influence and expertise.	Agency	In Progress	In Progress	In Progress
• Increase our use of media, print and online, to promote our programs and success stories.	Agency	In Progress	In Progress	In Progress

			(Significantly Increased)	(Significant Growth Continues)
• Work towards being a Model of Excellence.	Agency, Community	In Progress	In Progress	In Progress
• Increase our Energy Department's involvement on advisory and policy making boards for energy programs by accepting leadership positions and involving staff as additional opportunities arise.	Agency	Not Yet Started	In Progress	In Progress
2. Objective (Long-Term): Expand our existing environmental programs, including water conservation, and implementing new sustainable energy efficiency programs that increase parity with current green and energy efficient programs offered to the mainstream public.				
Strategies for Achieving Priority Goals & Objectives: 2017-2022				
Strategies:	Level (Community, Individual, Agency, Family)	Progress (Jan. 2019)	Progress (Dec. 2020)	Progress (Dec. 2021)
• Identify new programs to either leverage or add additional measures to our programs.	Agency	In Progress	In Progress	In Progress
• Increase our department's awareness of mainstream green and energy efficient programs through participation in energy forums and contacts with for-profit energy providers.	Agency, Community	In Progress	In Progress	In Progress
• Visit and observe other water conservation and energy sustainability programs.	Agency	In Progress	In Progress	In Progress
Goal #2 Alleviate Hunger				
<i>Reduce food insecurity/ hunger and provide healthier food options for low-income families by increasing food availability.</i>				
1. Objective (Short-Term): Improve the quality of services provided to OC Food Bank agencies and the community through evaluation, technical assistance, and civic engagement.				
Strategies for Achieving Priority Goals & Objectives: 2017-2022				

Strategies:	Level (Community, Individual, Agency, Family)	Progress (Jan. 2019)	Progress (Dec. 2020)	Progress (Dec. 2021)
• Increase staff to employ an Agency Relations Coordinator to increase monitoring, training, and technical assistance.	Agency	Completed	Completed	Completed
• Increase staff to employ a Public Policy Manager to engage our network in advocacy around issues pertaining to food, hunger, and nutrition.	Agency	Not Yet Started	In Progress	In Progress
• Track food distribution for evaluation purposes in measuring outcomes for future grant requirements whether they are from government, corporations, or foundations.	Agency	In Progress	In Progress	In Progress
• Increase the number of school and other non-traditional food pantries served.	Agency, Community	Not Yet Started	In Progress	In Progress
• Determine the types of food required by school (non-traditional) food pantries and if such food is not being provided by OC Food Bank to work with our suppliers and funders in securing and distributing such food.	Agency, Community	Not Yet Started	In Progress	In Progress
2. Objective (Long-Term): Increase the food distributed through the Donated Food Program by 50% over the next five years (900,000 additional pounds each year, totaling an increase of 4.5 million pounds in year 5).				
Strategies for Achieving Priority Goals & Objectives: 2017-2022				
Strategies:	Level (Community, Individual, Agency, Family)	Progress (Jan. 2019)	Progress (Dec. 2020)	Progress (Dec. 2021)
• Increase the numbers of disadvantaged residents being served by expanding existing programs and adding new ones.	Agency, Community	In Progress	In Progress	In Progress
• Secure grant funding to create a CalFresh Outreach initiative targeting seniors (goal of 240 per year) supported by an additional outreach coordinator.	Agency	In Progress	In Progress	In Progress

				(Started a CalFresh Collaborative)
• Research and determine how other regional food banks or pantries are using mobile food pantries; determine the needs for leasing or purchasing a mobile food bank.	Agency	Completed	Completed	Completed
• Coordinate with Fund Development to identify and secure funding from new partners and donors.	Agency	Completed	Completed	Completed
• Purchase new forklifts and determine cost for the implementation process of installing High Density Pallet Racking for increasing capacity of existing warehouse.	Agency	Not Yet Started	Completed (Purchase of forklifts) In Progress/Still Being Analyzed (High Density Pallet Racking)	Completed (Purchase of forklifts) In Progress/Still Being Analyzed (High Density Pallet Racking)

Goal #3 Create Financial Stability

Provide financial stability programs and services that train and support families during a financial crisis and prepare them for economic growth and self-sufficiency.

1. Objective (Short-Term): Maintain and improve existing financial stability programs; including increased investments in the use of technology.

Strategies for Achieving Priority Goals & Objectives: 2017-2022

Strategies:	Level (Community, Individual, Agency, Family)	Progress (Jan. 2019)	Progress (Dec. 2020)	Progress (Dec. 2021)
• Review existing financial assistance programs such that they are relevant to our clients: Set and review financial goals; save for the future; tax and financial planning.	Agency, Community, Family, Individual	In Progress	Completed	Completed
• Increase broadband internet access at our two Centers.	Agency	Not Yet Started	Completed	Completed
• Provide public indoor and outdoor Wi-Fi access at our Centers.	Agency	Not Yet Started		

			Completed	Completed
2. Objective (Long-Term): Develop a CAP OC workforce development program focused on education, job placement, and skill development for clients to achieve a living wage and escape poverty.				
Strategies for Achieving Priority Goals & Objectives: 2017-2022				
Strategies:	Level (Community, Individual, Agency, Family)	Progress (Jan. 2019)	Progress (Dec. 2020)	Progress (Dec. 2021)
• Partner with other agencies.	Agency, Community	Not Yet Started	In Progress	In Progress (Significant growth)
• Permanent job placement program encompassing interview skills, resume building, networking, and research.	Agency, Community	Not Yet Started	No Longer Applicable	No Longer Applicable
• Mentoring, Coaching and Counseling.	Individual	In Progress	In Progress	In Progress
• Implement a workforce development social enterprise program with a focus on energy-related employment opportunities as a CAP OC revenue stream.	Agency, Community	Not Yet Started	Under Discussion	Under Discussion
• Ongoing improvements in the two-Family Resource Centers that can become models for providing such services to other organizations.	Agency, Community	In Progress	In Progress	In Progress
Goal #4 Strengthen Families and Build Safe & Healthy Communities				
Improve neighborhood safety, living conditions, and civic participation by coordinating, integrating, and focusing CAP OC services.				
1. Objective (Short-Term): Assess, maintain and support existing client services at the three Centers, while expanding and improving services which are supportive of existing or new partnerships.				
Strategies for Achieving Priority Goals & Objectives: 2017-2022				
Strategies:	Level (Community, Individual, Agency, Family)	Progress (Jan. 2019)	Progress (Dec. 2020)	Progress (Dec. 2021)


• Assess all programs with respect to service delivery, client outcomes, and diversity; identifying all steps for change.	Agency, Community, Family, Individual	In Progress	In Progress	In Progress
• Develop strategic plans for each Family Resource Center.	Agency, Community, Family, Individual	Not Yet Started	Not Yet Started	Not Yet Started
2. Objective (Long-Term): Institutionalize the partnerships and programs developed in the federally funded Partnerships to Improve Community Health and other funders for promoting nutrition, healthy drink, and active transportation for a healthy lifestyle for Orange County disadvantaged communities.				
Strategies for Achieving Priority Goals & Objectives: 2017-2022				
Strategies:	Level (Community, Individual, Agency, Family)	Progress (Jan. 2019)	Progress (Dec. 2020)	Progress (Dec. 2021)
• Seek new government grant funding opportunities to fund some, or all, of the activities.	Agency	In Progress	In Progress	In Progress
• Continue to seek ongoing support from local foundations and corporations.	Agency	In Progress	In Progress	In Progress
• Develop directly or support partnerships that expand and/or improve the quality of services.	Agency	In Progress	In Progress	In Progress
Goal #5 Build Organizational Capacity <i>Increase CAP OC's economic and operational efficiency by providing stable funding, while updating and /or securing new facilities, equipment, technology, and resources.</i>				
1. Objective (Short-Term): Increase agency cash reserves for six months of operating liquidity, invest in new trucks for the OC Food Bank, and commit resources for organizational development of the Board and staff through development and training.				
Strategies for Achieving Priority Goals & Objectives: 2017-2022				
Strategies:	Level (Community, Individual, Agency, Family)	Progress (Jan. 2019)	Progress (Dec. 2020)	Progress (Dec. 2021)

• Evaluate new and existing grant and fundraising agreements to determine operational liquidity strategies for cash flow to include overhead, staff, and administrative costs whenever possible.	Agency	In Progress	In Progress	In Progress
• Undertake an IT Plan that includes recommendations for agency technology training needs.	Agency	Not Yet Started	Just Started	In Progress(An IT Assessment Was Prepared By PIMCO)
• Secure and provide training materials and programs for Board members to increase education and participation.	Agency	In Progress	In Progress	In Progress
• Encourage CAP OC Board of Directors to attend and participate in energy efficient forums and summits.	Agency	Not Yet Started	Not Yet Started	Not Yet Started
• Secure and provide training materials and programs for staff, to increase effectiveness and expand future advancement opportunities.	Agency	In Progress	In Progress	In Progress
• Undertake research on current and future emission controls and opportunities for securing tax credits and grants for clean air commercial trucks, including researching CNG, electric and hydrogen trucks, and develop a truck retirement and replacement schedule.	Agency	In Progress	In Progress	In Progress
• Purchase new trucks that will comply with projected future air emission requirements as funds are available, including tax credits.	Agency	In Progress	In Progress (Several New Trucks Purchased)	In Progress (Several New Trucks Purchased)
• Track training of agency staff as part of a future Human Resources Information System (HRIS) or Next Generation ROMA software.	Agency	In Progress	In Progress	In Progress
2. Objective (Short-Term): Increase Fund Development giving goals by 10% annually to fund on-going cash needs of the Organization and on-going costs to maintain and upgrade existing programs and facilities.				
Strategies for Achieving Priority Goals & Objectives: 2017-2022				
Strategies:	Level	Progress		

	(Community, Individual, Agency, Family)	(Jan. 2019)	Progress (Dec. 2020)	Progress (Dec. 2021)
<ul style="list-style-type: none"> • Implement a “branding” campaign that makes CAP OC the recognized expert on poverty issues in Orange County. Release an annual “Status of Poverty in Orange County Report” that is accepted as the authoritative source for related information. 	Agency	Not Yet Started	Completed (Rebranding), Not Yet Started (Report)	Completed (Rebranding), Not Yet Started (Report)
<ul style="list-style-type: none"> • Create a mobile/social media friendly website and social media channels that builds organizational capacity to acquire new donors, engage with existing donors, and increase online fundraising results through integrated marketing (including the possibility of hiring a marketing/social media staff person). 	Agency	In Progress	Completed	Completed
<ul style="list-style-type: none"> • Need to better understand our donors and why they increase their giving. 	Agency	In Progress	In Progress	In Progress
<ul style="list-style-type: none"> • Develop more long-standing relationships with foundations and corporations to increase general operating support as well as support for our new integrated Whole Family Approach strategy. 	Agency, Community	In Progress	In Progress	In Progress
<ul style="list-style-type: none"> • Analyze the NEON database of repeat donors and invite higher level donors to hold neighborhood CAP OC get-togethers to increase giving from existing donors by using GIS mapping software for establishing the neighborhood groups. • Analyze newly implemented Raisers Edge database to continue to move individuals through the donor funnel. These activities include converting annual donors into sustaining donors through a Monthly Giving Program, moving mid-level donors into pipeline for major donor gifts and converting volunteers into donors. 	Agency	In Progress	In Progress	In Progress
3. Objective (Long-Term): Acquire ownership or explore lease options of a warehouse with increased office space and analyze the need for satellite distribution facilities.				
Strategies for Achieving Priority Goals & Objectives: 2017-2022				
Strategies:	Level			

	(Community, Individual, Agency, Family)	Progress (Jan. 2019)	Progress (Dec. 2020)	Progress (Dec. 2021)
<ul style="list-style-type: none"> Analyze our staffing needs and whether additional offices are required to serve our existing and future clients. 	Agency	In Progress	In Progress	In Progress (New Office Space Has Been Acquired)
<ul style="list-style-type: none"> Assess the feasibility of starting a capital campaign for the facility acquisition, and if feasible, initiate a capital campaign. 	Agency	Not Yet Started	Not Yet Started	Not Yet Started
<ul style="list-style-type: none"> Engage real estate professionals to seek out the best available locations for warehouse and office space that provides optimal client service and optimal value for either acquisition or lease, including the potential use of satellite facilities in support of the OC Food Bank and Energy Department. 	Agency, Community	Not Yet Started	In Progress	In Progress
<ul style="list-style-type: none"> Develop a new annual event for to help raise funds for on-going capital projects. 	Agency	Not Yet Started	Not Yet Started	Not Yet Started
<p>4. Objective (Short & Long-Term): Establish a coordinated care model at CAP OC to decrease the likelihood of a crisis situation (housing, food, and utility) faced by our clients and that directly links as many client services as possible to a single point of entry or coordinated service delivery system, including partner agencies, resulting in an improved system of service delivery for better client outcomes.</p>				
<p>Strategies for Achieving Priority Goals & Objectives: 2017-2022</p>				
Strategies:	Level (Community, Individual, Agency, Family)	Progress (Jan. 2019)	Progress (Dec. 2020)	Progress (Dec. 2021)
<ul style="list-style-type: none"> Clients would be provided access to the full array of CAP OC services, including emergency utility assistance, education, case management, counseling, financial stability, and community engagement. 	Agency, Community, Family, Individual	In Progress	In Progress	In Progress
<ul style="list-style-type: none"> Include all levels of staff in developing coordinated care strategies, activities, and services that can result in service 	Agency	In Progress		

integration and identification of the outcomes to be measured, including a written definition/explanation of; comprehensive, integrated, client centered, service delivery model, and outcomes measurements.			In Progress	In Progress
• Begin by outlining existing services, including department target audience; service description should identify department, target audience, average number served, and number of sites/locations, number of staff, agency providing service, existing outcome measurement, and value of service.	Agency	In Progress	In Progress	In Progress
• Analyze software needs for tracking outcomes at CAP OC for the purpose of implementing ROMA Next Generation. A selected software package will meet the data requirements of ROMA Next Generation for CSBG purposes, integrate with the current Energy Hawkins software system, track objectives, measure National Performance Indicators, and be supportive of an integrated coordinated care model.	Agency	Completed	Completed	Completed
• Partner with other agencies to improve existing agency programs and identifying opportunities for new programs.	Agency, Community	In Progress	In Progress	In Progress
• Continue to maintain a presence on advisory and policy boards that impact our funding and services.	Agency, Community	In Progress	In Progress	In Progress
• Secure additional resources for having the means to better address financial needs in crisis situations.	Agency	Not Yet Started	In Progress	In Progress
• Seek grant funding to purchase a mobile outreach vehicle to assist in enrollments and applying for coordinated services.	Agency	Completed	Completed (Clementine)	Completed (Clementine)
• Improve technology infrastructure at both Family Resource Centers to increase organizational capacity for inputting data and reporting on outcomes for ROMA Next Generation purposes.	Agency	In Progress	In Progress	In Progress
• Develop staff knowledge and competencies in multiple programs through cross training, integrated work assignments, or other strategies with a focus on client centered strategies.	Agency	Not Yet Started	In Progress	In Progress



CAP OC'S 2021 Programs*

- I. Community Partnerships and Services Department (CPSD)..... 1-7
- II. Energy and Environment Services Department (EES)..... 8-10
- III. OC Food Bank (OCFB)..... 11-13

* The information provided in this document is an edited down version that was provided and presented to the Programs and Planning Committee and Board of Directors in October of 2021 in compliance with Organizational Standards.

I. Community Partnerships and Services Department (CPSD)

Southwest Community Center (SWCC)		
<i>Program Description:</i> Located in Santa Ana, CA. Provides Grab and Go hot meals to people experiencing homelessness Monday-Sunday, from 12 – 1pm and an additional bi-weekly food distribution for low-income families. Other services include rental and utility assistance, free tax services, financial empowerment programming, employment support, case management, referrals to outside services, and more.		
<i>Program Timeline:</i> Ongoing	<i>Funding:</i> Private donations, corporate and church grants, in-kind, Emergency Shelter and Food Program (ESFP), Santa Ana Community Development Block Grant (CDBG)	<i>Staffing:</i> 1 Manager + 1 Center Coordinator + 1 Maintenance Worker + 1 Facility Attendant + 1 Kitchen Supervisor + 1-5 Volunteers
<i>Target Audience:</i> People experiencing homelessness, children & families	<i>Data Software:</i> Depends on funding source (e.g., Shah, Excel, etc.)	<i>Addressing:</i> Immediate Needs & Transformational Changes (There is a greater focus on immediate needs)

Families and Communities Together (FaCT) Services

State and federally funded by the County of Orange Social Services Agency (SSA). FaCT is a network of 15 Family Resource Centers (FRCs) in Orange County that provide core services such as: case management/family support, information and referral, coordinated case management, clinical counseling, parenting, domestic violence services, and family stabilization. Some of the services provided are subcontracted. Each service has its own numbers; 100 case management and coordinated case management, 40 parenting, 40 domestic violence, 1,000 information and referral, 600 hours of counseling, and 100 family stabilization cases annually at each site.

July 1, 2020 – June 30, 2023 (3 annual contracts)

The following two-family resource centers incorporate FaCT services in their programming:

El Modena Family Resource Center (ELMO)
<i>Program Description:</i> Located in unincorporated Orange, CA. Focus on a two-generational Whole Family Approach that simultaneously integrate child development, workforce development and family development.

<i>Program Timeline:</i> Ongoing	<i>Funding:</i> In-kind, partner sponsored (Nana's Kids, 2 nd Harvest, OC Food Bank, La Purisima, etc.), grant funded (Edison, SCAN, etc.), private donations, Community Service Block Grant (CSBG)	<i>Staffing:</i> 1 Manager + 2 Center Coordinators + 1 Childcare + Maintenance Staff
<i>Target Audience:</i> Children & families	<i>Data Software:</i> Depends on funding source (e.g., VistaShare, Shah, Excel, etc.)	<i>Addressing:</i> Immediate Needs & Transformational Changes

Anaheim Independencia Family Resource Center (AIFRC)

<i>Program Description:</i> Located in unincorporated Anaheim, CA. Focus on a two-generational Whole Family Approach that simultaneously integrate child development, workforce development and family development.		
<i>Program Timeline:</i> Ongoing	<i>Funding:</i> In-kind, partner sponsored (Stand up for Kids, County Mental Health, 2 nd Harvest, etc.), grant funded (Edison, SCAN, Walmart, etc.), private donation, Community Service Block Grant (CSBG)	<i>Staffing:</i> 1 Assistant Manager + 4 Center Coordinators + 1 Maintenance Worker
<i>Target Audience:</i> Children & families	<i>Data Software:</i> Depends on funding source (e.g., VistaShare, Shah, Excel, etc.)	<i>Addressing:</i> Immediate Needs & Transformational Changes

Financial Empowerment

Financial Empowerment classes (consist of one session, 3 sessions, or 5 sessions) utilize the “Your Money, Your Goals” curriculum developed by the Consumer Financial Protection Bureau (Federal Government) to help participants develop and use knowledge, skills, and tools to improve their financial well-being.

The following three programs incorporate financial empowerment classes in their programming:

Homeless Prevention Program (HP)

<i>Program description:</i> Provide financial assistance and financial empowerment services to stabilize the participant's housing situation by providing participants with rental assistance and enrolling them in a 5-week series financial empowerment program using the curriculum "Your Money, Your Goals".		
<i>Program Timeline:</i> January 1, 2021 – May 31, 2022	<i>Funding:</i> CARES	<i>Staffing:</i> 1 Manager + 4 Coordinators

<i>Target Audience:</i> Low-income families, individuals, or couples impacted by the COVID-19 pandemic (legal status is not required)	<i>Data Software:</i> Access Database & Shah	<i>Addressing:</i> Immediate Needs & Transformational Changes
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Emergency Services Grant (ESG)

<i>Program description:</i> Assist individuals who are at risk of losing their home/becoming homeless. This homeless prevention program provides rental assistance, utility assistance, housing stability case management, and financial empowerment workshops.		
<i>Program Timeline:</i> October 1, 2020 – June 30, 2022	<i>Funding:</i> City of Garden Grove – Community Development Block Grant (CDBG)	<i>Staffing:</i> 1 Manager + 2 Coordinators
<i>Target Audience:</i> Garden Grove residents who are at risk of losing their home/becoming homeless	<i>Data Software:</i> Excel & Shah & Homeless Management Information Systems (HMIS)	<i>Addressing:</i> Immediate Needs & Transformational Changes

Santa Ana Financial Empowerment Program

<i>Program description:</i> 5-week series financial empowerment classes that include the following topics: 1) Goal Setting & Relationship with Money, 2) Reducing Expenses, 3) Creating a Budget, 4) Credit Score, Credit Report, and 5) Financial Products (bank); Identify Theft		
<i>Program Timeline:</i> July 1, 2020 – June 30, 2023 (Annual contracts are from July- June)	<i>Funding:</i> City of Santa Ana – Community Development Block Grant (CDBG)	<i>Staffing:</i> 1 Manager + 1 Coordinator
<i>Target Audience:</i> Santa Ana residents	<i>Data Software:</i> Excel & Shah	<i>Addressing:</i> Transformational Changes

Santa Ana Rental Assistance

<i>Program description:</i> Rental assistance.		
<i>Program Timeline:</i> August 1, 2021 – March 31, 2022	<i>Funding:</i> City of Santa Ana - CARES	<i>Staffing:</i> 1 Manager + 4 Coordinators
<i>Target Audience:</i> Santa Ana residents	<i>Data Software:</i> Neighborly and Access	<i>Addressing:</i> Immediate Needs

Housing Navigation and Sustainability

<i>Program description:</i> Housing Navigator. Provides housing navigation and sustainability services to homeless adults or those at risk of homelessness in Orange County to obtain and sustain housing placements.		
<i>Program Timeline:</i> October 1, 2019 – December 31, 2021 (Set to continue)	<i>Funding:</i> County of Orange Health Care Agency (HCA)	<i>Staffing:</i> 1 Manager + 1 Coordinator

<i>Target Audience:</i> Chronically ill, homeless adults or those at risk of homelessness in Orange County (High utilizers)	<i>Data Software:</i> WPC (Whole Person Care) Connect & Access	<i>Addressing:</i> Immediate Needs & Transformational Changes
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Anaheim Mobile Family Resource Center (AMFRC)

<i>Program description:</i> Links the most underserved and isolated residents with much needed outreach, information & referral services, critical resources, and emergency financial assistance. CAP OC provides \$500 gift cards to eligible residents.		
<i>Program Timeline:</i> January 1, 2021 – May 31, 2022	<i>Funding:</i> Anaheim Community Foundation	<i>Staffing:</i> 1 Manager + 3 Coordinators
<i>Target Audience:</i> Anaheim residents impacted by the COVID-19 pandemic	<i>Data Software:</i> Access Database (going into Shah)	<i>Addressing:</i> Immediate Needs & Transformational Changes

Elevate Youth

<i>Program Description:</i> Provide youth leadership development and prevention activities focusing on the issue of substance use, specifically the negative consequences of the War on Drugs on low-income communities, using various media and art. Partner with 6 schools and respective neighborhood hubs to engage 60 youth annually in Anaheim, Orange, and Santa Ana.		
<i>Program Timeline:</i> November 16, 2020 – November 15, 2023	<i>Funding:</i> The Center at Sierra Health Foundation (CA DHCS funded through Proposition 64)	<i>Staffing:</i> 1 Manager + 3 Coordinators
<i>Target Audience:</i> Youth 12-26 years of age in Anaheim, Orange, and Santa Ana	<i>Data Software:</i> Excel	<i>Addressing:</i> Transformational Changes

Tobacco Use Prevention Program (TUPP)

<i>Program Description:</i> Reducing Youth Access to Tobacco. Recruiting community members residing in the city of La Habra to participate in efforts to reduce youth access to tobacco as well as secondhand smoke exposure.		
<i>Program Timeline:</i> February 1, 2019 – June 30, 2021 Additional funds for: July 1, 2021 – December 31, 2021	<i>Funding:</i> County of Orange Health Care Agency (Funded through Propositions 99/56)	<i>Staffing:</i> 1 Manager + 1 Coordinator
<i>Target Audience:</i> La Habra Residents	<i>Data Software:</i> Excel	<i>Addressing:</i> Transformational Changes

CalFresh Healthy Living (Anaheim)

Program Description: Provide indirect and direct nutrition education to CalFresh eligible population in Anaheim in the Learn, Shop, and Play settings.

<i>Program Timeline:</i> Starting November 15, 2021 – September 30, 2023 (Program has not yet started)	<i>Funding:</i> County of Orange Health Care Agency (Funded through USDA SNAP-ED program)	<i>Staffing:</i> 1 Manager + 2 Coordinators + 1 subcontractor: Anaheim Elementary School District (AESD)
<i>Target Audience:</i> Children 4 years and under, Children/Youth 5 to 17 years, Adults 18 to 59 years, and Older Adults 60 years and older at targeted sites in Anaheim	<i>Data Software:</i> PEARS (online database)	<i>Addressing:</i> Immediate Needs & Transformational Changes

The Giving Farm and Westminster High School (WHS) Nutrition Education

<i>Staffing:</i> 1 Manager + 1 Coordinator (both minimal hours)	<i>Data Software:</i> N/A	<i>Addressing:</i> Transformational Changes
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USDA Farm to School Grant - COMPLETED

Program Description: Parent and student nutrition education.

Program Timeline: July 2019 – June 30, 2021

(Intended to be one-year due to pandemic was extended)

Funding: United States Department of Agriculture (USDA) - \$100,000 grant

Specialty Crop Block Grant: A Sweeter Future: Honey, Education, Entrepreneurship (Beekeeping)

Program Description: Develop school taste testing and culinary recipes with specialty crops and honey from The Giving Farm at WHS.

Program Timeline: November 1, 2020 – April 30, 2023

(Delayed due to pandemic, expected late 2021/early 2022)

Funding: State of California, Department of Food and Agriculture - \$100,000 grant

Success Coaches: SENIORS

Program Description: Using the Whole Family Approach, participants are the drivers when it comes to goal setting. Through individualized coaching services, participants learn to identify and set both short-term and long-term goals and develop strategies to meet those goals. The Success Coaches provide ongoing support, coaching, resources, and case management when needed. Graduates leave with 1-3 additional future goals.

<i>Program Timeline:</i> January 1, 2021 – May 31, 2022	<i>Funding:</i> CARES	<i>Staffing:</i> 1 Manager + 5 Coaches (3 FTE & 2 part-time)
<i>Target Audience:</i> Seniors (CSFP participants)	<i>Data Software:</i> Access & Shah	<i>Addressing:</i> Transformational Changes

Success Coaches: FAMILIES

Program Description: Using the Whole Family Approach, families who have completed a case management program or services at any of the three CAP OC Centers and achieved an increased level of stability are invited to participate in a 6-12 month coaching program. Training and support is provided to individual members of the family to identify and develop a SMART goal. In addition, the family as a unit will identify and develop a SMART goal for the entire family.

Program Timeline:
August 15, 2021 – ongoing
(Expected to begin enrollment early 2022)

Funding:
CARES

Staffing:
1 Manager + 3 Coaches
(1 at each center)

Target Audience:
Families

Data Software:
N/A

Addressing:
Transformational Changes

Young Adult Court (YAC)

Program Description: The Young Adult Court is a collaborative court of the Orange County Superior Court, UCI, probation, and Orangewood for male adults ages 18 to 25 arrested in Orange County who have legal and social service needs. The collaborative court works as a team to connect the youth to services and other opportunities, like applying for jobs, getting stable housing, or helping the youth enroll in school. The social workers provide clinical and regular case management services for the youth as part of the collaborative. YAC is much more involved than the traditional court system, if they complete the program (at least 18 months), their felony conviction may be reduced (to a misdemeanor) or dismissed by the Judge.

Program Timeline:
November 12, 2020 – May 31, 2022

Funding:
CARES

Staffing:
1 Manager + 1 Social Worker/
Clinical Case Manager

Target Audience:
Male adults ages 18-25 arrested in OC (all participants are referred by the defense attorney and randomized into the program)

Data Software:
Apricot (Orangewood) & Shah (CAP OC)

Addressing:
Immediate Needs & Transformational Changes

Healthy Marriages and Families Program (HMF)

Program Description: The Healthy Marriages and Families Program consists of 20 workshop hours per series that focus on building couple's strengths to achieve their relationships, family, and marriage goals. The workshops occur each week for two hours for a total of ten weeks. HMF is composed of two primary services: 16 hours of Healthy Relationship Education and 4 hours of Financial Stability Education. In addition, staff also maintain a case management caseload for families who needed additional services. In these workshops couples are taught practical skills for conflict resolution, improved communication, and effective speaker listener techniques.

Program Timeline:
September 30, 2015 – May 31, 2022 (Set to continue)

Funding:
CARES (CARES is the current funding source, before it was the Department of Health and Human Services, Administration for Children & Families, Office of Family Assistance)

Staffing:
Manager + 3 Coordinators
(Trained Staff)

<i>Target Audience:</i> General public	<i>Data Software:</i> Access & Shah	<i>Addressing:</i> Transformational Changes
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Workforce Development Program

Program Description: To elevate individuals through workforce advancement, opportunities for a livable wage, and holistic service delivery establishing healthy living. The Workforce Development program offers support with job placement, mentorship, supportive services, and follow-up and maintenance plans. Participants will take part in a nationally recognized online curriculum before being placed in a living wage job/ internship.

<i>Program Timeline:</i> June 14, 2021 – May 31, 2022 (Set to continue)	<i>Funding:</i> CARES	<i>Staffing:</i> 1 Manager + 2 Coordinators (Hired in late October)
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<i>Target Audience:</i> Youth/ Young Adults	<i>Data Software:</i> Shah	<i>Addressing:</i> Transformational Changes
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Early Childhood Providers

Program Description: Working with First 5 OC, the Early Childhood Providers is intended to support early childcare programs that have struggled due to COVID-19 with business development.

<i>Program Timeline:</i> February 2021 – May 31, 2022 (Intended as a one-time program)	<i>Funding:</i> CARES & First 5	<i>Staffing:</i> Consultant
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<i>Target Audience:</i> Childcare providers	<i>Data Software:</i> N/A	<i>Addressing:</i> Transformational Changes
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II. Energy and Environmental Services (EES) Department

Department of Energy (DOE) Weatherization Assistance Program (WAP)		
<i>Program Description:</i> Weatherization services prioritizing energy savings.		
<i>Program Timeline:</i> July 1, 2021 – June 30, 2022	<i>Funding:</i> Department of Energy	<i>Staffing:</i> EES Department including Production, UA, Billing, Call Center, Outreach & Management Teams (40 Staff)
<i>Target Audience:</i> Low-income community	<i>Data Software:</i> Multiple platforms (e.g., ServTraq)	<i>Addressing:</i> Transformational Changes

Low Income Household Water Assistance Program (LIHWAP)		
<i>Program Description:</i> Provide water utility assistance		
<i>Program Timeline:</i> Soft launch December 2021, official launch February 2022	<i>Funding:</i> American Rescue Plan Act (ARPA)	<i>Staffing:</i> EES Department including Production, UA, Billing, Call Center, Outreach & Management Team (40 Staff)
<i>Target Audience:</i> N/A	<i>Data Software:</i> N/A	<i>Addressing:</i> Immediate Needs

Disbursement Assistance Program (DAP)		
<i>Program Description:</i> Utility Assistance and Appliances for Weatherization (WX).		
<i>Program Timeline:</i> Ends December 31, 2021	<i>Funding:</i> FERC Barclay's Bank Settlement	<i>Staffing:</i> EES Production Department
<i>Target Audience:</i> Low-income community	<i>Data Software:</i> Multiple platforms (e.g., ServTraq)	<i>Addressing:</i> Immediate Needs & Transformational Changes

Disbursement Assistance Program (DAP) Solar		
<i>Program Description:</i> Train EES crew for solar design and installation using SunPower. Complete 5-7 homes.		
<i>Program Timeline:</i> Ends December 31, 2021	<i>Funding:</i> FERC Barclay's Bank Settlement	<i>Staffing:</i> EES Production Department
<i>Target Audience:</i> Low-income community	<i>Data Software:</i> Multiple platforms (e.g., ServTraq)	<i>Addressing:</i> Transformational Changes

Low Income Home Energy Assistance Program (LIHEAP) 2020

Program Description: Utility Assistance (UA) to meet immediate needs & Weatherization (WX) for sustainable impacts prioritizing health and safety. UA cap is \$1,000.

<i>Program Timeline:</i> Ends December 31, 2021	<i>Funding:</i> Health and Human Services (HHS)	<i>Staffing:</i> EES Department including Production, UA, Billing, Call Center, Outreach & Management Team (40 Staff)
<i>Target Audience:</i> Low-income community	<i>Data Software:</i> Multiple platforms (e.g., ServTraq)	<i>Addressing:</i> Immediate Needs & Transformational Changes

Low Income Home Energy Assistance Program (LIHEAP) 2021

Program Description: Utility Assistance (UA) to meet immediate needs & Weatherization (WX) for sustainable impacts prioritizing health and safety. UA cap is \$1,000.

<i>Program Timeline:</i> Ends June 30, 2022	<i>Funding:</i> Health and Human Services (HHS)	<i>Staffing:</i> EES Department including Production, UA, Billing, Call Center, Outreach & Management Team (40 Staff)
<i>Target Audience:</i> Low-income community	<i>Data Software:</i> Multiple platforms (e.g., ServTraq)	<i>Addressing:</i> Immediate Needs & Transformational Changes

Low Income Home Energy Assistance Program (LIHEAP) 2022

Program Description: Utility Assistance (UA) to meet immediate needs & Weatherization (WX) for sustainable impacts prioritizing health and safety. UA cap is \$3,000.

<i>Program Timeline:</i> November 1, 2021 - December 31, 2022	<i>Funding:</i> Health and Human Services (HHS)	<i>Staffing:</i> EES Department including Production, UA, Billing, Call Center, Outreach & Management Team (40 Staff)
<i>Target Audience:</i> Low-income community	<i>Data Software:</i> Multiple platforms (e.g., ServTraq)	<i>Addressing:</i> Immediate Needs & Transformational Changes

American Rescue Plan Act (ARPA-LIHEAP) 2021

Program Description: Utility Assistance (UA) to meet immediate needs & Weatherization (WX) for sustainable impacts prioritizing health and safety. UA cap \$3,000. Includes Business Plan funds for \$171,000.

<i>Program Timeline:</i> August 1, 2021 - December 31, 2022	<i>Funding:</i> American Rescue Plan Act (ARPA)	<i>Staffing:</i> EES Department including Production, UA, Billing, Call Center, Outreach & Management Team (40 Staff)
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<i>Target Audience:</i> Low-income community	<i>Data Software:</i> Multiple platforms (e.g., ServTraq)	<i>Addressing:</i> Immediate Needs & Transformational Changes
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CARES – LIHEAP

Program Description: Utility Assistance (UA) to meet immediate needs & Weatherization (WX) for sustainable impacts prioritizing health and safety. UA cap \$1,000.

<i>Program Timeline:</i> Ended September 30, 2021 (Contract ended pending closeout)	<i>Funding:</i> CARES	<i>Staffing:</i> EES Department including Production, UA, Billing, Call Center, Outreach & Management Team (40 Staff)
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<i>Target Audience:</i> Low-income community	<i>Data Software:</i> Multiple platforms (e.g., ServTraq)	<i>Addressing:</i> Immediate Needs & Transformational Changes
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Energy Savings Assistance (ESA) Program with Southern California Gas Company (SoCalGas)

Program Description: Provide virtual enrollments and virtual assessments for weatherization. Which includes: Faucet aerators, low-flow showerheads, attic insulation, door weatherstripping, caulking, furnace repair/replace (if owner occupied), clothes washer, water heater blankets, minor door/window repair, evaporative cooler vent covers, water heater.
(Participants are mostly leveraged with LIHEAP)

<i>Program Timeline:</i> Ends December 31, 2021	<i>Funding:</i> California Public Utilities Commission (ratepayers)	<i>Staffing:</i> EES Production Department
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<i>Target Audience:</i> Low-income community	<i>Data Software:</i> Multiple platforms (e.g., ServTraq)	<i>Addressing:</i> Transformational Changes
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Energy Savings Assistance (ESA) Program with Southern California Edison (SCE)

Program Description: Provide virtual enrollments and virtual assessments for light weatherization. This includes contactless drop off of measures (LED's, torchieres, power strips). Participants are referred back to SCE for additional measures such as, refrigerators if they apply.

<i>Program Timeline:</i> Ends December 31, 2021	<i>Funding:</i> California Public Utilities Commission (ratepayers)	<i>Staffing:</i> EES Production Department
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<i>Target Audience:</i> Low-income community	<i>Data Software:</i> Multiple platforms (e.g., ServTraq)	<i>Addressing:</i> Transformational Changes
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I. OC Food Bank (OCFB)

Commodity Supplemental Food Box (CSFP)		
<i>Program Description:</i> Also known as the Senior Food Box Program. Eligible low-income seniors 60 years of age and older receive a monthly food box weighing approximately 32 pounds filled with cereal, juice, peanut butter, milk, canned veggies, fruit, soup, and cheese.		
<i>Program Timeline:</i> Ongoing	<i>Funding:</i> United States Department of Agriculture (USDA) through California Department of Social Services (CDSS)	<i>Staffing:</i> 1 Senior Manager + 3 Managers + 9 Technicians
<i>Target Audience:</i> Seniors 60 years of age and older at 130% of the Federal Poverty Level (FPL)	<i>Data Software:</i> Hard copies in binders & Excel	<i>Addressing:</i> Immediate Needs

Donated Food Program		
<i>Program Description:</i> Food and personal care items donated by the food industry and food drives. Goods are re-distributed to nearly 250 member agencies who help support by contributing a \$0.06 per pound shared maintenance fee for all non-perishable goods received. There is no charge for the following perishable items: bread, dairy, and produce (fruits and vegetables).		
<i>Program Timeline:</i> Ongoing	<i>Funding:</i> Donations, grants, Community Service Block Grant (CSBG), and Shared Maintenance Fees	<i>Staffing:</i> 1 Manager + 1 Agency Relations Coordinator + 1 Agency Relations Assistant + 1 Warehouse Supervisor + Part-time support from 8 Drivers/ Warehouse Workers
<i>Target Audience:</i> 200+Partner Agencies	<i>Data Software:</i> Excel	<i>Addressing:</i> Immediate Needs

The Emergency Food Assistance Food Program (TEFAP)		
<i>Program Description:</i> United States Department of Agriculture (USDA) commodities received and provided at no cost to low-income people through approximately 25 Independent sub-distribution sites serving families, as well as 5 homeless providers for the preparation of hot meals.		
<i>Program Timeline:</i> Ongoing	<i>Funding:</i> United States Department of Agriculture (USDA) through California Department of Social Services (CDSS)	<i>Staffing:</i> 1 Manager + 1 Warehouse Coordinator + 1 Agency Relations Coordinator
<i>Target Audience:</i> Low-income community	<i>Data Software:</i> Excel	<i>Addressing:</i> Immediate Needs

CalFresh Outreach

Program Description: Assist CalFresh (aka Food Stamp) eligible households apply to receive needed nutrition benefits.

<i>Program Timeline:</i> Ongoing	<i>Funding:</i> United States Department of Agriculture (USDA) through California Association of Food Banks	<i>Staffing:</i> 1 Manager + 1 Outreach Coordinator
<i>Target Audience:</i> Eligible participants	<i>Data Software:</i> Excel	<i>Addressing:</i> Immediate Needs

Clementine the Mobile Food Trolley

Program Description: Clementine, is a mobile grocery store, housed in a quaint Old English Trolley. Clementine visits community sites on a routine schedule, providing nutritious food and diapers to vulnerable families with children at no cost.

<i>Program Timeline:</i> February 1, 2019 - Ongoing	<i>Funding:</i> PIMCO	<i>Staffing:</i> 1 Manager + 1 Driver/Warehouse Worker
<i>Target Audience:</i> Low-income families with small children in the household	<i>Data Software:</i> Excel & an annual report is submitted to PIMCO	<i>Addressing:</i> Immediate Needs

OC Diaper Bank

Program Description: Diapers and pullups are provided to a collaborative network of partner organizations serving families with infant children, delivered by Tom Tom, the Diaper Bank's stork themed diaper delivery truck.

<i>Program Timeline:</i> Mid-March 2020 – June 2024	<i>Funding:</i> California Department of Social Services (CDSS) & supplemented via donations, COVID Relief diapers, diaper drives, etc.	<i>Staffing:</i> 1 Manager + 2 Drivers/Warehouse Workers
<i>Target Audience:</i> Families with children (~0-5 years old) in Orange County	<i>Data Software:</i> Microsoft Forms (monthly partner reports) & Excel	<i>Addressing:</i> Immediate Needs

The Giving Farm at Westminster High School (WHS)

Program Description: A farm-to-food bank collaborative community program, managed by Solutions for Urban Agriculture, the Orange County Food Bank, OC Farm Bureau, and the Westminster High School Agriculture Program including Future Farmers of America (FFA). It utilizes student and community volunteer support and provides hands-on educational opportunities while investing in youth leadership and developing our next generation of agriculture producers. Produce grown at the 8-acre farm is used for participants of the OC Food Bank.

<p><i>Program Timeline:</i> Ongoing</p>	<p><i>Funding:</i> Limited through California Department of Social Services (CDSS) and donations</p>	<p><i>Staffing:</i> AmeriCorps Fellow (<i>projected start date January 2022</i>) + Volunteers (Short & long term)</p>
<p><i>Target Audience:</i> WHS Students, community, and volunteers</p>	<p><i>Data Software:</i> Volunteer Hub & Excel</p>	<p><i>Addressing:</i> Immediate Needs</p>

STRENGTHS:

The abilities, resources or strong suits that have the greatest potential for positively impacting an organization's success when achieving its mission.

- Mission and Vision; with consideration of reputation, recognition, and network
- Leadership ability
- Passionately dedicated Staff
- Well designed organization infrastructure and fiscal alignment
- Quick to Adapt
- Forward thinking
- Expansive multi-site services

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WEAKNESS:

The features of an organization that are considered an internal flaw. Examples of such are: capability deficiencies, liabilities, and any factors impeding the organization's ability to accomplish its goal.

- Data analysis and outcomes
- Technological systems such as CMS and client learning systems.
- People involved and Success planning
- Future staff alignment with specificity to their skills, training and onboarding.
- Communication and Structure
- Limited Space

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OPPORTUNITIES:

Favorable factors outside of an organization that could give said organization an advantage in accomplishing their goals.

- Ownership of one main campus.
- Brand growth, by nature of future thinking, planning action and promoting community development.
- Ending poverty by integrating services with family first approaches.
- Thought leadership; promoting and impacting change with living wage.
- Advocate for our participants; DEI; social justice.
- Push for systemic change
- Profile leveraging; private funding transfer of wealth.

THREATS:

Factors with potential harm towards an organization's end goal.

- Temporal based Funding
- Covid strain variants
- Increasing operation expenses and Safety measures
- Observed disparities in both wealth and income
- Competition with other agencies
- Divisive Politics

CAP OC's Theory of Change is our visual articulation of our beliefs and strategies for ending poverty in the communities we serve.

Excellence • Proactiveness • Innovation • Collaboration

vision: We see generations of healthy communities where poverty ceases to exist.

mission: We seek to end and prevent poverty by stabilizing, sustaining, and empowering people with the resources they need when they need them. By forging strategic partnerships, we form a powerful force to improve our community.

assumptions:

- Poverty is a complex problem.
- Families often need multiple generations to move out of poverty.
- Individuals in crisis need immediate assistance.

- Individuals, with a focus on youth and young adults, need targeted educational, technical, and skill-based training to increase the skills needed for tomorrow's workforce.
- Affordable housing and living wages are essential.
- There is a direct correlation between systemic racism and poverty.

overarching guidance: CAP OC uses the **Whole Family Approach** in addressing long-term generational poverty by utilizing all the resources of CAP OC through our Success Coaches to empower adults, seniors, youth, and children with the tools they need to make plans and reach goals. Each family is different, has unique needs, and will need a variety of services to achieve their goals.

our strategies

ADDRESS IMMEDIATE NEEDS

- Alleviate Hunger
- Promote Financial Stability
- Prevent Homelessness

EMPOWER COMMUNITIES

- Pursue Civic and Community Engagement
- Establish Economic Stability
- Provide Education Opportunities and Youth Empowerment
- Support Individual and Community Resilience
- Promote Racial Equity and Social & Environmental Justice
- Create Workforce Development Opportunities

immediate changes

- Families basic needs are met.
- Families are strengthened and have neighborhood support.
- Individuals have the education, tools, and resources to make sound financial decisions and move out of poverty.
- Individuals, seniors, and families have energy efficient, safe, sanitary, healthy, and affordable housing.

transformational changes

- Families are empowered with the resources they need to succeed to move out of poverty in two generations.
- Individuals and families in Orange County are strong, stable, healthier, economically secure, and live longer.
- Equitable community access to opportunities for low-income individuals, seniors, and families to be safe, healthy housed, and financially stable, regardless of zip code.
- Individuals drive change in their communities by advocating and partnering with nonprofits and institutions to develop services and policies that break barriers to their success and empower them to make positive changes.
- Youth have the education and access to resources to succeed in the future.

Comprehensive Services • Integrated Strategies • Client Empowered • Community Centered

THIS IS WHERE **POVERTY ENDS**



CAP OC's Volunteering Philosophy

CAP OC has a commitment to volunteerism. We aim to leverage volunteers at all levels of the organization and build an effective volunteer program that can meet our agency's mission in a cost-effective way. This can be achieved by implementing the following *One OC Service Enterprise* principles and maintaining the support of a volunteer infrastructure:

1. Detailed Strategic Plan to document volunteer opportunities.
2. Prioritize initiatives to manage resource allocation for volunteers.
3. Standardize training for paid staff and volunteers.
4. Volunteer tracking system used to manage resources.
5. Leverage modern technology to improve communications.
6. Clear on-boarding and expectation-setting with volunteers.
7. Ongoing need for funding grants/ fundraising in support of volunteer infrastructure.
8. Grow partnerships with other organizations to increase volunteer opportunities.

CAP OC is responsible for administering the principles of volunteerism throughout the agency. CAP OC uses a volunteer management software known as Volunteer Hub to link volunteers with the appropriate department or services based on their interests. This software was implemented in 2020 due to the COVID-19 pandemic to reduce fragmentation, standardize methods, and delegate volunteers across the organization. Ultimately, Volunteer Hub serves as a central base where all volunteers can be managed. After volunteers complete their service, they receive a Thank You email with a short Volunteer Satisfaction Survey (VSS) through Survey Monkey to help us improve the volunteer experience.

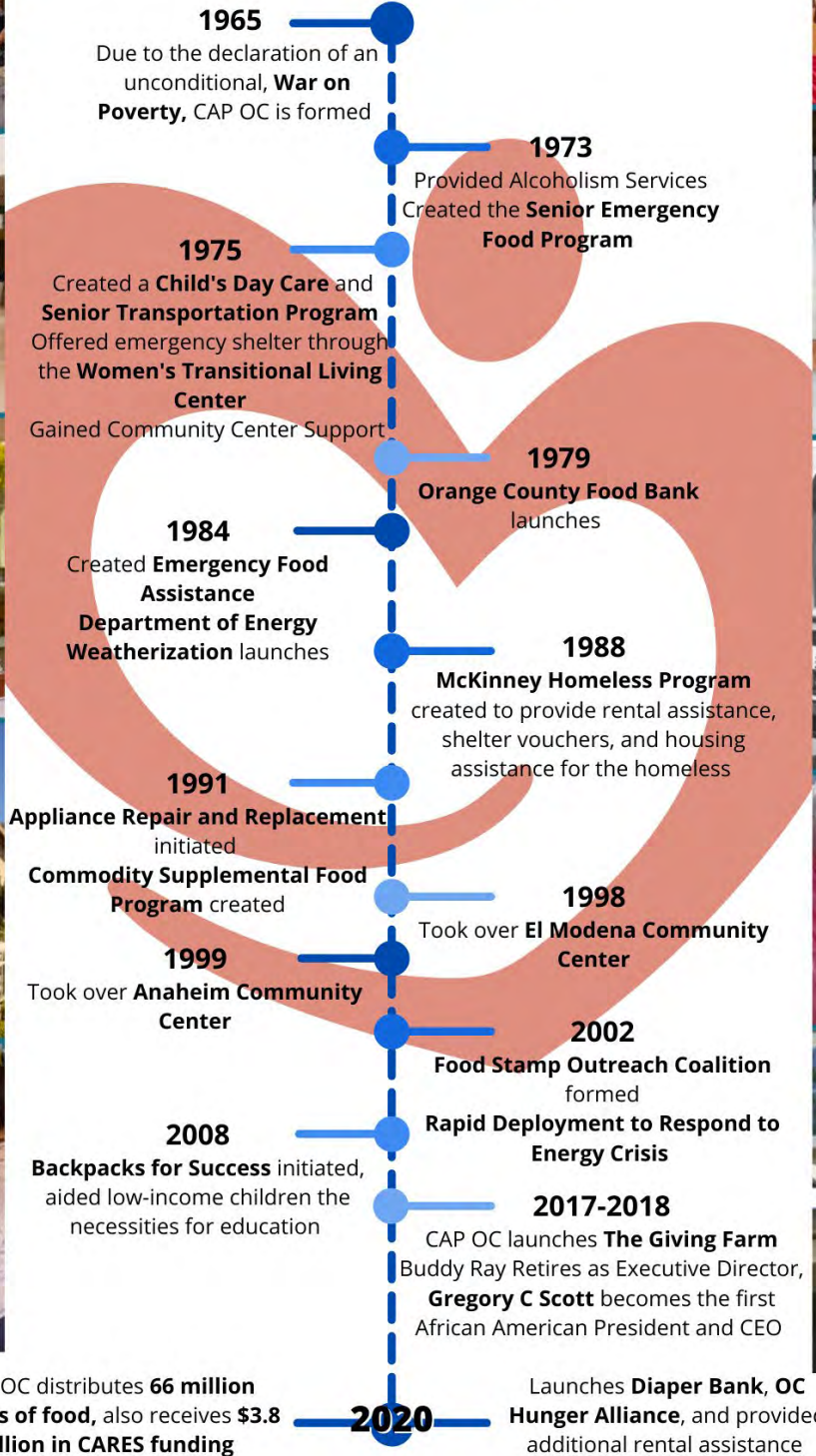
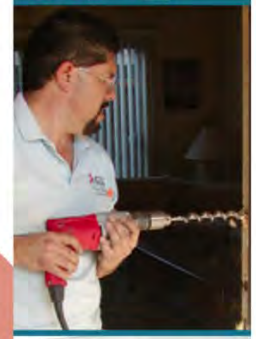
CAP OC volunteers come from a variety of sectors whether corporate, community groups, schools, or individuals independent of organization affiliation. It is important to expand and strengthen our partnerships to help support the efforts of CAP OC's various departments and services. Furthermore, it is crucial to highlight the contributions of volunteers across the agency so establishing appreciation efforts such as a Volunteer Appreciation Day is necessary.

Fundraising is another key aspect of volunteerism. Turning volunteers into donors is crucial not only to support CAP OC's programs and services but to allocate funds to the volunteer program to continue supporting its infrastructure. Thus, it is important to encourage volunteers/interns to identify new fundraising opportunities such as grants to support the program. In addition, CAP OC can raise funds for the agency through branded goods such as keychains, agency t-shirts, pens/pencils, etc.

Lastly, CAP OC needs to get recertified as a One OC Service Enterprise.

HISTORY OF COMMUNITY ACTION PARTNERSHIP

Orange County



CAP OC distributes **66 million pounds of food**, also receives **\$3.8 million in CARES funding**

Launches **Diaper Bank, OC Hunger Alliance**, and provided additional rental assistance

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Community Action Partnership of Orange County
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www.capoc.org

