



## Strategic Plan

FY 2019 – 2021

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“Poverty does not belong in civilized human society. Its proper place is in a museum.”  
- Muhammad Yunus, social entrepreneur and Nobel Peace Prize recipient

# Forward

Solutions That Empower People, Inc. or “STEP” has been the designated community action agency responsible for carrying out anti-poverty work in Franklin and Patrick counties of Virginia since 1966. It is our mission to work with our community partners to facilitate solutions that empower people to overcome barriers to economic, educational and developmental success. With this objective in mind, and as the needs of these communities have changed and new opportunities have become available, STEP has evolved to meet those needs through an array of programs and services that focus on early childhood education (Early Head Start and Head Start); youth services (LIFES Academy and Project Discovery); senior services (Meals on Wheels, transportation); supportive services (re-entry, homelessness prevention); housing services (rental assistance and weatherization); and financial services (tax preparation assistance). In addition to the mandated service areas of Franklin and Patrick counties, STEP provides certain programs and services in the counties of Bedford, Henry, and Pittsylvania as well as in the cities of Martinsville and Danville. STEP has an annual budget of \$4.7 million, has about 100 employees, is assisted by more than 200 volunteers, and serves more than 3,400 people annually.

Every three years STEP conducts a comprehensive community needs assessment to ensure that we understand and appreciate the root causes of poverty in our community. The results of this study set the criteria and priorities for determining the most effective means of utilizing the resources entrusted to us and, with the guidance and participation of our staff and Board of Directors, provide the framework for the following Strategic Plan.

*SPECIAL ACKNOWLEDGEMENT OF  
APPRECIATION TO:*

**Monica Jefferson**, (former) Program  
Manager, Virginia Housing Development  
Authority

*Approved by STEP Board of Directors: March 21, 2019  
Reviewed/Modified:*



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## *Summary of Community Needs*

Over the last eighteen months STEP has conducted an assessment of needs within the communities that we serve. This lengthy process identified the following critical needs which STEP will endeavor to address in the following Strategic Plan.

1. Safe, affordable, energy efficient and accessible housing
2. Affordable childcare
3. Transportation
4. Education/youth services

### *STEP Today*

Given a complete understanding of the current needs of the community, it is important that the reader next understand STEP as it exists today. This will underscore the evolution that STEP will have to undertake to help the low-income members of our community overcome the barriers that they encounter and add context to the following Strategic Plan.

STEP is headquartered in Rocky Mount (Franklin County), Virginia and has a second office in Stuart (Patrick County). These counties constitute STEP's primary service area. STEP also maintains an office in Martinsville (Henry County). STEP provides limited services in Henry, Bedford and Pittsylvania counties, our secondary service area. STEP has approximately 100 employees who are supported each year by more than 200 volunteers. STEP operates on an annual budget of about \$4.7M.

**OUR MISSION:** STEP, and our partners, facilitate solutions that empower people to overcome their barriers to economic, educational and developmental success within the communities we serve.

**OUR VISION:** STEP improves the quality of life and creates opportunities in our communities.

## **Agency Overview**

### **Administration**

(annual funding \$599,000)

STEP is governed by 24-member tri-partied board of directors. The composition of the board is maintained with an equal balance of elected officials (or their designees), low-income representatives and private members of the neighborhoods we serve in order to ensure broad community involvement and representation.

STEP delivers services through nine departments which function semi-autonomously. All STEP employees operate under the same personnel policies, payroll, e-mail system, and fiscal policies and procedures. All programs receive administrative support and oversight in information technology, benefits, data management, human resource management, development, planning, accounting, and supervision.

### **MARKETING AND PUBLIC RELATIONS**

(annual funding \$84,000)

Informing the public about STEP programs and services is critical not only to serve our clients but also to develop effective partnerships that allow us to provide holistic services as effectively and efficiently as possible. The creation of the Marketing and Communications Director position in 2016 facilitated a hundred-fold increase in agency awareness in its service areas, previously largely unaware of the agency or its programs.

STEP outreach efforts encompass print and broadcast media exposure, event hosting and participation, and social media presence via Facebook, Twitter, Instagram and Flickr. Additionally, STEP's website provides easy access to information about agency services and programs.

## **Program Descriptions**

### **EARLY CHILDHOOD EDUCATION**

(annual funding \$2,750,000)

Prenatal support and educational services for pregnant women, childhood development, and school readiness are available to eligible families through STEP's Early Head Start and Head Start (E/HS) programs. We also provide some home-based programs. STEP is funded for a combined total of 218 students (infant up to age 5) in our E/HS programs each year (although as families move in and out of our communities the actual number of students served each year typically exceeds this number).

**Early Head Start**

STEP's Early Head Start program provides low-income children with comprehensive child development support. This includes health and nutrition programs that enhance their ability to learn so they are prepared for their educational careers. Our family-driven philosophy empowers parents to support and nurture their children while meeting other critical social and economic goals. STEP Early Head Start enrolls 80 children each year.

**Head Start**

STEP's Head Start program provides a comprehensive education for three and four-year-old children that encourages parental involvement and is designed to foster healthy development and school readiness. STEP provides education, nutritious meals, and the opportunity for social, emotional, and intellectual growth that helps prepare the children for success in school and in life. Medical and dental support services are also offered. The Head Start approach serves the entire family and seeks to empower both parent and child. STEP Head Start enrolls 138 children each year.

**YOUTH SERVICES**

(annual funding \$489,000)

**LIFES Academy**

LIFES Academy provides an engaging alternative day school setting for middle and high school students with special needs. STEP currently serves up to 10 students in each classroom with one professionally trained staff member (teachers and counselors) for every two students. LIFES Academy helps students shape appropriate attitudes, behaviors, and life skills so they can realize their fullest potential both academically and socially. LIFES Academy is licensed by the Commonwealth of Virginia Department of Education and is an accredited member of the Virginia Association of Independent Specialized Education Facilities (VAISEF). Students are referred to LIFES Academy through their local education agency's special education department in cooperation with the locality's Family Assessment and Planning Team (FAPT) and Community Policy and Management Team (CPMT).

**Project Discovery (PD)**

Through STEP's Project Discovery program, college and career readiness programs are provided to middle and high school students in Franklin County. Students who want to go to college or enroll in a vocational training program are offered tutoring, educational support, SAT and college application preparation, college visits, and other related assistance. These students typically come from low-income families and are often the first member of their family to attend college. STEP helps students enrolled at Franklin County High School, Benjamin Franklin Middle School and, of course, LIFES Academy.

## **SUPPORTIVE SERVICES**

(annual funding \$280,000)

### **Virginia Homeless Solutions Program (VHSP)**

STEP provides temporary financial assistance and on-going case management services for low-income families and individuals who are at risk of losing their rental housing. To be eligible for this program, a family's income must be below 30% of the Area Median Income (AMI) as determined by the federal Housing and Urban Development (HUD) department.

STEP's "rapid re-housing" program provides emergency financial assistance to roughly 125 homeless veterans, individuals and families each year. Our homelessness programs are available in Henry, Franklin, Patrick, Pittsylvania counties and the cities of Martinsville and Danville.

### **Re-Entry**

Returning to society and being re-assimilated into a community following incarceration truly is a challenge. "Returning citizens" face significant challenges finding housing, employment and acceptance back into the communities they left behind. Without support to re-enter society, many released inmates find themselves incarcerated again within a few short years.

STEP engages incarcerated individuals up to a year prior to their release and helps each develop a plan for success upon their release. STEP offers family and parenting, housing, employment, educational, and other support services in Franklin, Patrick, and Henry counties, as well as the City of Martinsville. STEP works with about 100 returning citizens (pre-release) each year and provides aggressive case management services for about 50 returning citizens annually (post-release).

## **HOUSING AND WEATHERIZATION**

(annual funding \$507,000)

STEP provides weatherization and home energy assistance for qualified homeowners. STEP also manages the Section 8 Housing Choice Voucher Program for the Virginia Housing Development Authority. These programs help to ensure safe, affordable housing options for low-income residents.

### **Weatherization/Low-Income Home Energy Assistance Program (LIHEAP)**

STEP's weatherization program is designed to assist residents of Franklin and Patrick counties save money on their heating and cooling bills by helping them make their homes more energy efficient. Weatherization services can include insulation, weather-stripping and caulking, water-heater blankets, window and door repair or replacement, inefficient refrigerator replacement, and heating and cooling system repair or replacement. Reducing the energy consumption in each home helps to create a healthier environment while allowing residents to reallocate funds to more productive uses. STEP works with highly trained industry professionals



who use the latest technology, including infrared and thermal imaging, to properly diagnose each client's specific energy saving needs. STEP weatherizes up to 50 homes each year.

### **Section 8 Housing Choice Voucher Program**

STEP administers the Section 8 housing choice voucher program in Franklin, Patrick, and Bedford counties on behalf of the Virginia Housing Development Authority (VHDA). Staff also inspect rental homes participating in this program to ensure that they are properly maintained. Elderly residents and/or disabled families are our highest priority. STEP serves about 190 households annually.

### **FINANCIAL SERVICES**

(annual funding \$9,500)

### **Volunteer Income Tax Assistance (VITA)**

STEP provides free income tax preparation assistance and filing for over 500 income-eligible residents of Franklin County and Patrick counties each year.

### **Responsible Rides**

STEP partners with Freedom First Credit Union to provide an auto purchase program for low and moderate-income families. This program includes financial and vehicle maintenance training as well as access to affordable financing.

### **SENIOR SERVICES**

(annual funding \$396,000)

Seniors who receive nutritious meals and participate in socialization programs are healthier, happier, and remain independent in their own homes longer. Through our seniors programs we give seniors the tools that they need to continue living independently and with dignity.

### **Home Delivered Meals**

STEP is a member of the national Meals on Wheels America program. We deliver hot, nutritious meals prepared in our own commercial kitchens to homebound seniors 60 years and older living in Franklin and Patrick counties who have been referred by the Southern Area Agency on Aging (SAAA). Frozen meals that seniors can prepare at their convenience throughout the week are also provided, as are bagged groceries for seniors who live in remote areas. We serve more than 20,000 meals annually to over 100 homebound seniors.

### **Congregate Meals**

STEP prepares nutritious lunches and provides educational programming and other engaging activities at various sites throughout Franklin and Patrick counties. Programs are designed to provide seniors with education and information to help them live independently. We serve more than 5,000 meals annually to at least 170 seniors.

## Transportation Program

STEP provides transportation services for Patrick County seniors to congregate events, medical appointments, and grocery shopping. More than 50 seniors take advantage of these services each week, allowing them the freedom to be more mobile, self-sufficient and independent. STEP provides over 2,000 rides.

### DINING SERVICES

(annual funding \$284,000)

STEP operates fully equipped commercial kitchens at our Franklin and Patrick county sites. STEP staff prepare over 80,000 nutritious meals and snacks annually for the seniors that we serve and the children who attend our Head Start, Early Head Start and LIFES Academy programs.

## Customer Satisfaction

In a customer satisfaction survey of randomly selected STEP programs conducted in the fall of 2018, 241 STEP clients reported very high levels of satisfaction with agency programs, services and staff. Respondents were asked to record their experiences in areas including overall satisfaction, available programs and services, staff professionalism and the benefits (outcomes) they realized because of their participation. A complete copy of these surveys are included as Appendix B to this report.

## Agency Leadership

STEP's senior leadership averages more than 26 years of professional experience.

### STEP Staff Experience Summary

Position	Post-Secondary Education	Professional Experience	Time at STEP
Executive Director	MPA (Non-profit concentration)	34 Years	3 Years
Deputy Executive & HR Director	BS Accounting	26 Years	24 Years
Finance Director	BS Accounting	24 Years	3 Years
Marketing and Public Relations Director	BA English/Journalism/Communications	38 Years	3 Years
Early Childhood Education Director	BA Applied Science in Teaching	37 Years	21 Years
Youth Services Director	Masters of Arts, Special Education	15 Years	2 Years
Supportive Services Director	BA Human Services	9 Years	2 Years
Housing and Weatherization Director		33 Years	20 Years
Senior Services Director		20 Years	6 Years
Dining Services Director		18 Years	8 Years

# *Strategic Plan 2019-2021*

## Planning Strategically

Given a thorough understanding of the needs of the community that STEP serves and of STEP as it exists today, we next sought to identify and articulate how the agency would evolve in order to accomplish its mission. The first step in this process was to evaluate the strengths, weaknesses, threats and opportunities that face the organization. The results of this SWOT analysis follow.

<b>STRENGTHS</b>	<b>WEAKNESSES</b>
<ol style="list-style-type: none"> <li>1. Commitment to our Mission (leadership &amp; staff)</li> <li>2. Well-trained and experienced leadership/staff</li> <li>3. Broad spectrum of needs</li> <li>4. Fiscal stability</li> <li>5. Positive work environment</li> <li>6. Understanding the communities we serve</li> <li>7. Teamwork</li> <li>8. Data collection</li> <li>9. Engaged Board of Directors</li> <li>10. External partnerships</li> </ol>	<ol style="list-style-type: none"> <li>1. Need more staff for current work load</li> <li>2. Internal communications</li> <li>3. Lack of formal cross-training, mentorship, leadership development, succession planning</li> <li>4. Office space (not enough and condition)</li> <li>5. Data collection/inaccurate/describing outcomes</li> <li>6. Lack of administrative presence in Patrick and Henry county offices</li> <li>7. Formal working agreements partners</li> <li>8. Capturing and using staff ideas</li> <li>9. Exploring/pursuing new grant opportunities</li> <li>10. Poor staff compensation</li> <li>11. Case management</li> </ol>
<b>OPPORTUNITIES</b>	<b>THREATS</b>
<ol style="list-style-type: none"> <li>1. Community awareness of all programs and services</li> <li>2. Expanding relationships with community officials</li> <li>3. How do we reach everyone and meet all of the needs of our community?</li> <li>4. The actual needs themselves</li> <li>5. Availability of additional funding, expanding fee-based programs, growing fundraising</li> <li>6. ROMA</li> <li>7. Expanding educational programs and services</li> <li>8. Filling gaps in needs (i.e. transportation)</li> <li>9. Collaborative teams, bundled services, case management</li> </ol>	<ol style="list-style-type: none"> <li>1. Loss of Federal funding (diversity/inflation/political climate/regionalization of grants)</li> <li>2. Undersized/obsolete facilities and equipment</li> <li>3. Loss of experienced board members</li> <li>4. Resources – disgruntled staff/partners</li> <li>5. Bad publicity/public relations mishap</li> <li>6. Untrained staff</li> <li>7. Unhappy staff</li> <li>8. Inadequate leadership, competitors expanding into our service area, ineffective partners, dissatisfied/unmotivated customers</li> <li>9. Loss of private donations</li> <li>10. Loss of students to other school systems</li> </ol>

## National Community Action Agency Theory of Change

Another important factor to consider in charting the agency's course was the National Community Action Network Theory of Change which guides all Community Action activities and is the driving force behind this Strategic Plan. It states that every community advocacy group should strive to achieve these three goals (Community Action, 2018):

**Goal 1:** Individuals and families with low incomes are stable and achieve economic security.

**Goal 2:** Communities where people with low incomes live are healthy and offer economic opportunity.

**Goal 3:** People with low incomes are engaged and active in building opportunities in the communities.

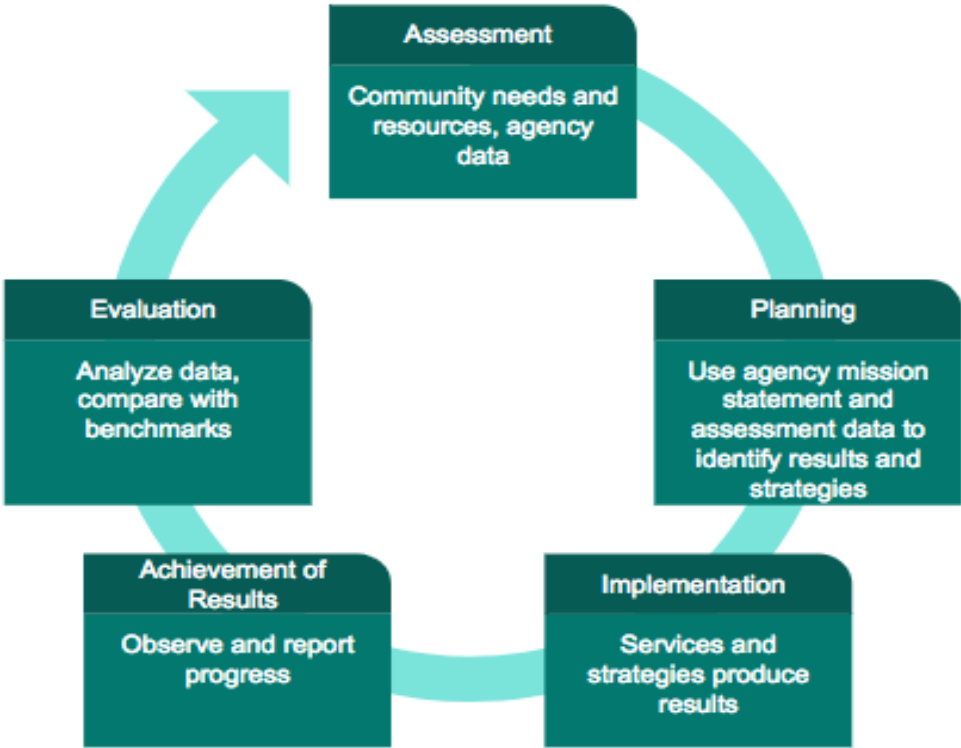
In order to accomplish these goals it is critical that community action agencies transform themselves to:

1. Become the recognized, go-to poverty-elimination leaders in the community
2. Be recognized as experts on poverty, poverty resources in the community, and solutions to poverty
3. Meaningfully involve low-income people in the governance of the agency
4. Develop collaborative community partnerships to reach mutual goals
5. Actively participate in community and economic development activities aimed at overcoming poverty
6. Be recognized as the community's voice (advocate) for people in poverty
7. Retain staff with strong expertise in community problem solving, collective impact models, convening, and leadership
8. Focus on eliminating the *causes* of poverty
9. Focus on *community-level* problem solving and systemic change

# Results Oriented Management & Accountability (ROMA)

Community Action Agencies have also been asked to commit to a number of Results Oriented Management and Accountability or “ROMA” principles and activities. STEP has adopted and is dedicating itself to employing this operational theory and methodology to ensure the constant assessment, evaluation and, as necessary, modification of our programs and services in order to realize and sustain the most impactful outcomes for those we serve.

## The ROMA Cycle



# STEP

## FY 2019-2021

### Strategic Plan Objectives

#### Goal 1: ROMA Integration for Operational Excellence

1. Integrate ROMA cycle into agency DNA to maximize outcomes that align with the agency's priorities and community assessment.
  - a. Establish uniform goals for all agency programs (i.e. moving families to self-sufficiency)
2. Develop data-driven decision-making models that predict and optimize organizational outcomes.
  - b. Develop data entry procedure
  - c. Integrate into performance evaluations
  - d. Leverage as governance tool
3. Develop and implement progressive electronic customer satisfaction system of collection and reporting.

#### Goal 2: Quality Services

4. Utilize referral and bundled services through advanced case management practices.
  - a. Single point of client entry
  - b. Multigenerational approach
5. Increase access to underserved and/or underfunded core disciplines.

#### Goal 3: Capacity Building

6. Position the agency for long-term financial stability.
7. Ensure that STEP is recognized as the go-to expert and primary resource on poverty and poverty solutions.
8. Focus on community-level partnerships aimed at eliminating the causes of poverty in our communities.
9. Enhance communication systems between agency leadership and staff.
10. Talent Development
11. Facilities Management

## **Strategic Plan Implementation**

This Strategic Plan is intended to provide a roadmap for the continuous improvement of efficiency and effectiveness of the agency's operations in order to deliver high quality services, advocacy and commitment of resources to citizens. STEP's leadership team will use this information to steer the organization toward the fulfillment of its mission. Changing economic, political, and cultural climate will require regular reviews of and amendments to the plan to address changes in the community, the environment, and at the agency.

STEP's Board of Directors will evaluate and assess the agency's Strategic Plan, core strategies, and outcomes at least annually. The Board, agency staff, community partners and stakeholders will review changes in external and/or internal contributing factors that might warrant a shift or change in priorities, long-term goals, objectives, and/or core strategies for realizing them.

The Strategic Plan is considered to be a "living document." Revisions to the plan will be made as needed to reflect any such changes. The agency will evaluate, update, and record progress made toward implementation of the plan according to the following schedule:

- Quarterly: Progress reports – Board of Directors, Executive
- Annually: Review of operational action plans – Board of Directors, Executive Director and senior agency leadership.

## STEP FY 2019- 2021 Strategic Plan

### Goal 1: ROMA Integration for Operational Excellence

<u>Objectives/Strategies:</u>	<u>Who is responsible?</u>	<u>Timeline:</u>	<u>Resources Available (+) Needed (-)</u>	<u>Measures:</u>	<u>National Goal</u>
<p>1. Integrate ROMA cycle into agency DNA to maximize outcomes that align with the agency's priorities and community assessment.</p> <p>a. Establish uniform goals for all agency programs (i.e. moving families to self-sufficiency)</p>	1. Exec. Director, Deputy Exec. Director	1. Quarterly board reports and annual reviews	1a. Strategic plan 1b. Logic models 1c. ROMA implementation checklist 1d. Quarterly CSBG reports	1. Quantitative reporting to board and program directors	1
<p>2. Develop data-driven decision-making models that predict and optimize organizational outcomes.</p> <p>a. Develop data entry procedure b. Integrate into performance evaluations c. Leverage as governance tool</p>	2a. Deputy Exec. Director 2b. Supervisors 2c. Deputy Exec. Director (set-up) & supervisors (execution)	2a. 5/1/19 2b. 9/1/19 2c. Initiate by 1/1/20	2a. Post in agency portal 2b. EmpowOR family outcome reports	2a. Staff training 2b. Performance reviews 2c. Logic model targets met	1
<p>3. Develop and implement progressive electronic system for collecting and reporting customer satisfaction.</p>	3. Exec. Director through intern or TBD staff member	3. 7/1/20	3a. Funding 3b. Technology	3. Presentation of results to board and program directors	1



**Goal 2: Quality Services**

	<u>Who is responsible?</u>	<u>Timeline:</u>	<u>Resources Available (+) Needed (-)</u>	<u>Measures:</u>	<u>National Goal</u>
<p>1. Utilize referral and bundled services through advanced case management practices.</p> <p>a. Single point of client entry</p> <p>b. Multigenerational approach</p>	<p>1a. Deputy Exec. Director (set-up), Exec. Director and Supervisors (execution)</p> <p>1b. Exec. Director, Deputy Exec. Director</p>	<p>1a. 12/31/19 (1<sup>st</sup> program implementation)</p> <p>1b. TBD</p>	<p>1a. EmpowOR</p> <p>1b. Applicable education training and agency visits</p>	<p>1a. Require accountability as measured through EmpowOR reports</p> <p>1b. Quality assurance monitoring.</p> <p>1c. TBD</p>	1
<p>2. Increase access to underserved and/or underfunded core disciplines.</p>	<p>2. Exec. Director, Deputy Exec. Director, Prog. Directors</p>	<p>2. 3/31/20</p>	<p>2. Partners, funding sources</p>	<p>2. Each Director identifies and presents at least one funding opportunity to advance their program(s)</p>	1 & 2

**Goal 3: Capacity Building**

<u>Objectives/Strategies:</u>	<u>Who is Responsible?</u>	<u>Timeline:</u>	<u>Resources Available (+) Needed (-)</u>	<u>Measures:</u>	<u>National Goal</u>
1. Position the agency for long-term financial stability.	1. Exec. Director	1. Annually	1a. Additional non-government funding 1b. Compensation benefit options 1c. Efficient agency operations	1a. Funding Summary report 1b. Financial reports	NA
2. Ensure that STEP is recognized as the go-to expert and primary resource on poverty and poverty solutions.	2. Exec. Director, Director of Marketing and Communications	2. Annually	2a. PR materials 2b. Empirical data 2c. Comprehensive marketing and communication plan	2a. Media exposure reports 2b. Stakeholder, media requests 2c. Public engagement reports	2
3. Focus on community level partnerships aimed at eliminating the causes of poverty in our communities.	3. Exec. Director, Program Directors and Managers	3. Annually	3a. Effective partnerships 3b. Funding	3a. Active partnership report 3b. CSBG/EmpowOR reports	2
4. Enhance communication systems between agency leadership and staff.	4. Directors and managers	4. Initial event by 6-1-19	4. Communication opportunities and vehicles	4a. Communication reports 4b. Communication events	NA

5. Talent Development	5. Exec. Director, Deputy Exec. Director	5. TBD	5a. Diversity 5b. Leadership Farm System 5c. Volunteer program 5d. Agency pay band implementation plan 5e. Tuition assistance program 5f. Funding	5a. Benchmark report 5b. Professional development 5c. Volunteer reports 5d. Demographic reports 5e. Agency pay band implementation plan	NA
6. Facilities Management	6. Finance Director	6. 12/31/19 for capital improve- ment plan	6a. Capital improvement plan 6b. Growth plan 6c. New facility identification 6d. Funding	6a. Implementation of capital improvement plan 6b. Bank account statement	NA

Appendix A



**STEP, Inc. Organizational Chart**

