



Building Bridges to Independence

2015 Goals and Outcomes



A Letter to Stakeholders

Community Teamwork is pleased to provide this outcome report entitled *Building Bridges to Independence* which outlines the progress we have made in year one of our three-year Strategic Community Action Plan for 2015 – 2017. Over the past year, this plan has served as our guide in addressing those needs most critical within our community. Although we are proud of the many accomplishments we have made this past year, we recognize that our work is not done.

Karen Frederick, Executive Director

With an emphasis on enhancing our commitment to clients, community and staff, we focused on four core areas including Family and Financial Stability, Outreach to Underserved Populations, Communications, and Strengthening Agency Infrastructure. These long-term goals are deeply rooted in our efforts to improve the lives of those we serve.

We are grateful to our many partners including those in government, education, other non-profits, businesses, and faith-based organizations throughout the Greater Lowell community. We cannot do this work alone and we rely on collaborations and partnerships with many community organizations to ensure that those we serve have access to all the services they need in an integrated and coordinated manner.

I would like to thank our Board of Directors for their leadership, our volunteers for their generosity of time, and our staff for their commitment to help low-income people become and remain self-sufficient. There is still much to be accomplished but, together, we will continue to seek solutions to address the issues of poverty that affect low-income people in Greater Lowell and beyond.

Sincerely,

A handwritten signature in blue ink, appearing to read "Karen Frederick".

Karen Frederick
Executive Director

Family & Financial Stability

To Assist Families Towards Stability and Economic Security.

Three Year Goals:

1.1: Over the next three years, Community Teamwork will work to increase the financial literacy of area residents through its Family Finance Solutions initiatives including the Financial Literacy Academy, the Volunteer Income Tax Assistance (VITA) Program, Targeted Financial Workshops, One-on-One Financial Counseling and Asset Development acquisition through the Individual Development Account (IDA) Program.

FY15 Outcomes:

- The numbers of individuals who enrolled in the Financial Literacy Academy (FLA) was 129 with 53 completing. Our goal of 90 completers was challenged due to the harsh winter and a number of classes being cancelled or postponed. Currently, the FLA is offered three times annually. There a concerted effort to increase funding so that we can offer the FLA four times per year resulting in higher numbers of completers.
- The number of individuals who obtained free income tax preparation through the VITA program increased by 22% with 547 returns prepared while the number of individuals obtaining the EITC rose by 40% over baseline to 264 people.
- Some agency programs are tracking savings accounts opened by clients as well as the aggregated dollar amount of those savings accounts. Over the next year we will review areas where we can possibly expand this into other programs.
- The total number of individuals acquiring an asset through both the IDA program and the First Time Homebuyers was 85, about a 50% increase over last year.
- The next round of Financial Capability Center funding through the United Way was not released during this reporting period. However, other funding opportunities are being researched.

1.2: Over the next three years, Community Teamwork will work in partnership with the Career Center of Lowell, Middlesex Community College, UMass Lowell, Vocational Schools and others to help clients access job training and gain employment skills so they may find jobs that lead to financial stability and economic self-sufficiency.

FY15 Outcomes:

- The number of individuals completing job readiness training increased by more than 60% up to 157 participants.
- The number of individuals obtaining employment increased by 40% up to 118 participants.
- The agency has engaged in numerous collaborations with area partners, including the Working Cities Challenge specifically designed to assist residents to access job training and jobs.

1.3: Over the next three years, Community Teamwork will work with our Regional Partners to expand homelessness prevention services for individuals and families in need. Community Teamwork will also encourage residents to participant in agency programs that will help to maximize their incomes and maintain their housing. CTI will continue to increase the supply and prevent the loss of affordable housing units using all available resources.

FY15 Outcomes:

- The number of individuals who avoided homelessness was 468, a 4% increase over last year.
- The numbers of individuals who participated in first-time homebuyer classes doubled to 466 completing the four-week seminar. Eighty-five (85) purchased homes, a 50% increase over last year.
- Common Ground Housing Development has built or preserved 60 units of affordable housing since inception. This year, they added an additional three units at Broadway and are on target for an additional 36 more units of new housing in Westford in FY16.

1.4: Over the next three years, Community Teamwork will work to improve client outcomes and implement an integrated service model including case management where needed. Community Teamwork will also adopt an appropriate scale and train staff on its use, such as the Self-Sufficiency scale, to measure family and financial stability and to ensure that clients are no longer in-crisis after being served.

FY15 Outcomes:

- A standardized client satisfaction survey was developed and implemented with 362 clients responding, giving management an insight into our strength areas and where we may need to improve.
- A Client Bill of Rights was developed to ensure that clients know and understand their rights and responsibilities as consumers of CTI services. A formal grievance process is currently being developed.
- The Quality Management Committee is examining the Arizona/Massachusetts Matrix as an assessment tool. The Committee will propose one instrument that can be used and administered across all programs. A matrix/assessment tool will be finalized in FY16.
- The agency has employed SMC Partners to implement the New Opportunities Case Management Software System. The system offers a comprehensive case management tool designed to increase efficiencies, improve accuracy of client data as well as client outcomes. Initial training on the system took place in FY15 with a complete roll-out of the system expected in FY16.

Outreach to Underserved Populations

To Connect More Low-Income People to Services They Need.

2.1: Over the next three years, Community Teamwork will work to fill service gaps within underserved communities based on need determined through research and data analysis.

FY15 Outcomes

- In FY15, child care programming expanded to offer Early Learning at the Parker School in Dracut, alleviating the underserved area of Centralville/Dracut due to transportation gaps.
- Tenant workshops were expanded to be offered in the communities of Haverhill, Lawrence, Salem and Salisbury.

- As an underserved population, a concerted effort to reach more veterans has been a focus in FY15. In partnership with the Lowell Housing Authority (LHA), a mailing went out to all LHA households with military service connections and weekly office hours are held in two of the largest Housing Authority sites. Additionally, a 700 piece mailing went out to all veterans in our Fuel Assistance catchment area consisting of 16 communities. The Veteran Peer Specialist conducts one-on-one meetings to ensure that veterans are connected to VA benefits.
- Community Teamwork successfully responded to an RFP funded through appropriations of the Community Preservation Act to offer Case Management services to Bedford Housing Authority residents. This area has been traditionally underserved.

2.2: Over the next three years, Community Teamwork will develop an outreach plan to create more visibility about the agency and its services in underserved areas to ensure they are being reached.

FY15 Outcomes

- An outreach plan was developed in FY15, however the agency made a number of strides in efforts to increase visibility in underserved areas. This year, the agency held a number of meetings with the Lawrence Eagle Tribune and developed a partnership in an effort to reach the underserved communities in Essex county.
- Eight presentations about Community Teamwork and its services were offered in underserved areas, including a presentation taped and broadcast in Haverhill; discussing our programs on the Greater Lowell Chamber of Commerce Chamber Chat radio show; tabling at both the Greater Lowell and Merrimack Valley Chamber of Commerce business expositions; a tabling event at the Dracut Council on Aging; Staff and volunteers participated in hosting an informational table and distributing materials at the Lowell Food and Wine Festival, Lowell National Night Out , and Veterans Stand Down Days in both Lowell and Bedford.
- Media communication efforts increased with a large 32-page insert in the Lowell Sun in celebration of the agency's 50th anniversary. One television program aired on the LTC public access station and radio station presentations aired on WCAP and radio BDC, a Boston Globe station.
- We received a Google Ad Grant valued at \$10,000 per month. Using key words, this on-line advertising program provides the agency with the opportunity to be brought to the attention of individuals in a broader geographic area. Our Google Ad campaign was launched in August and targeted 3 program areas: Housing & Utilities, Early Learning Programs, and Adolescent Programs. A plan to introduce additional key words and add additional program focus, including the Home Modification Loan program, is in place for the next fiscal year.

2.3: Over the next three years, Community Teamwork will enhance and implement its Language Access Plan to ensure that underserved populations have the information they need about agency services in their native language.

FY15 Outcomes

- A Language Access Plan (LAP) was developed. The LAP was rolled out to staff and implementation of the plan is still underway and will be fully implemented in FY16.

Communications

To Improve Communication with Clients, Community and Staff.

3.1: Over the next three years, Community Teamwork will work to enhance our clients overall experience with the agency to ensure they receive quality customer service, that their needs are met in a timely manner, and that they have the appropriate information necessary to make informed decisions about the range of services they may be eligible to receive.

FY15 Outcomes:

- A Customer Satisfaction Survey was standardized and conducted across all agency programs in four languages. This survey was available has a hard copy and on-line in English, Spanish, Portuguese, and Khmer. Three-hundred and sixty two (362) clients responded to the survey. Responses were compiled and analyzed and results were shared with the Quality Management Committee and the Executive Management Team. In general, clients are very pleased with the services they receive from Community Teamwork. Communication, both with clients and amongst staff, was identified as the areas in greatest need of improvement. A plan is being developed to address this area.
- A Client Bill of Rights was developed and an agency-wide communication system for tracking and addressing consumer complaints through a grievance procedure is underway.
- A strong emphasis on quality customer service has been instituted with regular training at each new employee orientation and within agency programs.
- On-line registration was implemented for First Time Home Buyer classes and Parenting Classes.
- The agency Communications Committee resumed meeting regularly with specific goals and targeted recruitment from programs.

3.2 Over the next three years, Community Teamwork will develop stronger channels of communication with all communities across our service area through a comprehensive Marketing Strategy.

FY15 Outcomes:

- A marketing strategy has been implemented and a number of efforts were employed to raise the profile of Community Teamwork. This included the development of an agency-wide brochure, the Lowell Sun insert, new partnerships with the Lawrence Eagle Tribune and enhanced social media with an increased number of “likes” and “followers.”
- Branding requirements have been articulated across the agency and templates have been developed for all print and electronic communications, PowerPoint Presentations, and email signatures.

3.3 Over the next three years, Community Teamwork will work to improve the breadth and depth of staff knowledge regarding agency and community resources through on-going training and updates about internal and external resources.

FY15 Outcomes:

- Three State of the Agency Addresses were delivered to Administration and at Division meetings during the fall.

- An employee newsletter was developed and is disseminated via email on a bi-weekly basis. Content of the newsletter includes a number of agency and community resources for staff to reference. Agency staff also participate by submitting content to the newsletter including interviews with staff, pictures, recipes, and contributing safety and customer service tips.
- An updated agency-wide brochure was created. The brochure includes information on all agency programs. These have been disseminated at various expos and fairs and are available throughout program waiting areas. Work began on a supplemental brochure for the Resource Center.
- Employee orientation provides new staff with information on agency and community resources while on-going training is offered to incumbent staff through professional development or in-service trainings offered by agency staff.

Strengthen Agency Infrastructure

To Ensure That Community Teamwork is Strong Into the Future

4.1: Over the next three years, Community Teamwork will create a comprehensive year round fundraising and communication plan to increase the agency's unrestricted revenue by at least 2% to meet best practice standards as defined by the Northeast Institute for Quality Community Action.

FY15 Outcomes:

- The Strategic Development Committee was re-established with new and expanded membership. This committee, working with the Director of Development, is taking a strategic approach to increasing our short and long term fundraising priorities and events. Goals included how to best position ourselves with corporate and individual donors beyond our traditional constituency of Greater Lowell; engaging millennials; and motivating the Board of Directors to fundraise and be consistent individual donors at a level that is personally significant to them.
- The agency met its goal to sell all of its Community Investment Tax Credits in FY14 making it eligible to reapply for an additional \$150,000 in tax credits in FY15. The agency was awarded an initial \$100,000 in early FY15 and an additional \$50,000 in the final quarter of FY15.
- A part-time Grants Manager was hired to target foundation giving in order to increase unrestricted funding.
- The Annual Appeal was moved to the fall for November 2014 and this new Thanksgiving Annual Appeal doubled donations over previous annual appeals. The 2015 Thanksgiving Annual Appeal was distributed the week prior to Thanksgiving. The format was changed to highlight a significant client success.
- A second targeted appeal was launched in September 2015. This appeal was specific to a need for renovations in one of our shelters.
- A third "End of Year" appeal will go out electronically and via social media both during the weeks of Christmas and New Year to wrap up 2015.
- The 50th Anniversary Gala event held in May 2015 was a tremendous success bringing in about \$140,000 in revenue and having more than 370 in attendance. This event has become the agency's signature event and will be held again in May 2016 with the goal of increasing last year's revenue by 10%.

- Web-based giving was increased through the use of a “pop-up” donate field the first time a user visited the agency website. This pop-up changes quarterly and features a different division, program, or appeal for the agency.
- The agency launched a text to give program in November of 2015. This enables donors to give by credit/debit card on their mobile devices.

4.2: Over the next three years, Community Teamwork will improve and expand donor communications and opportunities through strategic public relations and marketing activities that focus on assuring long-term loyalty of donors.

FY15 Outcomes:

- Information about matching gifts and other donation opportunities became a permanent page on the agency's website increasing awareness and opportunities to give.
- An organizational event calendar was created and is used to ensure that all agency events are known and well publicized.
- Marketing materials were updated or created as needed, and templates were created to support branding efforts.
- A major effort was made to utilize Gift works, the agency's donor database used to collect donor and volunteer information for dissemination of appeals and newsletters, for tracking donations and grants, and for stewardship to ensure thank you letters are received in a timely manner.
- Social media communication was expanded beyond pushing information and includes interaction with followers when appropriate. A regular schedule of information dissemination was implemented resulting in a 180% growth in Twitter followers, and 46% growth of likes to the agency's main Facebook page.
- A plan was implemented to integrate and coordinate all agency social media accounts. This has provided varying content and introduced new aspects of the agency to those followers of only specific programs.
- The Annual Report for FY15 was expanded to include milestones in the services we provide and pictures from programs and other event. The agency has resumed acknowledging our donors, including in-kind supporters and staff participating in our staff giving program in the Annual Report.

4.3: Over the next three years, Community Teamwork will develop an integrated data system that will support improved client service and documentation of our impact.

FY15 Outcomes:

- The agency made a decision on a new integrated data system. A soft roll-out of the New Opportunities software system was conducted for training purposes with full implementation of the software expected in FY16. The new software system is designed to enhance client services, outcomes and agency efficiency through its case management capabilities and its robust reporting systems.
- In partnership with UMass Lowell, Community Teamwork has developed a dashboard reporting system utilizing UMass's Web-based Analysis and Visualization Environment (W.E.A.V.E.) software.

- An economic impact study, in partnership with UMass Lowell, will be developed in FY16 once the New Opportunities software system has been fully implemented.

4.4: Over the next three years, Community Teamwork will develop and implement an agency-wide Professional Development Strategy.

FY15 Outcomes:

- A revitalized Professional Development Committee was established and a charge is in place for how professional development activities will be implemented throughout the organization. In FY16, the Professional Development Committee will conduct a comprehensive training needs assessment across the agency.
- A grant in partnership with Middlesex Community College was submitted to offer workforce training for Community Teamwork employees by offering a Management Certificate Program, Child Development Associate courses, and specific trainings to be held on the annual Professional Development day that include Team Building and Customer Service.
- Community Teamwork, along with CAPs across the state, is working with MassCAP to develop the MassCAP Training Center where an advisory committee was established to help develop a career pathway and training plan for low-wage Community Action staff.

4.5: Over the next three years, Community Teamwork will ensure that employees are consistently recognized for their contributions by implementing recognition practices at the program and agency level on a regular basis.

FY15 Outcomes:

- On the agency level, employees continue to be recognized for longevity during the annual employee recognition event held on Professional Development day.
- The bi-weekly employee newsletter instituted a Welcome to New Employees section and lists the names and departments of each new employee to the agency. The newsletter also runs spotlight articles that highlights and recognizes employees for special activities or for going above and beyond their normal course of duties.
- An announcement welcoming new staff was created and implemented. It is circulated monthly to all staff.
- Staff are acknowledged in the internal newsletter for accomplishments such as achieving a degree or certification, or other significant personal milestone.
- “Caught Caring” was implemented during the last quarter. The agency worked with a local candy vendor to develop an agency branded sleeve for candy bars that are left at the workspace of an employee who has gone above and beyond expectations. The candy bar is accompanied by a note of thanks.