

CSO, Inc.

Strategic Plan

2009-2014



Helping
Communities
Bridge
Gaps

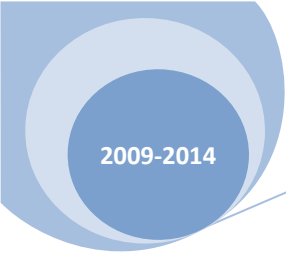


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Chief Executive Officer's Letter

Central Susquehanna Opportunities, Inc. (CSO) is well positioned to be a catalyst for positive change in the local communities that we serve over the next five years and beyond. The organization is well positioned due to the tireless leadership of the Board of Directors, the dedication of management staff, but most importantly because of the over 100 dedicated staff who work diligently to meet the needs of their neighbors and fellow citizens. CSO, through various programs serves as the broker of services at a time of need not only in local communities, but on a global scale as well.

CSO continues to remain ready to meet every challenge that the changing global socio-economic climate will bring to our organization. Part of being ready to meet these challenges includes an ongoing focus on strategic planning that not only focuses on our goals and accomplishments for our communities, but also ensures that CSO continues to have the organizational capability to fulfill our charge as the premier workforce development and community action organization in Central Pennsylvania.

CSO is a significant partner in each of the local communities it serves including; Clinton, Lycoming, Union, Snyder, Northumberland, Columbia, and Montour counties. Through planning and development the organization anticipates continuing and expanding these roles in the areas that CSO serves. The organization continues to expand outreach and development activities designed to further the scope of the impact that the organization has locally and on a regional scale.

To continue the legacy of community service and support the local communities, CSO must prudently manage funds and search for new streams of revenue. We recognize, moreover, that the need for additional sources of revenue and increased fundraising will be a priority in this planning cycle. This will require additional dedication and continued tireless efforts by key management and staff.

CSO believes that bringing focus to planning efforts will position CSO to meet challenges and capitalize on opportunities to improve organizational contributions to individuals, families, staff, business and industry, and the community at large. We have articulated these goals to increase the quality of our services, and programs through ongoing assessment and internal enhancements, through the increased use of technology, and increased outreach efforts in hopes of improving the quality of life for those we serve throughout our communities.



Barry McLaughlin
Chief Executive Officer
Central Susquehanna Opportunities, Inc.

Strategic Planning Committee

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President, CSO Board of Directors

Megan S. Bair

Workforce Development Director, CSO

Michael Roberts

Member, CSO Board of Directors

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Community Action Director, CSO

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Chief Executive Officer, CSO

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Development Director, CSO

Stephen J. Cook

Chief Financial Officer, CSO

Strategic Planning Process

CSO, Inc. has undertaken a detailed and painstaking approach to strategic planning that has been implemented through designed process over several years of diligent evaluation and decision making. The organization utilized a consultant to help develop a work plan designed to ensure that the agency was able to effectively evaluate all of the various components that relate to the organization, while ensuring that all stakeholders were able to participate in the process. The strategic planning effort was coordinated by a steering committee of senior staff and board members.

The planning process involved regular meetings with the consultant and staff to develop a comprehensive evaluation designed to ensure that the history and description of the organization and the various programs offered by the organization were properly understood and evaluated. One of the key components of information collection was a strength and weakness assessment that the entire staff of the organization participated in. A significant part of the work plan was dedicated to discussions designed to assess the organization and its multi-faceted services. Through these regular meetings, the organizational mission statement, values statement, and vision was created and implemented. These three statements are the cornerstone of the organization and its service delivery model.

Critical to the process was the inclusive nature of the discussions between staff, management, and community stakeholders. Through this collaboration the organization was able to plan to meet the needs of the communities served, this year, and for many years to come by developing not only goals, but strategies to meet those goals.

Introduction

Central Susquehanna Opportunities, Inc. (CSO) is a private, non-profit 501(c) 3 charitable organization headquartered in Shamokin, Pennsylvania. CSO serves as the Community Action Agency for the counties of Northumberland, Columbia, and Montour. In addition, CSO serves as the One Stop Operator of Pennsylvania CareerLink facilities in; Clinton, Lycoming, Union/Snyder, Columbia/Montour, and Northumberland. CSO has a dedicated board of 18 representatives from various aspects of the community. CSO has a dual mission as a broker of Workforce Development Services; CSO is responsible for providing Workforce



Investment Activities to the public through various WIA programs. These programs include programs for Adults, Dislocated Workers, Youth, and Public Welfare recipients. These programs are provided mainly through the auspices of the Pennsylvania CareerLink facilities. In addition, CSO working with other Pennsylvania CareerLink partners and the Commonwealth of Pennsylvania serve as staff and support for the Pennsylvania CareerLink facilities. Services include; employment search assistance, various workshops, and other one stop related services. The ultimate goal of the workforce development programs is to find self-sustaining employment for unemployed individuals and increasing the opportunities for those underemployed. Additionally, CSO is the Community Action Agency for Northumberland, Columbia and Montour counties. As the designated CAA, CSO provides services designed to help individuals help themselves and each other as they move from poverty to self-sufficiency.



The CSO Community Action programs are locally implemented, locally controlled, and locally designed to meet the specific needs of the three counties served with CAA services. The ultimate goal is to enable people to eventually to become independent of any public or charitable assistance.

Central Susquehanna Opportunities, Inc. History

The significant growth that CSO has undertaken has its foundation within a dedication to service, and history of ensuring that the community benefits from the efforts undertaken on a daily basis by CSO. This dedication has been the key catalyst for growth as CSO assumed Columbia County workforce development services in 2006. Additionally, in response to community needs in 2006 CSO developed and initiated **CSO, C.A.R.E.S**, one of CSO's largest charitable ventures. **CSO, C.A.R.E.S** is a home heating/energy program that provides assistance to those individuals unable to pay their home heating bills.

The evolution and growth of CSO within the past decade has been significant as CSO was designated the Workforce Investment Area Operator for Union, Snyder, Northumberland and Montour Counties in 1999. This was followed by CSO being designated the Community Action Agency for Northumberland, Montour and Columbia Counties in January, 2004. These two events formed the foundation for the continued expansion and evolution of the organization. CSO began to expand service to the community further in the summer of 2004 with the first annual CSO golf classic. The golf classic has expanded every year since, and the recently held 4th annual CSO golf classic was the largest one to date.



In 2007, the **Brush Valley Chamber of Commerce** joined CSO and is headquartered in CSO's administrative offices in Shamokin. The year 2008 saw the largest expansion of CSO to date with the addition of Workforce Development services in Clinton and Lycoming Counties. CSO currently provides Workforce Development services in seven of the nine counties within the Central Region Workforce Investment Area.

The lessons from the past ten plus years of CSO are many. The organization remains dedicated to the highest standards of excellence as evidenced by the continued additional charges that CSO takes on. The Commonwealth of Pennsylvania and other agencies recognize the continued attention to high standards that CSO represents and as a result there have been ongoing opportunities for organizational growth.



Summary of Programs and Operations

CSO has two distinct divisions in the Community Action Program and the Workforce Development Services program. CSO is highly successful in each distinct yet similar mission.

The Workforce program provides the following programs. ***The Central Region Youth Program***, The Youth Program focuses on utilizing positive youth development for youth ages 16-21 that are income eligible and have at least one barrier to employment. The ***EARN Work Support Component***, which is designed to serve CAO referrals who are first time

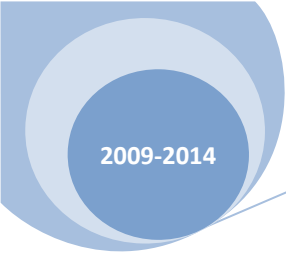
applicants for TANF benefits. The EARN WSC Program is currently active in the 7 counties served by CSO.



The **EARN Career Development Program** is designed to serve CAO referrals who are receiving TANF or Food Stamp benefits. This program is currently active in the 7 counties served, and provides individuals with case management, employment and training, and supportive services. **The WIA Title I Adult/Dislocated Worker** program component serves program eligible adults. The program works with clients to link individuals with training and support and ultimately find employment. Program is currently active in the 7 counties served, providing case management, employment and training, and supportive services. **Rapid Response** is a Commonwealth of Pennsylvania designed program to serve individuals through the CareerLink facilities in a rapid fashion that have lost employment through lay-off. Program is currently active in the 7 counties served, serves individuals dislocated from employment via lay-off or plant closing with financial support, educational linkage, job search, and supportive services.



The Community Action division of CSO provides a variety of services dedicated to improving lives and communities in Northumberland, Columbia, and Montour Counties. These programs include the **Community Service Block Grant**. The CSBG provides Financial Assistance to eligible entities. **Community Action programs** include other services including Case Management, Employment and Training, Health Care, Day Care, Transportation, Nutrition, Energy Assistance, Drug and Alcohol Counseling, Consumer Services, Youth Services, and Outreach and Referral. **The Food Stamp program** informs and educates potentially eligible, low-income, non-participating people about the benefits of the Food Stamp Program, the eligibility rules, and how to apply and assistance with completing the application.



The Family Savings Account is a community building initiative established for the purpose of promoting self-sufficiency for lower income Pennsylvanians through a matched savings program. **The Supported Work Program** serves clients who have limited employability as verified by a Medical Assessment. The goal is to engage clients for as many hours as they are to complete while increasing the hourly requirement The SW Program is currently active in Columbia, Montour and Northumberland and serves individuals with case management, employment and training, as well as supportive services. **The Work Ready Outreach Services** component serves TANF recipients who are not in compliance with program guidelines. The program works with clients to reduce barriers and resume programming. The program serves clients in Columbia, Montour, and Northumberland Counties.

The Supported clients who have been referred Team. These individuals have employment. The MDT works



Engagement Program serves by the CSO Multi-Disciplinary significant barriers to together to determine

appropriate activities for the client. This program is currently active in Columbia, Montour and Northumberland Counties. The program serves individuals with case management, employment and training, and supportive services.

Financial and Administrative Systems

CSO is financially viable due to significant organizational strengths that support CSO's long term financial viability and accountability.

There are several significant funding streams that CSO receives. These include funding from the Central Pennsylvania Workforce Development Corporation as the fiscal agent

for the Central Pennsylvania Workforce Investment Board. CSO, Inc. is the contractor for Workforce Development Services in Clinton, Lycoming, Union, Columbia, Snyder, Montour, and Northumberland Counties. CSO also provides fee for service grant writing services and serves as the administrative entity for the Brush Valley Chamber of Commerce. CSO receives significant funding from the Commonwealth of Pennsylvania due to CSO's recognition as the Community Action Agency for the counties of Northumberland, Montour, and Columbia. These sources of funding are managed effectively due to the structure and strengths of the CSO Financial Operating Systems that are currently in place. The CSO Fiscal department utilizes solid Fiscal Control mechanisms including specific financial approval and documentation procedures including strong financial oversight and accountability systems that are employed by highly qualified fiscal staff. CSO's 501 (c) 3 status and demonstrated success in fundraising events also increase the financial viability of CSO.



Mission

Central Susquehanna Opportunities serves as a catalyst for economic, educational, social, and workforce development in collaboration and cooperation with the entire community to provide diverse resources that promote self-sufficiency and community prosperity.



Vision

We will be the leader in advancing economic, educational, social, and workforce development opportunities.



Values

Central Susquehanna Opportunities believes:

- ***That each individual is unique and should be treated with dignity and respect***
- ***In developing partnerships in order to re-invest in the communities in which we live***
- ***In creating a work environment that empowers employees to make a difference***
- ***In providing services to the public in the most effective and efficient manner***



CSO, Inc. Overarching Goals 2009-2014

(Specific Yearly Strategic Goals included in Annual Plans)

CSO Board of Directors

Over the course of the next five years the CSO Board of Directors will continue to provide oversight and leadership to the organization. The board will ensure that CSO [provides services in the most effective and efficient manner, in collaboration and cooperation with the entire community](#). The board of directors will continue to develop the understanding of the responsibility of its fiduciary and programmatic oversight role. Additionally, the ability of the board to provide comprehensive oversight will be strengthened through participation in governmental and internal knowledge building. Finally, the board will continue to develop and expand its role in organizational activities through active participation in corporate outreach, events, fundraising, and other involvement in CSO activities and initiatives.

CSO Organizational Development

Through the next five years the board of directors, the management, and the staff of CSO will strive to be recognized as a focal point of excellence in the communities that are served by CSO. This will be accomplished by [developing partnerships to provide diverse resources that promote self-sufficiency and community prosperity](#). Partnerships will be developed with communities, elected officials, community members, and other organizations. Additionally, CSO will become recognized as a premiere workforce development and community action organization. This will be accomplished through communication, public relations, outreach events, dedicated fundraising campaigns and other initiatives that develop the programmatic capability of the organization.



CSO Fiscal/Administrative/Human Resources

Within the next five years, CSO will enhance existing fiscal systems and structure to ensure ongoing financial system specialization and functional oversight ability. CSO will develop the ongoing ability to administrate operational procedures. CSO will ensure adequate Human Resources capabilities and systems that meet the ever changing programmatic and organizational needs. CSO will explore the feasibility of developing, designing, and implementing an employee learning management system and enhancing the organizational human resource information systems. *As part of creating a work environment that empowers employees to make a difference*, CSO will develop the capability to create, provide, and track both internal and external continuing education and training opportunities for staff. The organization will be vigilant to emerging opportunities and threats *while serving as a catalyst for economic, educational, social, and workforce development*

CSO Community Action

Through the course of the next five years, CSO will develop the systems of the Community Action program to ensure community recognition, and expand program offerings. CSO will work with communities and partners to continually meet the ever changing needs of the communities while being *cognizant that each individual is unique and should be treated with dignity and respect*. CSO will remain flexible to meet emerging needs and issues and adapt programs and services to meet those needs.

CSO Workforce Development

CSO will enhance and develop the Workforce Development services offered in the CSO service areas over the next five years. Through systematic evaluation, *CSO will be the leader in advancing economic, educational, social, and workforce development opportunities*. CSO will work to ensure that the emerging needs of the local communities are met through programs and services that are designed and operate in an effective and efficient manner.



Summary

CSO is well positioned to provide real and immediate impacts to the local communities that the agency serves from 2009-2014. Using the overarching goals as detailed in the Strategic Plan as a guide, the board and management of CSO will be able to develop yearly measurable action goals to meet the long term strategic vision of the organization.

The CSO strategic planning process was an invaluable one for the board of directors, the management, staff, and community stakeholders. This process has allowed the organization to reflectively assess the past of the organization, and use that same information to make informed decisions about the future of the organization.

Cognizant of the 21st Century demand on Workforce and Community Action Agencies, CSO continues to strive to meet the needs of all people in the communities served, providing the resources, support, and expertise which makes not only individuals better, but the communities at large more vibrant, and able to sustain families as each family reaches for their own goals and dreams.

The CSO Strategic Plan outlines the objectives of the agency for the next five calendar years, while these goals are lofty, the results of planning and implementing these goals will be felt in the Susquehanna Valley for generations.