

Executive Skills Portfolio

For candidacy as a Certified Community Action Professional

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February 15, 2022

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Introduction

Description of the candidate's role in producing the work.

As the Outreach Services Director at Mid Michigan Community Action Agency, I developed pandemic response programs using Community Service Block Grant funds provided through the Coronavirus Aid, Relief, and Economic Security Act of 2020. I assessed the needs of the community during a time of intense economic upheaval, developed direct financial assistance program to respond to the crisis, trained staff to implement the programs, and evaluated the impact of the assistance.

Evidence that the work was done within three years of the date of the candidate's enrollment.

The Community Service Block Grant (CSBG) funds from the Coronavirus Aid Relief and Economic Security (CARES) Act were awarded to Mid Michigan Community Action Agency (Mid Michigan CAA) in April 2020. The service plan was reviewed and approved by the Board of Directors the same month. After approval from the Michigan Bureau of Community Action and Economic Opportunity in June 2020. I began making organizational structure changes to implement the new programs as evidenced by the Outreach Services Report provided to the Board of Directors on 6/25/2020. The work continues in these programs, as pandemic recovery is not complete. The program policies and procedures remain living documents, adapting to the ongoing needs of the community.

The exact purpose or goals of the work.

The purpose of the CSBG CARES programs was two-fold: to alleviate crises that arise due to challenges stemming from the pandemic and to assist in the recovery of communities. To achieve this, Mid Michigan CAA created two categories of specific assistance: Home Loss Prevention and Housing Stability services. The Home Loss Prevention service helps homeowners facing foreclosure or eviction from past due rent, mortgage, or property tax payments remain in their homes. The Housing Stability funds address other housing needs that would have caused households to leave their homes during the pandemic, such as the loss of utilities or emergent home repairs.

The budget for the work.

All program costs, including staff, direct assistance, space, and supplies were planned for in the Community Service Block Grant budget allocated by the CARES Act. The direct assistance budgeted for Home Loss Prevention was \$250,000. The direct assistance budgeted for Housing Stability was \$528,317.

Documents coming from the work which show results.

Attached is the January 2022 CSBG-CARES Dashboard which shows the most recent results of the program. This dashboard is also included in the work sample on Page 34.

CSBG CARES Dashboard January 2022

Program	Households Served	Individuals Served	Children Served	Seniors Served
Home Loss Prevention	151	311	95	62
Housing Stability	913	2183	790	317
Grand Total	1064	2494	885	379

Activity	Household Served
Eviction diversion	14
Foreclosure prevention	138
Home repair	59
Utility assistance	647
Water assistance	150
Water repair	56
Grand Total	1064

Program	Households Served	Total Awards
Home Loss Prevention	151	\$ 136,519.44
Housing Stability	913	\$ 431,911.39
Grand Total	1064	\$ 568,430.83

County	Award Amount
BAY	\$ 151,624.22
CLARE	\$ 64,063.13
GLADWIN	\$ 58,212.00
MECOSTA	\$ 34,855.88
MIDLAND	\$ 50,435.70
MUSKEGON	\$ 154,218.69
OCEANA	\$ 8,851.76
OSCEOLA	\$ 46,169.45
Grand Total	\$ 568,430.83

Quarter	Award Amount
2020	\$ 76,798.29
April-June	\$ 2,794.66
July-September	\$ 30,849.64
October-December	\$ 43,153.99
2021	\$ 477,450.22
January-March	\$ 169,266.52
April-June	\$ 140,915.28
July-September	\$ 88,105.41
October-December	\$ 79,163.01
2022	\$ 14,182.32
January-March	\$ 14,182.32
Grand Total	\$ 568,430.83

**CSBG CARES - Home Loss Prevention
ROMA Next Gen Logic Model Agency:
Mid Michigan CAA**

Program: BCAEO - CSBG CARES - Home Loss Prevention

Domain: Housing

Date Range: 06/01/2020 - 09/30/2022

Column 1	Column 2	Column 3	Column 4	Column 5	Column 6	Column 7	Column 8
Identified Problem, Need, Situation	Individual/Family Services Or Community Strategies Identify the intended # of clients to be served or the # of units to be offered	Actual Services Or Actual Strategies Identify the actual # of clients served or the # of units offered	Outcome	Outcome/Indicator Projected # and % of clients who will achieve each outcome or Projected # and % of units expected to be achieved	Actual Outcomes Actual # and % of clients who achieve each outcome or Actual # and % of units achieved	Implementation Who's responsible, Frequency, etc.	Evaluation Who's responsible, Frequency, Method, Data Source, etc.
Phase: Assessment	Phase: Planning	Phase: Results	Phase: Planning	Phase: Planning	Phase: Results	Phase: Implementation	Phase: Evaluation
The COVID pandemic has affected the lives of many in the community. This program seeks to prevent some of the worst of those effects by providing foreclosure and eviction relief to households in need, in order to prevent further ramifications from the pandemic causing or exacerbating a household's poverty status.	100 Individuals will receive SRV 7b Eligibility Determinations		Households (per instructions, count individuals) avoided eviction	50 of 100 or 50% of FNPI 4e The number of individuals who avoided eviction.		This service will be delivered via each county's Outreach office. Prospective customers will meet with the agency's Outreach staff and will provide all documentation required to establish eligibility and need. Once all documentation has been collected, Outreach staff will produce and assistance voucher from FACSPRO to initiate the vendor payment needed to alleviate the emergent need.	The agency's Outreach staff are responsible for evaluation of this program. All service indicators will be marked in real-time by the Resource Navigators.
	100 Individuals will receive SRV 7a Case Management		Households (per instructions, count individuals) maintained safe and affordable housing for 90 days.	100 of 100 or 100% of FNPI 4c The number of individuals who maintained safe and affordable housing for 90 days.			
	15 Individuals will receive SRV 4c Rent Payments (includes Emergency Rent Payments)		Households (per instructions, count individuals) avoided foreclosure	50 of 100 or 50% of FNPI 4f The number of individuals who avoided foreclosure.			
	75 Individuals will receive SRV 4e Mortgage Payments (includes Emergency Mortgage Payments)						
	100 Individuals will receive SRV 7c Referrals						

**CSBG CARES - Housing Stability
ROMA Next Gen Logic Model
Agency: Mid Michigan CAA**

Program: BCAEO - CSBG CARES - Housing Stability

Domain: Housing

Date Range: 06/01/2020 - 09/30/2022

Column 1	Column 2	Column 3	Column 4	Column 5	Column 6	Column 7	Column 8
Identified Problem, Need, Situation	Individual/Family Services Or Community Strategies Identify the intended # of clients to be served or the # of units to be offered	Actual Services Or Actual Strategies Identify the actual # of clients served or the # of units offered	Outcome	Outcome/Indicator Projected # and % of clients who will achieve each outcome or Projected # and % of units expected to be achieved	Actual Outcomes Actual # and % of clients who achieve each outcome or Actual # and % of units achieved	Implementation Who's responsible, Frequency, etc.	Evaluation Who's responsible, Frequency, Method, Data Source, etc.
Phase: Assessment	Phase: Planning	Phase: Results	Phase: Planning	Phase: Planning	Phase: Results	Phase: Implementation	Phase: Evaluation
The COVID pandemic and concurrent economic downturn are threatening the stability of local housing through lack of funds for critical needs to maintain a safe home.	<p>700 Individuals will receive SRV 7b Eligibility Determinations</p> <p>700 Individuals will receive SRV 7a Case Management</p> <p>175 Individuals will receive SRV 4k Utility Arrears Payments</p> <p>700 Individuals will receive SRV 7c Referrals</p>		<p>Individuals achieved and maintained capacity to meet basic needs for 90 days.</p> <p>Households (per instructions, count individuals) maintained safe and affordable housing for 90 days.</p> <p>Households (per instructions, count individuals) experienced improved health and safety within their home</p>	<p>700 of 700 or 100% of FNPI 3a The number of individuals who achieved and maintained capacity to meet basic needs for 90 days.</p> <p>700 of 700 or 100% of FNPI 4c The number of individuals who maintained safe and affordable housing for 90 days.</p> <p>100 of 700 or 14% of FNPI 4g The number of individuals who experienced improved health and safety due to improvements within their home (e.g. reduction or elimination of lead, radon, carbon monoxide and/or fire hazards or electrical issues, etc).</p>		<p>This service will be delivered via the County Outreach office. Prospective customers will meet with the agency's Outreach Staff and will provide all documentation required to establish eligibility and need. Once all documentation has been collected, Outreach staff will produce and assistance voucher from FACSPRO to initiate the vendor payment needed to address the customer's need(s).</p>	<p>The agency's Outreach staff are responsible for evaluation of this program. All follow-ups will be conducted by the agency's Outreach staff. All other service indicators will be marked in real-time by the Resource Navigators</p>

Outreach Services Department Update - 6/25/2020

Eva Rohlman, Outreach Services Director

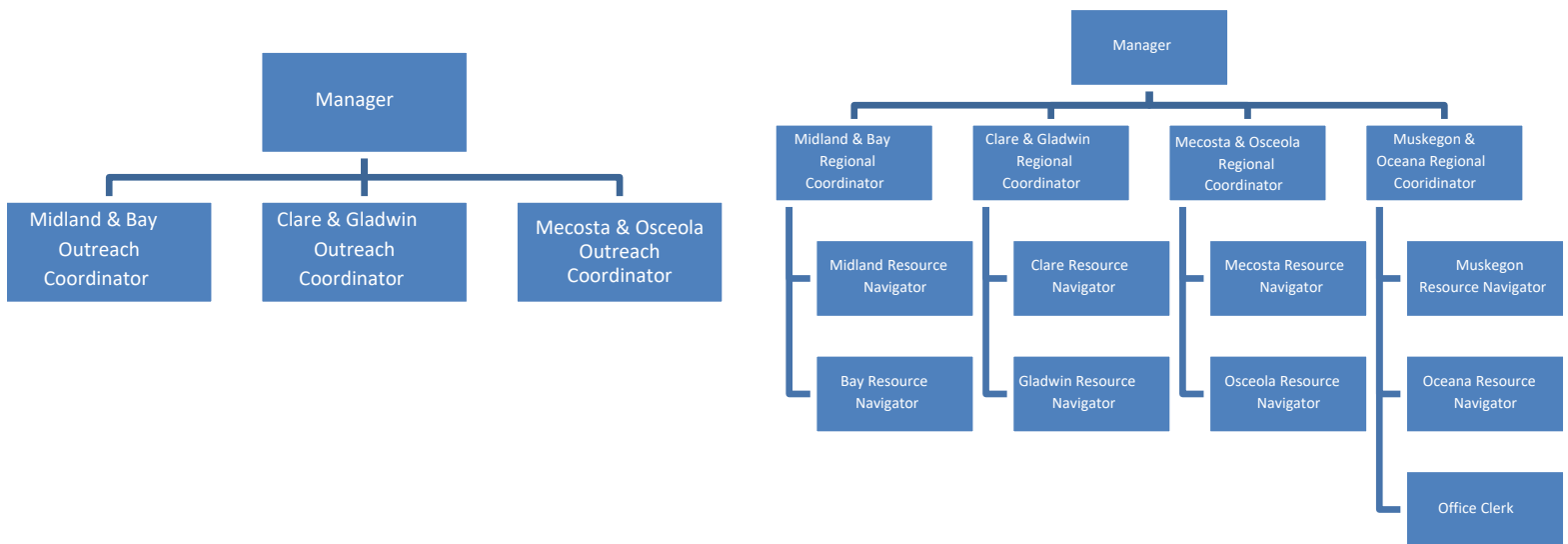
Commodity Food Programs – Jennifer Raymond, Program Manager

The Warehouse did not close its doors for one day during the entire pandemic. With little notice, all the distributions were modified to a drive-through format. Each day, the dedicated Commodity Food staff, the Weatherization crew, and many other voluntary agency staff showed up to pack boxes, work at distributions, and continue to feed our communities. My heart swells to know the time and effort everyone put into the project. As most people were staying home, these committed individuals displayed their brave Community Action heart.

Community Empowerment – Cherri Swanstra, Program Manager

Our staff have all continued working from home, adapting to the strange work environment with creativity and grace. For a department that has long believed that face-to-face interaction with clients is imperative to the work we do, everyone has worked to develop practices to keep everyone safe while moving the work forward.

COVID-19 has brought both opportunity and innovation to the Outreach staff. Over the next couple of months, we will be embarking on an organizational transformation to expand access and services through CARES funding. Sometimes growth is best explained visually.



The flood brought devastation to some communities that we hold near and dear. Our Outreach and Home Empowerment Coordinators have responded to providing services to flood survivors, while also adapting their traditional services to virtual experiences.

Homeless Programs – Jennifer Rodgers, Program Manager

While evictions were suspended during the pandemic in Michigan, people experiencing homelessness continued to need us. We have provided motels to more households than ever in the last 3 months, keeping vulnerable veterans out of shelters and providing access to clean water and social distance for households staying outside. Since the beginning of the pandemic, staff housed 17 new households, showing their willingness to keep going even in the face of adversity. The next 2 years will also bring change to the Homeless department, as funding is also expanding, and we are developing new positions to meet the need.

MID MICHIGAN COMMUNITY ACTION AGENCY
1574 E. Washington Rd.
Farwell, MI 48622

An Equal Opportunity Employer

REGIONAL COORDINATOR

Department: Outreach Services

Responsible to: Community Empowerment Manager

Status: Hourly

General Responsibilities:

- Responsible for the supervision, coordination, and implementation of Outreach programs, in accordance with the approved plans and budget, understanding adherence to policy guidelines established by the agency and funding source.
- Ensure quality program delivery providing a range of supportive services designed to promote economic self-sufficiency.
- Protect the privacy of customers and families and hold in confidence all information obtained in the course of service.

Essential Duties and Responsibilities:

- Provide ongoing supervision and mentoring to Resource Navigators.
- Responsible to ensure all required program documentation is reviewed for accuracy, consistency, and compliance.
- Oversee data entry to ensure customer data is reflected accurately and completely, including data quality review and assigning corrections to staff users.
- Prepare all required reports requested by the agency and the funding source in a timely manner.
- Attend relevant community events and meetings to support the agency programs; including evening and weekend events or meetings as needed.
- Recruit participants, coordinate, and conduct Neighborhood Meetings.
- Develop and maintain positive relationships with relevant public and private authorities and service providers.
- Responsible for programmatic training and ongoing support of staff.
- Facilitate a comprehensive orientation for new staff.
- Perform 90 day and annual performance evaluations.
- Participate in personal and professional development activities, including staff meetings, conferences, and training opportunities, as identified and approved by supervisors.
- Travel throughout service area as needed.
- Overnight travel may be required for trainings.
- Perform other duties as assigned.

Education and Experience Qualifications:

- Must possess a minimum of a Bachelor's degree in human services.
- Supervisory experience preferred.
- Demonstrated ability to work cooperatively and collaboratively.
- Demonstrated ability as a strength-based leader.
- Demonstrated ability to present materials to community groups.

Additional Requirements:

- Complete additional certification as required.

- Understand the importance of daily work attendance, and its impact on coworkers, clients, and the agency.
- Possess the ability to navigate and effectively resolve conflict.
- Must have strong communication and organizational skills.
- Must be self-directed and able to prioritize in a fast paced environment.
- Must be willing to accept new challenges.
- Must have proficient computer skills (Word, Excel, Outlook, Internet).
- Must have reliable transportation, a valid driver's license, provide proof of insurance, and MMCAA's "Insurance Carriers" driving record review.
- Successfully complete Criminal History and Child Abuse/Neglect clearance procedures at time of hire and when requested.
- The job duties require a working cell phone for accessibility to supervisors, clients, or co-worker or to enhance personal safety while away from the office location. The agency will provide a cell phone as needed.
- Must comply with Agency tobacco free and drug free policies.

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed are representative of the knowledge, skill and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Employee Acknowledgement

I have read this job description and I understand that my performance will be evaluated on these standards.

Signature

Date

MID MICHIGAN COMMUNITY ACTION AGENCY
1574 E. Washington Rd.
Farwell, MI 48622

An Equal Opportunity Employer

RESOURCE NAVIGATOR

Department: Outreach Services

Responsible to: Regional Coordinator

Status: Hourly

General Responsibilities:

- Assist low-income individuals and families by providing a range of supportive services designed to promote economic self-sufficiency.
- Protect the privacy of customers and hold in confidence all information obtained in the course of service.
- Provide quality professional customer service at all times.

Essential Duties and Responsibilities:

- Determine eligibility of low-income households for all Outreach department programs.
- Design an Action Plan with each program-eligible household and provide relevant resource referrals to promote self-sufficiency.
- Conduct data collection via FACSPRO database.
- Complete or collect all required program documentation with accuracy, consistency, and compliance.
- Attend relevant community events to support the agency programs; including evening and weekend events or meetings as needed.
- Develop and maintain positive relationships with relevant public and private authorities and service providers.
- Participate in personal and professional development activities, including staff meetings, conferences, training opportunities, as identified and approved by supervisors.
- Travel throughout service area as needed.
- Perform other duties as assigned.

Education and Experience Qualifications:

- Associate Degree in a human services preferred.
- Experience in human services, specifically with low-income populations, preferred.

Additional Requirements:

- Complete additional certification as required.
- Understand the importance of daily work attendance, and its impact on coworkers, clients, and the agency.
- Possess the ability to navigate and effectively resolve conflict.
- Must have strong communication and organizational skills.
- Must be self-directed and able to prioritize in a fast paced environment.
- Must be willing to accept new challenges.
- Must have proficient computer skills (Word, Excel, Outlook, Internet).
- Must have reliable transportation, a valid driver's license, provide proof of insurance, and MMCAA's "Insurance Carriers" driving record review.
- Successfully complete Criminal History and Child Abuse/Neglect clearance procedures at time of hire and when requested.
- Must comply with Agency tobacco free and drug free policies.

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed are representative of the knowledge, skill and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Employee Acknowledgement

I have read this job description and I understand that my performance will be evaluated on these standards.

Name

Date

Outreach Program Policies

Application Process

All applications are entered into FACSPRO. When live entry is unavailable, a paper application is available. Information contained on the paper applications mirrors the fields available in FACSPRO. An application is considered active once the FACSPRO Customer Report is signed by the customer or the paper application is signed by the customer.

Household must reside in Clare, Gladwin, Midland, Bay, Mecosta, Osceola, Muskegon or Oceana County.

Appointments

Applications are completed by appointment over the phone, in the customer's office location of choice, or by email. If a home visit is necessary to complete an appointment, it must be approved by the Assistant Outreach Director.

All appointments should be noted on the staff member's Outlook Calendar. The appointment should include the customer name, phone number, and service being sought. For example,

Jane Smith, MEAP, LP 25%, 989-222-1234

If the appointment is for a utility shut-off, a HOLD may be placed on the account until the customer's appointment date.

A reminder call should be made to the customer the day before the appointment. This is to ensure that the customer has all the paperwork necessary to complete the appointment. If the customer states they do not have all of their paperwork, the appointment should be rescheduled.

Rescheduling

If the agency closes or a staff person is unavailable, the client may be rescheduled to the earliest appointment available. It may cause further crisis to the client to be rescheduled, so this should be avoided whenever possible. Customers should not be rescheduled more than once to meet the needs of Mid Michigan CAA. If this occurs, the Assistant Outreach Director must be notified.

If a client reschedules an appointment, ask why they need to reschedule and find a better time and date for an appointment. Be flexible with work schedules, transportation, and public transportation needs. If a client fails to keep their appointment more than three times, seek further guidance from the Assistant Outreach Director.

Re-Verification of Eligibility

Household eligibility must be re-verified each time assistance is requested, or if a change in the household is reported, unless otherwise noted in a program procedure. Household changes include but are not limited to the following: change of address, income, or household composition.

Case Management Requirements

The Customer Action Plan and Budget Worksheet will drive case management with each customer. The Family Matrix in FACSPRO must be completed with the customer during intake. Each area should be discussed directly with the customer. This matrix should drive all referrals given to the customer. Ideally, a referral is provided for any area the family is not Safe or Thriving. Contact information for external referrals should be written on the Customer Action Plan and provided to the customer at the end of the intake appointment.

In House-Referral

Customers must be assessed for all eligible programs at Mid Michigan CAA and given an opportunity to apply. If those programs exist outside of the purview of the intake staff, an In-House Referral form (<G:\ALL Staff\Forms\Form - In House Referral Form.pdf>) must be emailed to the appropriate program with a cc: to the Assistant Outreach Director. A copy should be kept in the customer file. The referral should also be noted on the Customer Action Plan. The customer should also be given a flyer for the respective program and informed that they will receive follow up directly from that program.

Household Composition

A household is all persons occupying a housing unit, regardless of whether they are related. Household members who are absent from the home for 90 consecutive days or more are not counted as part of the household. Do not include renters or roomers in the household. Include the rental income in determining the household's income eligibility.

Social Security Number Requirement

For most program, as a condition of eligibility, households must provide the Social Security Number (SSN) for all members of the household. An exception exists for all commodity programs. No Social Security Number (SSN) can be requested for those programs as a condition of eligibility.

Income Documentation

For most programs, income of all household members must be thoroughly documented and verified using third-party documentation, if required. Some programs require 3 months of income, while others require 30 days of income.

The following items are acceptable documentation:

- Copies of paychecks or pay stubs.
- Current award letters or benefit statements for unearned income that is only verified once per year such as SSI and Social Security benefits, Veterans benefits, or pension/retirement income.
- Letters or other documents from income sources (e.g. DHHS, Social Security, VA).
- Written statements from employers, including deductions.
- Written statements of persons paying money to a client.
- Interest, annuities, or dividends statements/letters.
- For child support, a printout from the online MICASE system indicating how much was paid in for the last 3 months for a monthly average.

- If self-employed, accounting and other business records showing net income.
- Self-declaration of applicant, but only as a last resort. The intake worker should record the steps taken that will demonstrate a reasonable effort was made to obtain income documents in Customer Notes. The Self-Declaration of Income form must be completed. For CSBG programs, the statement must be notarized by the Assistant Director.

Bank statements are NOT an acceptable form of income documentation.

Zero Income Affidavit

A Zero Income Affidavit must be completed by any household that does not have income. When an applicant is claiming No Income for the household, they must sign and date a written statement indicating that there is no income for the entire household. This statement must also be signed by the Regional Coordinator. For CSBG or Weatherization, the statement must be notarized by the Assistant Director and approved by BCAEO staff.

Entering Income into FACSPRO

When entering income, use the following Income Categories. Use Defaults button when applicable.

Income Category Selection	Default Options
Alimony or Spousal Support	
Child Support	(Enter under Parent)
Educational Assistance	Assistantship, Fellowship, Grants, Scholarship, GI Bill, Work Study
EITC (Earned Income Tax Credit)	
Employment Support	Self-Employment, Earnings, FARM Self-employment, Training Stipends
Non-Cash Benefits	Should NOT be entered here. Should be entered in Non-Cash Benefits button
Other Income Sources	Adoption Subsidies, Annuity or Insurance Payment, Excluded Income types – Miscellaneous, Included Income Types – Miscellaneous, Independent Living Stipend, IRA (Individual Retirement Accounts), Rental Income, Third-Party Payments, Tribal Payment, Self-declaration of income
Pensions or Retirement	
Private Disability Insurance	
Social Security Dependent's Benefits	
Social Security Disability Income (SSDI)	Gross Amount (SSDI), Medicare Part B Deduction (SSDI), Medicare Part D Deduction (SSDI), Social Security Less Medicare Part B & D (SSDI)
Social Security Retirement Income	Gross Amount (SS Retirement), Medicare Part B Deduction (Retirement), Medicare Part D Deduction (Retirement), Social Security Less Medicare Part B & D (Retire)
Social Security Survivor's Benefits	
State Disability Assistance (SDA)	
Supplemental Security Income (SSI)	SSI, State SSI Supplemental Payment

TANF-Family Independence Program	
Unemployment Compensation	
VA Non-Service Connected Disability	
VA Service-Connected Disability	
Workman's Compensation Benefits	

Income Certification Date needs to be the date of application.

In Michigan, SSI benefits include an additional amount paid with state funds. The amount of the state benefit varies by living arrangement. The income is entered as State SSI Supplemental Payment in a separate entry as a quarterly payment.

Non-Cash Benefits are not considered income for eligibility purposes but are tracked for reporting under the Non-Cash Benefits tab, not the income categories as was previous practice.

For more detail, use the FACSPRO Income Categories and Defaults Desk Aid.

Customer Copayment

Copayment speaks to the heart of our mission of self-sufficiency. When a customer requests assistance, we ask each time what they are able to contribute toward their bill. After the customer provides information about their ability to pay, then the amount can be set by the intake staff.

For Employment Support, customers are responsible for a copayment equal to at least 10% of their monthly gross income rounded to the nearest \$5. Any customer certified to have zero income is responsible for a \$25 flat copayment.

All copay exceptions must be approved by the Assistant Outreach Director. If a customer is unable to pay their copay, an exception is preferable to the customer seeking that payment from a partner agency.

When assisting on a bill, documentation of the entire bill must be acquired before authorization of payment is made.

Notice of Eligibility

A notice of eligibility must be provided to all applicants notifying whether the application was approved or denied. If the application is approved, the notice should include any contributions the households must make to resolve the crisis.

If the application is denied, the notice should include the reason for denial. All eligibility notices must include information on how to request a review of the denial.

Customers We Cannot Assist

At times, a customer is unable to be provided assistance. In place of an Action Plan, Service Not Received should be tracked through an interaction in FACSPRO.

In FACSPRO:

- Click on the Programs tab
- If the Program is available to the customer, but they are unable to receive assistance:
- Choose Program
- Click Create Interaction
- Click Service Not Received
- Choose a Reason
- Save

If the Program is unavailable to the customer:

- Click View CAA Ineligible
- Choose Program
- Click Service Not Received
- Choose a Reason
- Save

Deceased Customers

If the customer must be removed from a household because they are deceased, mark as Deceased in Demographics under Customer Intake. Remove all income from the deceased household member under Income. Return to Personal Information tab and add a date of death. If a date of death is not known, enter the date notified.

Assistance Approval

Intake staff can approve assistance up to \$1000 without Assistant Outreach Director approval. The Regional Coordinators can approve assistance up to \$1,999 without approval. The Assistant Outreach Director must approve all assistance totaling \$2,000 or more.

Any assistance provided to Mid Michigan CAA employees, board members, interns, senior workers, volunteers or Policy Council members must be approved by the Executive Director. Complete the Program Participation Approval form along with the eligibility documentation to the Program Director for review and submission to the Executive Director.

Authorizations to Vendors

If the customer has an existing vendor relationship, we will work with that vendor if they are on our approved list of vendors. If a vendor is not on our approved list of vendors, a vendor packet must be completed and forwarded to Finance for approval. If the customer needs a vendor, we offer our list of vendors for the customer to choose from.

An Assistance Voucher should be created in FACSPRO as soon as the authorization is made to the vendor to encumber the funds. Once the invoice is received, complete the Assistance Voucher (AV) with the date that it is submitted for payment.

Prior to submission to the Regional Coordinator, ensure the following:

- The vendor and vendor address on the AV match the invoice
- The client's name is spelled correctly on invoice
- The client's address is correct on invoice
- The account number on the AV match the invoice
- The amount to be paid is correct
- The copayment and any partner agency payments are noted on AV as Additional Payment Sources
- Any discrepancies on the invoice are commented on in Comments section of AV.

Submit the signed AV to the Regional Coordinator for approval with the vendor invoice and verification of additional payment sources, if applicable. If an error is found on the AV, the Regional Coordinator will email the worker about the error. The error must be corrected and the AV reprinted. The date should be updated to the date resubmitted for payment. A new AV should not be created.

Building a FACSPRO Application

- Click "Find"
- Enter first 3 letters of last and/or first name
- Click "Find"
- If name is not on the list, click "New"
- All underlined items must be filled in a tab to be complete and display a green check
- Complete the Personal Information tab
 - Applicant is the "Individual" and all others added to the file are defined by their relationship to that individual
- Complete Address tab
- Complete Demographics tab
 - Click all characteristics that apply, but applicant must be marked Head of Household.
- Complete Income tab, if applicable
 - Click on the Income source, add New or click on existing to edit.
 - Social Security Retirement Income
 - Click DEFAULTS
 - Add Social Security amount less Medicare Part B and D using default
 - Add Medicare B using default
 - Add Medicare D using default
 - Supplemental Security Income (SSI)
 - Some SSI recipients also receive money from the State quarterly (usually \$42/quarter). Add State SSI Supplemental Payment in the SSI category as \$42 quarterly.
 - Income Cycle is Annual
 - Click Details
 - Click Application Date- Include date of application
 - Fill in Payment Frequency

- Social Security is calculated monthly
 - Fill in Income Collection Period
 - Fill in Last Pay Date
 - Fill in dates of pay and the gross amounts
 - Click – SAVE
 - Click Non-Cash Benefits button to add SNAP, WIC, LIHEAP, HCV, Public Housing, PSH, HUD-VASH, Child Care Voucher, ACA, Other
- Add remaining household members
 - If name is on the list of household members, double-click and review and update the information with the client.
 - Click Add to create a new household member.
 - Complete their information, including Income
- Click Assessment/Baselines
 - Always choose “Family” in the Matrix
 - Click on “View Demographics” and move to the bottom of the demographic section to fill in your assessment with this data.
 - This information should be updated each time you meet with a client.
- Click Customer Intake
- Click Customer Report
- Click Print Preview and print the report for the customer to review and sign.

If the customer applied on site, sign the report as the intake worker and attached the handwritten application.

Documenting the Client File

Customer Notes must be created in FACSPRO during each customer interaction to create an ongoing log of pertinent customer information.

File documentation must be uploaded into FACSPRO. All documentation should be scanned as one .pdf file and named using the customer last name, program, date of service. Use the following format to label the file:

LastNameFirstInitial PROGRAM 10-1-2021

All eligibility documentation, including household income, should be saved in one document and uploaded under the applicant according to the client file checklist.

Uploading Procedure

- Click on the Customer Intake tab
- Click Documents located in the top bar
- Click New
- Click Attach
- Click on the Desktop icon and double-click Scans

- Click on the file that you are uploading and click Open
- In Document Name type in the name of the file you are uploading
 - Example: LastNameFirstInitial Program 10-1-2019
- Click the drop-down in Document Type
- Click on the type of file you are uploading
 - Example: Wx Intake File
- Click Access
- Click Agency ONLY from the drop-down
- Click SAVE

CSBG CARES PROGRAM PROCEDURE

CSBG CARES funding is provided to immediately address the consequences of increasing unemployment, economic disruption, social distancing, lack of supplies, isolation/quarantine impact, and harmful effects of the virus on vulnerable groups during the COVID-19 pandemic.

ELIGIBILITY

Funds are available for the following:

- Critical home repairs
 - Well or sewer repair or replacement
 - Ramps or stairs
 - Repairs to home related to health and safety
- Foreclosure assistance
- Property tax assistance
- Rental assistance
- Utility assistance
- Other services as needed

Funding can be used in the following counties: Bay, Clare, Gladwin, Mecosta, Midland, Osceola, Oceana, and Muskegon.

AUTO ELIGIBILITY

Customers may be auto eligible for CARES funding if they are receiving any of the following:

- Approved State of Emergency Relief (SER)
- Active Food Assistance Program (FAP) case, including all members in the household
- Active Family Independence Program (FIP) case
- Medicaid
- Enrolled in another program with Mid Michigan Community Action where income eligibility is below 200% FPL

INCOME ELIGIBILITY

To be eligible for CSBG CARES funds, household must have a Gross income of not more than 200% of the federal poverty guidelines. Income for Economic Impact Payments (EIP) benefits are not to be counted toward household income. **See CSPM 800 for other included and excluded income.**

Income Calculation

Income calculations includes Gross income for every person in household. The CSBG CARES income computation period is the last 30 Days. In FACS-Pro, the Income Cycle for wages and monthly income is **Annual**. The Income Collection Period is **30 Days**.

Self-Certification of Income

Self-certification is only sufficient if documented efforts have been made to contact third-party sources. After all other avenues of documenting income eligibility are exhausted, a self-declaration of income is filled out and approval is sent to the Regional Coordinator.

Zero Income Affidavit

A Zero Income Affidavit must be completed by any household that does not have income. When an applicant is claiming No Income for the household, they must sign and date a written statement indicating that there is no income for the entire household. This statement **must** also be signed by the

Regional Coordinator.

REFERRALS

Any customer that contacts Mid Michigan CAA is eligible for virtual housing counseling workshops, including Rental Education, Spending and Savings, Learning Land Contracts, and Foreclosure Prevention. When customers call for assistance, Outreach staff will let the customer know of the available workshop times and dates.

To be eligible for CARES assistance, the customer should sign up for a workshop most in line with their current needs. Customers will need to sign up a minimum of 24 hours before workshop to attend that workshop.

Housing Counseling staff will call the customers the day before the workshop with a reminder call and make sure they have the Zoom information. After completing the workshop, the Housing Counseling staff will email the name of staff member to notify them of one of the following:

- Customer has completed the workshop
- Customer do not show for the workshop
- Customer was contacted and rescheduled for another workshop
- Customer was contacted and there was no response

A Weatherization application must be offered as a concurrent service with every CARES appointment. Other program or community resource referrals will be given for the unique situation of the household based on the information shared during the appointment. These may include other agency programs such as Food Commodities, Head Start, Early Head Start, and WIC.

HOME LOSS PREVENTION - FORECLOSURE PREVENTION

Outreach staff can approve assistance once per fiscal year up \$1000 for delinquent mortgage payments, property taxes, or land contract payments.

Documentation of Need

Documentation of delinquent amount is required from the lien holder.

Home Ownership

Proof of home ownership is required. If the home is being purchased via land contract, the contract must be in the customer's name, registered with the county, and valid within the last 5 years.

The household must have possessed the home for not less than one year and plan on remaining in the home.

Creating Action Plan

After all household information has been entered in FACSPRO, click on "Programs"

- Click on "CSBG - CARES"
- Click "Create Interaction"
 - In the drop down- click "Mid-Michigan CAA/ BCAEO – CSBG CARES – Home Loss Prevention"
 - Check the Box "MMCAA – CARES – Home Loss Prevention"

- Click “Process Selected”

Tasks

- Customer situation is COVID related
 - Date if the household indicates that their need has been impacted by COVID-19
- Assessment/Baseline
 - Date after completing the Family Matrix
- Assess Client for all eligible programs
 - Date after providing referrals

Services

- SRV 7a Case Management, SRV 7B Eligibility Determination, SRV 7C Referrals
 - Date all after intake appointment
- SRV 4e Mortgage Payments
 - Date if a mortgage delinquency is paid

Indicators

- FNPI 4e – Avoided eviction
 - Date if payment on land contract avoided eviction
- FNPI 4f – Avoided foreclosure
 - Date if payment on property taxes or mortgage avoided foreclosure

HOME LOSS PREVENTION - EVICTION PREVENTION

Outreach staff can approve assistance once per fiscal year up \$1000 for delinquent rent payments.

Documentation of Need

Documentation of delinquent amount is required from the landlord.

Lease

A signed lease or other proof of tenancy is required.

Creating Action Plan

After all household information has been entered in FACSPRO, click on “Programs”

- Click on “CSBG - CARES”
- Click “Create Interaction”
 - In the drop down- click “Mid-Michigan CAA/ BCAEO – CSBG CARES – Home Loss Prevention”
 - Check the Box “MMCAA – CARES – Home Loss Prevention”
 - Click “Process Selected”

Tasks

- Customer situation is COVID related
 - Date if the household indicates that their need has been impacted by COVID-19
- Assessment/Baseline
 - Date after completing the Family Matrix
- Assess Client for all eligible programs
 - Date after providing referrals

Services

- SRV 7a Case Management, SRV 7B Eligibility Determination, SRV 7C Referrals
 - Date all after intake appointment
- SRV 4c Rent Payments
 - Date if delinquent rent is paid

Indicators

- FNPI 4e – Avoided eviction
 - Date if payment avoided eviction

CRITICAL HOME REPAIR

Outreach staff can approve assistance once per fiscal year up to amounts up to \$1000. Further assistance must be approved by the Outreach Assistant Director.

Documentation of Need

An estimate from a licensed contractor is required to verify a need for repairs.

Home Ownership

Proof of homeownership is required. Some services can be completed if the customer rents their home and the rental agreement clearly states the work is the responsibility of the renter.

Deferrals

Be aware that some conditions will not allow the work to occur:

- Electrical or plumbing hazards or structural failures that cannot be addressed.
- The building or dwelling unit is for sale or in foreclosure.
- Ownership cannot be confirmed due to a legal dispute. Clear title must be established before services can be provided.
- The building or dwelling unit is scheduled for demolition/redevelopment.

Creating Action Plan

After all household information has been entered in FACSPRO, click on “Programs”

- Click on “CSBG - CARES”
- Click “Create Interaction”
 - In the drop down- click “Mid-Michigan CAA/ BCAEO – CSBG CARES – Housing Stability”
 - Check the Box “MMCAA – CARES – Housing Stability”
 - Click “Process Selected”

Tasks

- Customer situation is COVID related
 - Date if the household indicates that their need for or ability to complete this repair has been impacted by COVID-19.
- Assessment/Baseline
 - Date after completing the Family Matrix
- Assess Client for all eligible programs
 - Date after providing referrals

Services

- SRV 7a Case Management, SRV 7B Eligibility Determination, SRV 7C Referrals
 - Date all after intake appointment

Indicators

- FNIP 4g – Experienced improved health and safety due to improvements within their home
 - Date after the repair is completed

UTILITY ASSISTANCE

Outreach staff can approve assistance once per fiscal year up to amounts up to \$500. Further assistance must be approved by the Outreach Assistant Director.

CSBG CARES funds are to be used:

- For a water and sewer assistance after other funding has been spent,
- For heat assistance after MEAP funding has been depleted or if customer does not qualify for MEAP funding, or
- With approval from Outreach Assistant Director

Documentation of Need

A copy of the past due or shut off notice is required. The utility account must be in the household's name or the household must provide a lease agreement stating they are responsible for utilities in the home.

Fees and Deposits

A utility deposit will only be approved for a new customer if the customer was homeless and the deposit is a barrier to housing. Late fees and other expenses that are not energy or water related are the responsibility of the customer.

Creating Action Plan

After all household information has been entered in FACSPRO, click on "Programs"

- Click on "CSBG - CARES"
- Click "Create Interaction"
 - In the drop down- click "Mid-Michigan CAA/ BCAEO – CSBG CARES – Housing Stability"
 - Check the Box "MMCAA – CARES – Housing Stability"
 - Click "Process Selected"

Tasks

- Customer situation is COVID related
 - Date if the household indicates that their need for or ability to complete this repair has been impacted by COVID-19.
- Assessment/Baseline
 - Date after completing the Family Matrix
- Assess Client for all eligible programs
 - Date after providing referrals

Services

- SRV 7a Case Management, SRV 7B Eligibility Determination, SRV 7C Referrals
 - Date all after intake appointment
- SRV 4i Utility Payments

- Date if utility deposit is authorized
- SRV 4k Utility Arrears Payments
 - Date after payment is authorized

OTHER COVID-19 CRISIS NEED

Other needs may arise related to housing stability that are not noted above. CSBG CARES funds can be used with approval from the Assistant Outreach Director once per fiscal year up to amounts up to \$500. Documentation of the need is required. These needs may include technology, transportation, child care, clothing, etc. that impact their financial ability to remain in their home.

Creating Action Plan

After all household information has been entered in FACSPRO, click on “Programs”

- Click on “CSBG - CARES”
- Click “Create Interaction”
 - In the drop down- click “Mid-Michigan CAA/ BCAEO – CSBG CARES – Housing Stability”
 - Check the Box “MMCAA – CARES – Housing Stability”
 - Click “Process Selected”

ASSISTANCE VOUCHERS

When creating an assistance voucher in FACSPRO, a choice from the Reference dropdown must be made. Choose the category of assistance that best fits the service provided.

FOLLOW-UPS

The Action Plan in FACSPRO will be marked “Completed” after the 90 day customer follow-up is completed or attempted. A case note must be added into FACSPRO if contact was attempted, but client was unable to be reached. Date the following Indicators if the household has achieved stability due to the service provided.

- FNPI 3a – Achieved and maintained capacity to meet basic needs for 90 days, and/or
- FNPI 4c – Maintained safe and affordable housing for 90 days

Delete all Indicators and Services that do not relate to the service that was provided, then mark the Action Plan “Completed”.

DOCUMENTING THE CLIENT FILE

The following materials are required to be uploaded in FACSPRO a Document Type CSBG – CARES for the file to be considered complete.

- Client File Checklist
- A FACSPRO Customer Report containing:
 - Full name of the client and **all** members of the household
 - Contact information
 - Social Security Number of the applicant and **all** members of the household
 - Address, both mailing and service
 - City and Zip Code
 - County
 - Birth date of the client and all members of the household
 - Household’s actual percentage of federal poverty level as verified

- **Signature and date** from both customer and intake worker
- Documents to verify Automatic Eligibility assistance for CSBG CARES, OR
- Documents used to verify income (i.e paystubs, Social Security Statements)
 - Self-Declaration of Income must be approved by a supervisor
 - Zero Income Affidavit must be approved by a supervisor
- Document(s) used to verify household crisis (i.e. past due bill, estimate from licensed contractor, delinquency of mortgage, etc)
- Documentation of home ownership or rental agreement, if applicable
- Customer Action Plan
- Completed Budget Worksheet
- Assistance Voucher(s) with account number from AwardPro
- Vendor Invoice
- Proof of copayment, if applicable
- Action Plan Report
- Completed case notes

Customer Name: _____ Intake Date: _____

CSBG CARES FILE CHECKLIST

Check each box to complete

- Customer Report from FACSPRO
 - Must provide complete report
 - Must include the full Social Security Number for each member of the household
 - Must include all income for last 30 days
 - Must be signed and dated by applicant and intake worker
- Documentation of automatic eligibility OR
30 days of income verification for all household members
- Document used to verify household crisis (i.e. past due bill, estimate from licensed contractor, delinquency of mortgage, etc)
- Documentation of home ownership or rental agreement, if applicable
- Customer Action Plan
- Copy of completed Budget Worksheet
- Authorization letter/email
- Assistance Voucher from AwardPro
- Vendor Invoice
- Proof of copayment, if applicable
- Action Plan Report
- Completed Case Note
- Weatherization Application Offered
 - Completed
 - Declined
- Customer completed a "Customer Satisfaction Survey"

Staff Signature _____ Date _____



Customer Action Plan

Customer Name: _____ System ID #: _____

A Customer Action Plan must be completed by Resource Navigator in partnership with the customer during the first meeting. This Action Plan represents a record of the topics discussed, as well as detailed action steps the customer and Resource Navigator will take to meet the customer’s self-sufficiency goals.

Briefly describe obstacles or barriers customer is experiencing to achieve self-sufficiency goals:		
List short-term goals:		
List long-term goal:		
Action Steps CUSTOMER will take:	Target Date	Date Completed
Action Steps RESOURCE NAVIGATOR will take:	Target Date	Date Completed



Customer Action Plan

Referral	Contact Information	Date Completed

Program Enrolled	Date Completed

I agree with the outline of action steps, as outlined in the Customer Action Plan, and the timeline necessary to accomplish this plan. I will take action on the objectives outlined and will maintain contact with the Resource Navigator.

Customer Signature

Date

Resource Navigator Signature

Date

Next Appointment

Date

Time

A copy of this document must be provided to customer immediately if services are provided face-to-face or sent to customer if done by phone.



Customer Name: _____ **Date** _____

Step 1: Identify Income Sources		
Source	Expected per month	Actual per month
After-tax wages	\$	\$
Tips, bonuses, cash from hobbies	\$	\$
Unemployment compensation	\$	\$
Social Security	\$	\$
Supplemental Security Income	\$	\$
Cash assistance	\$	\$
Child support	\$	\$
Food stamps/SNAP/FAP	\$	\$
Other	\$	\$
Total Monthly Income	\$	\$

Step 2: Expenses Utility		
Utility	Average per month	Actual per month
Heating (natural gas, oil, propane, wood)	\$	\$
Electricity (cooling and heating, appliance, lighting)	\$	\$
Water and sewer	\$	\$
Phone (landline, cell, data)	\$	\$
Internet service	\$	\$
Cable/ Satellite service	\$	\$
Trash collection	\$	\$
Total Monthly Utilities Expenses	\$	\$

Step 3: Other Expenses		
Expense	Average per month	Actual per month
Rent/mortgage payment	\$	\$
Home maintenance	\$	\$
Groceries (could be offset by food benefits)	\$	\$
Car payment, gasoline, parking, bus fare	\$	\$
Insurance (car, homeowner, life)	\$	\$
Tuition or school-related fees	\$	\$
Child care	\$	\$
Child support, alimony	\$	\$
Pets	\$	\$
Credit cards	\$	\$
Clothes/uniforms	\$	\$
Snacks/meals eaten out	\$	\$
Personal (toiletries, hair, nails, etc.)	\$	\$
Entertainment	\$	\$

Charitable donations	\$	\$
Savings	\$	\$
Other	\$	\$
Total Monthly Expenses	\$	\$

Step 3: Compare Average Income and Expenses

Expected monthly income	\$	_____
- Average utility expenses	\$	_____
- <u>Average other expenses</u>	\$	_____
	\$	_____

Do you have money left over? If so, go back and increase your monthly savings expenses to build financial security.

Not enough income to cover expenses? Where are your spending leaks?

Customer Signature: _____ Date: _____

MMCAA Staff Signature: _____ Date: _____

Track Your Expenses

Track your actual income and actual expenses for the month in the tables above, and then complete Step 4.

Step 4: Compare Actual Income and Expenses

Actual monthly income	\$	_____
- Average utility expenses	\$	_____
- <u>Average other expenses</u>	\$	_____
	\$	_____

How did you do? Are you on track? Do you need to make some adjustments?

**CSBG CARES - Home Loss Prevention
ROMA Next Gen Logic Model
Agency: Mid Michigan CAA**

Program: BCAEO - CSBG CARES - Home Loss Prevention

Domain: Housing

Date Range: 06/01/2020 - 01/31/2022

Column 1	Column 2	Column 3	Column 4	Column 5	Column 6	Column 7	Column 8
Identified Problem, Need, Situation	Individual/Family Services Or Community Strategies Identify the intended # of clients to be served or the # of units to be offered	Actual Services Or Actual Strategies Identify the actual # of clients served or the # of units offered	Outcome	Outcome/Indicator Projected # and % of clients who will achieve each outcome or Projected # and % of units expected to be achieved	Actual Outcomes Actual # and % of clients who achieve each outcome or Actual # and % of units achieved	Implementation Who's responsible, Frequency, etc.	Evaluation Who's responsible, Frequency, Method, Data Source, etc.
Phase: Assessment	Phase: Planning	Phase: Results	Phase: Planning	Phase: Planning	Phase: Results	Phase: Implementation	Phase: Evaluation
The COVID pandemic has affected the lives of many in the community. This program seeks to prevent some of the worst of those effects by providing foreclosure and eviction relief to households in need, in order to prevent further ramifications from the pandemic causing or exacerbating a household's poverty status.	100 Individuals will receive SRV 7b Eligibility Determinations	151 Individuals received SRV 7b Eligibility Determinations	Households (per instructions, count individuals) avoided eviction	50 of 100 or 50% of FNPI 4e The number of individuals who avoided eviction.	14 of 50 (25%) of FNPI 4e The number of individuals who avoided eviction.	This service will be delivered via each county's Outreach office. Prospective customers will meet with the agency's Outreach staff and will provide all documentation required to establish eligibility and need. Once all documentation has been collected, Outreach staff will produce and assistance voucher from FACSPRO to initiate the vendor payment needed to alleviate the emergent need.	The agency's Outreach staff are responsible for evaluation of this program. All service indicators will be marked in real-time by the Resource Navigators.
	100 Individuals will receive SRV 7a Case Management	151 Individuals received SRV 7a Case Management	Households (per instructions, count individuals) maintained safe and affordable housing for 90 days.	100 of 100 or 100% of FNPI 4c The number of individuals who maintained safe and affordable housing for 90 days.	151 of 100 (151%) of FNPI 4c The number of individuals who maintained safe and affordable housing for 90 days.		
	15 Individuals will receive SRV 4c Rent Payments (includes Emergency Rent Payments)	14 Individuals received SRV 4c Rent Payments (includes Emergency Rent Payments)	Households (per instructions, count individuals) avoided foreclosure	50 of 100 or 50% of FNPI 4f The number of individuals who avoided foreclosure.	138 of 100 (138%) of FNPI 4f The number of individuals who avoided foreclosure.		
	75 Individuals will receive SRV 4e Mortgage Payments (includes Emergency Mortgage Payments)	138 Individuals received Mortgage Payments (includes Emergency Mortgage Payments)					
	100 Individuals will receive SRV 7c Referrals	151 Individuals received SRV 7c Referrals					

**CSBG CARES - Housing Stability
ROMA Next Gen Logic Model
Agency: Mid Michigan CAA**

Program: BCAEO - CSBG CARES - Housing Stability

Domain: Housing

Date Range: 06/01/2020 - 01/31/2022

Column 1	Column 2	Column 3	Column 4	Column 5	Column 6	Column 7	Column 8
Identified Problem, Need, Situation	Individual/Family Services Or Community Strategies Identify the intended # of clients to be served or the # of units to be offered	Actual Services Or Actual Strategies Identify the actual # of clients served or the # of units offered	Outcome	Outcome/Indicator Projected # and % of clients who will achieve each outcome or Projected # and % of units expected to be achieved	Actual Outcomes Actual # and % of clients who achieve each outcome or Actual # and % of units achieved	Implementation Who's responsible, Frequency, etc.	Evaluation Who's responsible, Frequency, Method, Data Source, etc.
Phase: Assessment	Phase: Planning	Phase: Results	Phase: Planning	Phase: Planning	Phase: Results	Phase: Implementation	Phase: Evaluation
The COVID pandemic and concurrent economic downturn are threatening the stability of local housing through lack of funds for critical needs to maintain a safe home.	700 Individuals will receive SRV 7b Eligibility Determinations	913 Individuals received 7b Eligibility Determinations	Individuals achieved and maintained capacity to meet basic needs for 90 days.	700 of 700 or 100% of FNPI 3a The number of individuals who achieved and maintained capacity to meet basic needs for 90 days.	913 of 700 (130%) of FNPI 3a The number of individuals who achieved and maintained capacity to meet basic needs for 90 days.	This service will be delivered via the County Outreach office. Prospective customers will meet with the agency's Outreach Staff and will provide all documentation required to establish eligibility and need. Once all documentation has been collected, Outreach staff will produce and assistance voucher from FACSPRO to initiate the vendor payment needed to address the customer's need(s).	The agency's Outreach staff are responsible for evaluation of this program. All follow-ups will be conducted by the agency's Outreach staff. All other service indicators will be marked in real-time by Resource Navigators.
	700 Individuals will receive SRV 7a Case Management	913 Individuals received SRV 7a Case Management	Households (per instructions, count individuals) maintained safe and affordable housing for 90 days.	700 of 700 or 100% of FNPI 4c The number of individuals who maintained safe and affordable housing for 90 days.	913 of 700 (130%) of FNPI 4c The number of individuals who maintained safe and affordable housing for 90 days.		
	175 Individuals will receive SRV 4k Utility Arrears Payments	797 Individuals received SRV 4k Utility Arrears Payments	Households (per instructions, count individuals) experienced improved health and safety within their home	100 of 700 or 14% of FNPI 4g The number of individuals who experienced improved health and safety due to improvements within their home (e.g. reduction or elimination of lead, radon, carbon monoxide and/or fire hazards or electrical issues, etc).	115 of 700 (16%) of FNPI 4c The number of individuals who maintained safe and affordable housing for 90 days.		
	700 Individuals will receive SRV 7c Referrals	913 Individuals received SRV 7c Referrals					

CSBG CARES Dashboard

January 2022

Program	Households Served	Individuals Served	Children Served	Seniors Served
Home Loss Prevention	151	311	95	62
Housing Stability	913	2183	790	317
Grand Total	1064	2494	885	379

Activity	Household Served
Eviction diversion	14
Foreclosure prevention	138
Home repair	59
Utility assistance	647
Water assistance	150
Water repair	56
Grand Total	1064

Program	Households Served	Total Awards
Home Loss Prevention	151	\$ 136,519.44
Housing Stability	913	\$ 431,911.39
Grand Total	1064	\$ 568,430.83

County	Award Amount
BAY	\$ 151,624.22
CLARE	\$ 64,063.13
GLADWIN	\$ 58,212.00
MECOSTA	\$ 34,855.88
MIDLAND	\$ 50,435.70
MUSKEGON	\$ 154,218.69
OCEANA	\$ 8,851.76
OSCEOLA	\$ 46,169.45
Grand Total	\$ 568,430.83

Quarter	Award Amount
2020	\$ 76,798.29
April-June	\$ 2,794.66
July-September	\$ 30,849.64
October-December	\$ 43,153.99
2021	\$ 477,450.22
January-March	\$ 169,266.52
April-June	\$ 140,915.28
July-September	\$ 88,105.41
October-December	\$ 79,163.01
2022	\$ 14,182.32
January-March	\$ 14,182.32
Grand Total	\$ 568,430.83

1. Traditional Management Skills Essay

Planning

When the CSBG CARES funds were awarded, I began the work by identifying the potential needs of our community. While there was not time or data available for a traditional Community Needs Assessment, I drew on the lessons learned by Mid Michigan CAA from the 2008 economic recovery programs. There was also the unique need to respond to Stay at Home orders from the State of Michigan and then the ongoing importance of social distancing. This emphasized the significance of maintaining safe, stable housing. I met with the staff within the Outreach Department and community stakeholders to identify and design interventions. Using our established Results Orientated Management and Accountability (ROMA) system, I developed Logic Models for the intended programs. The Logic Models for Home Loss Prevention can be found on Page 5 of the work sample. The Logic Model for the Housing Stability Program can be found on Page 6 of the work sample. Reviewing the budget for direct assistance and using data from established programs offered, I developed service targets for the CSBG Annual Report's National Performance Indicators and Services for individuals and families.

Organizing

After the service plan was approved by the Mid Michigan CAA Board of Directors and the Michigan Bureau of Community Action and Economic Opportunity (BCAEO), the Outreach Department began adding staff capacity in June 2020. The report to the Board of Directors on Page 7 provides the new Organizational Chart, expanding the existing capacity to meet the new needs of our community. Job Descriptions were developed for the new positions of Regional Coordinator and Resource Navigator. They are provided on Pages 8 through 11 of the work sample.

Directing

To begin providing services in the Home Loss Prevention and Housing Stability Programs, the Outreach Services Department needed updated Program Policies and Procedures to establish the service standards for the staff. The Policies and Procedures also defined the roles and responsibilities of the supervisors within the department. Most importantly, the Policies and Procedures reinforced the customer-focused attitude that is primary to the culture of Mid Michigan CAA. The Outreach Program Policies are provided beginning on Page 12 of the work sample. It creates the documentation standards required to meet the needs of the funder, provides detail to the new staff on the expectations of case management, and establishes the process for the approval of financial assistance. The CSBG CARES Program Procedure was written as a guide to providing the Home Loss Prevention Program and Housing Stability Program. It is provided in the work sample beginning on Page 20. The program procedures detail the types of assistance that these programs can provide, specify the way to document the financial assistance and case management, and establish the follow up requirements for the staff to remain in contact with their customers.

Evaluating

The programs are evaluated using ROMA, based on details entered into the agency's customer database, FACSPRO, by Resource Navigators. The details on how that information is provided to staff by the Outreach Program Policies (Page 12) and the Program Procedures (Page 20). While the program remains ongoing, the Logic Models containing the current results and outcomes of the program are

provided in the work sample on Page 32 and Page 33. The dashboard provided on Page 35 is also used to evaluate spending and the performance of the services. While providing these services, other funding became available for tenants and landlords to provide rental relief. As a result, fewer households were served with rental payments through the Home Loss Prevention program, however the funds have been needed by homeowners and households living with land contracts for relief on their property taxes. By establishing broad program guidelines and evaluating spending the progress toward the program goals, the programs have remained relevant and an important part of the economic stability of the region throughout the pandemic.

2. Community Action Positive Leadership Skills Essay

Demonstration of Leadership

Applying the Skills Approach to leadership from the Northouse text, I demonstrated the use of my Conceptual and Human skills, while providing other with the tools to demonstrate their Technical skills. As the leader of the Outreach Department, I had to take concepts and ideas about what may provide relief during the pandemic and transform it into action. I had to evaluate the human capital that existed within the program and make strategic decisions about how to expand the capacity. I demonstrated my competency solving problems by developing the Home Loss Prevention and Housing Stability programs without the traditional tools available when developing interventions using the Community Service Block Grant. I drew from prior experience developing programs, data from previous and ongoing programs offered by Community Action, and the resources available during the pandemic. The performance of these programs is not a direct result of my work, but the work of a team that had the tools to succeed. As a leader, I monitored their performance and ensured that the intended results were being achieved, as evidenced by the program dashboard and logic model results.

Building Capacity

An important aspect of the success of the Home Loss Prevention and Housing Stability interventions was building capacity within the agency to provide the services. The size of program prior to the CSBG CARES award is illustrated in the Board Report on Page 7 of the work sample. With only three direct service staff and a manager, the volume of assistance needed would have quickly overwhelmed the program. New staff was needed in each county to provide the excellent customer interaction that Mid Michigan CAA expects. The addition of the staff also required the department to establish a new level of supervisors within the program. Timely service to customers was most important to provide financial assistance critical to families staying in their homes, so I developed a supervisory position with the capacity to review and approve requests for assistance. On Page 8, the job description of the Regional Coordinators provided details of those new supervisory role.

Promotion of the Professional Development of Colleagues

When the Regional Coordinator position was developed, it was an opportunity to evaluate the skills of the existing team within the program. I was able to review the work and abilities of the current team. One existing staff member was promoted to Regional Coordinator. The promotion from within the department was an important opportunity to reinforce the culture of Community Action. Outreach Services was able to hire the other Regional Coordinators onto a team with an individual who had a demonstrated commitment to the values of Community Action. Developing a supervisory team became

an important part of the capacity building necessary to develop these programs. The role of Regional Coordinators as supervisors is evidenced throughout the Program Procedures that begins on Page 20. The team worked together to learn the skills necessary to be effective leaders in their own right. It is also important to note that the Community Empowerment Manager referenced in the Job Descriptions was also promoted to Outreach Assistant Director as referenced in the Outreach Program Policies during the course of this work. CSBG CARES funding began the pandemic recovery planning for Mid Michigan CAA, but as other programs were added, we continued to increase the capacity of the department to serve the needs of the community. Professional development and then promotion of the existing staff was an important feature of the growth in order to maintain our identity as a Community Action.

3. The Vision and Values of Community Action Essay

The program results on Pages 32-34 demonstrate that “Community Action removes obstacles, fills gaps, and confronts the causes/conditions of poverty.” The Home Loss Prevention and Housing Stability Programs were designed during a crisis that had not been seen before at Mid Michigan CAA or the community at large. Maintaining shelter for the purposes of quarantine and social distancing became a life-saving measure as COVID-19 spread. The programs prevented 138 foreclosures and 14 evictions, provided critical home repairs for 115 households, including restoring access to water for 56 households, and maintained utilities for 797 households, including access to water for 150 families. It provided important service not previously offered to members of our community.

The case management section of the Outreach Program Policies on Page 13 of the work sample demonstrates the “mobilization of resources internally and externally.” Resource Navigators work with each household to evaluate them using the Family Self-Sufficiency Matrix. Together, they build a Customer Action Plan to address their barriers. Resource Navigators connect them with poverty interventions both at Mid Michigan CAA, such as Weatherization or Head Start, or external resources like workforce development program at Michigan Works! or Temporary Assistance for Needy Families at the Michigan Department of Health and Human Services.

The CSBG CARES Program Procedure on Page 20 makes real that “serving the best interests of the poor is in the best interest of all people.” By providing housing stability to households living in poverty, families stayed in their home. During this pandemic, nothing was more important. The entire community benefited from the potential increase in spread that would have caused by households being displaced from their homes.

Mid Michigan CAA moves “from abstract ideas to achievement of self-sufficiency on an individual/family basis” through the use of the Customer Action Plan found on Pages 28 and 29 of the work sample. Resource Navigators work one-on-one with households to actualize their goals. They establish goals, build a plan, and access resources together. During these conversations, the work begins with the assets the client brings to the work. By assessing the household from a broad perspective of the Family Self-Sufficiency Matrix and their detailed Budget, the Resource Navigator can provide the household with the support they need avoid the next crisis and begin building for the future.

Community Action Vision and Values – ESP Cross Reference Sheet

Note the page(s) from work sample	I VISIONARY CONCEPTS
	1. Poverty can be eliminated by creating an environment that encourages opportunities for everyone.
	2. Community Action is development of these opportunities.
Pg 20	3. Serving the best interests of the poor is in the best interest of all people.
	4. Systems and people have the potential for change.
	5. Community Action's success is dependent upon the collective efforts of the entire community
Note the page(s) from work sample	II VALUES AND BELIEFS – a. The Misery of Poverty Must Be Addressed
	6. Poverty is unacceptable, painful, and far-reaching.
	7. Easing the misery of poverty is good, right, and essential in an affluent society.
	8. Community Action identifies and addresses the causes of poverty.
Pg 32-34	9. Community Action removes obstacles, fills gaps, and confronts the causes/conditions of poverty.
Note the page(s) from work sample	II VALUES AND BELIEFS – b. Despair Can Be Replaced by opportunity and Hope Through Community Action
	10. Empowerment of the poor for economic and social self-sufficiency through a variety of means.
	11. Local flexibility/control creating a program mix: responsive to customers and community's needs.
	12. Anti-poverty initiatives must be related to assessed community needs.
Note the page(s) from work sample	II VALUES AND BELIEFS – c. The Plight of the Poor Must Be Made Known
	13. Community Action is the voice for the poor.
	14. Use of full range of public relations techniques.
Note the page(s) from work sample	II VALUES AND BELIEFS – d. Attainment of Self Sufficiency and Independence
	15. Agencies move to shift focus from self-serving to selfless endeavors.
Pg 28	16. Agencies move from abstract ideas to achievement of self-sufficiency on and individual/family basis <ul style="list-style-type: none"> a. <i>Listen to the poor/interact one on one in partnership</i> b. <i>Encourage, assist and strengthen the abilities of the poor to play major role in programs, services and systems</i> c. <i>Accept the presence of the positive in people, work from an individual, asset-based model</i>
Note the page(s) from work sample	II VALUES AND BELIEFS – e. A Coordinated Response to Poverty Causes/Conditions Facilitated by the CAAs = Effective Approach to Moving People Out of Poverty
	17. Effective use of CAA Board structure
	18. Development of networks, coalitions and/or task forces
Pg 13	19. Mobilization of resources internally and externally
	20. Initiation of grassroots activities
	21. Community capacity building and development
	22. VALUES AND BELIEFS: The vision and values of Community Action must be modeled internally and projected externally

4. Community Action Partnership Standards of Excellence Essay

The work sample details how my work contributes to the Community Action Partnership Standard of Excellence - 4.2 Information and Knowledge Management within the Measurement, Analysis, and Performance Management category. As the Outreach Services Director at Mid Michigan CAA, I value the importance of quality data. No data is actionable unless it can be relied upon. This accuracy can only be achieved by holding staff to a high standard of quality when collecting data. The details of how to accurately input data into our client management system, FACSPRO, begin in the Outreach Program Policies on Page 12 of the work sample. The policies are used to train new staff and are available as an ongoing reference for the department. The step-by-step instructions aid our agency in gathering unduplicated client data, collecting information about our operations, and reporting our results to our funding sources.

The sections of the work sample that appear the most mundane provide some of the most important information for the front-line staff of the Outreach Department at Mid Michigan CAA. The work sample includes detailed instructions in the CSBG CARES Program Procedure on Page 20 on how to record client data on National Performance Indicators and Services for the CSBG Annual Report. Without these standardized procedures, the quality of the data collection would suffer. Our pursuit for high-quality data is only possible by providing high-quality references, along with the accompanying training to staff on how to record the data.

By developing program procedures that ensure the effective use of the client management system, I can access performance metrics on-demand about the work being done in the Home Loss Prevention and Housing Stability Programs. An accurate and functional dashboard, as evidenced on Page 34, is only possible with excellent data entry. Ongoing reporting on the Logic Models on Pages 33 and 34 is also achievable because records are maintained in real-time. The real-time data allows the programs to make real-time changes, if needed, to respond more fully to the needs of the community. At the heart of Community Action is the importance of meeting the needs of our neighbors with the least. We are charged with creating access to resources and opportunities. While information management may appear insignificant to embodying the values of Community Action, the use of data in decision making leads to a more community-responsive and customer-focused agency.