



**People** inc.

*Building Futures  
Realizing Dreams™*

PEOPLE INCORPORATED OF VIRGINIA  
**5-Year Strategic Plan  
2019–2024**

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# I Message from People Incorporated's President & CEO

People Incorporated has become a very good organization over its 55-year history and has developed a well-earned reputation as a highly mission-driven organization that is efficient and effective in administering a wide range of anti-poverty programs. Moreover, People Incorporated is well regarded as a leader in implementing innovative initiatives and approaches in human and community development.

The next five years, as laid out in this strategic plan, will be transformational for People Incorporated. Board members, staff, and clients all provided valuable input in the plan's development. This plan will serve as a roadmap guiding People Incorporated's continued growth and development while helping us all to better understand the crucial role we play in its success.

During the next five years, People Incorporated can become a truly great organization. During this time, it will have a transition in executive leadership and must continue to demonstrate the attributes of success for which it is known today. At the same time, People Incorporated will formalize and institutionalize its management processes, solidify its financial base, implement new approaches and new services to increase client success, and develop new ways to engage its clients, communities, employees, volunteers, and board.

The goals set out in this strategic plan continue to build on the 55 years of experience that People Incorporated has in serving low-income individuals, families, and communities. Specifically, over the next five years, People Incorporated will:

- Pursue excellence in programs and services that are responsive to the needs of economically disadvantaged individuals and families
- Create conditions in communities that help support self-sufficiency for all families
- Support initiatives, both internal and external, in response to emergent needs
- Strengthen internal governance and management to support mission achievement
- Ensure program management and implementation is responsive to all community and family needs to strengthen impact
- Build Board expertise and involvement in agency governance and mission-driven activities.

By 2024, People Incorporated will be more effective and impactful in fulfilling its mission and achieving its vision. With the continued dedication of our staff, board members, and hundreds of other volunteers, this plan will enable People Incorporated to make progress toward the excellence that the people, families, and communities that we serve need and deserve.

Sincerely,



Robert G. Goldsmith  
*President & CEO*

## II Mission, Vision, and Philosophy

### MISSION

To provide opportunities for economically disadvantaged people to reach their goals in order to enhance their lives, their families, and their communities.

### VISION

*Building Futures,  
Realizing Dreams:*

Our communities are safe and healthy places where people live with dignity, build futures, have a true sense of belonging, and realize their hopes and dreams for themselves, their families, and their communities.

### PHILOSOPHY

Every person needs support from others. People Incorporated promotes the dignity of individuals and families, moves people into the economic mainstream, and works to develop existing strengths and resources within communities. All our efforts are directed by the concerns, hopes, needs, and dreams of the people we serve.



## People Incorporated History and Background

People Incorporated began as the Hayter’s Gap Community Club in a rural Appalachian valley of Washington County, Virginia in January 1964. The principal of the local elementary school and a country storeowner and his schoolteacher wife started the club to provide education, recreation, and day care for Hayter’s Gap residents. The club soon grew in scope when it attracted the attention of staff from the federal Office of Economic Opportunity (OEO). In December of 1964, the Hayter’s Gap Community Club was re-named the Progressive Community Club and was chartered as one of the nation’s first Community Action Agencies, designated to serve low-income people throughout Washington County and the neighboring city of Bristol.

Over time, People Incorporated has expanded its program offerings and geographic service area to best respond to the needs of low-income Virginia residents. In the 1980s, People Incorporated expanded to serve the four-county and one city area of Southwest Virginia that it still serves today. In the late 2000s, Virginia made a concerted effort to ensure that all counties in the state have a designated Community Action Agency. As a leading agency, People Incorporated was asked to consider expansion. In 2009, the agency became the Community Action Agency for five counties in the Northern Shenandoah Valley region of Virginia, doubling the geographic reach. People Incorporated further expanded in 2012 to serve three additional

counties and two more cities in the Northern Piedmont and Greater Prince William regions. This new, expanded area is much more urban and suburban than People Incorporated’s original service area, providing new and diverse challenges and opportunities. People Incorporated’s most recent expansion came in 2014 when the organization added one more county from the Northern Piedmont region.

Today, what began as a small community-based organization has grown into People Incorporated of Virginia. Now serving thirteen counties and three cities across Virginia, People Incorporated offers almost 30 programs focused on child and family development, housing services, community economic development, workforce development, and community services and designed to foster self-sufficiency and encourage economic growth. The agency also develops and carries out significant economic development projects.

## IV

# Strategic Plan Methodology

People Incorporated conducted an intentional strategic planning process starting in March 2018 and concluding with the adoption of this plan in April 2019. People Incorporated contracted with Jeannie Chaffin to assist and guide the agency through this planning process. The following process outlines the methodology used to develop this plan:

- 1. Establishment of Strategic Planning Committee (March 2018)** – People Incorporated established a guiding, ad hoc committee of senior staff and Board members to provide guidance and oversight to the strategic planning process.
- 2. Strategic Thinking and Planning Lab #1 (April 2018)** – The key components of the strategic planning process were two “labs” held in April and September to engage staff, board, and other stakeholders in listening and dialogue. Almost 50 individuals attended this lab. The April lab included a review of Community Needs Assessment results, trends in issues affecting People Incorporated’s target audience, and key issues facing the agency. The lab also provided the venue to begin developing an agency-wide vision statement.
- 3. Research and Learning (May-August 2018)** – At the close of the April lab, attendees assembled into teams and identified areas that needed more research and information before developing goals and strategies. These teams focused on the top needs from the CNA and the key agency issues. Teams met over the summer to gather additional data and information to inform plan development.
- 4. Strategic Thinking and Planning Lab #2 (September 2018)** – The same group of attendees from the April lab reconvened in September. At this lab, teams presented the findings from their research and learning and discussed recommendations for objectives and strategies to be included in the plan. Attendees worked to prioritize all of the key issues identified and made progress on finalizing a vision statement.
- 5. Draft Plan Review (December 2018 – April 2019)** – Jeannie Chaffin produced an initial draft of the strategic plan for review in December 2018. The Strategic Planning Committee then spent early 2019 reviewing and revising the plan to best meet the needs of the agency. The final piece of this revision process included an in-depth review by the full Board of Directors at the March 2019 retreat. The Board carefully reviewed each goal, objective, and strategy, making final recommendations and edits.

# V Goals, Objectives, and Activities

## PROGRAMMATIC COMMITMENTS

Goals	Objectives	Activities	Indicators
<b>GOAL 1:</b> Create conditions in the community that support self-sufficiency for all families	<b>1.1:</b> People Incorporated will create conditions that help develop a qualified workforce and attract businesses that offer accessible, quality jobs	<b>1.1a:</b> Build strategic and intentional partnerships with Workforce Development Boards, employers, and other organizations to promote new solutions	<ul style="list-style-type: none"> <li>– Number of formal partnerships with Workforce Development entities and the outcomes of these partnerships</li> </ul>
		<b>1.1b:</b> Develop community facilities, new services, and economic drivers in high need communities	<ul style="list-style-type: none"> <li>– \$ of NMTC investment</li> <li>– Number of jobs created and retained through NMTC</li> <li>– Number of community facilities developed</li> </ul>
		<b>1.1c:</b> Support entrepreneurship and business development to stimulate economic development and job creation	<ul style="list-style-type: none"> <li>– Number of businesses created or expanded</li> <li>– Number of jobs created or retained through lending</li> <li>– \$ of NMTC investment</li> <li>– Number of jobs created and retained through NMTC</li> <li>– Number of community facilities developed</li> </ul>
	<b>1.2:</b> People Incorporated will expand the availability of safe, affordable housing in communities	<b>1.2a:</b> Increase capacity, expertise, and infrastructure to pursue affordable housing development in identified communities and for specific target populations	<ul style="list-style-type: none"> <li>– Number of safe, affordable housing units developed</li> <li>– Efficiency of development process (on time and on budget)</li> <li>– # and \$ of LIHTC credits</li> </ul>
		<b>1.2b:</b> Effectively and efficiently manage affordable housing properties	<ul style="list-style-type: none"> <li>– Vacancy rates</li> <li>– Resident satisfaction</li> <li>– Sustainability</li> </ul>
		<b>1.2c:</b> Improve the quality of existing housing occupied by low-income households	<ul style="list-style-type: none"> <li>– Number of homes weatherized</li> <li>– Number of homes repaired</li> <li>– Number of homes rehabilitated</li> </ul>

# V Goals, Objectives, and Activities, *continued*

## PROGRAMMATIC COMMITMENTS, *continued*

Goals	Objectives	Activities	Indicators
<b>GOAL 2:</b> Pursue excellence in programs and services that are responsive to the needs of economically disadvantaged individuals and families	2.1: People Incorporated will provide quality educational experiences that prepare children for success throughout the entirety of their educational experience	2.1a: Engage parents in advancing their own potential and providing support for their child's education	– # and % of HS/EHS parents actively participating as volunteer
		2.1b: Ensure that children are receiving high quality early education	– # and % of children demonstrating skills for school readiness
		2.1c: Support academic success for at-risk middle and high school students	– # and % of students increasing academic, athletic, or social skills for school success (Improving Scholars)
	2.2: People Incorporated will help individuals increase their skills and qualifications so they obtain and maintain quality jobs and reach their full potential.	2.2a: Support college readiness and access for first-generation and low-income students	– # and % of students increasing academic, athletic, or social skills for school success (Project Discovery)
		2.2b: Provide workforce development training and career services	– # and % of individuals earning a post-secondary credential or degree
		2.2c: Assist with mitigating barriers to employment	– # and % of individuals obtaining employment
	2.3: People Incorporated will assist individuals with low incomes in securing safe and affordable housing	2.3a: Rapidly rehouse homeless individuals and assist families with safe, affordable housing to prevent homelessness	– # and % of households who obtain and maintain safe, affordable housing – # and % who avoid eviction
		2.3b: Support homeownership for low- and moderate-income families	– # of households who purchase a home

GOAL 2 *continues on page 9*

## PROGRAMMATIC COMMITMENTS, *continued*

Goals	Objectives	Activities	Indicators
<b>GOAL 2</b> <i>continued</i> : Pursue excellence in programs and services that are responsive to the needs of economically disadvantaged individuals and families	2.4: People Incorporated will support overall health and well-being for low-income individuals and families	2.4a: Ensure healthy families and on-track development for vulnerable children	<ul style="list-style-type: none"> <li>– # and % of families with improved parenting skills</li> <li>– # and % of children in permanent homes</li> </ul>
		2.4b: Support healthy food access for low-income families	<ul style="list-style-type: none"> <li>– Number of households receiving food assistance</li> <li>– Number of children receiving healthy meals</li> </ul>
		2.4c: Ensure children receive immunizations and other health and dental care services	<ul style="list-style-type: none"> <li>– # and % of Children receiving immunizations</li> <li>– # and % of children with age appropriate immunizations and medical care</li> <li>– # and % of Children Receiving dental screenings/exams</li> </ul>
	2.5: Support access to financial resources for low-income families	2.5a: Promote financial literacy	<ul style="list-style-type: none"> <li>– # of individuals improving financial literacy</li> <li>– # of households participating in VITA</li> <li>– # of households that become banked</li> </ul>
		2.5b: Provide accessible personal lending products as an alternative to predatory lending and as a credit building tool	<ul style="list-style-type: none"> <li>– # of personal loans made</li> <li>– % of loans repaid</li> </ul>
	<b>GOAL 3:</b> Advocate for the needs of low-income individuals and communities	3.1: Expand agency advocacy competency	3.1a: Train Board and staff in advocacy skills
3.1b: Develop talking points for Board and staff			<ul style="list-style-type: none"> <li>– Talking points developed and distributed</li> </ul>
3.2: Undertake advocacy activities at the local, state, and national levels		3.2a: Develop and implement an annual advocacy plan based on community needs	<ul style="list-style-type: none"> <li>– Annual Board approved advocacy plan</li> <li>– Meeting objectives in the advocacy plan</li> </ul>
		3.2b: Work with local governments on the need to create more affordable housing and provide solutions	<ul style="list-style-type: none"> <li>– Changes in local planning and zoning to facilitate development of affordable housing</li> </ul>

# V Goals, Objectives, and Activities, *continued*

## OPERATIONAL COMMITMENTS

Goals	Objectives	Activities	Indicators
<b>GOAL 4:</b> Strengthen internal governance and management to support mission achievement	4.1: Build leadership to secure future success	4.1a: Develop Standard Operating Procedures for all positions	– Development/adoption of procedures
		4.1b: Senior Leadership and Human Resources will create a plan for leadership development including career advancement pathways	– Creation of leadership development plans – Documentation of knowledge, skills, and abilities needed for all leadership positions
	4.2: Improve communication to support a high-impact organization	4.2a: Fund and fill position with dedicated responsibility for communications	– Position filled
		4.2b: Staff and Board will Implement an agency-wide communication plan that addresses gathering, using, and sharing information internally and externally with staff, customers, board members, partners, other stakeholders, funders, and the community at large	– Met or exceeded target for media interactions – Increased overall staff satisfaction with communications at People Incorporated
		4.2c: Staff committee will facilitate purchase and installation of agency intranet technology to share and manage content, news, and workflows	– Adoption and implementation of new intranet
		4.2d: Staff will establish a library of training resources on the intranet	– Creation of training resource library
		4.2e: Communications staff will lead revision of external-facing tools (e.g. newsletter, brochures) to modernize, improve customer appeal, and share consistent branding, including a refresh of agency brand	– Met or exceeded target for media interactions – Updated marketing materials
		4.2f: Redesign People Incorporated website to upgrade user-friendliness, mobile compatibility, and overall design.	– New website implemented
		4.2g: Hire bi-lingual staff	– Number/percentage of bilingual staff

GOAL 4 continues on page 11

## OPERATIONAL COMMITMENTS, *continued*

Goals	Objectives	Activities	Indicators
<b>GOAL 4</b> <i>continued:</i> <b>Strengthen internal governance and management to support mission achievement</b>	<b>4.3:</b> Strong processes and systems to achieve organizational excellence and high impact	<b>4.3a:</b> Pursue Community Action Standards of Excellence and apply for Award for Excellence	– Achievement of Community Action Standards of Excellence – Application for award by 2023
		<b>4.3b:</b> Board and staff will support the intentional development of human capital (including analysis of employee compensation, health benefits, retirement benefits, professional development, autonomy, and leave policy)	– Decreased employee turnover rate – Improved employee satisfaction
		<b>4.3c:</b> Staff and Board will use agency-wide scorecard to ensure continuous improvement	– Adoption and use of agency-wide scorecard
		<b>4.3d:</b> Staff and Board will create highly effective and generative partnerships and networks across multiple sectors	– Number of partnerships and percentage that are effective
		<b>4.3e:</b> People Incorporated will upgrade and modernize management data systems	– Improved data systems including: HR, Property Management, Capital Maintenance, Volunteer Management, Project Management, and Loan Underwriting and Servicing
		<b>4.3f:</b> Develop and adopt a building and equipment maintenance plan	– Plan adopted by Board

**GOAL 4** *continues on page 12*

# V Goals, Objectives, and Activities, *continued*

## OPERATIONAL COMMITMENTS, *continued*

Goals	Objectives	Activities	Indicators
<b>GOAL 4</b> <i>continued</i> : <b>Strengthen internal governance and management to support mission achievement</b>	<b>4.4:</b> Continue to diversify, stabilize, and increase the agency's financial resources	<b>4.4a:</b> Board and staff will develop and implement a fundraising plan, to include private giving and social enterprise, that identifies new approaches to using Board members' knowledge of local resources and opportunities	<ul style="list-style-type: none"> <li>– Creation of fundraising plan</li> <li>– Increased private revenue from Board activity</li> <li>– Increased discretionary income</li> </ul>
		<b>4.4b:</b> Board and Staff will work together to create community awareness and understanding of People Incorporated's need for resources and support	<ul style="list-style-type: none"> <li>– # of presentations and speaking engagements</li> </ul>
		<b>4.4c:</b> People Incorporated will utilize volunteers to expand agency capacity and add value in innovative and creative ways	<ul style="list-style-type: none"> <li>– More volunteer hours contributed</li> </ul>
		<b>4.4d:</b> People Incorporated will grow reserve fund levels	<ul style="list-style-type: none"> <li>– Increased reserve fund levels consistent with finance committee goals</li> </ul>
		<b>4.4e:</b> The Board and Finance staff will maintain a long-term financial plan for the organization	<ul style="list-style-type: none"> <li>– Adoption of financial plan</li> </ul>
	<b>4.5:</b> Strengthen internal monitoring and evaluation capacity to better measure mission achievement	<b>4.5a:</b> Implement agency-wide assessment for measuring families' progress out of poverty toward self-sufficiency	<ul style="list-style-type: none"> <li>– Adoption of assessment tool</li> <li>– Administration of assessment at regular intervals</li> <li>– # and % of families that we move out of poverty</li> </ul>
		<b>4.5b:</b> Expand collection of longitudinal data to measure agency impact over time	<ul style="list-style-type: none"> <li>– Follow-up with clients at annual intervals after exit</li> <li>– Measurement and reporting on long-term impact</li> </ul>

**OPERATIONAL COMMITMENTS**, *continued*

Goals	Objectives	Activities	Indicators
<p><b>GOAL 5:</b> Ensure program management and implementation is responsive to community and family needs to strengthen impact</p>	<p>5.1: Integrate services to improve results</p>	<p>5.1a: Senior Leadership will create an employee advisory committee to work on integrated service efforts (e.g. confidentiality, centralized intake, physical locations)</p>	<ul style="list-style-type: none"> <li>– Increased number of families and individual receiving multiple services</li> </ul>
		<p>5.1b: Data &amp; Evaluation and Program staff will embed utilization of empowOR across the organization through requirements, training, accountability, and expanded functionality</p>	<ul style="list-style-type: none"> <li>– Improved data quality in empowOR</li> </ul>
		<p>5.1c: Staff will develop and implement processes and systems to provide intensive cross-service coaching to targeted families (Whole Family/ 2-Gen)</p>	<ul style="list-style-type: none"> <li>– Number of families receiving a whole family approach</li> <li>– Improved results for families receiving multiple services</li> </ul>
		<p>5.1d: Senior leadership and human resources will coordinate and integrate training opportunities across the organization (e.g. provide regular all-staff training in agency programs; centralize access to employee training; include other programs at section staff meetings; identify common training needs)</p>	<ul style="list-style-type: none"> <li>– Implementation of agency-wide training plan</li> <li>– Evaluation of effectiveness of individual trainings</li> </ul>
		<p>5.1e: Staff will utilize a range of communication and education tools to connect customers to agency services (newsletters, website, county-specific information)</p>	<ul style="list-style-type: none"> <li>– Increased number of families and individual receiving multiple services</li> <li>– Increased number of families and individuals served annually</li> </ul>
		<p>5.1f: Senior leadership and Human Resources will revise employee onboarding process to focus on integration and agency-wide goals driven by People Incorporated's mission</p>	<ul style="list-style-type: none"> <li>– Increased employee satisfaction with involvement at People Inc.</li> </ul>

GOAL 5 continues on page 14

# V Goals, Objectives, and Activities, *continued*

## OPERATIONAL COMMITMENTS, *continued*

Goals	Objectives	Activities	Indicators
<b>GOAL 5</b> <i>continued</i> : <b>Ensure program management and implementation is responsive to community and family needs to strengthen impact</b>	5.2: Pursue locally responsive growth	5.2a: Board Planning Committee and development staff will develop guiding principles for adding new services in current areas, expanding to new service areas, and reviewing current program portfolio	– Expansion of, or changes to, services based on intentional review and consistent with guiding principals
		5.2b: Design a rubric for evaluating potential programs and initiatives based on mission, vision, values, service area needs, profitability, etc.	– Board approval of rubric – Development and use of the rubric
		5.2c: People Incorporated will identify and replicate current service offerings in newer areas. Consider not only the “top needs” from the needs assessment, but also where the organization can have impact based on specific conditions, gaps, and opportunities.	– Expansion of, or changes to, services based on intentional review and consistent with guiding principals
		5.2d: Increase level of service to Northern Piedmont and Greater Prince William regions	– Development and implementation of strategic plan for regions – Increased number of individuals served annually
		5.2e: Have staff and Board members that are designated and trained to represent the organization and develop and strengthen relationships and partnerships, including developing knowledge of existing program and providers in all service areas	– # of staff completing Ambassador training – Completion of Board training in People Incorporated history and current operations – Improved relationships with other service providers
		5.2f: Pursue solutions to the top community needs of living wage jobs, job skills training, transportation, mental health, substance abuse, and affordable housing.	– Increased community resources to address these needs (both internal and external)

## OPERATIONAL COMMITMENTS, *continued*

Goals	Objectives	Activities	Indicators
<b>GOAL 6:</b> Build Board expertise and involvement in agency governance and mission-driven activities	6.1: Board will receive annual training in mission-driven programming and governance responsibilities	6.1a: Governance committee and staff work to develop annual Board training plan	– Adoption of plan
		6.1b: Staff provide regular training to Board in activities and goals of agency programs	– Increased Board knowledge of agency programs and services
	6.2: Board will oversee succession of President & CEO	6.2a: Board will establish a leadership transition committee to review, revise, and communicate transition/succession plan for President & CEO	– Establishment of leadership transition committee – Development of transition plan including timeframes
		6.2b: Leadership Transition Committee will consider organizational needs, direction, and opportunities in the development of the President & CEO job description	– Revised CEO job description
		6.2c: Board will hire a new President and CEO	– New President and CEO is in place

# VI Plan Implementation and Accountability

The goals, objectives, and activities outlined in section V provide high-level guidance for People Incorporated over the next five years. Achievement of these goals will require hard work and dedication from both staff and Board.

## IMPLEMENTATION

Staff and Board will create an annual work plan to support strategic plan implementation. At a minimum, this plan will include the following details about each of the activities:

- Strategies for the year with action steps
- Performance indicators and corresponding targets
- Resources/cost
- Staff or Board members responsible (including designation of one individual as a “team lead”)
- Target date of completion for strategic plan activity and action steps
- Current status

## ACCOUNTABILITY

The President and CEO will provide an annual update on strategic plan progress to the Board of Directors at their annual retreat in March of each year. The update will include a review of plan goals, objectives, and strategies and annual performance for each indicator. This comprehensive, formal review also provides the venue for annual revisions to the plan.

Throughout the year, Board and staff will monitor progress toward strategic plan goals through the agency-wide scorecard.



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