

BRUNSWICK FAMILY ASSISTANCE
STRATEGIC PLAN 2021-2026

INTRODUCTION

The Board of Directors and staff of Brunswick Family Assistance (BFA) developed this strategic plan for the period 2021-2026. It provides direction and a five-year road map for programs, services, and organizational development. This is a working document that will be reviewed and updated as organizational needs grow and/or change.

The plan was prepared with broad involvement and guidance from the Board and management staff. The Strategic Planning Committee, comprised of Board members and the Executive Director, developed an organizational framework and process for creating the strategic plan. The Committee met to establish the vision, mission, core operating values, and strategic directions for BFA which were then approved by the full Board of Directors. BFA staff provided valuable support, assistance, and analysis in completing the plan.

VISION STATEMENT

Brunswick Family Assistance is a transformative, forward-looking, and collaborative organization that helps low-income people in Brunswick County to live a higher quality of life. We envision a community where all people have access to an adequate and nutritious supply of food and sufficient resources to sustain themselves. BFA shall continue to be a leader in partnering with other organizations to help solve community problems.

MISSION STATEMENT

Brunswick Family Assistance is dedicated to improving the lives of families and individuals in crisis in Brunswick County, who are willing to help themselves, by providing emergency assistance, educational and skills development programs.

VALUES---OUR CORE PRINCIPLES

Mission Core Values and Guiding Principles

In striving to achieve our mission and vision objectives, BFA operates under our core values, which are intended to be defined by our guiding principles in the conduct of our activities. These are essential to productive relationships and organizational excellence and include:

1. **Fairness:** We believe that everyone should expect to be treated fairly and this is a fundamental principle that should be applied to and by BFA governance (the Board of Directors, officers and management), employees, volunteers, clients, the public and our partner organizations (hereinafter the “BFA Community”). We value, recognize and readily give appreciation to our donors, employees, volunteers, and collaborative stakeholders.

2. **Respect:** Each member of the BFA Community should be treated with respect and should similarly return that same treatment of respect consistent with our core value of diversity, equity and inclusion. Mutual respect and dignity are paramount and fundamental principles and core values of BFA. To this end, BFA supports goals of equity and justice in denouncing racism, intolerance and exclusion.
3. **Care:** In carrying out duties on behalf of BFA, directors, officers, employees and volunteers are expected to apply elements of care, diligence and accountability while fully adhering and complying with BFA's policies and rules of conduct. We will do the best job possible to meet the needs of our clients while adhering to paramount principles of service, responsiveness and compassion. We will promise only what we can deliver and deliver what we promise. We will develop collaborations with stakeholders that share our vision. We will work collaboratively to seek solutions to community problems. We will be trusted and effective stewards of our resources. Essential to the Care value is that each member of the BFA Community engenders and practices passion for and dedication to BFA's Mission and Vision.
4. **Honesty:** BFA governance, employees and volunteers are expected to act with integrity, at all times conducting themselves ethically, honestly and with high moral standards in fulfilling BFA's mission, free of any actual or potential conflicts of interest

BFA HISTORY AND BACKGROUND

BFA was started in 1981 as a private, non-profit organization dedicated to improving the lives of Brunswick County residents who are in financial crisis. We serve low-income people and those in crisis by addressing their needs through a comprehensive approach and providing a wide range of coordinated programs and services designed to have a measurable impact on people's lives.

Today, BFA is the largest United Way Agency in Brunswick County and is the only County organization devoted exclusively to aiding the unemployed, the homeless, the elderly, the disabled, and the underemployed. We touch the lives of approximately 21% of our Brunswick County neighbors. As a result of the programs, services and assistance that we provide, BFA strives to improve our community and make it a better place to live.

BFA collaborates and coordinates with other non-profit organizations, community groups, and faith-based organizations to leverage resources and services. We carry out our work through a small, dedicated staff and a cadre of volunteers who generously donate their time and talents. BFA also benefits from the on-going generosity of the community as shown by monetary contributions, food and clothing donations, and volunteer service. Without this support, the scope and extent of our assistance would have to be reduced and the needs of the community would go unmet.

CHALLENGES AND THREATS

There is much need in Brunswick County and, as a result, BFA has provided increasingly high levels of assistance over the years. In 2020, the dollar value of all goods and services provided totaled just over \$1.7 million, including over \$600,000 in direct financial assistance and distributed food valued at \$1,100,000 to low-income, food-insecure residents of Brunswick County.

Much of the need can be attributed to the demographic and weak economic conditions in Brunswick County. With the exploding growth in the county from incoming retirees looking to live close to the ocean, affordable housing will be affected in areas close to the water, possibly pushing low income, more affordable housing into the west side of the county, away from services. In addition, the planned extension of US 31 into North Carolina will have a huge impact on Brunswick County.

According to local statistics...

Employment in Brunswick County is heavily concentrated in low-paying, part-time, or seasonal jobs. Approximately 42% of all jobs are in retail trade, accommodations and food services, or health care and social services. Manufacturing, which typically pays higher wages, accounts for only 5% of all jobs in the County. As a result, household income trails the national average. The large number of retirees with higher incomes distorts the income levels in the county. They also skew the price of housing. This has had some adverse effects on BFA as we have seen a reduction in federal funding because area income levels were above the minimal levels for assistance.

TO BE UPDATED WITH CURRENT COUNTY STATISTICS

These factors have profound implications for BFA, other organizations providing human service needs, and the entire community. Coming out of the COVID19 pandemic, BFA expects requests for client assistance to continue at historically high levels in the years ahead which will place pressure on our ability to meet these increasing needs.

WHAT WE DO: BFA SERVICES AND PROGRAMS:

In order to address these pressing needs and problems in our community, BFA has a number of programs and services that provide food, clothing, and financial assistance for essential needs to individuals and families in financial crisis, based on eligibility and availability of funds. Assistance is provided based on a demonstrated need and in some instances, individuals are required to pay part of their expenses. BFA never gives money directly to clients.

Food Program.

1. Food Pantry. BFA operates two emergency food pantries that normally distribute food five days a week to those in crisis. Our food pantries are unique in Brunswick County in terms of the number of unique, individual families served and total geographic area served. We are a partner with the Food Bank of Central and Eastern North Carolina (FBCENC) which enables us to glean from local grocery stores.

2. Commodities. BFA partners with the FBCENC to distribute USDA surplus food (commodities) to residents on a monthly basis.
3. Summer Food Program. BFA operates a summer food program that provides breakfast, lunch, and a snack every day of the week to school-age children throughout summer recess. The program focuses primarily on providing meals to children who receive free or reduced-cost food during the school year. Families can pick up, or have delivered, a bag of food for each school-aged child in the home during the duration of the summer break.

Direct Emergency Financial Assistance. We have a number of programs that disburse direct financial assistance for such critical needs as rent/housing, electricity and utilities, medical prescriptions, and transportation.

1. Rental/Housing Assistance. We help pay rent and for individuals and families who are at risk of becoming homeless due to eviction.
2. Electric/Utilities Assistance. BFA provides monetary assistance to help pay electric and other utility bills for residents who are at risk of losing these services.
3. Medical Assistance. We provide limited monetary assistance to individuals to help pay for life-sustaining medical prescriptions.
4. Transportation Assistance. BFA collaborates with the Brunswick Transit System to provide referrals for transportation assistance. In addition, we provide other direct transportation assistance on a case-by-case basis (i.e., bus tickets to help homeless clients relocate to an area where they have more sustainable resources).

Christmas Program. This program distributes Christmas presents to children under 12 years of age and seniors who meet eligibility requirements, many of whom would not have any gift to open on Christmas morning. In addition, each family receives food and all the trimmings for a traditional Christmas dinner.

Back to School Program. Through this annual program, school supplies, backpacks, and clothing/uniforms are provided to students in grades K through 8. This program is also known as Christmas in July.

Financial Literacy Program. This program, established in 2014, teaches basic financial information to clients in an effort to bring them into the financial mainstream. Clients are taught how to make smart choices with their money, how to track expenses, and how to develop a household budget. In 2019, BFA partnered with other local organizations to modify this program and integrate it into the local high schools. This became the foundation for what is now a part of basic curriculum for local high school students.

Job Skills Development Program: This program offers fundamental knowledge and resources to help clients secure and retain employment. The course explores a broad range of job search techniques, including compiling appropriate information for job applications, targeting cover letters, and developing resumes. It also covers typical interview questions and strategies and basic job retention qualities.

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Public-Private Partnership. BFA has partnered with the County's Division of Social Services to administer the annual Low Income Energy Assistance Program (LIEAP). LIEAP is a federal Government program that provides eligible persons a one-time payment ranging from \$200-600 to help pay their heating expenses in the winter.

PLAYING TO OUR STRENGTHS

BFA is able to make a difference in Brunswick County because of three key factors: our dedicated employees, our volunteer corps, and the generosity of the community. Our most valuable resource and asset is our people. The BFA staff brings passion, compassion, and a first-class customer service ethic to the job every day. From Board membership to client programs, our volunteer corps, which totals more than 300 volunteers, always answers the call to graciously donate their time, talent, and expertise throughout the year. Finally, the strong financial support and generosity from all segments of our community have enabled us to provide and expand our much-needed programs, services, and assistance to those in crisis.

BFA recognizes that no single organization, whether government, a non-profit, or a faith-based organization, can adequately address all the needs and issues in Brunswick County. That is why it is imperative that social service organizations work together collaboratively to marshal the full extent of resources to deal with the problems facing our community. From our participation in the Brunswick County VOAD (Volunteer Organizations Active in Disaster), to the many referrals and cooperative case management systems we have in place, BFA values and appreciates our community partners who help us to leverage the strengths and expertise that each party brings to the table. BFA is in a unique position to help lead efforts to address the multitude of needs in the community because of its long history of service to Brunswick County, its reputation and its executive leadership. BFA will continue to take a leading role in cultivating these invaluable partnerships in the years ahead.

BFA is financially sound, secure, and stable. Years of hard work and dedicated service delivery have built a level of community trust that has allowed us to strengthen our balance sheet and overall financial position. We also have a contingency fund and a Board reserve fund (i.e., emergency fund) as well as Board reserved funds to supplement client assistance should the client needs exceed our annual budget. These funds can be tapped into if revenues drop or if the area is hit by a natural disaster resulting in unprecedented demand for our services. BFA's financial statements and accounting systems are audited annually by an independent auditor and have consistently received a clean audit opinion.

The management and Board of BFA take its fiduciary responsibility to be effective stewards of the resources and funds entrusted to us very seriously. We accept accountability and we believe in and practice transparency in our finances. We are a mission-driven organization that understands the importance of strong, responsible financial management and the impact that it has on the clients we serve. We provide reports to major donors and stakeholders that explain how funds were expended and measurable outcomes achieved. In addition, our annual audited financial statements and Form 990 are available on our website.

OPPORTUNITIES AND FUTURE DIRECTION

BFA will continue to be a forward-looking, progressive organization guided by our mission of helping those in crisis in Brunswick County, who are willing to help themselves, by offering programs that address the many issues affecting people living in poverty. Our focus will also take aim at trying to address the root cause of problems that require individuals to seek assistance from BFA. Our goal is to uplift our clients by helping them become more self-supportive and independent so they will be able to provide for themselves and their families.

By revitalizing the financial literacy and job skills development programs, BFA will keep with our mission of helping people who are willing to help themselves. BFA will continue to evolve these programs and offer them not only to our clients, but also to the public in an effort to increase community engagement and program success rates. We will also keep open communication with the local school systems as they use the program in the high schools and partner with other local organizations to expand the programs and broaden their outreach.

BFA knows and understands that the services we provide are critical to meeting basic human needs (food, water, shelter) and we take our obligation to our clients very seriously. We believe that creating an environment that helps our clients feel safe and comfortable is key to the successful delivery of our programs and, therefore, the successful futures of our clients. BFA will work to improve communication methods with our clients that will better enable us to deliver vital information and opportunities. We also endeavor to identify areas of unmet needs, such as food deserts, so that we may work with community partners and stakeholders to address those needs.

Partnership, collaboration, and coalition-building will continue to be key areas of focus for BFA in the years ahead. We will explore the feasibility of developing a formal, centralized referral system amongst other social service providers. This will improve efficiency and strengthen the delivery of services to clients.

Finally, BFA will take action to develop a succession plan for management staff and Board members. This will ensure continuity of operations, smooth transition in management, and continued effective oversight when staff or Board member changes occur.

BFA STRATEGIC PLAN 2021-2026
ACTION PLANS

Strategic Priority #1: Organizational & Financial Soundness

- Action plan #1: Strengthen organizational soundness by exploring long-term structure options that meet the growing demands of BFA programs. Have a long-term physical structure identified that will serve as BFA's Charlotte headquarters before the 4600-10 Main Street lease is up in 2025.
- Action Plan #2: Further develop working documentation of key work processes and procedures for client services & programs, accounting and administrative functions, grant programs, fundraising programs, and community outreach programs.
- Action Plan #3: Develop a succession plan for key staff, volunteers and Board members that will ensure continuity of operations and smooth transition during periods of turn-over.
- Action plan #4: Develop and maintain a 5-year plan for implementation of BFA's current reserve policy.
- Action Plan #5: Continue to take steps to ensure stable, secure, reoccurring, and long-term funding from community stakeholders. This includes the transition to a more robust, online accounting system. Also, the addition of professional marketing and development/fund raising experience of the staff of BFA will be considered as the need for prospect development, grant writing, support and on-line donor and community communications increases.

Strategic Priority #2: Effective and Efficient Delivery of Client Services and Assistance

- Action Plan #1: Conduct a county-wide survey to identify poverty "hot spots" and/or food deserts that may spotlight gaps in services. When gaps in services are identified, create a plan to address those needs through community partnerships and/or BFA satellite or permanent offices and food pantries in those areas.
- Action Plan #2: Improve the delivery of services to clients and referrals amongst agencies by continuing to cultivate relationships with community partners to reduce overlap and redundancy of service programs.
- Action plan #3: Improve client communication methods using either an email distribution service or the CiviCore client database.
- Action Plan #4: Revamp the Financial Literacy and job skills programs. Work with the local school Board to regenerate the program in local high schools and create models that will increase client engagement.

Strategic Priority #3: Outreach, Partnership and Collaboration

- Action Plan #1: Develop and implement a robust marketing policy that will strengthen visibility on social media outlets and other online marketing mechanisms.
- Action Plan #2: Work with marketing professionals to update BFA's website to be more vigorous and current.

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- Action Plan #3: Continue to strengthen BFA's volunteer corps through ongoing volunteer recruitment and retention efforts and trainings utilizing Volunteer Hub communications and other outreach mechanisms, including volunteer open-house events.
- Action Plan #4: Continue to partner with key agencies and community partners to develop a centralized client referral system.

Strategic Priority #4: Effective Board Governance

- Action Plan #1: Develop a succession plan for Board Members to include expanding the diversity of the Board and establishing a list of skills, knowledge, and abilities for use in recruiting Board members.
- Action Plan #2: Continue to work with QENO and other training programs to further enhance and strengthen Board Governance.
- Action Plan #3: Conduct annual Board/staff retreat on key BFA programs to develop a better knowledge and understanding of BFA operations and client assistance by BFA Board members