

Concho Valley Community Action Agency
 Executive Director's Report
 Wednesday, October 18, 2017

FOUR QUESTIONS OF ENGAGEMENT

1. Does it align with our mission?
2. Is it a need of the community?
3. Do we have the capacity?
4. Is it cost effective?

CEAP

Utility Assistance - September 2017

County	Households	Individuals	Monthly Expenditures	Monthly Average/HH	YTD Expenditures
Coke	20	43	3,211.27	160.56	20,734.96
Concho	21	40	3,365.54	160.26	26,664.82
Crockett	14	35	3,326.81	237.63	13,580.83
Irion	4	6	463.95	115.99	6,081.80
Kimble	14	23	1,701.89	121.56	13,715.48
Menard	33	63	4,643.01	140.70	29,948.71
Reagan	6	23	1,327.05	221.18	4,831.28
Schleicher	23	37	3,731.92	162.26	17,282.17
Sterling	2	5	184.53	92.27	1,175.26
Sutton	31	71	4,618.09	148.97	21,852.29
Tom Green	624	1,497	117,259.01	187.92	588,030.35
Total	792	1,843	143,833.07	181.61	743,897.95

2017 CEAP Expenditures Encumbered

Utility Assistance	\$	964,912.85
Entered 1/1-1/21		<u>35,514.73</u>
Balance Remaining	\$	929,398.12

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Entered 1/22-1/28	<u>63,841.73</u>
Balance	
Remaining	\$ 865,556.39
Entered 1/29-2/4	<u>39,975.82</u>
Balance	
Remaining	\$ 825,580.57
Entered 2/5-2/18	<u>52,090.22</u>
Balance	
Remaining	\$ 773,490.35
Entered 2/19-2/26	<u>25,064.82</u>
Balance	
Remaining	\$ 748,425.53
Entered 2/27-3/4	<u>27,240.07</u>
Balance	
Remaining	\$ 721,185.46
Entered 3/5-3/11	<u>30,367.49</u>
Balance	
Remaining	\$ 690,817.97
Entered 3/12-3/18	<u>23,618.31</u>
Balance	
Remaining	\$ 667,199.66
Entered 3/19-3/25	<u>34,841.19</u>
Balance	
Remaining	\$ 632,358.47
Entered 3/26-4/1	<u>25,712.72</u>
Balance	
Remaining	\$ 606,645.75
Entered 4/2-4/8	<u>21,250.06</u>
Balance	
Remaining	\$ 585,395.69
Entered 4/9-4/22	<u>70,137.50</u>
Balance	
Remaining	\$ 515,258.19
Entered 4/23-4/29	<u>28,501.18</u>

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Balance Remaining	\$	486,757.01
Entered 4/30-5/6		<u>18,337.85</u>
Balance Remaining	\$	468,419.16
Entered 5/7-5/27		<u>50,173.52</u>
Balance Remaining	\$	418,245.64
Entered 5/28-6/3		<u>13,229.79</u>
Balance Remaining	\$	405,015.85
Entered 6/4-6/10		<u>23,786.54</u>
Balance Remaining	\$	381,229.31
Entered 6/11-6/17		<u>50,859.18</u>
Balance Remaining	\$	330,370.13
Entered 6/18-7/8		<u>49,595.63</u>
Balance Remaining	\$	280,774.50
Entered 7/9-7/15		<u>22,558.98</u>
Balance Remaining	\$	258,215.52
Additional Funds		<u>(118,184.00)</u>
Balance Remaining	\$	376,399.52
Entered 7/16-7/22		<u>26,407.37</u>
Balance Remaining	\$	349,992.15
Entered 7/23-7/29		<u>16,492.26</u>
Balance Remaining	\$	333,499.89
Entered 7/30-8/19		<u>73,360.98</u>

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Balance Remaining	\$	260,138.91
Entered 8/20-8/26		<u>29,975.51</u>
Balance Remaining	\$	230,163.40
Entered 8/27-9/2		<u>26,950.46</u>
Balance Remaining	\$	203,212.94
Entered 9/3-9/9		<u>21,848.55</u>
Balance Remaining	\$	181,364.39
Entered 9/10-9/16		<u>28,115.51</u>
Balance Remaining	\$	153,248.88
Entered 9/17-9/23		<u>16,346.14</u>
Balance Remaining	\$	136,902.74
Entered 9/24-9/30		<u>23,155.24</u>
Balance Remaining	\$	113,747.50
Entered 10/1-10/7		<u>11,812.80</u>
Balance Remaining	\$	101,934.70

The above figure now includes CEAP contract amended 7/17. However, it does not include approximately \$50,000 that we will reallocate to direct services from categories in which we will not fully expend funds.

CEAP eligibility is capped at 150% of the Federal Poverty Rate. See attached scale.

We are going through utility assistance funds faster than any previous year. At the pace of the last few weeks, we would exhaust all direct assistance funds before June. Therefore, we have implemented a priority system that gives preference to the elderly, disabled, and families with children 5 years of age or younger. Also, outreach workers will travel earlier this year so that we will have the opportunity to serve the rural counties before all funds are expended.

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Outreach workers will travel to the rural counties in April. We are advertising in the local papers in February and March so that rural clients are aware of our visit. Please help us get the word out. Promotional material available from Executive Director. UPDATE (May): We have learned that utility assistance will receive another allocation, probably around 10% of the current contract.

Reliant has asked CVCAA to administer funds directed towards their client. On July 17, we receive an installment of \$8,750.

WEATHERIZATION

Weatherization eligibility is capped at 200% of the Federal Poverty Rate. See attached scale.

Currently, CVCAA has active contracts from all weatherization funding sources (LIHEAP, DOE, and TACAA). The 2016 advertising campaign was successful, bringing in many new applications. We will continue the campaign in 2017 so that we maintain a solid inventory of available units for consideration. When promoting our program, please remember that this is not a rehabilitation or renovation program. Units must be structurally sound before weatherization is performed. UPDATE (May): LIHEAP WAP will receive an increase this year for around 10% of the current contract level. UPDATE (July): We received an additional \$30,000 on the amended LIHEAP WAP contract. UPDATE: (August): We received the 2017-18 DOE contract. It is for \$93,000.

On August 3 our AEP contract was monitored. There were no negative findings.

The week of October 16 TDHCA will monitor LIHEAP and DOE weatherization.

CSBG

With Board approval, we intend to increase the budget for Case Management from \$10,000 to \$12,000 per year. The additional funds will allow CVCAA to place 2 more persons on Case Management. There are currently 23 clients enrolled in Case Management. UPDATE: Four persons transitioned out of poverty. We added one to the program and are evaluating several more. UPDATE (July): 3 persons are currently being tracked to transition out of poverty. UPDATE (August): There are currently 32 persons enrolled in Case Management. Of the 32, 10 persons are being tracked to transition out of poverty. To date, 7 persons have transitioned out of poverty. UPDATE (September): 2 more persons have transitioned out of poverty bringing the total to 9, our goal for the year. We are currently tracking 8 individuals. UPDATE (October): We are tracking 4 individuals. Ten persons have transitioned out of poverty. A family of 8 dropped out last month because they moved out of our service delivery area.

CSBG Case Management eligibility is capped at 125% of the Federal Poverty Guideline. See attached scale.

CVCAA received a CSBG discretionary grant for \$16,250. This funds must be used for direct services (education, training, etc.). Therefore, we are partnering with the Concho Valley

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Workforce Development Board who will provide or subcontract training opportunities for our clients. We hope to work closely with CVWDB in the future.

Two staff individuals have completed coursework to become Results Oriented Management Accountability (ROMA) Implementers. According to Organizational Standards, ROMA Implementer must be part of an agency's strategic planning. If an agency does not have a ROMA certified person on staff, the service must be procured. UPDATE (July): Both staff members passed their ROMA certification.

VITA

The Volunteer Income Tax Assistance program started preparing and filing taxes on February 1. CVCAA is the only VITA site in San Angelo. We are partnering with Central Texas Opportunities this tax season. The collaboration earned a grant from the IRS. Our agency also received supplemental grants from HEB and BBVA Compass Bank. UPDATE (July): BBVA Compass Bank has already committed to supporting VITA in 2018. We have received a \$5,000 check.

As of March 5, 510 returns had been accepted by the IRS.

As of April 6, 1,082 returns had been accepted by the IRS.

Final report: 1,409 returns accepted by the I.R.S.

VETERANS' SERVICES

On January 30, Executive Director presented a grant proposal before the Texas Veterans Commission. The grant is for \$75,000 and would provide emergency utility assistance and emergency rental assistance for qualified veterans. If awarded, ED would like to amend the contract to include emergency mortgage assistance. Awards should be announced in March. UPDATE (April): No Community Action Agencies were funded. UPDATE (August): The application period is now open.

VISTA

CVCAA applied for a VISTA volunteer. The volunteer would be tasked with capacity building, specifically helping CVCAA restart and expand a housing program. HOME NOFA is due June 1. We are considering Homeowner Rehabilitation/Reconstruction Assistance (HRA) and Tenant Based Rental Assistance (TBRA). UPDATE (March): We secured a VISTA Volunteer. He should start with us before May. We will be asking about the predominant housing needs in your communities. UPDATE (September): Our HOME application was approved at the September TDHCA Board meeting.

VISTA Volunteer begins the week of April 26.

UPDATE (May): VISTA volunteer is putting together information concerning possibilities within a housing program. Executive Director believes that the Board should consider appointing a

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Housing Committee to work with VISTA volunteer and Executive Director. County Judges may be interested in housing possibilities within their counties.

Executive Director is planning on securing a NMLS license so that we can package applications for USDA. For each application, USDA will pay CVCAA \$350. After a period of time and with an additional certification USDA will pay \$1200 per application. UPDATE (August) Executive Director sits for exam on 8/22. UPDATE (September): Executive Director passed the Mortgage Loan Originator (NMLS) exam.

UPDATE (October): VISTA volunteer Daniel Loyer is no longer associated with our agency. The program will be reevaluated.

FUND RAISING

The Crazy Desert Trail Race will be Saturday, March 11th at the San Angelo State Park. TXU is sponsoring the event on our behalf.

San Angelo Gives will be Tuesday, May 2. Please consider contributing to CVCAA during this 24 hour event. All gifts are amplified through the San Angelo Area Foundation. UPDATE (May): CVCAA received \$610 from donors. Matching has not yet been established.

UNITED WAY

An application was submitted to United Way for funding to the tune of \$5,000 representing unreimbursed costs associated with the weatherization program.

CORPORATE OFFICES

Executive Director is investigating the feasibility of securing a new location that would be owned by CVCAA. UPDATE (October): We are considering the Salvation Army's invitation to move into their future facility.

Strategic Priorities

- Establish low cost, branded office space
- Fully expend all grants
- Implement effective marketing strategy
- Secure adequate, qualified weatherization applications
- Maintain equitable distribution of services
- Implement new management information system for weatherization assistance program
- Foster a climate of innovation

UPDATE:

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- (March) Executive Director would like to speak with other agencies that have empty space and/or plan on building/expanding in the future. Having several agencies/services in a central location would benefit clients and reduce agency overhead.
- We've had to slow down spending or face several months when no services could be offered.
- As indicated by the overwhelming volume of clients visiting our facilities, the community appears to be aware of our services.
- We've contracted with Clemmons and Associates for advertising services. There has been a notable increase in interest concerning home weatherization.
- Outreach workers will travel to rural counties in April. We are considering sending out staff twice in 2018.
- Shah client information systems, the software that we have been using to track utility assistance for the past several years, added a weatherization module. The module is working well and does not require that we purchase a new system.
- Two employees are training to become Result Oriented Management Accountability Implementers. Part of their training includes evaluating systems with an eye towards innovated strategies that produce desired outcomes.

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Program Year 2017 Income Limits for CSBG (Effective January 24, 2017)		
Persons in Family/Household	100% of Federal Poverty Guidelines	125% of Federal Poverty Guidelines
1	\$12,060	\$15,075
2	\$16,240	\$20,300
3	\$20,420	\$25,525
4	\$24,600	\$30,750
5	\$28,780	\$35,975
6	\$32,960	\$41,200
7	\$37,140	\$46,425
8	\$41,320	\$51,650
Families with more than 8 persons	Add \$4,180 for each additional person	Add \$5,225 for each additional person