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NeighborImpact

STRATEGIC PLAN, 2024-25 (VOLUME 1)

DRAFT Strategic Plan, Operating Plan, DEI(B) Plan, Board Development Plan, For the period,

Jan. 1, 2024-December 31, 2025

With acknowledgement to partners and affiliates:



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About NeighborImpact

NeighborImpact is an Oregon nonprofit corporation formed in 1984. It is recognized as exempt from taxation under section 501 (c) 3 of the Internal Revenue Service tax code. NeighborImpact provides services to approximately 65,000 Central Oregonians each year from its offices in Redmond, Bend, Prineville, Madras, La Pine and Warm Springs. (Services are provided through an affiliate relationship in Sisters and many services are provide electronically through mobile applications, e-platforms such as Zoom and other electronic means.) The entire Central Oregon region—Crook, Deschutes and Jefferson Counties and the Confederated Tribes of Warm Springs—is served. Services include operating the regional food bank, providing energy assistance and energy education, weatherization of homes, Head Start and early childhood education, including Early Head Start, skill building for childcare providers in the region, support for the homeless and unstably housed families, a shelter, preparation and support for buying a home and preserving home ownership, including foreclosure counseling; financial coaching and education, matched savings and reverse mortgage counseling. The organization also operates a lending program, a Representative Payee program (for individuals who need help with money management due to cognitive or physical impairment) and an Oregon Health Plan assister program that helps qualified individuals find subsidized medical insurance coverage. The agency also annually hosts volunteer income tax preparation in partnership with other organizations in the region.

The Strategic Planning Process

NeighborImpact prepares a strategic plan biennially with quarterly reporting to the board of directors. We use the ROMA planning cycle in preparing our plan. Deputy Executive Director Andrew Spreadborough is a trained ROMA implementer and oversaw construction of the strategic plan. Presentations are given to the board of directors regarding ROMA principles at regular intervals. In preparing this plan, the board sought quantitative and qualitative feedback, reviewing such data as was available and conducting listening sessions in seven communities within Central Oregon, including one at the Warm Springs reservation. Sessions were two hours, led by board members. All panelists addressed the same five questions: How is NeighborImpact in meeting the needs of people in this community? What are the biggest challenges in serving economically challenged people in your community? What can NeighborImpact do or do better to help fill those gaps? What is the best way to distribute information about services to low- and moderate-income individuals and families in your community? What are we missing? The results of those conversations were compiled in this plan. In addition to data review and listening sessions, a community survey was conducted using Facebook, Instagram and Google. Upon examination of initial survey returns, staff commissioned two additional surveys of person identifying Hispanic/Latino or persons 18-34 years of age to supplement the response. The combined surveys yielded 644 responses and The strategic planning process culminated with a board and senior management retreat held November 4, 2023. The plan was formally adopted December 14, 2023.

Board of Directors & Senior Management

NeighborImpact's board of directors is drawn from the community we serve. NeighborImpact uses a tripartite board structure, drawing members from among elected officials, community members and the economically disadvantaged. NeighborImpact also strives to ensure that board is diverse, inclusive and capable of representing the many voices and communities that make up Central Oregon. Some board members satisfy certain positional requirements (a licensed attorney, a CPA, representation from the faith sector, etc., to meet certain regulatory guidelines.) Economically disadvantaged members may be disadvantaged themselves or may be nominated by organizations representing economically disadvantaged citizens. To ensure a democratic process, NeighborImpact solicits nominations from economically disadvantaged individuals to serve on its board. NeighborImpact's board also includes a representative from the Head Start Policy Council. The present board and management consists of:

BOARD

President

Chad Carpenter, Sunriver

Vice President

Daniel Martinez, Warm Springs

Secretary/Treasurer

Brenda Comini, Prineville*

Hon. Christy Abbe, Metolius
Councilor, City of Metolius

Jose Balcazar, Bend

Mindy Corley, Bend

Hon. Roger DeHoog, Bend,
Oregon Supreme Court

Kari Hathorn, Prineville
District Attorney

Hon. Annette Hillman, Madras
Crook/Jefferson Circuit Judge

Mae Huston, Madras*

Ron Osmundson, Redmond

Heather Simmons, Bend

Cat Zwicker, Redmond
Councilor, City of Redmond

Head Start Policy Council Representative

Chrystal Yustaat, Prineville

* resigned or resigning by year-end

SENIOR STAFF

Executive Director, Scott Cooper

Deputy Executive Director, Molly Heiss

Dep. Executive Director, Andrew Spreadborough

Deputy Executive Director, Patrick Carey

Director of Finance, Kim Lonien

Director of Human Resources, Patty Wilson

Chief Information Officer, Michael Hensley

Chief Development Officer, Suzette Chapman



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Our Mission

NeighborImpact supports people and strengthens communities.

Our Core Values

NeighborImpact is guided by the following core values in its interaction with clients, the community and within the organization:

Respect for the dignity of all people, regardless of social condition;

Inclusiveness: We serve and include in culturally responsive ways the underserved, the underrepresented, the marginalized and the left behind. We seek to overcome historical injustice perpetrated on account of race, ethnicity, ableism, gender, sexual orientation, nationality, religion and all other forms of discrimination;

Compassion for those in need;

Preferred partner for other organizations and government;

High accountability and **transparency** in our financial management practices;

Excellence and **best practice** in service delivery, governance, and employment practices;

Integrity in our dealings with clients, funders, the public and our employees;

Leadership in the field of poverty alleviation;

Oriented toward change, urging those we serve to seek out opportunities for self-help to the best of their abilities;

Responsive, entrepreneurial and **Flexible** in responding to community needs;

Technologically proficient and **good stewards** of facilities entrusted to our care.

An Aspiration Statement

We aspire to be a region where these conditions prevail.

- I. Every person who needs a home should be able to afford one. NeighborImpact will work to develop adequate capacity and resources to provide homeownership counseling, foreclosure prevention and mortgage assistance in Central Oregon and beyond to other unserved communities in Oregon.
- II. The housing market offers an adequate number of affordable units to match demand. Through partnership or in its own right, NeighborImpact will be a developer of affordable housing, pursuing a goal of partnering in construction and operation of at least one affordable housing community in each of Central Oregon's seven major cities.
- III. All unhoused neighbors have the opportunity and choice to access a safe place to sleep. This looks like client-led action planning that integrates personal definition of home. NeighborImpact will deliver houseless assistance programs that are high quality and recognized as presenting choice and are safe, well-maintained, trauma-informed and characterized by casework that focuses on holistic support that creates increased stability. People are maintained in their homes through eviction prevention and preservation and other appropriate assistance that support independent living. NeighborImpact will have continuous, sustained and self-replenishing sources of lending capital to robustly and reliably support placing and retaining people in their homes.
- IV. For every parent in need of daycare, there should be an accessible, affordable and linguistically and culturally appropriate childcare option. NeighborImpact will provide training and technical assistance to all types of early care and education programs, including home-based and center-based programs and staff, and will continue to develop a sustainable supply of quality care, adequate to meet demand.
- V. Preschool should be available in every city in the region. NeighborImpact will operate and expand Head Start regionwide, including Early Head Start in Central Oregon and in other geographically adjacent unserved communities in pursuit of the goal of ensuring that every child whose family cannot afford preschool is served.
- VI. Central Oregonians should have access to nutritious and plentiful food sufficient to prevent hunger after public resources are expended. NeighborImpact will be the major supplier of food to supplement public benefits in each Central Oregon city, using a combination of redistribution through partners and direct distribution. NeighborImpact and local partners will distribute food that is culturally appropriate and nutritious and will use best practices to minimize spoilage and wastage and maximize food distribution. NeighborImpact's food system will be adequately and reliably resourced with a combination of public and private funding, with at least 60 percent of funding coming from public resources renewable annually.
- VII. Central Oregonians, including the houseless, will have access to quality health, mental health and substance abuse prevention, intervention and recovery resources. The cost of energy in Central Oregon should be offset for cost-burdened households by high quality, accessible public assistance offered by NeighborImpact and/or direct assistance from utilities. Energy and other utility assistance and weatherization services, including multi-family and manufactured home park weatherization, offered by NeighborImpact will be easy to access and apply for, both through digital and paper platforms.
- X. In construction practices and energy usage, management and retrofitting, the Central Oregon region will be aware of conservation and climate justice, embracing cost savings, renewable energy, carbon reduction and durability.
- XI. Diversity will be celebrated and welcomed in the region. Inclusion will be intentional, systemic and widespread. NeighborImpact and other service organizations will plan for service delivery that includes historically underserved and marginalized populations and make extra effort to reach those populations and deliver services.

A Vision Statement

Within 10 years (by January 2034)...

- I. No matter where Central Oregonians live, NeighborImpact will be accessible. NeighborImpact will have a staffed, physical point of contact available regularly and consistently in each of the nine communities in our region.
- II. Clients consistently will experience the process of applying for services as simple, easy and straightforward. NeighborImpact will be known for its accessible and easy to understand application processes, available in multiple languages, digitally, on paper and optimized for smartphone, desktop and other common platforms. NeighborImpact will have a universal application and an agencywide data system that creates a single point of access to seek assistance from NeighborImpact and potentially its partner agencies.
- III. A “no wrong door” approach to service delivery will reduce the burden and stigma of seeking supportive services. Individuals presenting at any one NeighborImpact program consistently will receive immediate assistance or experience a warm hand off to other services and programs so that the entire human-centered needs of clients are addressed seamlessly and comprehensively to the best of NeighborImpact’s ability.
- IV. An informed and data-driven perspective will guide NeighborImpact’s decision-making. NeighborImpact will have a common data system that will allow the organization to see service data in real time, to create usable dashboards and to create an unduplicated count of services being rendered.
- V. NeighborImpact will retain its recognition as a regionally admired nonprofit exemplifying excellence in management and operations, diversity, equity and inclusion. Its management of finances, people, information, inclusive practices and facilities will meet or exceed industry standards. Its communications and fundraising will be effective and embrace innovation. NeighborImpact will be generous in sharing knowledge and developing the capacity of its partners in human service delivery.
- VI. Need and equity will guide NeighborImpact’s performance and performance monitoring. We will deliver services in rough proportionality to representation of racial and ethnic groups in poverty in the region. We will target services to other underserved populations and, when possible, measure our performance in serving those groups.
- VII. People are and will continue to be our greatest strength. NeighborImpact will invest in workforce, paying a livable wage that is comparable to private and public sector employment. The organization will be inclusive in hiring and staffing, ensuring representation and inclusion in all levels of staffing and management. Cultural competency, bilingualism and biliteracy will be recognized and valued.
- VIII. Private donations (including corporate and foundation gifts, event revenue and earned income not raised by programs) will further the work of supporting low- and moderate-income individuals. NeighborImpact will partner with its community in funding the work of serving low-and moderate-income communities. By 2034, NeighborImpact’s cost of fundraising as identified in its annual audit will be not more than 25 percent of its fundraising cost.
- IX. Our organization will be an effective legislative advocate seeking resources for Central Oregon and statewide and nationally from federal, state and local government to aid and stabilize low- and moderate-income individuals in overcoming their economic struggles.
- X. Information about NeighborImpact services and other services available to low-and moderate-income people will be widely available and easily accessed, thanks to investment by NeighborImpact in multi-platform communication, marketing and media and social media management. Widespread adoption of artificial intelligence will enhance staff productivity and improve the client experience. In communicating, we will be sensitive to people who are sensory impaired, offering adaptive modes of communication when possible.
- XI. NeighborImpact will bring new services to the region and expand existing services, while also off-loading mature services to other nonprofits as efficiency or mission alignment dictates.

(Condensed version)

NeighborImpact Aspiration and Vision Statements

Our Aspirations:

- Everyone who needs a home can afford one
- A variety of housing is available at all price points
- Every houseless person has a safe option to sleep and stay.
- People are able to stay in their homes
- Adequate, accessible, affordable, linguistically appropriate childcare is available to all parents who need it
- Quality preschool is available throughout the region.
- All Central Oregonians have access to nutritious and plentiful food.
- Central Oregonians, including the houseless, will have, access to quality and available health, mental health and substance abuse prevention, intervention and recovery resources.
- The cost of energy for cost-burdened households is offset by public assistance.
- An environmental ethic will overlay construction and energy use in the region.
- Diversity will be celebrated and welcomed.

In 10 years,

NeighborImpact will:

- Be physically present in all nine communities in Central Oregon.
- Be known for its easy and accessible applications optimized for many platforms and in many languages.
- Have a “no wrong door” approach to cross-referral for services.
- Have a common data system
- Be known for operational and management excellence
- Deliver services based on need and with a focus on equity.
- Compensate its employees at a living wage and reward bilingualism and biliteracy.
- Raise funds collaboratively with the community it serves.
- Be an effective legislative advocate.
- Provide quality information consistently across multiple and accessible platforms
- Bring new services to the region to meet expanding needs.

Culturally Responsive Service Commitment

NeighborImpact is invested in and committed to increasing its cultural responsiveness at the program and service level, as well as at the individual level. Culturally responsive programs & services are those that are respectful of the beliefs, practices, culture and linguistic needs of clients.

NeighborImpact continues to improve its services to individuals and communities diverse by virtue of their place of birth, ancestry or ethnic origin, religion, economic circumstances, capabilities and/or intersectionality. It requires belief, knowledge and commitment at different levels of intervention: systemic, organizational, professional and individual.

We acknowledge that this is a non-linear path and that our current stage is not where we aspire to be. We are continuing to grow, as an agency and as individuals, within our community.

Strategic Plan, 2024-25

The Strategic Plan is tied to the 10-Year Vision. It outlines actions that will implement the mission, improve life and enhance community. It is focused on external, rather than internal impact. Plan performance is reported to the board quarterly. Deliverables are defined and responsibilities are clearly assigned. Each plan objective is also analyzed for potential opportunities to serve diverse and underserved populations in the region. The plan may be modified only by the board.

	Dependencies	Timeline	Deliverable
		DEI(B) Considerations	Responsible Person

1. NeighborImpact will provide food regionally to the population up to 300% of poverty to supplement—not replace—SNAP, WIC, USDA school lunch and other public sector programs.			
i. NeighborImpact will complete construction of its food warehouse. <i>(Vision VII)</i>	Dependent on construction proceeding on schedule	Q5, January 2025 opening	Certificate of occupancy obtained
		DEI(B) Consideration: NeighborImpact will require contractor to solicit minority and women-owned businesses to bid	Deputy ED, Programs Director, Food Programs
ii. NeighborImpact will prefer partners who offer shopping-style food distribution. <i>(Vision VII)</i>	Will need to be negotiated with partners.	Q6, in place by July 2025	Number of partners with shopping style distribution
		DEI(B) Consideration: Shopping style accommodates ethnic, medical and specialty diets while minimizing food waste	Deputy ED, Programs Director, Food Programs

	Dependencies	Timeline	Deliverable
		DEI(B) Considerations	Responsible Person

2. NeighborImpact will address affordable housing and houselessness as a purveyor of high quality, sustainable services.			
i. NeighborImpact will subcontract with OHCS, HUD and other state and federal departments to operate rapid-rehousing, eviction-prevention and rental assistance programs that are sustainable, and which cover the costs of administration and program delivery. <i>(Visions II and III)</i>	Will federal and state resources be maintained, and will community action agencies remain the primary distribution network for housing/houseless resources?	Ongoing and opportunistic Check in Q2, Q6, Q8	Maintain 80% or more of budgeted resources, households served as compared to baseline for June 30, 2023
		DEI(B) Consideration: Applications for housing grants now generally require an equity plan be attached as part of application.	Deputy ED, Programs Director, Housing Stabilization
ii. NeighborImpact will receive and redistribute through a funder model funding to support permanent and emergency shelters, provided such funding is sustainable. <i>(Vision III)</i>	Funding dependent	Ongoing and opportunistic Check in Q2 and Q6	Shelters, permanent and temporary combined, operating in all six communities and at Warm Springs
		DEI(B) Consideration: Funding will be tied to adoption of culturally responsive service standards and performance	Deputy ED, Programs Director, Housing Stabilization

Goal 2 continued (housing/houselessness)	Dependencies	Timeline	Deliverable
		DEI(B) Considerations	Responsible Person

iii. NeighborImpact will continue to evolve the focus of its housing stabilization and homeless services departments to be holistic, offering financial and emotional support in a trauma-informed manner for needs beyond housing. <i>(Vision II and III)</i>		Ongoing and opportunistic Q1, Q5	Survey housing and houseless staff on knowledge of trauma-informed principles January, 2024, January 2025. Measure knowledge gap.
		DEI(B) Consideration: Training and re-training will be offered to staff quarterly to ensure that staff approach the work in a trauma-informed, culturally responsive way in the language of the client's choice.	Deputy ED, Programs Director, Housing Stabilization
iv. NeighborImpact will explore the 1115 Medicaid Demonstration Waiver and its implications for housing and embrace the model provided it is cost neutral and additive to quality and quantity of service. <i>(Vision III)</i>	This is a pilot under development. The program may not be feasible or financially appropriate or accessible to NeighborImpact.	Ongoing and opportunistic Q8	Participation in Medicaid Waiver Program
		DEI(B) Consideration: Because people of color are overrepresented among the homeless, the Medicaid Waiver will provide support to people of color disproportionate to representation in the general community.	Deputy ED, Programs Director, Housing Stabilization

Goal 2 continued (housing/houselessness)	Dependencies	Timeline	Deliverable
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		DEI(B) Considerations	Responsible Person
v. Add one or more community health workers to the Housing Stabilization team to support individuals with compromised health to maintain or obtain housing. <i>(Vision XI)</i>	Funding dependent	Q5	Community Health Worker hired
		DEI(B) Consideration: Examine health disparity among racial and ethnic groups in Central Oregon and address unique needs.	Deputy ED, Programs Director, Housing Stabilization
vi. NeighborImpact will participate in regional planning efforts to reduce the economic and social impacts of houselessness on those experiencing houselessness and communities. NeighborImpact will support, but not lead local government's evidence-based efforts to address houselessness. <i>(Vision III)</i>	Local governments are approaching houselessness differently without an agreed upon and defined regional plan.	Ongoing and opportunistic Quarterly check in	Participation report
		DEI(B) Consideration: This goal inherently serves a marginalized community.	Deputy ED, Programs Director, Housing Stabilization
vii. NeighborImpact will explore partnerships to engage in creating housing options for the elderly and the disabled to allow aging in place and to equip people to make decisions to ensure continued quality of life ahead of natural cognitive decline. <i>(Vision XXI)</i>	Availability of partnerships, resource and a model.	Q5 and Q8 check-ins	Partnerships created, individuals served
		This goal inherently services a DEI community.	Deputy Ed, Programs

3. NeighborImpact will have robust, sustainable and self-supporting lending program supporting home preservation and home acquisition.			
i. NeighborImpact will package USDA 504 loans to increase access to home purchase and rehabilitation resources <i>(Vision IV)</i>		Q4	Certification of lending director. Loan county
		DEI(B) Consideration: NeighborImpact will ensure that all lending material is translated to Spanish and English.	Deputy ED, Strategy and Operations Director, Lending

Goal 2 continued (home ownership)	Dependencies	Timeline	Deliverable
		DEI(B) Considerations	Responsible Person

ii. NeighborImpact will apply for CDFI certification <i>(Vision IV)</i>	Assumes application is open and TA grants are available.	Q3	CDFI certification attained.
		DEI(B) Consideration: CDFIs are required to serve underserved census tracts in their territories. Central Oregon has several underserved tracts. Creating a CDFI is in and of itself an equity strategy.	Deputy ED, Strategy and Operations Director; Lending
iii. NeighborImpact will increase the number and percentage of amortizing loans that NeighborImpact will service. <i>(Vision IV)</i>	Assumes availability of capital for lending	Q5	Loan count
		DEI(B) Consideration: NeighborImpact will ensure that all lending material is translated to Spanish and English.	Deputy ED, Strategy and Operations Director; Lending
iv. NeighborImpact will investigate feasibility of first-mortgage market with a go/no go recommendation to the board by Oct. 1, 2024, regarding the advisability of entering the first mortgage market, either as a direct or correspondent lender.. <i>(Vision IV)</i>		Q7	Report to board.
		DEI(B) Consideration: Recommendation will include analysis of opportunity to offer advantage or inflict detriment on underserved populations by decision to go or not to go	Deputy ED, Strategy and Operations Director; Lending

	Dependencies	Timeline	Deliverable
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		DEI(B) Considerations	Responsible Person
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4. NeighborImpact will achieve and expand high-quality, fully-enrolled preschools for eligible children 0-5 throughout its designated service territory.				
i.	NeighborImpact will initiate conversion of Early Head Start slots from home-based to center-based. NeighborImpact will have at least one center-based EHS. in Deschutes and Crook Counties. <i>(Vision VI)</i>	Requires permission from funder	Q1, first center operating, Deschutes Q5, second center operating, Crook Q7, additional centers in Deschutes	Centers open and operating
			DEI(B) consideration: Monitor enrollment for equity once program reaches sufficient size (40) to achieve statistical significance.	Deputy ED, Special Programs Director, Head Start Associate Director, Early Head Start
ii.	NeighborImpact will maintain 97% enrollment in its Head Start program. <i>(Vision VI)</i>		Q1	Enrollment achieved
			DEI(B) Consideration: Enrollment will be proportional to demographics of eligible population.	Deputy ED, Special Programs Director, Head Start
iii.	NeighborImpact will convert at least 33% of its remaining half day slots to full day slots <i>(Vision V)</i>	Requires permission from funder	Q7	50 slots converted.
			DEI(B) Consideration: n/a	Deputy ED, Special Programs Director, Head Start
iv.	NeighborImpact will compete for additional Head Start slots to address unmet need for preschool and childcare. <i>(Vision VI)</i>	Assumes opportunities to apply for expansion. Will not do this if it undercuts 97% enrollment goal.	Ongoing & opportunistic	Additional Slots obtained compared to baseline June 30, 2023.

Goal 4 continued (early education)	Dependencies	Timeline	Deliverable
		DEI(B) Considerations	Responsible Person
v.		DEI(B) Consideration: n/a	Deputy ED, Special Programs Director, Head Start
vi. NeighborImpact will prioritize Sisters for expansion of Head Start. <i>(Vision IX)</i>	Assumes opportunities to apply for expansion. Will not do this if it undercuts 97% enrollment goal. Assumes availability of eligible children/families to fill classes.	Ongoing & opportunistic	Sisters site open
		DEI(B) Consideration: NeighborImpact will prioritize outreach to minority communities in Sisters in recruiting	Deputy ED, Special Programs Director, Head Start
vii. Integrate Diaper Distribution into Early Head Start and Head Start <i>(Vision XIX)</i>	Depends on volume of diapers and cooperation from Oregon Food Bank, Portland Diaper Bank and CAPO	Q2	Diapers being distributed to all eligible families
		DEI(B) Consideration: n/a	Executive Director Deputy Director, Special Projects Head Start Director EHS Associate Director, Food Program Director

	Dependencies	Timeline	Deliverable
		DEI(B) Considerations	Responsible Person

5. NeighborImpact will address the childcare crisis by reducing the disparity between demand and supply for childcare slots, by training new workforce to support the childcare industry and by supporting the sustainability of childcare providers.			
i. NeighborImpact will have created 700 slots of childcare, regionwide, as measured from number of slots July 1, 2023. New slots will be distributed among the three counties and at Warm Springs. <i>(Vision V)</i>	Assumes participant availability in all communities.	Q4, December 2024, at least (5%) Q8, December, 2025, (10%)	Slot count and geographic distribution measured
		DEI(B) Consideration: At least 10 percent of slots created will offer culturally specific and/or bilingual services.	Deputy ED, Programs Director, Childcare Resources
			Deputy ED, Programs Director, Childcare Resources
ii. NeighborImpact will support the training of 100 new educators/teachers, ready to work in the childcare industry. <i>(Vision V)</i>	Assumes continuation of PIP or other funding	Check in Q4 and Q8	Training count
		DEI(B) Consideration: At least 10 percent of individuals trained will be people Hispanic, indigenous or underrepresented populations.	Deputy ED, Programs Director, Childcare Resources
iii. NeighborImpact will support regional childcare homes and centers as the CACFP administrator in Central Oregon, capturing at least \$2 million in food support for the region’s providers. <i>(Visions V, Vision VII)</i>	Funding at this time is inadequate to administer the program. Negotiating rate of reimbursement.	Q6	CACFP contract acquired
		DEI(B) Consideration: NeighborImpact will distribute opportunity to participate to all qualified providers in Spanish. NeighborImpact will recruit all eligible providers of color to participate in the CACFP program.	Deputy ED, Programs Director, Childcare Resources

Goal 5 continued (childcare)	Dependencies	Timeline	Deliverable
		DEI(B) Considerations	Responsible Person

iv. NeighborImpact will form a study committee to examine whether NeighborImpact can provide child care.	Competition with providers serviced by NI CCR; potential cost of operation; mission alignment; tax considerations, start u funding;	Q5	Board President, Executive Director
		DEI(B) Consideration: Incorporate DEI(B) consideration in to design	

6. NeighborImpact will utilize new federal infrastructure funding to expand its weatherization capacity; NeighborImpact's energy program will increase its responsiveness and cultural outreach.			
i. Expand annual production in weatherization by 10% (<i>Vision VIII</i>)	Assumes funding from BIL will flow through community action.	Q6.	Compare production to June 30, 2023.
		DEI(B) Consideration: 40 percent of homes weatherized or otherwise serviced will house one or more persons from an underserved population	Deputy ED, Programs Director, Weatherization
ii. Implement new strategies, including consumer education, to address summer cooling and smoke management., (<i>Vision VIII</i>)	Assumes funding from BIL will flow through community action.	Q7	Households served with summer cooling and smoke management systems and education.
		DEI(B) Consideration: In choosing new strategies, NeighborImpact will prioritize strategies that can serve households at CTWS.	Deputy ED, Programs Director, Weatherization

Goal 6 continued (energy/weatherization)	Dependencies	Timeline	Deliverable
		DEI(B) Considerations	Responsible Person
iii. Seek staff certifications in multi-family weatherization. <i>(Vision VIII)</i>		Q5	Certification obtained.
		DEI(B) Consideration: NeighborImpact will ensure that at all times the program has at least one bilingual staff member.	Deputy ED, Programs Director, Weatherization
iv. Enter into formal partnerships at Warm Springs and Latino Community Association to provide assistance in completing utility and weatherization applications <i>(Visions VIII, IX, X and XI)</i> .	Assumes collaboration with CTWS and LCA	Q4	Partnership agreement obtained
		DEI(B) Consideration: Assistance will be available in English and in Spanish.	Deputy ED, Programs Director, Utility Assistance, Weatherization
v. Have an online, mobile-optimized application available for utility applicants <i>(Visions VIII, IX, X and XI)</i> .		Q1	Application is available.
		DEI(B) Consideration: Application will be bilingual	Deputy ED, Programs Directors, Utility, Weatherization

7. NeighborImpact will have physical presence and media outreach in all communities. NeighborImpact will have a regularly updated print and electronic resource guide, linked to 211, available and known in all communities and will expand awareness of its programs among clients and the general population in communities outside Bend and Redmond.			
i. NeighborImpact will establish liaison positions in La Pine and Sisters <i>(Vision IX)</i>	Dependent on funding	Q5	Liaison positions established.
		DEI(B) Consideration: NeighborImpact will recruit liaisons as bilingual preferred.	Director of Development Communications Director

Goal 7 continued (communications)	Dependencies	Timeline	Deliverable
		DEI(B) Considerations	Responsible Person
ii. NeighborImpact will seek funding to create a sustainable communications internship dedicated to ensuring that the Answer Book, aka online resource directory, is updated regularly with new information about NeighborImpact and other resources in the region. <i>(Vision XVIII)</i>	Dependent on funding	Q5	Internship program established
		DEI(B) Consideration: NeighborImpact will recruit intern as bilingual-preferred	Executive Director Director of Development Communications Director
iii. NeighborImpact will link the Answer Book (hard copy and online) to 211 as a local resource directory. NeighborImpact will regularly canvas partners for 211 updates. <i>(Vision XVIII)</i>	Dependent on 211 and partner cooperation. Assumes establishment of internship program	Q6	211 agreement in place; regular canvas or partners in place.
		DEI(B) Consideration: Answer Book is available in English and in Spanish. 211 has over 300 languages available.	Director of Development Communications Director
iv. The online resource directory will be rebranded and marketed as Online Answer Book. <i>(Vision XVIII)</i>	Will need social media budget for this.	Q2	Resource online
		DEI(B) Consideration: Answer book will be marketed to Spanish-language traditional and social media.	Director of Development Communications Director

	Dependencies	Timeline	Deliverable
		DEI(B) Considerations	Responsible Person

8. NeighborImpact will integrate internal departments into a comprehensive Community Development division responsive to its mission of “Strengthening Communities.” We will expand the definition of “communities” from geographic focus to geographic and demographic focus.			
i. Redevelop the Theory of Change for “Strengthen Community” to reflect expanded role for Community Development (<i>Vision XIX</i>)		Q1	TOC updated
		DEI(B) Consideration: Include impacts of community development on underrepresented/underserved communities.	Executive Director Deputy ED, Strategy and Operations
ii. Support creation of affordable housing, either by developing it or through partnership, with construction of a minimum of 40 units by December 2025. (<i>Vision II</i>)	Assumes collaboration with Housing Works	Q8	Creation of 40 units of affordable housing
		DEI(B) Consideration: NeighborImpact will monitor the demographics of housing it controls, either directly or through LLC partnership.	Executive Director , Deputy ED, Strategy and Operations

Goal 8 continued (community development)	Dependencies	Timeline	Deliverable
		DEI(B) Considerations	Responsible Person
iii. Support movement of people to financial stability and homeownership with a robust suite of educational and counseling services with a focus on equity. (<i>Visions I and XIV</i>)	Assumes continued funding	Ongoing Q7	5% increase in volume of annual unduplicated households served annually, compared to Sep 30, 2023 baseline, by Sep 30, 2024 and Sept. 30, 2025 (compared to prior year.)
		DEI(B) Consideration: NeighborImpact will measure demographics of program participants and adjust strategies to recruit and attract.	Deputy ED, Strategy and Operations, Director HomeSource
vi. Have an online, mobile-optimized application available for utility applicants (<i>Visions VIII, IX, X and XI</i>).		Q1	Application is available.
		DEI(B) Consideration: Application will be bilingual	Deputy ED, Programs Director; Utility Assistance.
vii. Successfully oversee heat pump grant/rebate program.		Q1	Deployment of funds; Equity in distribution achieved.
		DEI(B) Consideration: Monitor distribution based on demographics. Implement marketing or program changes to redress disparity as needed	Deputy ED, Strategy and Operations

Goal 8 continued (community development)	Dependencies	Timeline	Deliverable
		DEI(B) Considerations	Responsible Person
iv. Extend an invitation to all eligible local governments to participate in CDBG applications at all times. <i>(Visions III, V, VI, VII)</i>	Assumes cooperation from local government, no change in state or federal rules around CDBG, continued appropriations and continued availability of expertise at NI to executive.	Ongoing & opportunistic	Volume of applications filed and funded
		DEI(B) Consideration: NeighborImpact will direct local government attention to projects potentially serving underrepresented communities.	Executive Director Deputy ED, Strategy and Operations Other staff
v. Find local solutions to increase economic and social opportunity and engagement for identifiable disadvantaged communities in the region. NeighborImpact will have a Tribal Partnership strategy by December 31, 2024 a strategy for outreach and engagement of the Hispanic population by December 31, 2025. NeighborImpact will establish informal relationship with black-led organization(s) By December 31, 2024. NeighborImpact will develop other written community-impact strategies when representative groups with interest in such partnerships can be identified. <i>(Vision XIV)</i>	Assumes cooperation from CTWS, Latino Community Association and The Father's Group.	Ongoing and opportunistic. Q6	Tribal partnership strategy written, Hispanic outreach and engagement strategy prepared, relationship with black lead organization established.
		DEI(B) Consideration: NeighborImpact will apply to participate in the Reinventing our Communities initiative. (Federal Reserve) and other similar initiatives (balancing time commitments and other work.)	Executive Director Deputy ED, Strategy and Operations

	Dependencies	Timeline	Deliverable
		DEI(B) Considerations	Responsible Person

9. NeighborImpact will pursue productivity gains and universal access by continuing to embrace a technology-driven and rapidly changing workplace and social services environment.			
i. NeighborImpact will have a universal application in place by December 31, 2025 (<i>Vision X</i>)	This has been attempted elsewhere with not great success. Assumes a prototype can be developed and implemented.	Q8	Application in place
		DEI(B) Consideration: Application will be translatable to multiple languages.	Chief Information Officer Deputy ED, Programs
ii. Artificial intelligence will underpin 24-7 reception by December 31, 2025. A pilot will be in place by December 31, 2024 (<i>Visions X and XVIII</i>)	Assumes continued improvement, progress and uptake in AI utilization.	Q4 and Q8	AI reception options identified.
		DEI(B) Consideration: AI assists will be multi-lingual	Deputy ED, Programs Chief Information Officer
iii. Every program will have an easy-to-access alternative application process that does not require digital proficiency in order to apply. Alternatives applications will be available in each community in the region. (<i>Visions X and XVIII</i>)		Q4	Every program has process in place.
		DEI(B) Consideration: Applications will be in multiple languages.	Deputy ED, Programs Other staff

Operating plan, 2024-25

The Operating Plan is distinct from the Strategic Plan in that it guides the internal work of NeighborImpact to improve process and gain efficiency or functionality. It makes NeighborImpact a better organization and may or may not be client and community focused. Staff does not regularly report to the board on Operating Plan elements, but the plan drives departmental work over two years.

Food	Responsible: Director of Food Program
<ol style="list-style-type: none"> 1. NeighborImpact will advocate for sustainable public funding to support at least 60 percent of operating costs of food bank. 2. Fully utilize the mobile pantry (16 permanent slots per month available.) 3. Recruit a minimum of one Partner Agency in each major Central Oregon city to participate in food home deliveries. 4. Hold one Partner Agency operations meeting, one Partner Agency appreciation/networking event and two PA virtual trainings annually. 5. Launch and maintain public awareness campaign to distinguish the NI Food Bank as an Affiliate Food Bank from Partner Agencies 	
Child Care Resources	Responsible: Director of Child Care Resources
<ol style="list-style-type: none"> 1. Explore potential partnership with Housing Works to create an early learning center in Redmond. 	
Housing Stabilization & Homeless Services	Responsible: Director of Housing Stabilization
<ol style="list-style-type: none"> 1. Reduce annual staff turnover by 20 percent or less. 2. Implement a clear, defensible cost allocation plan for staff time and operational expenses not covered by cost pools. 3. Audit every subrecipient timely biennially as required in Oregon Housing & Community Services Master Grant Agreement. Audit will cover all years funded through NeighborImpact 4. Cap maximum housing benefit payable to limited-term housing assistance clients. 5. Reduce journal voucher moves to 10 or less per month. 6. Seek out additional DHS and OHA funding to achieve diversity. 	
Head Start/Early Head Start	Responsible : Executive Director, HR Director, Deputy Executive Director, Special Projects; Head Start Director; Associate Director, Early Head Start
<ol style="list-style-type: none"> 1. Successfully conclude negotiation of a new Contract with OSEA in 2024. 	
	<i>Responsible: Deputy Executive Director, Special Projects; Head Start Director</i>
<ol style="list-style-type: none"> 2. Purchase and install a modular on the current admin campus in Redmond. 3. Prepare Head Start for its FA2 on-site review 4. Implement at better coordinated referral system with HUB 5. Investigate a pilot with Heart of Oregon to train new staff for Head Start. (Charmaine Browning) 	
Representative Payee	Responsible: Representative Payee Manager
<ol style="list-style-type: none"> 1. Have 100 active clients by December 2024; have 200 active clients by December 2025. If not achieved, evaluate continued program viability. 2. Implement RPM cloud-based software to improve efficiency. 	

HomeSource	Responsible: Director of HomeSource
1. Transition to a new Client Management System (Compass), pending NeighborWorks release	
2. Implement new Deschutes County developer affordable housing incentive program in collaboration with Central Oregon Builders Association.	
3. Intentionally provide services to communities traditionally excluded from homeownership opportunities.	
4. Measure client sense of belonging and success.	
5. Create an Hispanic Women's Empowerment Network (Sonia Capece)	
6. Explore revenue-generation activities	
Lending	Responsible: Director of Lending
1.	
2. Seek a partnership with local banks and credit unions to fund Downpayment Assistance for first-time homebuyers.	
3. Move lending to 100 percent self-funded from interest and fees earned by December 31, 2025.	
Utility Assistance	Responsible: Director of Energy
1. Reduce annual staff turnover to 20 percent or less.	
2. Develop a more structured referral process with Warm Springs Tribal Services to create warm handoff and eliminate duplication.	
Weatherization	Responsible: Director of Weatherization
1. Increase the conversion rate of "incomplete applications" to complete applications to 60 percent	
2. Review current application for potential modifications to address access by low-literacy clients.	
3. Increase use of electronic communication for clients who opt-in. Utilize text software and email.	
Community Development	Responsible: Deputy Executive Director, Strategy and Operations
1. Develop a Community Development program presence on the NeighborImpact web site and within agency outreach and communications materials.	
Operations	Responsible: Director of Finance, Deputy Executive Director, Programs
2. Educate, train and revise policy around updated Uniform Grant Guidance (expected December 2023)	
3. Organize and implement a "contracts team" composed of staff throughout agency to share information, problem-solve, ID needed system improvements, and ensure key staff are trained in federal contracting rules.	
	Responsible: Deputy Executive Director, Strategy and Operations
1. Maintain and support the Green Team and its work. Raise sustainability score in 100 Best Practices Survey (baseline October 2023)	
2. Finish business continuity plan.	
	Responsible: Executive Director
1. Install art in Redmond office to represent Warm Springs culture, history and traditions	
Finance	Responsible: Director Finance
1. Implement paperless systems.	
2. Convert voucher system to electronic	
3. Add an additional staff person dedicated to budget management.	
4. Review potential adopt of indirect rate if 15% de minimis is approved in updated Uniform Grant Guidance.	

Human Resources	Responsible: Director of Human Resources
1. Measure culture quarterly, using Gallup Q12 instrument or similar.	
2. Identify new outlets for outreach with job opportunities to communities of color and other underrepresented communities.	
3. Implement blind resume screening to reduce implicit bias.	
4. Review the hiring committee system to eliminate bias and internal preference in hiring (when that bias may contribute to lack of diversity.)	
5. Investigate additional bonus pay to reward bilingualism and biliteracy. Increase rigor of testing.	
6. Create a new supervisor training program for training new and existing supervisors.	
7. Implement an annual procedure for collecting auto insurance verification from employees who drive for work. Implement a reporting system from employees who have major driving violations or license suspension/revocations.	
8. Implement strategies to reduce student loan debt for employees.	
9. Apply annually for the 100 Best Nonprofits to Work for in Oregon.	
<ul style="list-style-type: none"> • See additional items in Diversity Plan related to HR responsibilities 	
Information Technology	Responsible: Director of Information Technology
1. Finish digital continuity plan	
2. Plan for integration of AI into operations. Train staff on AI opportunities and appropriate safeguards.	
3. Implement new security protocols to protect against ransomware and newly emerged threats to cloud-based information.	
Facilities	Responsible: Director of Facilities
1. Use FMX tickets. Ensure that tickets are acknowledged and scheduled within two business days of receipt. Most items should be responded to within 14 calendar days. Projects may be scheduled for longer-duration delivery with advance approval of the Deputy Executive Director for Special Projects (or facilities manager). A monthly report of ticket receipt, acknowledgement, schedule, delivery and pipeline will be published.	
2. Create snow management plan annually. Plan and contracts will be in place and published by Nov. 1 of each year. Landscaping plan and contracts will be in place and published by March 1 of each year.	
3. Place baby changing stations at each facility where one can reasonably be installed; ensure that evacuation plans are in place for all facilities; ensure that evacuation drills are conducted at each facility as required by OSHA regulations; ensure that evacuation plans are posted at each facility; ensure that lead testing is conducted timely at each facility; ensure that feminine products are regularly supplied at each facility; will evaluate all facilities of NeighborImpact for gender-inclusive designation.	
4. Ensure that Safety Committee meetings are conducted quarterly, and minutes are taken and distributed to senior management.	
Communications & Partnerships	Responsible: Director of Communications
1. Establish baseline measurements of community awareness in each community outside Bend and Redmond to measure effectiveness of outreach strategies and measure improvement.	
2. Develop a new suite of marketing materials for use in each outlying community which visually represent and textually appeal to each unique population.	
3. Sustain <i>By Design</i> and <i>Grapevine</i> publications.	
<ul style="list-style-type: none"> • See item in DEI plan related to internal newsletter 	

Development & Fundraising	Responsible: Director of Development
1. Implement planned giving. Measure impact	
2. Maintain cost of fundraising (fundraising expense/fundraising revenue) at 25-30%. Perform review of cost allocation to fundraising to ensure that revenues and expenses are properly credited for purposes of audit disclosure, starting in 24-25.	
3. Target \$500,000 in fundraising in 23-24 to support food bank operations from individual, foundation, local government and corporate giving. Target \$700,000 for 24-25. Continue to raise awareness with board and public sector that food banking is designed to supplement, not replace, government food programs. The faith/philanthropy model cannot sustainably provide the needed level of financial support required to fully operate the food bank at current levels without ongoing and renewable public subsidy.	
4. Launch an annual fundraising event that will raise a minimum of \$100,000.	
Governance	Responsible: Executive Director and Executive Specialist
1. Mentor entire board to gold level or above in training plan.	
2. Conduct board operations survey annually in December/January	
3. Thank board appropriately each quarter	
4. Recognize board service and contribution milestones at board meetings.	
5. Include board in all major events (Donor reception, Volunteer reception, Empty Bowls, gala.)	
6. Create a tech support plan for board	
7. Create optional annual trainings for board in how to read a financial and Roberts Rules of Order in 2024; move to board academy by 2025.	



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Diversity Plan, 2024-25

The Diversity Plan is a combination staff, board and committee effort. Once adopted, it will guide the agency's work for the biennium.

Support Native American communities and individuals in the region.
1. Seek a Tribal Partnership agreement with Confederated Tribes of Warm Springs to define collaboration and opportunities for shared services and support. (Executive Director)
2. Reach out to Grande Ronde and Klamath Tribes to pursue greater awareness of and relationship with NeighborImpact. (Executive Director)
3. Develop an outreach strategy to reach indigenous people not living on reservation but within the NeighborImpact service territory to introduce NeighborImpact services. (Deputy ED, Programs)
4. Continue on-site clinics at reservation for housing, energy and weatherization with one clinic (not necessarily all three services) being held quarterly. Include other services as relevant. (Deputy ED, Programs)
5. Continue to partner with Warm Spring Housing Authority to find ways to restore housing and cooperate in passing through housing assistance to address homelessness and prevent overcrowding. (Deputy ED Programs)
6. Continue partnership to resource Warm Springs through pantry supply and use of the mobile pantry. (Director, Food Program)
Support and partner with Culturally Specific Organizations (CSO).
1. Offer to craft partnership agreements with Latino Community Association, Warm Springs Community Action Team, The Father's Group and Central Oregon Black Leaders Assembly and other Culturally Specific Organizations, in addition to Warm Springs. (Deputy ED Programs)
2. Formalize process to invite CSOs to become subrecipients annually. (Deputy ED Programs)
3. Offer training and support to CSO subrecipients in service delivery, fiscal and data management, reporting and reporting. (Deputy ED, Programs)
Continue DEI(B)-related training for all staff and board
1. Continue rollout of trauma-informed training. Use Head Start trainings and department specific trainings to provide education on how to use Trauma-Informed practices to reduce stigmatization in service delivery and eliminate resistance to seeking services. Implement similar Trauma-Informed training at the department level throughout the agency. Hire a consultant (using one-time resources) to organize and deliver trainings. Deputy ED for Programs (Emergency Services); Deputy ED for Special Projects (Head Start)
2. Provide at least one training annually for all staff and separate training for board related to Diversity, Equity and Inclusion (and Belonging) work. Ensure that each training has a reflection component. (Executive Director and DEI Committee Staff Person)
3. Maintain department-level plans for implementation of DEI(B) strategies in all departments. (DEI Committee through Executive Director and DEI Committee Staff Person.)
Implement HR practices to recognize and advance DEI(B) at NeighborImpact
1. Implement blind resume screening to reduce implicit bias. (HR)
2. Identify new outlets for outreach with job opportunities to communities of color and other underrepresented communities. (HR)
3. Review the hiring committee system to eliminate bias and internal preference in hiring (when that bias may contribute to lack of diversity.) (HR)
4. Create a staff newsletter (not more than 2 pages, 2x-3x per year), possibly with staff contributed content, to celebrate diversity within NeighborImpact, to highlight service to diverse communities, to highlight DEI training and development opportunities for staff from underrepresented groups. (Communications and Executive Specialist as liaison to DEI Committee)
Develop DEI(B) performance indicators for external and internal work, establishing baseline and measuring and reporting ongoing performance.

Board Development Plan, 2024-25

The board development plan was created by the Board Development Committee and will guide the committee's work for the biennium.

Create A Board Pipeline of Diverse Candidates
1. Create a Nominating Committee orientation that will emphasize recruitment and recruitment strategies and considerations and highlight the importance of diversity and inclusion as recruitment considerations.
2. Review (through Board Development and Executive Committees) the board matrix and consider additional flexibilities that may ease recruitment stress.
3. Host an annual luncheon for elected officials to showcase NeighborImpact work and invite elected officials to consider board membership.
4. Host “Coffee Cupper,” get-acquainted events in the two rural counties to create opportunities to identify future board members and volunteers and to raise awareness of the organization.
5. Align committee recruitment to align with the board matrix to ensure a pipeline of quality members awaiting board appointment.
Improve Planned Officer Succession
1. Examine strategies to create a “shadow period” for incoming officers to work alongside existing officers. (Officers includes Chair, Vice Chair and Secretary Treasurer.)
2. Identify potential to increase availability of candidates for officer positions by eliminating or reducing geographic requirements and eliminating some or both Executive Committee at large positions.
3. Implement an annual orientation (target 4 th Thursday in September) to review officer and role responsibilities ahead of board recruitment season.
Deepen Mentorship Program for New Board Members
1. Continue the Board Buddy System; assess for efficacy.
2. Consider extending the Board Buddy System an optional six months additional to ensure adequate support for new members
3. Create a monthly, optional Board Briefing for one-hour updates to board members on operational and program issues that will improve their knowledge and skills and explain how board can engage the work.
Improve Board Camaraderie, Engagement, and Teamwork through Socialization and Education Opportunities with Each other and Staff
1. Conduct a December “Time/Treasure/Talent” survey of all incoming board members to identify unique talents and willingness to serve.
2. Provide opportunities for board and staff to socialize get to know each other. (April (spring social), June (summer social), October (donor reception), November (in conjunction with retreat.) Embed time for connection at existing meetings/events with intentional ways to facilitate relationship-building amongst each other and with staff
3. Promote existing volunteer opportunities for the board to engage with each other as a team
4. Use board training matrix to support ongoing and meaningful engagement by sending board members to training in pairs or multiples.



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**Serving Crook, Deschutes and
Jefferson Counties and the
Confederated Tribes of Warm Springs**



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