



STRATEGIC PLAN

2026 - 2028



BUILDING BRIDGES TO PROSPERITY FOR EVERY GENERATION.



We believe lasting change begins when we confront the root causes of poverty - not just its symptoms. Our purpose is to break generational cycles, dismantle barriers, and replace them with pathways that lead to stability, dignity, and self-determination.

*At our core is the belief that **every person has inherent worth, purpose, and the potential to thrive**. We exist to unlock that potential - through opportunity, compassion, and innovation - empowering individuals and families to build stronger futures and more resilient communities.*

We meet people where they are, turning moments of need into opportunities for growth, stability, and hope.

ABOUT US

Community Action of Greater Indianapolis (CAGI) is a proud member of America's nationwide Community Action Network, a movement created to fight poverty by addressing its root causes and promoting economic security for all.

As a Community Action Agency, CAGI exists not only to meet immediate needs but to **change the conditions that create them**. Guided by the Community Action Promise and the principles of the **Results-Oriented Management and Accountability (ROMA) framework**, we work to break generational cycles of poverty through programs that strengthen families, stabilize households, and build community resilience.

Through innovative programming, strong partnerships, and a deep commitment to dignity and self-determination, CAGI connects people to opportunity - helping them build brighter futures and creating communities where everyone can thrive.

CAGI is more than a service provider. **We are a catalyst for transformation - addressing root causes, expanding opportunity, and advancing our shared vision of a community where dignity, purpose, and potential can flourish.**

OUR VISION

A thriving community where every individual has the opportunity, resources, and support to reach their fullest potential — breaking cycles of poverty, achieving lasting stability, and living with dignity and purpose.

OUR MISSION

To eradicate poverty, promote upward mobility, and to empower those we serve to become self-sufficient.

Moving Our Mission Forward

BOLD GOALS 2026-2028

AGENCY

Goal 1 - Engage More Families & Neighbors

Create 10,000 new brand touchpoints in the community.

Goal 2 - Fuel the Mission

Strengthen long-term financial sustainability by raising \$ 255,000 revenue from non-governmental funding sources.

Goal 3 - Power Our Internal Engine

Optimize internal systems and improve service delivery through investment in operational capacity.

Goal 4 - Stay True to Who We Are

Thoughtfully navigate the evolving political and social landscape by aligning agency messaging and programming with the Community Action mission.

COMMUNITY

Goal 1 - Invest in Housing That Changes Lives

Revitalize distressed neighborhoods by increasing the number of safe, affordable housing units provided by the agency by 5%.

Goal 2 - Champion Better Health for All

Bridge the gap in healthcare access and improve health outcomes for low-income communities.

FAMILY

Goal 1 - Make Aging in Place Possible

Ensure at least 600 vulnerable seniors can age safely and with dignity in their communities through access to housing, healthcare, and supportive services.

Goal 2 - Help Every Neighbor Rise

Equip and empower 30% of those we serve transition from crisis to stability and lasting independence.



GOAL 1 - ENGAGE MORE FAMILIES & NEIGHBORS

Create 10,000 new brand touchpoints in the community.

STRATEGIES & TACTICS

- 1.1 Establish a dedicated communications and engagement role to lead brand strategy, media relations, social media, and community outreach efforts.**
 - 1.1.1** Gather proposals and cost estimates from external brand management and marketing agencies to evaluate the feasibility and scope of outsourcing the role.
 - 1.1.2** Develop a projected cost model for hiring a full-time internal staff member, including base salary, fringe benefits, and necessary tools or software.
 - 1.1.3** Prepare and present a cost-benefit analysis report to the Board of Directors, comparing internal vs. external options, and recommend a course of action based on strategic fit and financial impact.
 - 1.1.4** Establish cross-functional communication protocols and define workflows between departments and the new role to ensure integration and alignment across the agency.

- 1.2 Develop and implement a comprehensive brand and engagement plan that includes messaging guidelines, audience segmentation, storytelling strategies, and outreach channels.**
 - 1.2.1** Implement branding consistency standards across all platforms and signage.
 - 1.2.2** Allocate annual budget resources specifically for brand development, marketing campaigns, digital tools, and community engagement activities.
 - 1.2.3** Invest in training for key staff on brand management, public relations, and digital engagement best practices.
 - 1.2.4** Create a brand ambassador initiative that equips staff, board members, and community partners to consistently and confidently represent the agency's mission and services.
 - 1.2.5** Leverage client success stories and data to elevate brand visibility and trust through newsletters, social media, out of home and digital advertising, and community events.
 - 1.2.6** Implement performance metrics to regularly assess the impact of branding and engagement efforts, including audience reach, public awareness, and partnership growth.

GOAL 2 - FUEL THE MISSION

Strengthen long-term financial sustainability by raising \$ 255,000 revenue from non-governmental funding sources.

STRATEGIES & TACTICS

2.1 Ensure the systems and structures are in place to run an effective, efficient, best-practice fundraising program.

2.1.1 Create and monitor philanthropic revenue goals, formalizing targets for individuals, foundations, and corporations.

2.1.2 Formalize receipting and gift acknowledgement processes.

2.2 Diversify and grow funding sources by developing individual and corporate support and increasing unrestricted revenue from foundations.

2.2.1 Establish a sustaining pipeline of individual donors personally invested in our mission to broaden the funding base and reduce reliance on foundation and federal sources.

2.2.2 Sustain and diversify unrestricted foundation support.

2.3 Develop the infrastructure for staff and volunteers to create and foster individual donor relationships.

2.3.1 Create defined portfolios and roles for key staff, supported by volunteers.

2.3.2 Establish the data management system and CRM infrastructure.

2.3.3 Build CRM systems and communication processes to track and manage donor touchpoints.

2.4 Embed a culture of philanthropy across the organization, ensuring staff, board, and other volunteers understand their roles in fundraising and increase engagement to support fundraising efforts.

2.4.1 Clearly define fundraising roles within CAGI to minimize overlap.

2.4.2 Align roles with fundraising goals and capacity, while considering the addition of support roles (e.g., grant writer).

2.4.3 Foster staff and volunteer fundraising expertise and involvement in development activities.

2.4.4 Create and share intriguing, relevant, and personalized messaging that articulates a compelling vision for CAGI and the role philanthropic support can play in advancing our mission and vision.

GOAL 3 - POWER OUR INTERNAL ENGINE

Optimize internal systems and improve service delivery through investment in operational capacity.

STRATEGIES & TACTICS

3.1 Enhance the Board of Directors' capacity, effectiveness, and engagement in strategic decision-making.

- 3.1.1** Invest in recurring governance training tailored to the specific duties and expectations of CAP board members.
- 3.1.2** Develop and implement governance policies to support informed decision-making, organizational stewardship, and fiduciary oversight of the Board.
- 3.1.3** Evaluate the board's existing committee structure to ensure it is positioned to effectively support the agency's future priorities, recommending realignment or restructuring as needed.
- 3.1.4** Implement a refreshed annual "give-or-get" commitment and board accountability scorecard to reinforce board ownership of the agency's mission, fundraising, and governance responsibilities.

3.2 Implement a centralized client intake and case management model in which program intake, case management, CharityTracker data entry, and program evaluation activities are performed for all agency programs and services by a single cross-trained integrated team.

- 3.2.1** Develop standardized intake protocols, including creating a universal intake checklist and system that applies across all programs to ensure consistency in how client eligibility, needs, and demographics are documented.
- 3.2.2** Create cross-program workflow maps to visually depict the work flow so staff and leadership can track bottlenecks and ensure clients transition smoothly.
- 3.2.3** Restructure staffing model to align with new workflows and caseload management needs.
- 3.2.4** Develop a structured curriculum for all intake/case management staff focused on program eligibility rules for all programs, data entry standards for CharityTracker, and client-centered case management techniques.
- 3.2.5** Build a live dashboard to track the number of open cases per staff, client progress by program stage, and timeliness of intake-to-service delivery.
- 3.2.6** Ensure ongoing case conferences by scheduling monthly cross-program team meetings where staff discuss challenging cases, share updates on program rule changes, and align on procedures.



GOAL 4 - STAY TRUE TO WHO WE ARE

Thoughtfully navigate the evolving political and social landscape by aligning agency messaging and programming with the Community Action mission.

STRATEGIES & TACTICS

- 4.1 Develop and implement a mission-centered communications framework that emphasizes the agency's commitment to reducing poverty and serving all vulnerable populations – using language that resonates across political perspectives.**
 - 4.1.1 Conduct a comprehensive review of public-facing materials and program messaging to ensure alignment with the agency's mission and values, while maintaining sensitivity to the current political and cultural climate.
 - 4.1.2 Provide board and staff training on values-based communication, equipping agency representatives to speak confidently about the mission, services, and community impact in a way that is inclusive, nonpartisan, and community-driven.

- 4.2 Build stronger local government partnerships to expand support, visibility, and investment in agency initiatives.**
 - 4.2.1 Create a structured process for ongoing outreach, communication, and relationship-building with elected officials, municipal departments, and county agencies.
 - 4.2.2 Inform and inspire local decision-makers through coordinated messaging that highlights program outcomes, return on investment, and the agency's role in stabilizing communities.
 - 4.2.3 Grow municipal and county investment in agency programs while building collaborative initiatives aligned with local priorities such as housing, aging services, and public health.
 - 4.2.4 Provide tailored district-level data to help local leaders understand community needs and the agency's direct impact.
 - 4.2.5 Activate and equip the Board to serve as high-level ambassadors who reinforce the agency's credibility, cultivate relationships with local officials, and advance funding and partnership opportunities.



GOAL 1 - INVEST IN HOUSING THAT CHANGES LIVES

Revitalize distressed neighborhoods by increasing the number of safe, affordable housing units provided by the agency by 5%.

STRATEGIES & TACTICS

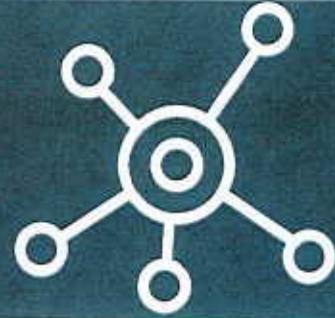
- 1.1 Acquire, renovate, and convert vacant or distressed properties into affordable rental units specifically designated for clients facing significant rental barriers – such as prior evictions, poor credits, or urgent housing needs.**
 - 1.1.1** Establish partnerships with local land banks, municipalities, and community development corporations (CDCs) to identify and acquire vacant or tax-delinquent properties at low or no cost. Prioritize properties in high-need areas and align acquisitions with neighborhood revitalization and anti-blight efforts.
 - 1.1.2** Pair the housing units with a supportive service model—including financial coaching, tenant education, and case management—to help residents rebuild rental histories, improve credit, and transition toward permanent housing or homeownership.
- 1.2 Develop and launch a Recovery Housing Program that provides safe, supportive, and substance-free housing for individuals transitioning from treatment or incarceration, integrating wraparound services such as case management, employment readiness, life skills coaching, and peer recovery support.**
 - 1.2.1** Complete feasibility analysis of four program models and select one for implementation.
 - 1.2.2** Leverage existing relationships to develop the level of services to provide in addition to housing and establish strong partnerships with referral networks.
 - 1.2.3** Obtain state certification with the Division of Mental Health and Addiction (DMHA).
 - 1.2.4** Establish a comprehensive business plan, including floor plans, zoning requirements/documentation, and a public policy strategy that supports the program.
- 1.3 Implement a neighborhood revitalization initiative targeting high-poverty and underinvested areas by coordinating housing rehabilitation, infrastructure improvements, and community engagement efforts that foster economic growth, enhance safety, and restore neighborhood pride.**
 - 1.3.1** Pursue funding opportunities and incentives to support housing rehabilitation, new construction, and down payment assistance for low-to moderate-income families.
 - 1.3.2** Create a Neighborhood Renewal Fund to support revitalization efforts in targeted communities through property improvement grants or low-interest loans, blight elimination projects, and neighborhood beautification initiatives.

1.4 Expand the Homebuyer Education program to underserved communities within the agency's service area.

- 1.4.1 Partner with local libraries, schools, and faith-based organizations to host on-site and mobile workshops in targeted underserved neighborhoods. Offer flexible scheduling (evenings/weekends) and bilingual sessions to improve accessibility and engagement.
- 1.4.2 Integrate one-on-one financial coaching into the Homebuyer Education program to help participants improve credit, manage debt, and develop savings plans.
- 1.4.3 Launch a Virtual Homebuyer and Financial Empowerment Academy offering on-demand classes, live virtual workshops, and a Financial Steward Certification that participants can earn upon completion.

PROGRAM CONNECTIONS:

- HOMEBUYER EDUCATION PROGRAM
- HOUSING CHOICE VOUCHER PROGRAM
- INDIVIDUAL DEVELOPMENT ACCOUNTS (IDA)
- WEATHERIZATION PROGRAM



GOAL 2 - CHAMPION BETTER HEALTH FOR ALL

Bridge the gap in healthcare access and improve health outcomes for low-income communities.

STRATEGIES & TACTICS

2.1 Expand access to preventive care and screenings.

- 2.1.1 Host biannual community health fairs offering free or low-cost screenings (blood pressure, diabetes, cholesterol, hepatitis C, and cancer).
- 2.1.2 Partner with local clinics, mobile health units, and pharmacies to provide on-site preventive services.
- 2.1.3 Implement a referral network that connects residents to primary care providers and specialists.

2.2 Strengthen health education and awareness.

- 2.2.1 Offer monthly educational workshops on chronic disease prevention, nutrition, and medication management.
- 2.2.2 Develop culturally tailored health materials and distribute through community events, social media, and faith-based organizations.
- 2.2.3 Integrate digital tools (text reminders, online workshops) to reach residents who face transportation or time barriers.



GOAL 1 - MAKE AGING IN PLACE POSSIBLE

Ensure 600 vulnerable seniors can age safely and with dignity in their communities through access to housing, healthcare, and supportive services.

STRATEGIES & TACTICS

- 1.1 Establish a community Senior Safety Net Fund to provide emergency assistance to low-income seniors facing urgent needs such as food insecurity, prescription costs, utility shutoffs, or lack of basic necessities.**
 - 1.1.1** Develop and execute a public awareness and fundraising campaign to generate community contributions for the Senior Safety Net Fund. Engage local foundations and philanthropic organizations to establish multi-year commitments.
 - 1.1.2** Create clear eligibility criteria and internal procedures to ensure timely, transparent, and equitable use of funds.
 - 1.1.3** Coordinate with senior service programs for referrals and wraparound support.
- 1.2 Establish an internal cross-functional Senior Services Action Team comprised of program staff to provide holistic care management, personalized resource navigation, and caregiver support.**
 - 1.2.1** Formally establish the Senior Services Action Team with clear roles, responsibilities, and communication channels across departments.
 - 1.2.2** Define shared goals, service coordination protocols, and data-sharing guidelines.
 - 1.2.3** Develop an internal referral and case conferencing process to ensure holistic support for each senior client.
 - 1.2.4** Develop and pilot a comprehensive care management model that blends resource navigation with personalized support.
- 1.3 Develop and preserve safe, quality, and affordable housing options tailored to the needs of low-income seniors by investing in senior-friendly housing development projects.**
 - 1.3.1** Ensure that all new and preserved housing units incorporate features that support safety, mobility, and healthy aging in place.
 - 1.3.2** Expand capital resources and funding partnerships for senior housing.
 - 1.3.3** Integrate supportive services and aging in place programming into senior housing.

1.4 Become an approved Medicaid Waiver provider and launch a comprehensive community-based support program.

1.4.1 Complete feasibility analysis (with personnel and regulatory requirements) for participation.

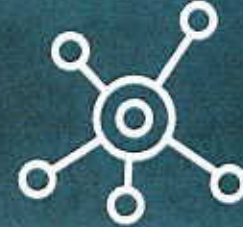
1.4.2 Examine the list of waivers to target from the Home and Community Based Services (HCBS) PathWays list (caregiver coaching, adult day services, attendant care, structured family care, care management).

1.4.3 Obtain Family and Social Services Administration certification.

1.4.4 Enroll with Indiana Health Coverage Plans and Managed Care Entities.

PROGRAM CONNECTIONS:

- FOSTER GRANDPARENTS
- HEALTH HUB
- WEATHERIZATION
- SUPPORTED BY SENIOR SERVICES TEAM



GOAL 2 - HELP EVERY NEIGHBOR RISE

Equip and empower 30% of those we serve transition from crisis to stability and lasting independence.

STRATEGIES & TACTICS

2.1 Be a lifeline in times of crisis-and a springboard to a stronger, more stable future-for individuals and families navigating economic hardship.

2.1.1 Integrate short-term crisis services with long-term case management, connecting clients to wraparound supports to help move from crisis to stability.

2.1.2 Establish a flexible emergency assistance fund – supported by public and private dollars – that allows for rapid response to evolving needs.

2.1.3 Expand programming that provides personalized coaching, intensive case management, and job readiness training to support justice-involved individuals seeking to rebuild their lives.

2.1.4 Expand STAR program model to integrate traditional case management with a one-on-one strengths based coaching model.

2.1.5 Explore the feasibility of expanding services to better support veterans through housing stability, suicide prevention, and disability benefit navigation.

PROGRAM CONNECTIONS:

- ALL PROGRAMS
- SUPPORTED BY CENTRALIZED INTAKE & CASE MANAGEMENT TEAMS



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