



# 2011-2015 Charlotte County Community Action Plan



## Introduction

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Charlotte County Government has received Community Services Block Grant (CSBG) funding since 2000. On May 19, 1996 the Charlotte County Board of County Commissioners created the Community Action Agency Advisory Board in response to changes in Florida's Administrative Code. This action allowed Charlotte County Human Services, a department organized under Charlotte County Government, to be designated as the lead agency for Community Services Block Grant (CSBG) funding. On October 1, 2000, the first CSBG eligible customers were served by the Charlotte County Community Action Agency.

The Community Action Agency Advisory Board (CAAAB) is a tripartite board that oversees the utilization of the Community Services Block Grant (CSBG) funds, advocates for programs and services that serve the low-to-moderate income families and makes programmatic and funding recommendations. The CAAAB has taken an active role in the development of this plan. On May 18, 2010 the Community Action Plan Task Force was formed to provide oversight and guidance of the Community Action Plan process. Through the participation of this task force over the course of several meetings, community needs were identified and prioritized. The result is this document, the 2011-2016 Charlotte County Community Action Plan. The Charlotte County Department of Human Services would like to extend their gratitude to the members of this task force who have helped guide the development of the Community Action Plan:

- Dee Rutko, SWFL Works, CAAAB Member
- Diane Corriveau, Community Resident, CAAAB Member
- Alleen Miller, Charlotte County School Board, CAAAB Member
- Kim Gaut, Hearing Impaired Persons, CAAAB Member
- Eunice Wiley, Community Resident, CAAAB Member
- Laura Brown, Community Resident, CAAAB Member

In addition we would like to recognize the members of our staff who served on Community Action Plan Coordinating Team:

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## Executive Summary

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This Community Action Plan, covering the period from October 1, 2010 through September 30, 2015 is the third five-year Community Action Plan developed and managed by the Charlotte County Community Action Agency, as follows:

1. October 1, 2001 – September 30, 2006
2. October 1, 2006 – September 30, 2010
3. October 1, 2010 – September 30, 2015

In the fall of 2009 the Community Action Plan was amended to include a prioritization for American Recovery and Reinvestment Act (ARRA) Funds, which were to be utilized to create or retain jobs and to provide employment supports such as education and childcare to ensure low-income residents were able to become job-ready, maintain employment or improve employability skills. Many new and innovative programs were piloted through the ARRA funding provided to Charlotte County and have been incorporated into the plan of work for the future of service delivery through community action.

This Community Action Plan embraces the major philosophical and services changes resulting from the adoption of several strategic goals by the Board of County Commissioners on January 22, 2010. For the delivery of human services, the overarching goal established by the Board of County Commissioners is to pursue available funding sources to facilitate providing services to meet community needs. This includes several directional statements which seek to improve the local human services delivery system, including:

- Better coordination of services
- Increase access to affordable health and behavioral healthcare
- Maximize opportunities to achieve self-sufficiency

Although each of these directional statements have impacted this plan to some extent, the third statement related to maximizing client self-sufficiency has had the greatest impact. In April of 2010 the Social Services division of Charlotte County Human Services merged with the Family Services Center staff in what is today known as the Family Services Division. The newly merged division has focused its priorities on increasing efficiency, improving operations and transitioning the agency from a delivery model that was focused entirely on crisis intervention services to a comprehensive case management model where services are linked to an outcomes-based case plan.

This plan has incorporated and expanded upon the data in the Community Needs Assessment of 2004, and supports the past and current use of CSBG funding. The primary and secondary data sources that supported the development of this plan include:

1. Demographic data from the 2000 Census, 2008 American Community Survey and multiple other federal, state and local sources that combined provide a Community Profile.
2. Other human services assessments and plans related to Charlotte County.
3. A compilation of data from a survey of human services providers and other community partners.
4. A compilation of data from a survey of private industry in the community.
5. A compilation of data from a survey of Community Services Block Grant eligible clients; and
6. A compilation of data from a survey of elected officials representing the County.

The information has been compiled and arranged to create an overall picture of the needs of the low-income in Charlotte County and to assist in the identification of the highest priority needs for the purposes of creating strategic investments in improving service delivery in these areas of need.

#### *Identified Service Components*

When all of the community needs assessment data had been compiled, reviewed and analyzed, the Community Action Plan Task Force met to set priorities for the needs identified. The data was grouped into seven priority issue areas:

- Health & Nutrition
- Education
- Childcare
- Employment
- Housing
- Transportation
- Income

Utilizing the *Root Cause Analysis* method, the Community Action Plan Task Force members established the two concentration areas of the highest need. The two issue areas which indicate the highest level of community need are the issue areas of Employment and Education.

## *Relationship to National Goals*

The U.S. Department of Health and Human Services has identified six national goals for Community Action Agencies and sub-recipients of Community Services Block Grant (CSBG) funds to address. They are as follows:

1. Low income people become more self-sufficient
2. The conditions in which low-income people live are improved
3. Low income people own a stake in their community
4. Partnerships among supporters and providers of service to low-income people are achieved
5. Agencies increase their capacity to achieve results
6. Low-income people, especially vulnerable populations achieve their potential by strengthening family and other supportive systems.

The recommendations of this Community Action Plan, align with the six national goals, most especially goals one, two, five and six.

## **Vision Statement**

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In 2004, a vision statement was adopted by Charlotte County Human Services. Upon review and through discussion, the Community Action Plan Task Force adopted the same vision for the 2010 Plan.

The vision statement as adopted is:

The Charlotte County Human Services Department will partner with the Charlotte Community, including other human services agencies, government, businesses, and religious groups, in creating an environment in which all individuals have opportunities to become self-sufficient, reach their full potential, improve the quality of their lives and those of their families, and participate as stakeholders in their community.

## Community Needs Assessment

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The 2010 Charlotte County Community Action Agency Advisory Board (CAAAB) Needs Assessment is a report on the demographics, needs and trends affecting Charlotte County. It is designed to lead the strategic planning process for the Community Action Agency for the next five years (2010 – 2015). The data and information in this report was gathered and reviewed by various staff of Charlotte County Human Services, Charlotte County CAAAB members, community partners and low income families.

In 2009 the Charlotte County Board of County Commissioners approved four focus areas for the community action programs provided by the Human Services Department. These focus areas are:

1. Qualify low-income households for community services,
2. Develop and strengthen linkages to community resources,
3. Maintain services to keep senior and disabled people in their homes; and,
4. Strengthen self-sufficiency programs.

Of these focus areas, three of the four have been designed to work directly with the community to identify and reduce the causes of poverty. All services, activities, initiatives and programs provided through Charlotte County Human Services fall within one of these strategic commitments.

### *Methodology*

This report is based on information gathered from three different sources. Because Charlotte County Human Services is moving towards a transformation of our service delivery model to provide more meaningful and effective self-sufficiency programming through case management as opposed to crisis intervention, this needs assessment was designed to test the assumptions of the new model.

The agency gathered data includes:

- 1) Survey  
121 individuals and families served by the Family Services Division completed the client survey. Community partners and elected officials were surveyed electronically through an internet based program hosted by Survey Monkey ([www.surveymonkey.com](http://www.surveymonkey.com)). 52 responses were received through this method.
- 2) MIS System Data

Family Services Division staff reviewed intake data collected through the department's MIS system, CM Tools for the period of October 1, 2009 – September 30, 2010. Information collected was based upon the answers provided by those completing a comprehensive intake process.

### 3) Secondary data

Secondary data information was obtained through the various federal, state and local sources in the following categories:

- Population Profile
- Employment
- Education
- Housing
- Transportation
- Childcare
- Income
- Nutrition & Healthcare

Information from these sources presented an overview of the current community conditions. In May and September the Community Action Plan Task force met to discuss the various data points and to formulate their recommendations for prioritization of services to the community in the future.

### *Review of Findings*

The Community Action Plan Task Force, which is a cross-functional team of agency staff and CAAAB members, analyzed the information gathered through the surveys, management information system and secondary data. Using a process developed by the Central Missouri Community Action Program, the task force followed a four step process to gain a deeper understanding of the information.

- Step 1. Overall look at service area focused on Population Profile, which was derived from federal, state and local census data.
- Step 2. Entire group gave input on assumptions about population
- Step 3. Began the focused attention in each categorical area (employment, housing, use of income, etc.)
- Step 5. The Family Services Manager acted as the Strategic Team Leader, through a nominal group process, providing her assumption about the community needs. The rest of the group then provided their assumptions and observations and tested the assumptions with data and the observations with a cross-functional perspective. Discussion was guided by the following questions:

- ♦ What are the assumptions (what do we inherently know) about the current conditions around the Outcomes and Goals in each focus area?
- ♦ Is there anything in the statistical report information from CM Tools or the secondary data that supports or counters these assumptions? Why?
- ♦ Does anything from the survey data support or counter these assumptions? Why?
- ♦ Does the data show any surprises or concerns not yet mentioned? Why?
- ♦ What resources, internal or external can/are being focused in this area? Why?
- ♦ What may be the root causes for these conditions? Why?

Steps 3 and 4 were repeated for each focus area.

Step 5. Discuss interrelationship between the focus areas – what themes emerged and what outcomes had substantial ties to success in other areas?

Each focus area was assigned to a member of the Charlotte County Human Services, Family Services Division who together formed the internal Coordinating Team for the 2010 Community Action Plan. The team also reviewed the information, held discussions on what could have been the causes of various issues raised and agreed on priority issues. The members of the Coordinating Team met in September 2010 to review and prioritize the findings of this assessment. Each staff member presented a summary of the information obtained from their respective focus area to the entire team. The Coordinating Team then discussed the findings, reviewed the information representing the findings, and made final recommendations of priorities to the Community Action Plan Task Force.

Throughout the Needs Assessment process, the Community Action Agency Advisory Board members reviewed the secondary data, participated in discussions and work with agency staff to disseminate and garner participation in community surveys. In January 2011, the 2011 Community Action Plan was presented to the Community Action Agency Advisory Board for approval.

### *Summary of Findings*

The following is a summary of the discussions held by the Coordinating Team and Community Action Plan Task Force in the analysis of data collected based upon the five steps mentioned above. Discussions included assumptions about the agency

strategies, observations of clients and the community, and a review of the data to test those assumptions and observations.

**Summary of Findings**

**Population Profile**

*Population Change*

The population change between 2000 - 2007 is shown in the Table 1 below. During the nine year period from April 1, 2000 and July 1, 2009, US Census estimates for the Charlotte County service area grew by 10.8%. This is not as drastic as the 27.6% percent growth experienced in the previous ten year census period; however, it does demonstrate that the area is still growing in the double digits.

**TABLE 1: Population, Charlotte County and Florida**

County	Census 2000 Population	Estimated 2009 Population	Population Change	% Change
Charlotte	141,627	156,952	+15,325	10.8%
Statewide	15,982,839	18,537,969	+2,555,130	16.0%

Source: US Census Bureau, 2000 Census and 2009 Estimates

*Population Projections*

Southwest Florida is expected to continue on its path of growth over the next 20 years. The Southwest Florida Regional Planning Council jurisdiction includes the six county area surrounding Charlotte County. The council has projected growth in each county through the year 2030, this is illustrated in Table 2. below.

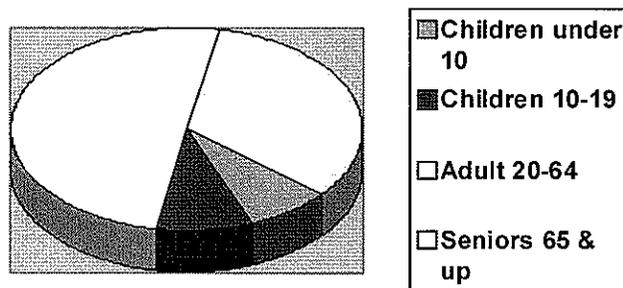
**TABLE 2: Projected County, Region and State Growth in Southwest Florida**

Geographic Area	1990	2000	2010	2020	2030
<b>Charlotte</b>	<b>110,975</b>	<b>141,627</b>	<b>171,600</b>	<b>202,400</b>	<b>231,500</b>
Collier	152,099	251,377	343,500	441,600	536,900
Glades	7,591	10,576	12,800	15,000	17,000
Hendry	25,773	36,210	45,800	55,500	64,900
Lee	335,113	440,888	539,300	642,200	740,100
Sarasota	277,776	325,957	371,300	418,200	462,000
Region	909,327	1,206,635	1,484,300	1,774,900	2,052,400
Florida	12,937,926	15,982,378	18,776,400	21,683,300	24,420,700

### *Age and Gender Demographics*

The population of Charlotte County is significantly older than the state as a whole. According to US Census population estimates for Charlotte County, the median age is 54.6 years of age, compared to the statewide average of 39 years. Children under 10 comprise 7.7% of the population, children ages 10 to 19 make up 9% of the population. The adult population ages 20-64 constitute the largest demographic of the county, representing 50.2% of the total population. Senior citizens ages 65 and older comprise 33% of the population. Table 3 depicts the age demographics of Charlotte County's population.

**TABLE 3: Charlotte County Age Demographics**



Source: US Census Bureau, American Community Survey, 2005-2009.

There are more women than men in Charlotte County. 52.2% of the residents of Charlotte County are female, while 47.8% are men; statewide the percentages are 51% and 49% respectively.

### *Race and Ethnicity*

Only eight percent of the population of Charlotte County is non-white; compared to a statewide population comprised of nineteen percent non-whites. Approximately two percent of the population is listed as "other non-white"; that category includes American Indian, Alaskan Native, Asian, Native Hawaiian and other Pacific Islanders and those of mixed race who chose not to select white or black.

Ethnicity in Florida is broken out separately than race. For ethnicity, a person must designate themselves as Hispanic or Non-Hispanic; people in both those groups can identify as white, black or other non-white. About 5% of the residents

of Charlotte County identify as Hispanic; of those 90% are identified as white. Table 4 illustrates the race and ethnicity of Charlotte County

**TABLE 4: Race and Ethnicity Census, Charlotte County 2008**

<b>Race</b>	<b>Hispanic</b>	<b>Non-Hispanic</b>	<b>All Ethnicity</b>
<b>White</b>	7,344	145,045	152,389
<b>Black</b>	645	9,857	10,502
<b>Other Non-White</b>	134	2,802	2,936
<b>All Race</b>	8,123	157,704	165,827

Source: The Florida Legislature, Office of Economic and Demographic Research

### *Households*

The number of households in Charlotte County expanded by an average of 13.8% from 2000 to 2009. The current number of households is 72,646. Table 5 depicts household increase by year and average household size. The average household size in the county decreased from 2.18 in 2000 to 2.11 in 2009.

**TABLE 5: Charlotte County Household and Household Size Data**

<b>2000 Households</b>	<b>2009 Households</b>	<b>% Change</b>	<b>2000 Average Household Size</b>	<b>2009 Average Household Size</b>	<b>% Change</b>
63,864	72,646	+13.8%	2.18	2.11	-3%

Source: US Census Bureau, American Community Survey, 2005-2009.

## **Summary of Findings**

## **Socioeconomic Indicators**

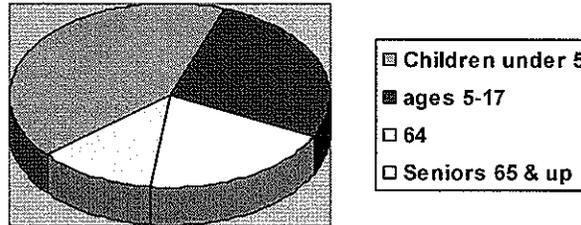
### *Income Levels*

Two common measures of income are Median Household Income, based on U.S. Census Bureau estimates, and Per Capita Income, based on U.S. Department of Commerce estimates. According to census data from the 2008 American Community Survey, median annual household income in Charlotte County is \$44,639. This is lower than the state, which is \$47,802. Charlotte County's per capita income for the same period is \$27,561 compared to an average state per capita income of \$21,577. The economic downturn has hit Charlotte County hard. The bankruptcy filing rate increased from 3.79 people out of every 1000 in 2000 to 5.74 per 1000 in 2009.

*Poverty*

2008 estimates show a total of 9.5% of Charlotte County residents live below poverty. Based upon estimates from the 2008 American Community Survey, children under 5 are the most vulnerable population with an estimated 21.0% living in poverty. Table 6 illustrates poverty level by age category for Charlotte County residents.

**TABLE 6: Charlotte County Poverty Level by Age**



Source: US Census Bureau, American Community Survey, 2005-2009.

*Public Assistance Programs*

Individuals and families who are reliant upon public assistance programs to meet their basic needs is depicted in Table 7.

**TABLE 7: Charlotte County Enrollment in Public Benefits**

Program	2001	2003	2008
<b>Temporary Assistance to Needy Families</b>	282	216	654
<b>Food Stamps</b>	2,002	2,352	2,619
<b>WIC Program</b>	2,100	2,200	2,964

Source: Florida Department of Children and Families, Florida Department of Health

*Use of Income*

All Americans face challenges relative to use of income. As a society, we are constantly bombarded with commercials wanting to sell us the latest and greatest. Those of low income are not the only persons facing crisis in money management with debt spiraling and costs of health care and other items rising. The recent downturn in the economy shows that in fact, many Americans are living one paycheck away from financial crisis. According to the Corporation for Enterprise

Development (CFED), the foundation for reaching the American Dream “rests on two pillars: first, a family’s ability to build assets that can be used to invest for the future, send children to college, and weather unexpected financial storms; and second, safety nets and safeguards that provide financial security in the event of a job loss, medical emergency, or other life events that could otherwise put a family in a tailspin.” In Charlotte County the top three reasons identified as barriers to self-sufficiency in the use of income issue area are:

1. Clients have difficulty maintaining a budget
2. Clients have difficulty with money
3. Lack of knowledge of possible resources

**Summary of Findings**

**Crime**

In general, Charlotte County is much safer than the state of Florida as a whole. Occurrences of crime within Charlotte County are shown in Table 8. According to the Florida Department of Law Enforcement’s Uniform Crime Reporting system, Charlotte County’s crime rate has fallen by 16.5% from 2008 to 2009. Residents in Charlotte County are almost half as likely to be the victim of a domestic violence offense as the average resident of Florida.

**TABLE 8: Charlotte County Crime Statistics**

<b>Crime</b>	<b>2009</b>	<b>2008</b>	<b>2007</b>	<b>2006</b>
<b>Homicides</b>	3	10	2	2
<b>Aggravated Assaults</b>	440	522	627	624
<b>Burglaries</b>	1,274	1,149	1,343	1,200

Source: Florida Department of Law Enforcement, Uniform Crime Reports

*Juvenile Crime*

Charlotte County has seen significant decreases in our delinquency referrals in the past 5 years and attributes this success to our commitment to delivering high quality prevention programming. While the overall number of delinquency referrals is decreasing, there is cause for alarm due to the increase in violent offenses committed by juvenile offenders. The number of youth arrested for committing violent crimes has increased by 25.5% over the past 5 years. Youth that are arrested in Charlotte County have limited resources to keep them in their county. Youth are held at either the Charlotte County Jail or at the Lee County Juvenile Assessment Center (JAC) when arrested. Those that are transported to the JAC are usually placed in secure detention at the Lee County Juvenile Detention Center (JDC) or are sent to another facility throughout the state of

Florida. In 2007-08 the JDC reported 2,452 admissions from Circuit 20. Of this approximately 12% are Charlotte County residents.

During FY 2007-08, judges committed 54 Charlotte County juvenile offenders to residential delinquent treatment facilities and 14 juvenile offenders transferred to adult court for commitment through the Florida Department of Corrections (this represents a 600% increase from previous year). In FY 2007-08 11% of the youth charged with delinquency offenses in Charlotte County were charged with violent felony offenses.

## **Summary of Findings**

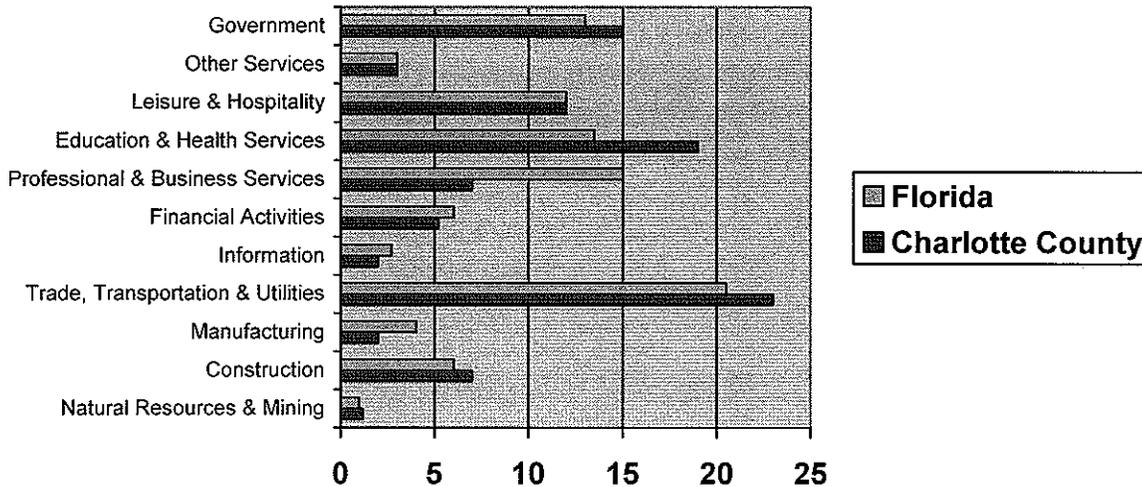
## **Employment**

As could be expected from an older population, the labor force as a percent of the total adults is significantly lower than the state average. The current economy has impacted employment stability in Charlotte County significantly. The unemployment rate jumped from 3.7 percent in 2000 to 11.9 percent in 2009; and is currently 12.9 percent (as of November 2010). This is slightly higher than the state unemployment rate of 12.2 percent and significantly higher than the national unemployment rate of 9.3 percent.

### *Employment by Industry*

The average annual wage in Charlotte County is \$30,965. The primary sources of employment, or the economic base for Charlotte County, include Education and Health Services (21.7%), Retail Trade (20.2%), Leisure and Hospitality (13.6%), Local Government – includes school district (12.2%), Professional and Business Services (7.6%), Construction (6.4%), Financial Activities and Other Services (4.9% each), State Government (2.8%), Wholesale, Manufacturing, Transportation and Utilities (1.3% each), Information (1.0%) and Federal Government (.8%). Table 9 depicts this data in comparison to the state of Florida. According to the Southwest Florida Workforce Development Board the occupations with the highest projected rate of growth include Pharmacy Technicians, Survey and Mapping Technicians, Interior Designers and Network Systems and Data Communications Analysts.

**TABLE 9: Employment by Industry**



Source: Charlotte County Economic Development Office

### *Living Wage*

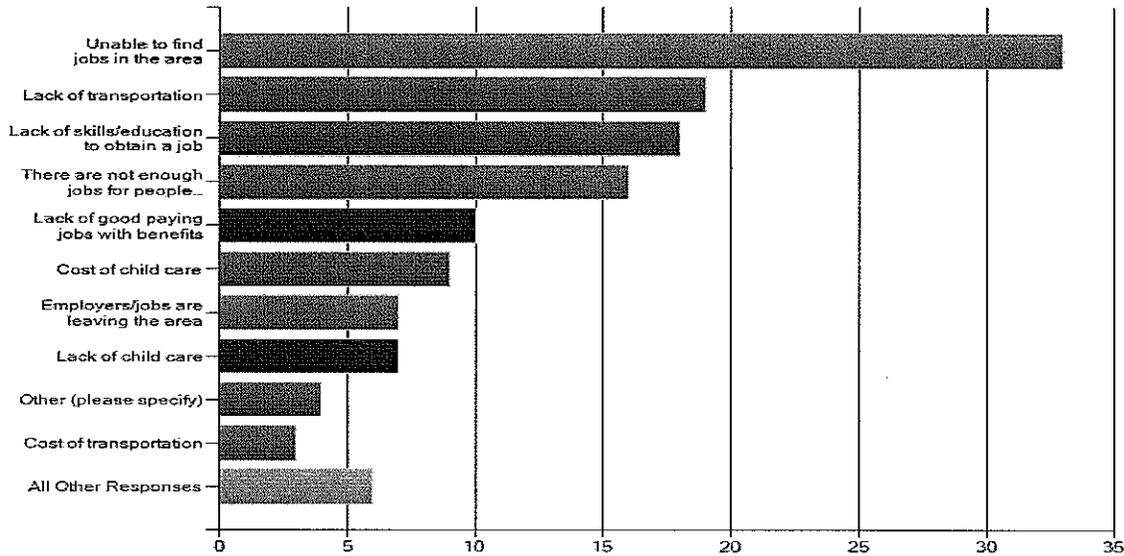
The living wage is the hourly rate that an individual must earn to support their family, if they are the sole provider and are working full-time (2080 hours per year). The living wage is established by the local governing body of a municipality. Charlotte County does not currently have a defined living wage; however, the Southwest Florida Workforce Development Board has defined the living wage for purposes of their on-the-job training programs at \$14.18 per hour. The minimum hourly wage for the state of Florida is \$7.25.

There is an assumption that there are not enough living wage jobs in Charlotte County. Table 10 illustrates the top three reasons that employment is a barrier to self-sufficiency in Charlotte County as:

1. Unable to find jobs in the area
2. Lack of transportation
3. Lack of skills / education to obtain a job

## TABLE 10: SURVEY RESULTS ON EMPLOYMENT ISSUE AREA

You have indicated that EMPLOYMENT is an issue to the population you serve. Please select the THREE most important reasons this is an issue in Charlotte County:



### Summary of Findings

### Education

Charlotte County has an excellent K-20 public education system and provides residents with school choice. With a remarkably low drop out rate of 2.9% for school year 2008-2009, more residents of Charlotte County have received a high school diploma than the state average. However, a higher percentage of people at the state level who are aged 25 and older have received a Bachelor's degree than the percentage of residents of Charlotte County who have done the same. Table 11 shows the educational attainment of Charlotte County as compared to the state of Florida.

**TABLE 11: Educational Attainment Rates**

	<b>Charlotte</b>	<b>State</b>
% HS graduate or higher	82.1%	79.9%
% Bachelors Degree or higher	17.6%	22.3%

Source: Florida Department of Education

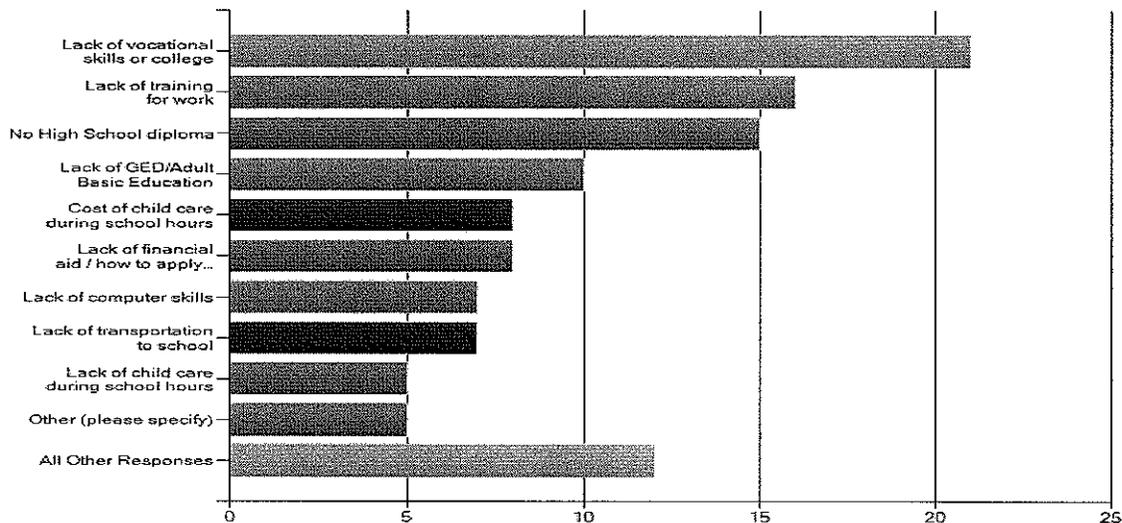
The National Center for Education Statistics produces estimates for adult literacy based on educational attainment, poverty and other factors in each county. Based on their 2003 estimates 12% of Charlotte County residents lack basic prose literacy skills. While this number seems high, it is lower than the state estimate of 20%.

The assumption was made that education was a barrier for individuals seeking self-sufficiency due to lack of post-secondary education & vocational skills. Survey data (Table 12) indicated the top three reasons for these barriers are:

1. Lack of vocational skills or college
2. Lack of training for work
3. No high school diploma

**TABLE 12: SURVEY RESULTS FOR EDUCATION ISSUE AREA**

You have indicated that EDUCATION is an issue to the population you serve. Please select the THREE most important reasons this is an issue in Charlotte County:



**Summary of Findings**

**Housing**

It is an assumption that affordable housing is a challenge for Charlotte County. Data from the 2008 Florida Housing Data Clearinghouse shows the existing home value of a single family home in Charlotte County as \$161,925. It is assumed that due to the downturn in the real estate market and declining property values that this figure is in actuality lower than the estimate. The average sales price for a home in 2009 was reported at \$164,525.

The median rent paid by Charlotte county households in 2000 was \$626 per month, compared to a statewide median rent of \$641. In Charlotte County and the surrounding metro area, the HUD Fair Market Rent in 2010, representing rent for a typical modest apartment was \$683 for a studio apartment, \$715 for a one-bedroom, \$928 for a two-bedroom, \$1,355 for a three-bedroom and \$1,630 for a four-bedroom unit.

Cost burdened households pay more than 30% of income for rent or mortgage costs. In 2009, 18,793 of Charlotte County households pay more than 30% of their income for housing. This equates to 25% of the households in Charlotte County. 11%, or 7,960 households utilize more than 50% of their income for housing.

Household Income is measured as a percentage of the median income for the county, adjusted for family size. In Charlotte County and the surrounding metro area, the 2010 HUD-estimated median income for a family of four is \$54,500. Table 13 demonstrates the distribution of households by income and cost burden.

**TABLE 13: Charlotte County Households by Income and Cost Burden**

Household Income as a Percentage of Area Median Income	Amount of Income Paid for Housing		
	0-30%	30-50%	50% or more
<= 30% AMI	1,440	824	3,016
30.01 - 50% AMI	3,146	2,253	2,797
50.01 - 80% AMI	7,625	3,825	1,573
80.01+% AMI	44,010	3,931	574
Total	56,221	10,833	76,90

Source: Florida Housing Data Clearinghouse

Housing units are considered to be substandard if they are overcrowded, do not have heat, or lack complete kitchens or plumbing. In 2000,

- 1,105 housing units in Charlotte County were overcrowded, meaning that they housed more than one person per room.
- 457 housing units in Charlotte County did not have heat.
- 280 housing units in Charlotte County lacked complete kitchen facilities.
- 144 housing units in Charlotte County lacked complete plumbing facilities.

Needs assessment data revealed the top three reasons that housing is a barrier to self-sufficiency as:

1. Cost of rent / mortgage payments
2. Credit Issues
3. Lack of deposits for rentals

*Mortality Rate*

Mortality rates can be key indicators of the state of health of a community. A significant number of Charlotte County's deaths are premature and preventable. The most frequent causes of death for people in Charlotte County are cancer and heart disease. Among types of cancer, lung cancer causes the highest number of deaths in Charlotte County. The incidence of prostate cancer is much higher than lung cancer; however, it bears a higher survival rate. Together cancer and heart disease accounted for nearly half of the deaths in 2008.

*Maternal & Child Health*

On average 1,205.7 babies were born per year in Charlotte County between 2006 and 2008. Babies born to young mothers under the age of 19 are more likely to experience poor birth outcomes than those born to adult mothers and are more at risk for developmental complications later in life. Infant mortality rates are considered the primary indicator of the health of a community. Infant mortality rates in Charlotte County are well below the average for the state of Florida. The percent of infants born with a low birth weight is also lower than the state average. However, more babies are born in Charlotte County without receiving care in the first trimester. There are also a higher percentage of babies born in Charlotte County who only received late care or no prenatal care at all.

*Access to Health Care*

Access to health care is assumed to be a challenge in Charlotte County. Medicaid provides medical coverage to low income individuals and families. As of 2008, approximately 10,000 out of every 100,000 people in Charlotte County were enrolled in Medicaid. This number has risen significantly since 2007, due to economic conditions. In Charlotte County there are a total of 324 Medicaid/Medicare providers, with only one reported pediatric provider for children under 13. Charlotte County has 3 hospitals, 1 Federally Qualified Health Clinic (provides dental only), 3 Health Department locations, 1 Community-based provider and 2 Mental Health & Substance Abuse facilities.

Lack of health insurance coverage is a significant barrier to accessing health care. The Small Area Health Insurance estimates from the U.S. Census Bureau provides annual estimates of the population without health insurance coverage for all U.S. states and their counties. The most recent year for which reliable county-level estimates are available is 2005. Charlotte County was estimated as having 25%

of adults without health insurance; however, due to increases in the unemployment rate it is estimated that this number may be as high as 30.8%.

*Nutrition*

Adequate nutrition is necessary to promoting a healthy lifestyle and improving the health and vitality of a community. It is alarming that the number of individuals receiving assistance through the Supplemental Nutrition and Food Program, or more commonly known, the Food Stamp program. Table 14 exhibits this increase below. Also of concern is the increase in participation in the School Free and Reduced Lunch program. Currently 51.7% of all Charlotte County students are enrolled in the Free and Reduced Lunch program. While it is important to note that these children do receive a nutritious breakfast and lunch provided to them at school, it is their out-of-school time nutrition in the evening and weekends that is concerning.

**TABLE 14: Food Stamp Enrollment Increase, Charlotte County & Florida**

	<b>Charlotte County</b>	<b>Florida</b>
<b>December 2009</b>	16,139	2,516,964
<b>December 2010</b>	19,644	3,079,742
<b>% Increase</b>	21.7%	22.4%
<b>April 2007</b>	5,063	1,206,625
<b>December 2010</b>	19,644	3,079,742
<b>% Increase</b>	287.99%	155.24%

Source: Florida Department of Children and Families, December 2010

**Summary of Findings**

**Childcare**

There are a total of 101 licensed child care facilities in Charlotte County. The Early Learning Coalition provides child care subsidies to eligible families to ensure disadvantaged children start school ready to learn. There is currently a waiting list of 113 families who have applied and been determined eligible for these services, but due to funding limitations are not able to receive assistance. The average cost of enrolling one child in a licensed child care facility for one week is \$125.00.

After school programs are not subject to licensing by any state or local agency and thus, very little information is available regarding the numbers of children that are being served, their socioeconomic status and the need for expanded services. It is assumed based upon feedback from community partners and client surveys that there is a need for expanded quality out-of-school time opportunities for children ages 5-18.

Public transportation in Charlotte County is provided by Charlotte County Human Services, Transit Division. Dial-A-Ride is an open access Para transit system that provides curbside pick-up and drop-off. Residents are able to access Dial-A-Ride services through central dispatch and have the option of establishing daily service through a subscription.

Based upon a 2009 study conducted in the development of the Charlotte County Transit Development Plan, the Dial-A-Ride system provided 65,779 trips traveling more than 468,269 revenue miles. The most recent client survey revealed that 43.5% of passengers are 65 years of age or older, with 4% age 24 and younger. 68.8% of riders live in households with annual household income of less than \$20,000. Ridership surveys show that 58.4% of individuals utilizing the Dial-A-Ride program live in households without any vehicles. The most common trip purposes are as follows:

- ♦ Doctor or Dentist Appointment (39.5%)
- ♦ Shopping (24.1%)
- ♦ Recreation or Visiting Someone (12.8%)

Charlotte County Human Services, Transit Division is also the entity that ensures coordinated transportation services for the transportation disadvantaged (TD) population in Charlotte County through the Sunshine Ride program. In Fiscal Year 2010, Sunshine Ride provided 89,095 trips.

Based upon survey data, transportation is a barrier to self-sufficiency due to the following:

1. Public Transportation hours are not convenient
2. The costs associated with maintaining a vehicle
3. The cost of buying or the down payment required

# Strategic Plan

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## Department Mission Statement:

The Department of Human Services will be a partner in the creation of a community wherein low-income and vulnerable people become self-sufficient, reach their full potential, improve the quality of their lives and those of their families and become stakeholders in their community.

## **Goal 1: Low Income People Become More Self-Sufficient**

### **Objective 1**

By the year 2015, 75 CSBG eligible applicants will identify those obstacles and/or problems that inhibit their becoming self-sufficient by the provision of increased access to employment, educational opportunities, and health care.

**Objective 1.1** By September 30, 2015, 60 CSBG eligible applicants will identify those obstacles and/or problems that inhibit their becoming economically self-sufficient

**Strategy 1.1A** Decrease the barriers to improved employment and educational opportunities through coordination with other social services and community agencies.

### **Actions:**

- 1) Schedule monthly meeting with agencies through the Program Coordinating Committee of the Family Self-Sufficiency Program.
- 2) Develop linkage, referral and client tracking system with community partners who provide work readiness, ABE/GED services, post-secondary or vocational education and job placement services.
- 3) Provide information and referral and case management services to families enrolled in the Family Self-Sufficiency Program.
- 4) Develop linkages with Charlotte Technical Center, Edison State College and State College of Florida to facilitate access to educational opportunities.

**Measure 1.1A1** Success will be measured by the number of participants seeking employment who are referred to other agencies and obtain it.

**Measure 1.1A2** Success will be measured by the number of participants seeking educational opportunities who are referred to other agencies and who enroll in an educational program.

**Strategy 1.1B** Decrease obstacles and problems associated with obtaining and retaining employment and educational opportunities.

**Actions:**

- 1) Implement and coordinate a transportation assistance program which will provide linkages to public transportation or automobile maintenance education and car repair assistance for eligible participants.
- 2) Implement and coordinate assistance in obtaining required employment physicals for CSBG eligible participants through employers and the Charlotte County Health Department.
- 3) Coordinate day care options with the Early Learning Coalition, after school programs, employers, and educational institutions for participants in the Family Self-Sufficiency Program.
- 4) Promote job readiness in providing assistance with the development of interviewing skills, resume writing, appropriate attire and employee behavior.
- 5) Research available financial aid for educational opportunities available for CSBG eligible applicants through programs offered by the government, schools, private foundations and employers.

**Measure 1.1B** Success will be measured by the number of participants who are employed or are enrolled in an educational program who remain in the program.

**Objective 1.2** By September 30, 2015 15 CSBG eligible clients will improve their knowledge of financial tools and accumulate savings through asset building activities.

**Strategy 1.2** Increase opportunities for clients to improve their understanding of financial tools and demonstrate financial management.

**Actions:**

- 1) Provide financial counseling, credit repair and financial literacy workshops that allow clients to increase their knowledge of financial tools and assist them in creating and maintaining a budget.
- 2) Identify local financial institutions that provide asset development programs and develop partnerships for implementing full scale asset development program.
- 3) Recruit, educate and support clients participating in asset development programs.
- 4) Seek additional funding for asset development activities.

**Measure 1.2** The number of clients demonstrating the ability to complete and maintain a budget and participants who increased their savings through IDA or other savings account.

**Goal 2: The conditions in which low-income people live are improved**

**Objective 2**

By the year 2015, 1 community facility will be improved and will increase access and preserve the availability of supportive services for CSBG eligible clients.

**Objective 2.1** By September 30, 2015 the Family Services Center site plan will be implemented to increase availability and preserve access to supportive services for CSBG eligible families.

**Strategy 2.1** Complete and implement master space plan for the Family Services Center.

**Actions:**

- 1) Identify targets for expanded services at the Family Services Center
- 2) Complete master site planning
- 3) Identify funding sources
- 4) Implement master site plan improvements

**Measure 2.1** Number of new or preserved services available to CSBG eligible families as a result of facility improvements.

**Goal 3: Low Income People Own A Stake In Their Community**

**Objective 3**

By the year 2015, 25 eligible CSBG households will have become involved with their community through participation in home ownership preparation or active involvement in community improvements.

**Objective 3.1** By September 30, 2015, 15 eligible households will have become involved with their community through participation in home ownership preparation or active involvement in community improvements.

**Strategy 3.1A** Prepare households to become active in home ownership preparation.

**Actions:**

- 1) Develop linkage and coordination with the housing providers and refer eligible Family Self-Sufficiency Program and CSBG households to home ownership seminars.
- 2) Provide case management services and home management counseling to eligible CSBG households.
- 3) Develop linkage with credit counseling services for referral of eligible CSBG households.
- 4) Create linkage with home improvement businesses and schools for scheduling of instructional classes on home maintenance and

minor home repairs.

- 5) Provide assistance to eligible FSSP and CSBG households in applying for home ownership or home repair assistance through the Community Development Block Grant Program and other community programs.

**Measure 3.1A** Success will be measured by the number of participants who participate in home ownership preparation classes or seminars.

**Strategy 3.1B** Encourage households to become active participants in community improvement activities.

**Actions:**

- 1) Engage clients who live within Community Redevelopment Areas to become involved in improving the conditions of their neighborhood.
- 2) Develop linkage with community agencies and groups for information on activities, board vacancies, meeting schedules and community concerns.
- 3) Develop linkage with housing agencies, including the Punta Gorda Housing Authority, Charlotte County Habitat for Humanity, the Charlotte County Homeless Coalition and the Affordable Housing Advisory Committee to identify issues concerning low income households in Charlotte County.
- 4) Provide information and encourage eligible CSBG households to participate in community improvement initiatives.

**Measure 3.1B** Success will be measured by the number of participants who participate in a community improvement activity(s).

**Goal 4: Partnerships among supporters and providers of service to low-income people are achieved.**

**Objective 4**

By the year 2015, a Human Services Network (HSN) will be established to

improve communication and coordination among all human services providers in Charlotte County.

**Objective 4.1** By September 30, 2015, the Charlotte County Human Services Network (HSN) will be established to provide an avenue for information sharing, community problem-solving and collaboration.

**Strategy 4.1** Encourage partnerships among human services providers and provide for an information network in which to communicate community needs, problem-solve and improve collaboration.

**Actions:**

- 1) Identify key human services agencies who will take a leadership role in forming the HSN
- 2) Form a HSN Leadership Committee
- 3) Identify community providers to participate
- 4) Identify meeting times and locations
- 5) Establish communication strategy
- 6) Hold initial kick-off meeting and gain consensus on meeting frequency and committee activities
- 7) Implement communication strategy

**Measure 4.1** Success will be measured by the number of agencies participating in the HSN.

**Goal 5: Agencies increase their capacity to achieve results**

**Objective 5**

By the year 2015, agency staff and Community Action Agency Advisory Board members increase capacity to achieve results through training.

**Objective 5.1** By the year 2015, all Family Self-Sufficiency (FSS) staff will receive ROMA training from a certified ROMA trainer.

**Strategy 5.1** Program staff have an understanding of Results Oriented Management Approach (ROMA) and how the ROMA principles are applied in case management to produce, document and evaluation program outcomes.

**Actions:**

- 1) Develop staff Individual Development Plans to identify interests among staff and to build upon both competencies and deficiencies in knowledge and skills.
- 2) Identify and seek training opportunities for staff to become familiar with ROMA practices.
- 3) Incorporate staff development activities in annual performance evaluation
- 4) Identify and select one staff member to become a *certified* ROMA trainer.

**Measure 5.1** Success will be measured by determining how many FSS staff completed training programs.

**Strategy 5.2** By the year 2015, all Community Action Agency Advisory Board (CAAAB) members will receive ROMA training from a certified ROMA trainer.

**Actions:**

- 1) Identify and seek training opportunities for CAAAB members to become familiar with ROMA practices.
- 2) Incorporate CAAAB member development activities in annual work plan.
- 3) Identify and select one staff member to become a *certified* ROMA trainer.

**Measure 5.2** Success will be measured by determining how many CAAAB members attended training.

**Goal 6: Low Income People, Especially Vulnerable Populations, Achieve Their Potential By Strengthening Family and Other Supportive Environments**

**Objective 6**

By the year 2015, 125 CSBG eligible households, especially vulnerable populations, will achieve their potential by strengthening family and other supportive systems.

**Objective 6.1** By September 30, 2015, provide crisis assistance and supportive services to 125 eligible CSBG households to stabilize their living situations.

**Strategy 6.1** Strengthen the linkage of agencies providing programs to families in crisis to minimize duplication and coordinate service delivery.

**Actions:**

- 1) Continue to identify services provided in the community through contact with agencies.
- 2) Update needs assessment annually by documenting services provided in the community and identifying service gaps.
- 3) Continue to provide referrals to agencies with support and financial assistance programs including Community Development Block Grant Program, Food Stamps, Temporary Assistance for Needy Families (T.A.N.F.) through Florida Department of Children and Families, Low Income Home Energy Assistance Program (L.I.H.E.A.P ), Energy Assistance for the Elderly (E.H.E.A.P.), Care to Share Program (FPL), Charlotte County Heartship Program (water utilities), Subsidized childcare and Food Pantry Assistance.
- 4) Develop and implement programs to provide financial assistance to households unable to resolve crisis and stabilization of family through other resources.

It is the intent of this Objective to provide temporary assistance to

households who are experiencing a crisis through unanticipated events or circumstances which present barriers toward goals of self-sufficiency. Examples include, but are not limited to:

- 1) Mortgage Assistance for permanent residence of household
- 2) Rental Assistance for permanent residence of household
- 3) Security Deposits for Utilities at permanent residence of household
- 4) Security Deposits for Rental Unit at permanent residence of household
- 5) Automobile Loan Payments for car needed for work or school and owned by household
- 6) Automobile Repairs for car needed for work or school and owned by household
- 7) Other assistance as determined by need

**Measure 6.1 Success** will be measured by the number of participants assisted which resulted in the resolution of the household crisis.

## **Service Delivery System**

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The Charlotte County Human Services Department is a functioning county department operating under the authority of the Charlotte County Board of County Commissioners. Direct supervision of this department is provided through the County Administrator's Office.

The Department of Human Services is responsible for providing financial assistance and services for indigent and low income households not provided through other state or local agencies. The Department is the local administering agency for the Low Income Home Energy Assistance Program (L.I.H.E.A.P) and also provides temporary and financial assistance through the Charlotte County Utilities Heartship (Water & Sewer) program, Healthcare Responsibility Act, Indigent Burial program and Food Pantry Assistance. Beginning in Fiscal Year 2005-2006, the Charlotte County Board of County Commissioners appropriated county funds for the Department to begin providing Housing and Family Assistance. This new program was developed to augment the Community Services Block Grant.

The Senior Services Division of the Human Services Department has been providing services for seniors since the 1970's when homemaker, transportation and congregate meals were first funded under the Older Americans Act. Charlotte County Human Services has been operating as the Lead Case Management Agency since the early 1980's when the State of Florida first designated lead agencies for the delivery of services funded under the Community Care for the Elderly (CCE) Program. Charlotte County Human Services has proceeded to provide case management and related services through the Older Americans Act (OAA), Alzheimer's Disease Initiative (ADI) Program, Nursing Home Diversion Program, Home and Community Based Services Program (Medicaid Waiver), Assisted Living Waiver, Home Care for the Elderly (HCE) Program, and Emergency Home Energy Assistance for the Elderly Program (EHEAP). Charlotte County Human Services has also provided nutrition services through the Older Americans Act Congregate Meals Program from the late 1970's until July 1999. Since July 1999, Human Services has coordinated services with the nutrition provider under contract with the Area Agency on Aging for Southwest Florida. At the beginning of 2010, Human Services entered into a partnership agreement with Senior Friendship Center, Inc. for congregate meals and home delivered meals. Also in 2010, the Human Services Transit Division contracted with Senior Friendship Centers to provide transportation services for clients attending the congregate meal sites.

In January 2000, the County's Housing Manager who is responsible for administering the State Housing Initiative Partnership (SHIP) and other grant funded housing programs was transferred to the Human Services Department. Together with existing staff, housing division staff has been successful in strengthening partnerships in the community and in providing affordable housing to individuals and families of all age groups. This has been especially important since the Hurricane Season of 2004. Several affordable housing complexes have been built including the replacement of the Punta Gorda Housing Authority project with new 171 units targeted for the very low income. Planned to be completed in 2011, a new 82 unit affordable housing complex in the Deep Creek area will be just for seniors. The Housing Division has also been able to leverage Hurricane Housing Recovery Program funds, Neighborhood Stabilization Program funds and Impact Fee Reduction funds to promote new and revitalized housing.

In May 2000, the County's Transit Division was transferred to the Department of Human Services. The County's Transit Division is the designated Transportation Disadvantaged Coordinating Agency. The Human Services Department Director supervises the Transit Division and Department staff serves on the local coordinating board to advocate for senior and low-income individuals. Department staff continues to provide eligibility screening and referrals to the Transit Division for individuals in need of transportation.

In January 2001, the Transit Division implemented the Dial-a-Ride (point to point) public transportation system. This system is available to all individuals for a regular charge of \$3.00 per trip. (Fare increased effective 10/1/07). This service has afforded seniors and disadvantaged individuals with the opportunity to enjoy different activities not provided through trips funded under the Transportation Disadvantaged Program.

In January 2003, Veteran Services was transferred to the Department of Human Services. This transfer has resulted in an increased awareness of the common service needs and available resources for veterans in the community. The enhanced communication between the Veteran Services Division and other Department divisions has afforded a more efficient delivery system for this target population. It is estimated that there are over 25,000 Veterans in Charlotte County, the vast majority of which are over 60.

With much community support, including sponsorship from the United Way of Charlotte County, and the Charlotte County Leadership Class of 2005 (affiliate of the Chamber of Commerce), the Board of County Commissioners

authorized the creation and implementation of the 2-1-1 Charlotte call center. 2-1-1 was certified by the Agency for Healthcare Administration (AHAC) and went live effective July 1, 2005. The 2-1-1 call center currently answers over 1,000 calls per month from citizens and community agencies which are seeking information on health and human services programs available to county residents. The 2-1-1 data base provides information on over 400 agencies and 600 programs available to residents of Charlotte County. The data base serves as a natural tool in linking services and agencies and identifying service gaps. On a weekly and monthly basis, 2-1-1 staff, housing staff, social services and senior services staff attend community coalitions to share information on available resources, identify unmet needs and coordinate service delivery.

In the summer of 2006, the Human Services Department opened the Family Services Center. The Family Services Center is a multi-generational one-stop center for services to families and children. Some of the agencies currently housed at the Center include: Center for Independent Living, Boys and Girls Club, Police Athletic League, Human Services, Healthy Families, Healthy Start, Family Literacy, Guardian Ad Litem, Center for Abuse and Rape Emergencies, Children's Advocacy Center, and Experience Works (Senior Employment). In April of 2009, Family Services Center staff merged with the social services division to form the Family Services Division. The Family Services Manager coordinates activities for the Center and provides administrative oversight of the Department's Family Services Division, which houses the Community Services Block Grant program. This division's focus is to promote comprehensive case management and supportive services to assist individuals and families move toward self-sufficiency and to become stakeholders in their own communities.

The Charlotte County Board of County Commissioners has also just recently approved a Community Revitalization Area (CRA) in the center of Port Charlotte near the hospitals and Cultural Center. The declining housing stock in this area has many older homes occupied by low income seniors and families. Plans are being made to revitalize this community with new and improved housing, infrastructure and transportation. Both the Housing Division and Family Services Division have taken an active role in the development of this area.

The identification of community resources and the coordination of services has always been a major priority for the Department. It is through this identification and coordination process that Program Specialists learn of the availability of community services and unmet needs of the community. It is also through this process that Program Specialists and other department

support staff work in coordinated efforts with other service delivery agencies, including but not limited to, non-profit agencies, private industry, and other Federal, State and local agencies to maximize resources, minimize duplication, and explore avenues of addressing unmet needs.

An essential role of the case management agency is the ability to not just address the needs of clients, but to identify those who may not be aware of available services in the community. Working in tandem with other Department outreach staff the Department annually prepares and implements an outreach plan which will provide information to all segments of the community. Special emphasis is provided to target those in greatest social or economic need, frailty or minorities. Charlotte County government recognizes that outreach in the community is a top administrative priority and has committed support and encouragement to the County's Human Services Department to continue its outreach activities in coordination with efforts on behalf of the County's Public Information Office, other Lead Agencies, and the 2-1-1 Information & Referral system.

The Department of Human Services has provided service to Charlotte County for over 30 years. The Department has experienced and skilled staff and expert administrative support from other County departments. The Department has demonstrated its commitment and success in communicating and responding to the public; reaching out and targeting services to the economically disadvantaged; coordinating resources, referrals and services with other providers; and responding to client-related emergency situations and natural disasters.

To facilitate the goals of the Community Action Plan, the Charlotte County Human Services Department will provide services geared toward National Goals 1- 6.

The Objectives of these Goals are:

**Goal 1:** By the year 2015, 75 CSBG eligible applicants will identify those obstacles and/or problems that inhibit their becoming self-sufficient by the provision of increased access to employment, educational opportunities, and health care

**Goal 2:** By the year 2015, 1 community facility will be improved and will increase access and preserve the availability of supportive services for CSBG eligible clients.

**Goal 3:** By the year 2015, 25 eligible CSBG households will have become involved with their community through participation in home ownership

preparation or active involvement in community improvements.

**Goal 4:** By the year 2015, a Human Services Network (HSN) will be established to improve communication and coordination among all human services providers in Charlotte County.

**Goal 5:** By the year 2015, agency staff and Community Action Agency Advisory Board members increase capacity to achieve results through training.

**Goal 6:** By the year 2015, 125 CSBG eligible households, especially vulnerable populations, will achieve their potential by strengthening family and other supportive systems.

To achieve these goals, the Department will strengthen its linkages with the Charlotte County Public Schools, Charlotte Technical Center, Edison State College, the Florida Department of Children and Families, Charlotte County Transit Department, Children's Services Council, SWFL Workforce Development Board, the City of Punta Gorda and the Charlotte County Health Department. The Department will also strengthen and coordinate links with the faith-based ministries of St. Vincent de Paul, Salvation Army, Good Samaritans, Macedonia Human Services, Community Services of 7<sup>th</sup> Day Adventists, St Maximillian Church, Peace Lutheran Church and Port Charlotte United Methodist Church. Additional links will be strengthened with community non-profit agencies including the United Way, Senior Friendship Centers / RSVP, CARE (women's crisis centers), Englewood Helping Hands, Center for Independent Living, Habitat for Humanity, Punta Gorda Housing Authority the Charlotte County Homeless Coalition,, Charlotte Behavioral Healthcare and other service agencies as identified.

By strengthening links and coordinating services, the Department will actively participate in developing and building community partnerships that will identify the needs of low income families and lend support in assisting families to become self-sufficient and stake holders in their community.

It is expected that by September 30, 2015, the following measures will be met:

**Goal 1:** 60 CSBG eligible applicants will identify those obstacles and/or problems that inhibit their becoming economically self-sufficient and 15 CSBG eligible clients will improve their knowledge of financial tools and accumulate savings through asset building activities.

**Goal 2:** The Family Services Center site plan will be implemented to

increase availability and preserve access to supportive services for CSBG eligible families.

**Goal 3:** 15 eligible households will have become involved with their community through participation in home ownership preparation or active involvement in community improvements.

**Goal 4:** The Charlotte County Human Services Network (HSN) will be established to provide an avenue for information sharing, community problem-solving and collaboration.

**Goal 5:** All Family Self-Sufficiency (FSS) staff and Community Action Agency Advisory Board members will receive ROMA training from a certified ROMA trainer.

**Goal 6:** 125 CSBG eligible applicants will have stabilized their living situations.

# **Family Self-Sufficiency Program (FSSP)**

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## **INTRODUCTION**

The Charlotte County Department of Human Services FSSP Program represents a community-based approach to the organization and delivery of locally available social services in order to help eligible families become self-reliant and independent of all forms of public assistance. The Program is based upon Results Oriented Management Approach (ROMA) principles and is designed to identify the needs of participating families and to deliver a comprehensive and coordinated set of services to facilitate their efforts to achieve and maintain economic self-sufficiency.

The FSSP is based on the following principles:

- a) Local communities have the capacity for identifying and developing effective solutions to address community problems;
- b) Public and private resources can be made more effective through a coordinated approach to service delivery;
- c) The goal of self-sufficiency requires a comprehensive package of services that are tailored to local circumstances and individual needs; and,
- d) Leadership, communication, and empowerment are interrelated and interdependent.

This FSSP Action Plan outlines the procedural steps to enact the principles which form the basis for the FSSP. As such, it provides a guide to the key policies, administrative issues, and regulatory framework involved in the implementation of a Family Self-Sufficiency Program. It is envisioned that, based on changing local circumstances and/or changing federal requirements, this Plan will periodically require revision. The Department of Human Services assumes primary responsibility for the implementation and maintenance of the Action Plan.

## **NEEDS ASSESSMENT**

Refer to CAP Needs Assessment.

## **ORGANIZATION**

The FSSP will be organized around a Program Coordinating Committee (PCC), made up of representatives from the Community Action Agency Advisory Board (CAAAB) who complement the concept of family self-sufficiency. Members of the PCC will serve in a voluntary capacity. The responsibilities of the PCC will include the establishment of policies to guide the FSSP, monitor and evaluate the progress and administration of the FSSP, identify obstacles to the success of the program and develop effective approaches to overcome them, identify potential resources that may be available to support FSSP objectives, and inform the community of the FSSP and obtain support for its basic goals.

The size of the PCC has not been limited in order to allow for additional representation from the public, organizations participating in support programs, and agencies providing program expertise and assistance in the attainment of program goals.

Initially, the Family Services Manager of Charlotte County Human Services will serve as the Chairperson of the Family Self-Sufficiency PCC. It is the Chairperson's responsibility to schedule and hold periodic meetings, develop meeting agendas, and work closely with the FSSP Coordinator to ensure that the goals and objectives of the FSSP are being met. From time to time, subcommittees may be organized by the PCC to address specific policy and programmatic issues.

The Department will provide an FSSP Coordinator. The Coordinator will have overall responsibility for the operation of the FSSP. The primary duties of the Coordinator include:

- Provide for the integration of Family Self-Sufficient Program
- Outreach to potential participants
- Coordinate screening and selection procedures
- Organize and oversee the Individual Self-Sufficiency Process
- Execute and administer the Contract of Participation
- Provide general case management services
- Provide periodic reports to the PCC
- Prepare reports to the program participants
- Evaluate success of participants and FSSP

## **GOALS AND OBJECTIVES**

Based on the Community Needs Assessment conducted during July and August 2010, the Family Self-Sufficiency Program has identified the following obstacles to individual achievement of economic self-sufficiency:

- Need for long term employment opportunities
- Need for remedial and/or advanced educational opportunities
- Need for affordable childcare
- Need for dependable transportation to employment
- Need for financial literacy & asset development

The following goals for the FSSP have been established in an effort to overcome the identified obstacles to self-sufficiency:

1. Develop a comprehensive package of services sufficient to allow participant to become self-sufficient.
2. On an on-going basis, identify obstacles to self-sufficiency and mobilize the resources coordinated through networks established by the Program Coordinating Committee necessary to overcome those obstacles to enable families to achieve self-sufficiency.
3. Inform and obtain the support of the general community for the basic objectives of the Family Self-Sufficiency Program.
4. Develop and coordinate adequate transitional support services to ensure that a participant's achievement of self-sufficiency is sustainable.
5. Encourage families to be honest about the causes of their economic weaknesses and to pledge to commit to the goals of the FSSP.

In support of these goals the Department has established the following objectives for the first year of FSSP operations:

- Develop and implement a public information plan that includes outreach to eligible participants, as well as the general community.
- Complete the selection of 6 potential participants in accordance with FSSP selection procedures.

- Execute a Contract of Participation for at least 4 of the selected participants.
- Complete a first year program and participant evaluation and establish appropriate second year objectives.

Objectives to initial and continued self-sufficiency for FSSP participants will be identified by the PCC on an on-going basis, especially as relevant circumstances change. At a minimum, the PCC will evaluate the goals and objectives of the FSSP annually and make any necessary adjustments.

## **IMPLEMENTATION PLAN AND SCHEDULE**

The Implementation Plan of the FSSP involves the following five components:

### **I. Outreach to potential eligible participants.**

The primary objective outreach effort is to provide potentially eligible families with sufficient information to allow them to decide if the FSSP fits within their personal needs and goals. Outreach activities will include: providing program flyers/brochures to area social service agencies, churches, etc.; distributing a FSSP fact sheet to all households applying for services provided through the Community Services Block Grant; referrals from the agencies participating at the Community Career and Service Center and serving on the Program Coordinating Committee; and providing information on FSSP at community service centers, meetings and forums.

Outreach efforts will begin at the start of the program year. It is anticipated that outreach activities to reach potential applicants will be concluded at the end of an initial 45 day period. Outreach activities directed at community support will continue through the year. Outreach efforts will be reported to the PCC at the next scheduled meeting. Changes in outreach strategies will be implemented with the approval of the Director of the Human Services Department and the PCC as needed.

### **II. Selection of eligible participants.**

The primary objective of the selection process is to provide all interested applicants with an equal opportunity to participate, while at the same time placing maximum responsibility on the applicant for representing their circumstances, needs and personal goals, and relating them to the opportunities provided by the FSSP.

Selection for participation in FSSP will be based on a first come first served

process of applications received by the Department from potential clients applying for services. It is anticipated that selection of participants will be completed within 120 days from the end of the outreach activities. It is expected that 5 families will be selected in the first year of the FSSP ending 9/30/11.

Additional selections steps are as follows:

- a) All families expressing an interest in participating in the FSSP will be invited to attend a briefing where detailed information will be presented.
- b) At the conclusion of the briefing, those families still interested in participating will be asked to submit an FSSP application.
- c) Applications will be screened and evaluated by a Selection Committee appointed by the PCC and chaired by the FSSP Coordinator.
- d) Based on the results of the initial screening and evaluation, applicants will be scheduled for interviews according to the date of their application.
- e) Final selected families will be notified of their selection and briefed on the next steps in the process.

### **III. Creation of Individual Training and Service Plan (ITSP).**

The primary objective of the ITSP is to develop an individualized service plan based on a needs assessment of each FSSP participant. The elements of the ITSP will be used to specify the contractual obligations of the participating family on the Contract of Participation.

After a family has been selected for participation in the FSSP, a needs assessment will be completed. The assessment will result in a basic inventory of the head of the family=s education, skills, interests, and talents. The assessment will also include an evaluation of employment potential and the identification of major obstacles to achieving self-sufficiency. (Sample interview sheet attached.) The needs assessment will be conducted by the FSSP Coordinator. It is this assessment which will result in an Individual Training and Service Plan (ITSP) for the family. The ITSP will include:

- The activities and services needed by the family to a achieve and maintain self-sufficiency.
- Source of needed services and resources and how they will be

- provided.
- Schedule for completion of activities and provision of services.
  - Participating family=s responsibilities.
  - Coordination of service delivery.
  - Family evaluation scale

The ITSP will adhere to a maximum 5 year term, with up to a discretionary maximum 2 year extension, for the completion of all activities. Once an ITSP has been completed, a Contract of Participation will be written between the Department of Human Services and the participating family.

#### **IV. Program management.**

The primary objectives of the program management component of the FSSP are two-fold: to provide overall management of the FSSP, including coordination of services through the participating agencies; and to provide individual case management services to each participating family to ensure compliance with their respective ITSPs and contractual responsibilities.

Management of the FSSP will have the following two components:

- 1) Day to day coordination. The FSSP coordinator will be responsible for implementing effective administrative practices and procedures; establishing adequate record keeping, reporting, and quality control systems; and maintaining good communication with the members of the PCC and agencies providing support services. The FSSP Coordinator will also be responsible for executing and administering the Individual Contract of Participation.
- 2) Individual case management. The FSSP Coordinator will be responsible for the case management activities of the families participating in the ITSP and Contract component. The case manager will establish a good working relationship with each family to ensure services are provided as appropriate and that the family is meeting the responsibilities and schedule of activities provided in the ITSP and Contract.

#### **V. Evaluation.**

The primary objective of the evaluation process is to serve as an assessment of accomplishments relative to the goals and objectives established for the Family Self-Sufficiency Program (FSSP) and to provide the basis for any changes in policies or procedures.

The FSSP Coordinator will provide quarterly updates to the PCC for review and recommendations. The FSSP Coordinator will also provide an annual evaluation to the PCC in August of each year. The annual evaluation will be used to adjust policies, procedures, time tables, etc. to meet goals and objectives of the FSSP. The evaluation will include the following items:

- An assessment of progress measured against the established goals and objectives for the FSSP.
- An assessment of the implementation plan and schedule.
- A report on individual participant accomplishments.
- A report on obstacles to self-sufficiency based on current circumstances and participant needs.
- Recommendations for changes and adjustments based on the information gathered.

## **ADMINISTRATIVE ISSUES**

### **I. Selections of participants.**

The process for selecting participants for the FSSP will generally be in accordance with the procedures outlined in Section 5.2. However, more specific selection methods (i.e., screening, interviews, etc.) and criteria may be developed by the Selection Committee of the PCC. The FSSP application forms will be developed by the FSSP Coordinator.

### **II. Contract of Participation.**

A Contract of Participation will be executed by and between the Department of Human Services and the designated head of the participating family.

The term of the Contract is 5 years from the effective date. Extension of the term, up to 2 years, will be provided for good cause by the Department if requested in writing by the participating family.

During the term of the Contract, the head of the family and all participating family members will complete the activities within the completion dates stated in the Individual Training and Service Plan. The participating family must comply with the terms of the contract. The head of the family will seek employment (i.e., actively apply and interview for jobs) and, after completion of applicable job training programs specified in the individual

training and services plan, maintain suitable employment based on the skills and education of that individual and available job opportunities. The determination of suitability of the employment will be made by the Department and PCC in consultation with the head of the participating family. Final decision regarding suitability of employment will rest with the Department.

### **III. Program termination and grievance procedure.**

A participating family may be terminated from the FSSP prior to the expiration of the term of its Contract of Participation for any of the following reasons:

- 1) When the Department determines that the head or participating family member has failed to fulfill the terms of the Contract and any extension thereof.
- 2) Withdrawal of the family from the Family Self-Sufficiency Program.
- 3) Mutual consent of the parties.
- 4) By such other act as is deemed inconsistent with the purpose of the Family Self-Sufficiency Program by operation of law.
- 5) When the family is no longer receiving any public assistance.

Participating FSSP families may request an informal hearing by the PCC to consider whether a decision to terminate is in accordance with law and applicable Department policies.

## **Appendix A**

### Community Needs Assessment Template



Charlotte County Department of Human Services

Family Services Division

**2010 Community Action Plan Update**

**Community Needs Assessment Template**

(Adapted from the Missouri Comprehensive Community Needs Assessment)

## INTRODUCTION

Community Action Agencies have been key players in the war on poverty since their inception in the 1960's. They are uniquely qualified to examine the needs of communities and individuals as they strive to eliminate poverty because Community Action Agencies work directly with low-income individuals and families, and so deal with the problems of poverty on a daily basis.

In addition, Community Action's unique Board structure requires that at least one-third of its members be representatives of low-income persons, one-third be elected public officials (or their designees), and the remaining members be representatives of the private sector. This tri-partite structure promotes a variety of viewpoints and expertise on both the issues and solutions affecting those in poverty. In most cases, Community Action Agencies provide a wide range of services that address a variety of poverty problems.

Why then, does poverty continue to affect so many Americans? How can Community Action Agencies develop improved and effective strategies to help people move out of poverty? Before deciding on what to do, Community Action Agencies must determine what NEEDS to be done in the communities in which they work. Before developing a deep understanding of the current conditions, likely future trends, and issues of most concern within the community(s) they serve. In order to do so, Community Action Agencies should conduct periodic Comprehensive Community Needs Assessments of their communities.

### Conducting a Comprehensive Community Needs Assessment

A multi-level community needs assessment process can aid agencies in looking beyond the current status quo, and help provide guidance in the planning process for improving services and programs to combat poverty.

A comprehensive picture of the current community conditions, combined with an in-depth understanding of the causes of current poverty conditions is indispensable to the development of strategic goals. This picture of current conditions can do many things:

- Guide board governance in sound decision making
- Create opportunities for community buy-in to the agency's planning process
- Create opportunities for new alliances and connections with new partners
- Form successful strategies
- Insure services meet the current needs of the community
- Build credibility
- Provide a foundations for pursuing new/different funding
- Guide staff training and educational planning
- Enhance CAA's capacity to respond to change
- Generate authentic input from stakeholders
- Indicate causes as well as conditions of poverty

Many organizations conduct community assessments "because we have to" - as a requirement for receiving funding. For many years, all types of agencies and organizations became caught up in a 'program maintenance' mentality, and needs assessment often became skewed in an effort to prove the need for a program or programs so that funding source criteria could be met. In some cases, an organization's needs assessment became an annual (or semi annual) collection of data to *prove* a need. Sometimes, those conducting the assessment held his or her breath to see if the statistics changed for the better - because if that happened (the service area didn't show as much need), an agency might receive less funding.

Many times agencies conduct multiple need assessments (one for each separate program or grant) rather than undertaking one comprehensive assessment that takes a look at the entire community and its overall needs. By undertaking one comprehensive assessment and asking a range of questions, agencies can better coordinate services, direct change rather than just maintain the status quo, and set the framework for innovation in service delivery.

For Community Action Agencies, the Community Service Block Grant (CSBG) requires each CAA to compile a community needs assessment (rather than just a program-focused needs assessment). In examining an agency's community needs assessment process, for Community Action Agency Assessment tool uses the following criteria:

### **I E. Community Needs Assessment**

1. At risk	There is little or no needs assessment data, and the agency has no system for synthesizing available data to guide the direction of comprehensive agency strategic or operational plans.
2. Insufficient but making progress	There are needs assessment for specific programs required by funding sources. The data are only used to meet program requirements.
3. Sufficient	Systems exist for utilizing the program needs assessment data on an agency level or for disseminating funding within the agency. There is a regular conducted, board based community needs assessment and a system is in place to utilize the data across program lines.
4. Sufficient and making strides toward excellence	There is a regularly conducted, broad based community needs assessment and a system is in place to utilize data in developing the agency strategic plan and in formulating goals and objectives.
5. Excellent	The agency meets the criteria in 4 and the information from the needs assessment is used in formulating agency goals and objectives in which the board members were involved and approved. Information is also shared with the community, local policy makers and legislators. The agency needs assessment and strategic plan are utilized in seeking funding through government and private funding sources.

Excerpt from the Missouri Community Action Agency Assessment, Compiled by David Tucker for the Missouri Association for Community Action, Inc. February, 2004, revised August 2001.

Community assessments can and should be more than just a gathering and analyzing of data, they can also be a basis for creating change. A comprehensive community based needs assessment can help an agency address family needs by providing a snapshot of families in the service area, including their economic well being, educational status, health and welfare. A comprehensive assessment can provide important community information as to which other agencies or organizations may be working on addressing particular issues, and where gaps in the community services lie. It provides a mechanism to meet and develop partnerships with other community groups interested in strengthening services to citizens in the area. Finally, a comprehensive community needs assessment helps an agency in its planning process by providing the foundation for strategic and operational planning, assessing the agency's impact on meeting the needs of the community, determining what programs or strategies may have become obsolete, and deciding what strategies may provide new opportunities for the agency and the community.

### **A Template for Conducting a Comprehensive Community Needs Assessment**

There are multitudes of techniques used to conduct needs assessments – gathering statistical data, conducting focus groups, surveying community groups and organizations, interviewing target groups, and assessing the asses in a community, to name a few.

This template is divided into three main areas:

- Gathering the data needed to understand the community
- Analyzing the data to develop an informed view of community issues and trends
- Using the information to help prioritize issues as a prelude to developing strategic planning goals

Each of the topics listed under the 'Data Gathering' section of this template addresses an issue area related to poverty. Included in each section is a list of potential survey questions, possible sources of data, other community assessments and plans that can be used for reference, and a sample of potential community partners that can assist in gathering useful data. Each section also includes a listing of recommended questions and data sets. However, the sampling questions and data sets are just that – recommendations.

Even so, if the Charlotte County Action Agencies begin their needs assessment process by gathering and using the same basic data and information, Community Actions could build a compilation of information which could be used to gain a better understanding of poverty. Each agency could, of course, also gather additional information that may be unique to their local communities.

### **TIMELINE**

The timeline for conducting a needs assessment can vary greatly and oftentimes can take longer or shorter depending upon the staff available, workloads, and size of the community being examined. The following is provided as a rough guide:

- Surveying-At least two weeks (if one is able to keep the survey open for a month, the agency has the opportunity of reaching a wider variety of clients).

- Electronic surveying-1 to 2 weeks
- Focus groups-usually one month from beginning until end. The number should be sufficient to cover the community area
- Secondary data collection-may be done throughout the process
- Analysis and interpretation-2 weeks with reporting out and a focused discussion at the end
- Issue prioritization-1 to 2 meetings

### **STEPS IN THE PROCESS**

1. Develop overall plan for the Comprehensive Community Needs Assessment process
2. Set the timeframe and timeline for completing process
3. Determine who will be the primary team to oversee the assessment and who will be responsible for the data collections, surveying, and information gathering
4. **(Data Gathering)** Conduct the surveys, focus groups and interviews and collect the data
5. **(Strategic Analysis of Information)** Set up a cross functional team representing different programs and from across the agency structure as well as interest board members for review of the information
6. **(Strategic Analysis of Information)** Break into individual issue teams, based on team members' interest, expertise, or other criteria for review of the issue areas and discussion
7. **(Prioritize Issues)** All teams meet together for reporting out and focused discussion to prioritize the issues

### **DATA GATHERING**

#### **SURVEYS**

The agency will want to conduct some form of survey to determine 'felt' needs to supplement that data that is gathered. An agency should consider surveying not only existing clients but also partners, community leaders, vendors and other service providers.

1. Determine the questions to ask. The suggested questions in this document have been used by Community Services Inc. of Northwest Missouri. They are short and to the point. By adding an 'other' category, respondents may add their own comments as well.

In addition, the Missouri Association for Community Action has available a Missouri Community Scale and Community Assessment Tool developed by Annette Backs Edwards as a tool for community analysis. This tool provides an excellent set of questions one can choose from when conducting surveys, focus groups and personal interviews.

2. Determine the types of people to ask
3. Determine the method of asking the questions – on site, mail, electronic

For surveying clients you might have surveys available at all intake locations for clients to fill out. They could be distributed to Head Start families to fill out when services are provided, during parent nights, or policy council meetings. You may choose to mail the survey out to clients in a separate mailing or with other information you are distributing (The return rate may be small, therefore utilizing the mail as your only means of intake is not recommended).

Include the surveys in all courses that your organization may be involved in (leadership, life skills, or homeownership).

Considerations:

-You may want to also have the document translated into native languages or your clients if you serve high immigrant population.

-When determining a time limit for the surveys, think through when or what may affect the number of clients you might see – what times of the month do clients come in with certain needs?

-If using mail, consider the cost as you should include a self-addressed stamped envelope for replies.

-Asking a client the questions verses asking them to fill out a questionnaire. This will entail training to the staff to insure the questions are being asked in the same manner.

For surveying your partners, service providers, and community leaders, begin by compiling a listing of those who you want to contact. Personal interviews while often preferred cannot always be accomplished due to time. Other means may be to mail the survey, or use an electronic survey document such as Survey Monkey (<http://www.surveymonkey.com>) or Zoomerang (<http://www.zoomerang.com>). Notifying the partners, service providers and community leaders of this survey can easily be done via e-mail with a friendly reminder sent half-way through the open time period. Analysis of both of these surveys will not only provide a picture of how partners, leaders, and others in the community perceive need – which may not always be the same.

#### FOCUS GROUPS AND PERSONAL INTERVIEWS

Another manner of gathering data is holding a number of focus groups. This process can be used to further determine community needs and concerns. “Needs assessment surveys typically have written, closed-ended, relatively narrow questions which are quantitatively scored. Such surveys can be very useful; but they usually can’t capture all that a person is thinking or feeling. Responses in a focus group, on the other hand, are typically spoken, open-ended, relatively broad, and qualitative. They have more depth, nuance, and variety. Nonverbal communications and group interactions can also be observed.

Focus groups can therefore get closer to what people are really thinking and feeling, even though their responses may be harder – or impossible – to score on a scale.” (Community Toolbox, University of Kansas).

Participants in the focus groups can be made up of cross functional agency staff members, board members, community leaders, other service providers, vendors, clients and partners. Keep in mind how to arrange the focus groups for maximum openness and encouraging participation. Always remember the perceived and real power structures in the community arena including the relationships between clients and staff.

Focus group or personal interview questions such as the following can give a good sense of how the community feels about poverty:

- What would our community look like without poverty?
- What keeps families in poverty?
- What should we do to address poverty?

A final way to gather viewpoints as to the felt needs in the community is to conduct person interviews with the clients, partners, staff, and community leaders. Personal interviews allow for you to delve deeper into various aspect of the questions, however, the process of personal interviews will take more time.

General questions for partnership focus groups or personal interviews could include the following:

- Do you address this issue or need in the community? (Education, housing, employment, day care, etc.)
- How do you address this issue? (Advocacy, direct, service, referral)
- What do you see are the challenges facing this issue in the community?
- Who else is working on this issue in your area?
- How would you know your programs were successful?

## SECONDARY DATA COLLECTION

Perhaps the most daunting of tasks in a community assessment is determining how much and what data to gather. Equally important is the examination of the data after it has been gathered. This document proposes a set core date suggested for collection that will aid in painting the picture of poverty in Charlotte County. Individual agencies may also choose to collect other data specific to their unique area. The suggested data revolves conditions affecting poverty- employment, use of income, education, housing, nutrition, transportation and health. The Data section under each condition list, where to access various statistical information, and a listing of questions that are a part of statewide MIS system which can give agency additional client information.

Depending upon the timing of the needs assessment, some data may not be as recent as desired. At times, there is no other data available outside of estimates that may be provided. However, the agency can still use this data especially if supplemented by information form clients, surveys and other methods suggested for gathering information.

## PRELATED PLANS FROM OTHER SOURCES

Many communities and organizations have likely already undertaken a number of plans covering the same geographic are that the Community Action Agency covers. These plans provide a wealth of knowledge for the agency and inform the agency of what other programs are active in the region. The challenge of many regional plans is that other regional agencies often to not have the same boundaries as the lead organization in poverty matters. It is suggested that the local action agency look at other plans that touch on at least one issue area or aspect of the community needs assessments. By examining the plans, an agency can see what is being proposed by other groups, can adjust their plans if needed, or become active partners in helping the other agencies achieve their plans if the goals and objectives are a good a match.

## OTHER SOURCES OF INFORMATION

Just as there are various methods for gathering information, a variety of sources can contribute information to an assessment. Customers, partner groups and organizations, other service providers, community leaders, Community Action staff and board members, and agency vendors can each provide unique insights into local poverty conditions. Part of the process of determining which sources to gather information from should include a

method for establishing the technique (individual interviews, focus groups, surveys, etc.) that will work best for each source of information.

## **DATA GATHERING ISSUE AREA – EMPLOYMENT**

Understanding the employment situation in the community provides the background necessary for determining what type of jobs are available, what are the salaries available in the area, what skills business and industry are looking for and what it takes for a family to become self-sufficient.

The poverty rate determined by the federal government is based on a 40 year old formula which determined that Americans spent approximately 1/3 of their after tax income on food. Based upon three times the cost of minimum (lowest) food plan the Department of Agriculture developed for an American family, the poverty rate does not consider any factors such as housing, child care, transportation, or health care costs. While understanding and knowing the poverty rate in the community can be useful, looking at the numbers of persons living below a county self-sufficiency rate, compared to the average county wages, may reflect a more accurate picture of the conditions among the 'working poor' of the area.

### **Survey, Focus Groups and Person Interview Questions:**

Employment is a problem in this area because:

- People lack skills to obtain a job
- Unable to find jobs in the area
- People lack education to obtain a job
- Lack of good paying jobs with benefits
- Lack of child care during the hours needed
- Lack of computer skills
- Cost of child care
- Few jobs for people without skills
- Current jobs are low paying
- Cost of transportation
- Long commute to jobs
- Employers leaving the area
- Lack of transportation

### **Secondary Data:**

Unemployment rates

Source: <http://www.labormarketinfo.com/Library/LAUS.htm>

Average County Wages and Sustainable Wages needed in County

Source: [http://www.floridaedo.com/pdf\\_folder/Demographic\\_Profile.pdf](http://www.floridaedo.com/pdf_folder/Demographic_Profile.pdf)

Top 10 Employers

Source:

High School Graduation Rates

Source:

Average Childcare Costs

Source:

Licensed Childcare Facilities in County

Source:

Childcare Waiting Lists

Source:

Commuting Statistics

Source:

Income, Employment, Earned Income Tax Credit Information

Source:

*MIS Assessment*

1. Please answer the following regarding the employment status for family members:

- Currently working
- Full-time employment earning minimum wage or less
- Temporary full-time
- Temporary part-time
- Part-time employment
- Retired
- Disabled
- 14-25 years old and not working
- Unemployed less than 3 months
- Unemployed more than 3 months
- Full time homemaker
- Unemployed never worked
- Not applicable, young child

2. If you could improve your current employment what areas would you focus on?

- More hours
- Better pay
- Increased benefits
- Increased responsibilities
- Reduced required overtime
- Change career or position
- Job stability
- Location of job
- Flexible working hours
- Not applicable

3. Please identify your strengths and barriers for employment?

- Formally trained for certified skills
- Skills gained from experience
- Positive work history
- Education
- Dependable transportation
- Dependable childcare
- Other strengths
- Lack of reliable transportation
- Lack of reliable childcare
- Permanent health/disability problem
- Temporary disability problem
- Lack of High School Diploma/GED
- Pregnancy

- Emotionally unable to work
- Lack of Adult Dependant Care
- Discrimination (age, race, gender)
- Other barriers
- No barriers

4. Do you need any of the following employment services?

- Unemployment
- Support achieving goals
- Workforce Employment Services of SW Florida
- Career search
- Shelter workshops
- Skills training
- Business ownership
- Job seeking
- Vocational rehabilitation

**Related Plans:**

WORKFORCE INVESTMENT BOARDS

Source:

LOCAL ECONOMIC DEVELOPMENT

Many regional planning commissions are designated the Local Development Districts through the Economic Development Administration of the US Department of Commerce. Charlotte County's Economic development website can be found at:

**Potential Partners:**

Partners in your discussion include the aforementioned groups as well as

- Local governments
- Chamber of Commerce
- Economic Development Agencies

**DATA GATHERING  
ISSUE AREA – EDUCATION**

Data and information on the educational levels of clients as well as the issues surrounding access to education provide the framework for helping to move people from poverty into self-sufficiency. It has been shown that low income children who attend Head Start are more likely to graduate from high school and attend college (National Center for Children in Poverty). In addition, every year of college increases one income. If your agency's programs include providing Head Start and Early Head Start close coordination is encouraged in this section to reduce duplication of efforts.

**Survey, Focus Group and Personal Interview Questions:**

- Education is a problem because
  - No high school diploma
  - Lack of GED
  - Lack of access to programs for obtaining GED
  - Cost of childcare

- Lack of childcare
- Lack of computer skills
- Lack of programs for gaining computer skills
- Cost of transportation
- Lack of transportation
- Lack of tuition money
- Lack of vocational skills
- Lack of access to programs teaching vocational skills
- Lack of college education
- Threats of violence in schools
- Lack of dropout prevention programs
- Lack of preschool programs
- Lack of knowledge of available educational opportunities

**Secondary Data:**

Charlotte County Public School's Elementary and Secondary directory

Source: [www.yourcharlotteschools.net](http://www.yourcharlotteschools.net)

Elementary and Secondary Data

Source:

(Accessible by School District)

Summary Reports – Profile IV provides a summary of pupil data

Educational Performance Data

- Dropout rates

- Graduation rates

- Graduate Analysis (where students went after graduation)

- High School Graduate performance report (report those who graduate from college)

Births to mothers with out High School Diplomas

Source:

Average Childcare costs

Source:

Licensed Childcare facilities in County

Source:

Colleges, Universities, Trade Schools in the area

Source:

Educational levels

Source:

Number of children eligible for Head Start

Source:

Number of children participating in First Step program

Source:

Number of children with disabilities receiving services

Source:

Resources for those with disabilities

Source:

*MIS Assessment:*

1. Please answer the following questions regarding education for family members.  
Satisfied with education

- Would like to improve reading skills
- Would like to improve writing skills
- Would like to improve English or language skills
- Would like to improve math skills
- Would like to obtain a GED\
- Would like training in a specific area
- Would like to earn a two or four year degree
- Other areas of improvement

2. Please answer the following regarding strengths and barriers to education for family.

- Done well in school before
- Have support for education, including family
- Have specific educational goals
- Dependable transportation
- Dependable childcare
- Other strengths
- Lack of transportation
- Lack of childcare
- Previous difficulty with school
- Lack high school diploma or GED
- Cost of school a problem
- Language issues a problem
- Discrimination (age, race, gender)
- Other barriers

3. Do you need any of the following educational services?

- One on one support achieving goals
- ABE/GED Classes
- Vocational Rehabilitation
- Workforce Training
- Financial Aid / Scholarships
- Specialized skills training
- Community College/University
- Literacy/Reading tutoring
- English as a second language

4. Please answer the following questions regarding Head Start services

- Already enrolled in Head Start
- On waiting list for Head Start
- Needs Head Start
- Not interested in Head Start
- Enrolled in Head Start
- Enrolled in Early Head Start
- On waiting list for Early Head Start
- Needs Early Head Start
- Not interested in Early Head Start

**Potential Partners:**

Charlotte County Public Schools

Pre-school Providers  
Private School Officials  
Vocational, technical and college placement officials  
Local Parent as Teachers Program  
First Step Program

Related Plans:

Workforce Investment Board Plans referred to earlier have reference points related to education needs in the area and should be reviewed.  
School District Strategic Plan

### ISSUE AREA – HOUSING

Finding affordable housing (both rental and housing for homeownership) continues to be a challenge for many Americans. Safe, decent, sanitary and affordable housing provides not only shelter for clients, but stabilization for children, and in cases of homeownership – housing becomes a way to build and retain an asset for the future. The foreclosure crisis and tightening of the lending market has added to the need for affordable rental housing as well as the need to address the vacant homes to stabilize neighborhoods. The recent crisis also has renewed emphasis on how much a family should be paying toward housing and utilities. Finally examination of homes in light of their energy consumption and costs broadens the understanding of the housing issue in the service area.

Data Elements:

Rental Vacancy rates  
Owner occupied vacancy rates  
Average costs of homes  
Fair Market Rents  
Foreclosures  
Percent houses overcrowded  
Number of homeless children  
Number of unsafe, unsanitary homes  
Section 8 wait lists  
Housing Authority wait lists  
Housing affordability (hourly wage a worker must earn to afford housing)  
Number of families using Emergency Utility Assistance  
Number of families using Low Income Home Energy Program assistance  
Average dollar amount of Emergency Utility Assistance Payments  
Average age of houses  
Number of homes weatherized

Survey Questions:

General (check off type) Questions:

Housing is a problem in this area because

- Cost of rent/house payment
- Cost of utility/rent deposit
- Housing size doesn't meet family needs

- \_\_\_ Lack of temporary emergency housing
- \_\_\_ Affordable housing not available
- \_\_\_ Need weatherization
- \_\_\_ Need repairs (roof, foundation, plumbing, etc.)
- \_\_\_ Where housing is available, neighborhood conditions are not acceptable
- \_\_\_ Lack of shelters for emergency situations (domestic violence)
- \_\_\_ Lack of shelter for emergency situations (natural disaster)

Sample Community Scale Questions (scale 1-10):

1. To what extent is there affordable housing in the low-income community
2. To what extent are you able to find affordable housing suitable for your family size within your community?
3. To what extent are organizations such as Habitat for Humanity and other non-profit builders active in the low-income community?
4. To what extent are you able to stay in the same dwelling from year to year (e.g., you are not forced to move every year due to rising rental costs)?
5. To what extent do you feel you would lose your housing if you were unexpectedly unemployed?
6. To what extent do you feel you could purchase a home in your community?
7. To what extent do you feel you have options in term of the price you pay to live within your community?
8. If you needed to find temporary shelter, to what extent would you be able to find someplace within your community?
9. To what extent do you feel there is assistance available in your community for landlord/tenant disputes?

MIS Questions:

1. Do you have any of the following housing problems? (Listing)
2. Does your home have the appropriate number of bedrooms?
3. Monthly amount your family pays for housing
4. Would you be interested in owning your own home?
5. Does your family receive subsidized housing?
6. Has your home been weatherized?
7. What is your primary heat source?
8. What is the average cost of heat per month?
9. If you are homeless, please check all that apply to you. (Listing)

Potential Partners

Building Officials, Planning Officials, Zoning Officials  
 County Assessor  
 Local Community Development Departments  
 Local Office of Rural Development (USDA)  
 Local Realtors  
 Housing Authority  
 Housing Corporation

Related Plans

Local Affordable Housing Plan  
 State Consolidated Plan

Economic Development  
Florida Housing Plans  
Regional Planning Commission plans  
Governor's Council to End Homelessness

## ISSUE AREA – NUTRITION

Those struggling in poverty as well as many families moving out of poverty find it difficult at times to provide food for their families. Food pantries are seeing many new clients who are oftentimes working more than one low-wage job or have recently lost employment. Children can not learn and parents find it difficult to work when hungry and undernourished. Rising obesity rates among children and adults leads to increasing health issues and costs. Addressing hunger and nutritional needs is *basic* to moving people into self-sufficiency.

### Data Elements:

Number of children receiving free/reduced lunch  
Average number of recipients receiving food stamps  
Total food stamp benefits received  
Number of food pantries  
Number of households served by food pantries  
Number of grocery stores in the community  
Number of farmer's markets  
Number receiving WIC (Women, Infant, Children) aid  
Number eligible to receive WIC  
Number of Senior Nutrition Centers

### Survey Questions (General Check off):

Nutrition is a problem in this area because:

- Lack of transportation to available grocers
- Not enough income to purchase food
- Food stamps run out before end of month
- Don't use resources available
- Not eligible for food stamps
- Lack of education in nutrition
- Alternative food resources not available (pantries)
- Lack of food

### Sample Community Scale Questions

1. To what extent are there senior citizen centers located in areas accessible to elderly members of the low-income community?
2. To what extent does your organization utilize senior citizen centers for the provision of services to elderly members of the low-income community (e.g. adult day care, card clubs, meal delivery)?
3. How does your organization help to coordinate school-lunch programs for low-income children?
4. Is there a reduced fee/free school-lunch program at the school your child(ren) attend?
5. To what extent are there enough community organizations providing community supports to met the needs of the low-income community (e.g., community members

aren't required to wait in long lines at distribution points for food stamps or WIC benefits).

MIS Questions:

1. Is your food supply adequate?
2. Does your family have any barriers to obtaining and preparing nutritious meals?
3. Do you need WIC?
4. Please mark any of the following that apply to your family's situation (Listing).
5. Do you need food stamps?

Potential Partners

Local food pantry

Social Services office

Local ministerial alliances

Grocers

Local farmers groups

Area Agency on Aging

Meals on Wheels program

Related Plans

Food Bank information

State Nutritional and Food Action Plan

### ISSUE AREA – USE OF INCOME

All Americans face challenges relative to use of income. As a society, we are constantly bombarded with commercials wanting to sell us the latest and greatest. Those of low income are not the only persons facing crisis in money management with debt spiraling and costs of health care and other items rising. The recent downturn in the economy shows that in fact, many Americans are living one paycheck away from financial crisis. According to the Corporation for Enterprise Development (CFED), the foundation for reaching the American Dream "rests on two pillars: first, a family's ability to build assets that can be used to invest for the future, send children to college, and weather unexpected financial storms; and second, safety nets and safeguards that provide financial security in the event of a job loss, medical emergency, or other life events that could otherwise put a family in a tailspin." The information community gathers on use of income can help an agency think about services which can lead to individuals building their safety net and eventually achieving many goals.

Data Elements:

Income Levels

Persons receiving Temporary Assistance for Needy Families

Children receiving free/reduced lunch

Recipients receiving food stamps

Total food stamp benefits received

Earned income Tax Credits received and average return

Number receiving SSA and/or SSI benefits

Average SSA or SSI benefit amount

Average household size receiving SSA and/or SSI benefits

Number paying child support  
Number receiving child support  
Average child support amount paid/received  
Number of payday loan, check cashing businesses  
Number of banks, credit unions, savings and loan businesses  
Number of pawn shops

Survey Questions:

Use of income is a problem in this area because

- Lack of knowledge of budgeting
- Difficulty with money management
- Lack of use of earned income tax credits
- Lack of knowledge about savings

Sample Community Scale Questions:

1. To what extent are there opportunities for low-income persons to participate in savings programs in your community?
2. To what extent do you feel you could apply for and obtain a savings account at a bank in your community?
3. To what extent do local banks offer community development loans to members and organizations in the low income community?
4. What kinds of financial counseling or budgeting assistance does your organization provide for families in order to determine affordable monthly payments and develop budgets to help ensure families will not lose their homes?
5. To what extent is there financial counseling and budgeting assistance to members of the low-income community?

MIS Questions:

1. Which of the following is true of your family's income?
2. Which of the following is true regarding your family and child support?
3. How does your family manage money?
4. What past due bills does your family have?
5. Does your family have any of the following credit debts?
6. Regarding your family's taxes, please check all that apply.
7. In the past six months has your family done any of the following to meet basic needs?
8. Has your TANF, Medicaid or FSS been sanctioned?
9. How much longer will you be receiving TANF?
10. Are you interested in budgeting and/or financial education/training?

Potential Partners

Local Banks  
Local Credit Unions  
Local Savings and Loans  
Schools

Related Plans

Local bank Community Reinvestment Act reports and plans

## ISSUE AREA – TRANSPORTATION

In recent years, transportation accessibility has been a focus area for Charlotte County. Charlotte County's rural/urban mix makes transportation a challenge for the community. While public transportation is available, it does not run on a schedule benefiting those employed or seeking employment. Available, affordable transportation is another key element to self-sufficiency.

### Data Element:

Commuter trends

Public Transportation trends

DAR Ridership

Sunshine Ride Ridership

### Survey Questions:

Transportation is a problem in this area because

- Lack of knowledge on how to buy a car
- Cost of buying/down payment for a car
- Lack of credit to buy a car
- Cost of maintaining a car
- Cost of car repairs
- Cost of gasoline
- Lack of help in learning to drive or getting license
- Limited public transportation

### Sample Community Scale Questions:

1. To what extent do public transportation routes cover the needs of the low-income community?
2. To what extent are you able to obtain transportation to the nearest town or commercial center during business hours when you need to?
3. To what extent are you able to obtain transportation to the nearest town or commercial center to participate in recreational, social or cultural activities?
4. To what extent are you able to obtain transportation in the case of an emergency?
5. To what extent are bus stops located in well-lit and safe areas?
6. How frequently do public transportation routes run in low-income neighborhoods?
7. Are reduced fares for children and elderly riders of public, rural and shuttle transportation available?
8. Have you ever not been able to go to an appointment or meeting due to inability to afford transportation?

### MIS Questions

1. Dependable transportation?
2. Lack of reliable transportation?
3. Lack of transportation for health services

### Potential Partners

Regional Planning Commissions

Local Economic Development Department  
Chamber  
City/County Government  
Local Highway District

Related Plans  
TD Plan  
MPO plan

## ISSUE AREA - HEALTH

According to Families USA, 86.7 million people under the age of 65 in the United States went without health insurance for some or all of the two-year period from 2007 to 2008 and one out of three people (33.1%) under the age of 65 was uninsured for some or all of 2007-2008. Information on health, access to health care and health care is important to understand because they go hand in hand toward helping individuals and families to be successful.

### Data Element:

Medicaid and Medicare providers  
Birth to Teens  
Number of doctors in the area accepting Medicaid  
Number of dentists in the area accepting Medicaid  
Number of Hospitals  
Number of Federally Qualified Health Clinics  
Waiting list for dental and health care at Federally Qualified Health Clinics  
Number receiving Cover Florida benefits  
Number receiving Medicare  
Number paying Medicare SMI  
Number paying Medicare Part D  
Number uninsured  
Number of Child abuse and neglect reports  
Cause of death numbers  
Number of mental health facilities  
Number of alcohol and drug treatment facilities  
Number of licensed counselors  
Number of in home health care workers

### Survey Questions:

Health care is a problem in this area because

- Doctors will not accept Medicaid
- No clinics or doctor offices in same town
- Waiting list for dental services
- Hospital/Emergency room not available in same town
- Lack of transportation
- Lack of insurance

- \_\_\_ Existing health conditions
- \_\_\_ Lack of income to pay for prescriptions
- \_\_\_ Lack of income for medical emergencies
- \_\_\_ Lack of resources for alcohol or drug abuse treatment
- \_\_\_ Lack of resources for mental health treatment

Sample Community Scale Questions:

1. To what extent are there multiple providers/companies offering plans for individual and family health insurance coverage within the low income community?
2. Approximately how many different health insurance providers are present within the low income community?
3. To what extent are primary care providers who participate in health insurance plans offered in the low income community located in areas accessible to the low income community?
4. In terms of proportion of a family's total income, how much do premiums for basic health insurance plans typically cost in your community?
5. To what extent are routine inpatient, outpatient and ambulatory procedures available at hospitals serving the low income community?
6. How long do low income patients typically have to wait to be seen for routine services and procedures at area hospitals?
7. To what extent do hospitals and/or community organizations sponsor support groups for families of patients and patients (e.g., burn care families, trauma families, single-mother newborns)?
8. To what extent are there specialists available in the low income community?
9. To what extent are low income individuals able to chose a primary care provider that they will establish and maintain a relationship (as opposed to reporting to a clinic an seeing whoever is available on any given day)?

MIS Questions

1. Has medical or prescription co-pays and deductions
2. Good health
3. Temporary health problems
4. Chronic health problems
5. Needs in-home health worker
6. Needs a home chore worker
7. Needs hospice services
8. Needs immunization services
9. Needs medical services
10. Needs dental services
11. Needs vision services
12. Needs drug/alcohol abuse services
13. Needs counseling services
14. Needs mental health services
15. Needs prescription medications
16. Needs family planning
17. Needs prenatal care

## Potential Partners

Local physicians, nurses  
Local Clinics or Hospital personnel  
Local Health Department  
Healthy Start Coalition  
Local faith-based providers

## Related Plans

Health Improvement Plans

## ADDITIONAL GENERAL STATISTICAL DATA

### Data Elements:

Population Change (2000-Current)  
Most current population estimates  
2000 population by sex and age  
Poverty rates  
Number of Children in poverty  
Number of households in poverty  
Number of seniors in poverty  
Number of homicides  
Number of domestic violence incidents  
Number of juvenile court referrals  
Immigration statistics (Change 2000-Current)

## **Part 2 – ANALYSIS OF INFORMATION STRATEGIC THINKING RELATIVE TO THE NEEDS ASSESSMENT**

The agency's vision should help to guide the next step of this process – the analysis of information. What makes a community needs assessment conducted by Community Action unique is the framework by which analysis takes place. The mission and vision of each agency and community action in general sets the tone for success.

Two considerations to keep in mind:

1. Is the vision of the organization to eliminate poverty? If so, the strategic thinking should push beyond continuing operating programs as has been done in the past. This is not to say current programs would be eliminated; however, they may be changed to ensure that the outcome of eliminating poverty can be achieved. Will an agency totally eliminate poverty? No, for people move up and out, there will always be others who, due to circumstances, will find themselves living on the edge and in need of assistance. However, within the frame of eliminating poverty one might ask when looking at the information – is this particular data a result of poverty or a cause of poverty or is the community's view of poverty realistic and how might it be changed to help eliminate poverty?
2. Is an agency's vision to stabilize families? Programs then can be thought of as tools to stabilize situations for families who can then begin the journey out of poverty. One

might ask questions such as what are the trends and causes of changes in data so that positive changes might be replicated.

The percentage or amount of time, finances, and staff to dedicate to each form of the analysis is up to each agency and the following questions are posed to help look at the data and information and help set the framework for moving into the next step of the planning process – prioritizing the issues to address and choosing what activities to focus on to best address the issue.

Why should the information be analyzed?

The information gathered is just that – information. The data (both statistical and agency gathered) gives a snapshot of the real and perceived conditions in the community. Analysis provides the opportunity to not only look at the needs but also discuss various assets the community has that can be brought to the table at the time of solutions. It puts the data into context. Without context, the information is meaningless.

Who should be involved in the strategic thinking relative to the analysis?

Needs assessments and their analysis provides an agency an opportunity to educate the board and staff about the community as a whole, discuss service delivery, and develop ways to work across programs to address the needs of the community. Often times, agency staff has ideas as to how to coordinate services and programs, but do not take the time to develop these ideas further. A cross functional team representing different programs and different levels within the agency and inclusive of interested CAAA board members as well as members of the Head Start Policy Council can lay the foundation as the agency moves from the needs assessment to the strategic plan, and the development of program activities. In addition, partners and stakeholders in the community can be a part of the analysis of the data and information. While they may not be involved in the decision making regarding the setting of action steps and implementation they can offer insight to data and information from a different prospective.

#### SUGGESTED PARTICIPANTS

Agency staff (frontline, middle management and upper management)

Members of the Board of Directors

Members of Head Start Policy Council

Members of other advisory and related internal boards

Community Stakeholders (service providers, local government planners)

#### STEP 1

Prior to assessing each issue area, the group should discuss general and issue specific statistical data. What does the population information show? Is there a growing minority population? Are many persons moving out of the area? How many persons, children and elderly are in poverty and has this changed over the years?

#### STEP 2

The group can then break into smaller sub groups if desired to discuss the statistical data and agency gathered data related to each issue area. The agency gathered information

brings to the discussion those perceived issues as well as an understanding of what is taking place in the community. This discussion time may also lead to some ideas for possible programs, outreach, and coordination. If this happens, make note of the ideas for future use by those preparing the strategic plan, but do not become side tracked by determining solutions as this is still the analysis stage. After discussing the issue areas, the groups can then report back to the larger body for the issue prioritization.

#### SUGGESTED ISSUE AREA QUESTIONS:

Suggested questions listed under each issue area are provided to facilitate the analysis discussion. The questions also ask about identifying root causes to an issue. A root cause is the basic reason a problem exists. Understanding the root cause to an issue provides a basis for solving the problem. It can be used to find which individual factors could provide targets for change, it can explore social causes, and it can uncover multiple solutions for a problem. The appendix provides a sample of using the "But Why" technique to help drill down to root causes of identified problems.

#### ISSUE AREA – EMPLOYMENT

What do the information gathered and plans reviewed tell us about the community?

- Is the unemployment rate low? If so, do businesses have a difficult time finding employees?
- Are there a variety of jobs available requiring different job skills? Do the jobs available predominately require only one or two types of skills?
- How close are the average county wages to the wage needed for a family to be self-sufficient? Are there plans for increasing wages in the community?
- What appears to be the predominate barriers to employment in the area?
- Is it easy for an individual to get to work? Are the community residences commuting to areas of higher wage jobs?
- Is child care readily available? Is there a need for child care outside the "normal working hours"?
- Are resources available to help persons find employment? How far must one travel to access these services?

What might be some of the root causes of the problems identified by this data?

What assets does the community have in this issue area?

- Are vacant buildings available to be used for training purposes?
- Are the job skills that are prevalent in the community ones that can be used to attract or start new businesses?

#### ISSUE AREA – EDUCATION

Will addressing this issue eliminate poverty or stabilize a family to help them move out of poverty?

What does the information gathered and plans reviewed tell us about the community?

- Is there a high incidence of students not completing high school? If so, are they able to get their GED? If there is a high incidence of drop-out and low GED attainment – why? Is there a correlation between low unemployment and high drop out rate? Is the drop out rate related to mothers giving birth?
- Where do students go after graduation? How many graduate from college?
- Is child care available for students to remain in school? Is child care available for adults to return to school or further their education? Do the hours of child care services relate to educational opportunities? (For instance, is care available for evening learning classes)
- Are their eligible children not taking advantage of Head Start or Early Head Start programs?
- Are there transportation issues affecting a family's ability to access education?
- What might be some of the root causes of the problems identified by the data?

What assets does the community have in this issue area?

- If a high number of students are remaining in the community, how can they participate in community work?
- Can an empty school building be used for other purposes?

#### ISSUE AREA – HOUSING

Will addressing this issue eliminate poverty or stabilize a family to help them move out of poverty?

What does the information gathered and plans reviewed tell us about the community?

- Is there sufficient diverse affordable housing in the community?
- Are financing alternatives available for homeownership?
- What is the connection between “use of income” credit issues and housing?
- Are utility rates creating a burden for community members?
- What is the relationship between available housing and homelessness in the community?

What would be some of the root causes of the problems identified by the data?

What assets does the community have in this issue area?

- Can the foreclosed houses be used for other purposes in the neighborhood?
- Are local lenders able to partner with you in providing classes or information on homeownership?
- What are the talents of the homeless population that could be tapped inot for the betterment of the community?

#### ISSUE AREA – NUTRITION

Will addressing this issue eliminate poverty or stabilize a family to help them move out of poverty?

What does the information gathered and plans reviewed tell us about the community?

- Are eligible children who receive access to meals during the school year receiving meals during the summer?
- Why would persons be utilizing the food banks on a regular basis?
- Is food accessible? (grocery stores, farmers markets)
- What type of food is accessible?
- Does transportation needs affect access to food?

What would be some of the root causes of the problems identified by the data?

What assets does the community have in this issue area?

- Are vacant lots available for development of community gardens?
- Is there a community kitchen available for training of food preparation and cooking classes?
- Do individuals want to start their own businesses related to food and food products?

#### ISSUE AREA – USE OF INCOME

Will addressing this issue eliminate poverty or stabilize a family to help them move out of poverty?

What does the information gathered and plans reviewed tell us about the community?

- Is there an apparent demand for budget information?
- Does the number of check cashing facilities reflect on a need not met by the financial institutions?
- Does the use of pawn shops reflect on the need for monthly cash or the need for cash to meet emergency needs?
- What are sources for emergency funds in the community?
- What educational information may be needed related to use of income?

What would be some of the root causes of the problems identified by the data?

What assets does the community have in this issue area?

#### ISSUE AREA – TRANSPORTATION

Will addressing this issue eliminate poverty or stabilize a family to help them move out of poverty?

What does the information gathered and the plans reviewed tell us about the community?

- Is there a relationship between employment and transportation (commuting, public transportation access)
- Is there a need for personal vehicles to help in transportation needs?
- Is there a relationship between access to food and transportation?
- How close are major services (education, health care, employment opportunities and grocers) to the community?

What would be some of the root causes of the problems identified by the data?

What assets does the community have in this issue area?

- Are there abandoned railways, trails or other areas that can be transformed to other transportation modes (bikeways, walkways)?
- Are there busses not longer in use that can be used for transporting people to jobs, medical centers or commercial areas?

## ISSUE AREA – HEALTH

Will addressing this issue eliminate poverty or stabilize a family to help them move out of poverty?

What does the data tell us about the community?

- Is there a relationship between access to health care and health care costs?
- How long does it take for an individual or family to get access to a doctor or to dental services?
- How far are emergency services from the community and what is the transportation means to access these services?
- Do the businesses in the community offer health insurance?
- Are there any excessive health concerns or conditions (pockets of chronic disease, high numbers of disease indicators)?

What would be some of the root causes of the problems identified by the data?

What assets does the community have in this issue area?

- Are there retired medical personnel that could provide guidance on the issue?
- Are there buildings that could be converted to clinics in various areas of the community?
- Is there a possible alternative transportation method to get individuals to appointments?

## PART 3 – ISSUE PRIORITIZATION

The last step in the needs assessment process is the prioritization of the issues to give the agency an idea of which area to focus on first. All of the issues are important and have an effect on poverty in the community. By prioritizing issues, an agency with limited time and resources can determine which issue to address, whether addressing one issue more comprehensively may help to solve other issues, and whether an agency should address an issue or let it be addressed by others. After prioritizing issues, the agency can then move on to determine goals, objectives and action steps for their strategic plan. Finally, prioritization can help the agency focus on areas for new funding, trying new strategies, developing more partnerships, integrating services and creating change.

### Prioritization Questions

One way to begin the process is to hold a general conversation around questions relative to each issue area.

1. What has been done in the past to address this issue?
2. Why should we be interested in this issue?
3. What can be done to address this issue?
4. Who (what agency, group, organization) should address this issue? Can the agency address the issue alone, who should partner with the agency to address the issue, who in the agency should address the issue?
5. Do we have control over this issue? Do we have control over an aspect of this issue? Control does not mean dominance. In this context it means the agency can actually effect change regarding the issue. For instance, can the agency create the jobs in the community, or can it train the potential employees for jobs that are created by others?
6. Do we have the capabilities (skills, funding and knowledge) to address this issue? Do we have to spend time and resources learning new skills or programs to help address the issue?
7. What programs do we currently have that can help address this issue?
8. What might we change in our way of doing business that could help address this issue?
9. If this is an important issue and we do not have the capabilities to address the issue, who can we partner with to help create the change and address the issue?

### Prioritization tools

There are various tools that can be used to help in the prioritization of issues. Through the analysis process a listing of issues more detailed than the general issue area might have emerged (for instance, instead of addressing the broad area of housing, the issue may actually be the rising number of foreclosed houses in a neighborhood or community). Prioritization tools help in reducing the large listing of issues into manageable numbers.

#### 1. Nominal Group Process

One of the first ways to begin narrowing down the multiple lists of issues is to use a nominal group process. The most common way this is done is to put on a large paper all of the issues and give the individuals in the group a certain number of sticky notes/dots/markers and let them "vote" with those dots the issues of their highest priority. Individuals may place one dot/marker on each concern or they may place all their dots on one area if they believe it is the one that is of highest priority. Counting up the dots then provides a reduced list of issues to further refine.

#### 2. Paired Comparison Technique

By using a paired comparison technique, the team can decide on which issue or issues are a priority. In addition, it may help in determining which issue or programs to consider reducing or eliminating. It directly compares one issue to another and allows for the group to decide between two equally important issues.

Process:

Set up a matrix identifying all the issue areas you have ranked as most important. You will only compare each set of issues once. Through your group discussions you

may have determined sub parts of the broader issue categories that need addressing rather than the whole category. For instance, perhaps the graduation rates in the area are adequate; however, there is a need for more pre-school services. The example below is utilizing the major categories; however, you should substitute other more defined issue areas that resulted from your discussions.

#### Initial Matrix for Discussion

	Employment	Education	Housing	Nutrition	Use of Income	Transportation	Health
Employment							
Education							
Housing							
Nutrition							
Use of Income							
Transportation							
Health							

Using information gained through your discussions of the issues, and thinking about whether addressing the issue will either end poverty or stabilize families, the individuals in the group will chose one issue as a priority over the other. The group facilitator reads each possible pair and individuals vote on which is the preferred choice to address first.

#### EXAMPLE OF COMPARISON CHOICES

Comparison	Preferred Choice
Employment / Education	Employment
Employment / Housing	Housing
Employment / Nutrition	Employment
Employment / Use of Income	Use of Income
Employment / Transportation	Employment
Employment / Health	Health
Education / Housing	Housing
Education / Nutrition	Education
Education / Use of Income	Use of Income
Education / Transportation	Education
Education / Health	Health
Housing / Nutrition	Nutrition
Housing / Use of Income	Housing
Housing / Transportation	Housing
Housing / Health	Housing
Nutrition / Use of Income	Nutrition
Nutrition / Transportation	Nutrition
Nutrition / Health	Health
Use of Income / Transportation	Use of Income
Use of Income / Health	Health
Transportation / Health	Health

After all the issues are compared one to one they are scored as to how many times an issue was chosen.

### EXAMPLE SCORING

Issue	# Times Chosen	Total
Employment	XXX	3
Education	XX	2
Housing	XXXXX	5
Nutrition	XXX	3
Use of Income	XXX	3
Transportation		0
Health	XXXXX	5

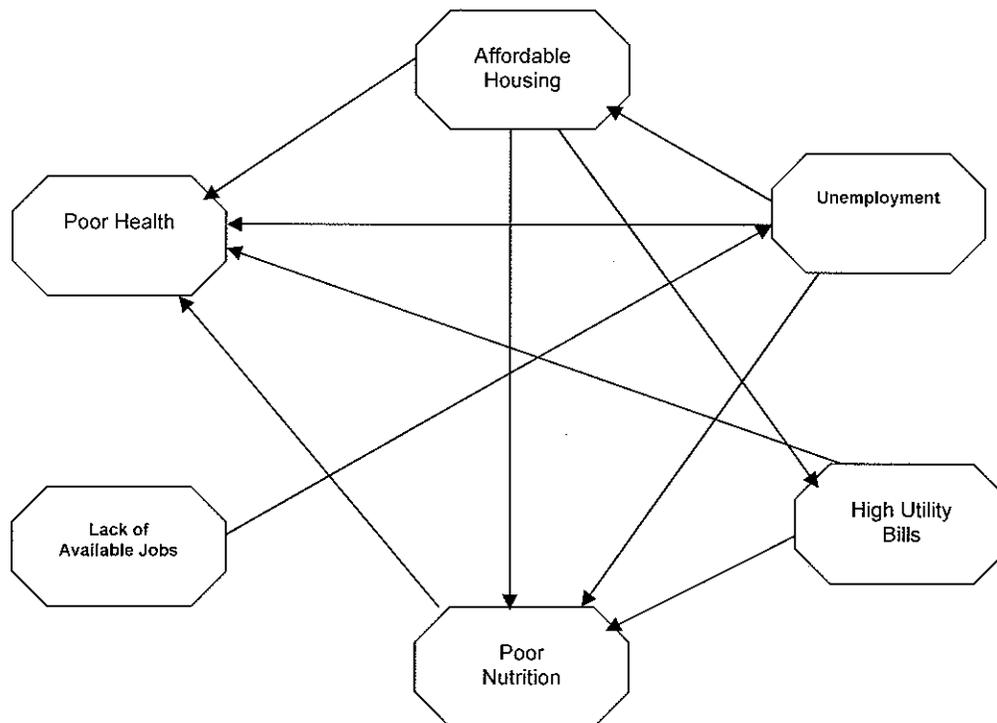
All ties go through the process again to come up with the prioritized issues. In this case, the new matrix would compare health, housing, employment, nutrition, and use of income. If another tie results, you would then repeat the process until a final prioritization results with no ties.

### 3. Interrelationship Diagram

A third way to help determine what issue to prioritize is to examine the interrelationships between the core causes of poverty. It helps you to see how addressing one issue may affect another issue.

Process:

Begin by listing the top 5 or 6 issues in a circle on a piece of paper. Starting with the first issue, ask whether addressing it will affect the next issue, the third issue, etc. If it will affect the issue, draw an arrow to the issue. If addressing the second issue will affect the first, draw an arrow from #2 to #1.



The issue having the most arrows going outward will have the most affect on others and therefore might be the one to consider as the first priority.

#### 4. Force Field Analysis

A final tool to aid in prioritization takes a look at the various forces that are in play around the issue. What forces are keeping the situation the same? What forces are causing it to change?

Process:

The appendix shows a sample force field analysis sheet. List the issue in the center. On the left side, list all the forces for change and on the right side, list all the forces against change. For instance the issue area might be "transportation does not meet the needs of the low-income community."

Forces for change might include: employers want reliable workforce, family members will not need to provide transportation, it provides independence for individuals.

Forces against might be: need to run busses past 'normal working hours', private sector transportation does not want competition.

Assign a score for the forces from 1 (weakest) to 5 (strongest) for each force. Add the scores to help determine what forces are dominate. This can help determine how to address the issue.

#### **How to come up with final priorities?**

The final priorities are actually a balancing between looking at the various results of the tools, discussing the issues in relations to the agency's mission and vision, and looking at existing funding, knowledge and assets. There are no 'right or wrong' final priorities. Each agency's priorities will be different. The key to the selection of the priorities is the fact they were determined by going through an analytical process and the decision was based on a reasonable set of results. After prioritization, the document is ready to be written and the first phase of the Community Action Plan is considered complete.

### **STEP 4 – STRATEGIC PLANNING AND LOGIC MODELS THE NEXT STEPS**

The next step in the CAP process is the preparation of the plan itself.

This final chapter provides an introduction to the logic model and how this process can be used for multiple funding sources.

Many funding sources require strategic plans although terminology might differ somewhat in the actual planning document. For instance, one funder might use the term goal meaning an achievable outcome within a one year period, while another refers to an outcome as a long term goal. Therefore it is important to understand the terminology per funder. Once that is understood, it becomes easy to fit the strategic plan within each funders framework.

Similarly, different funders define logic models in slightly different ways, and understanding this can help in matching the prioritized issues for different funders. The samples on the following pages show how a project can be adapted to flow for two different types of funder logic models.

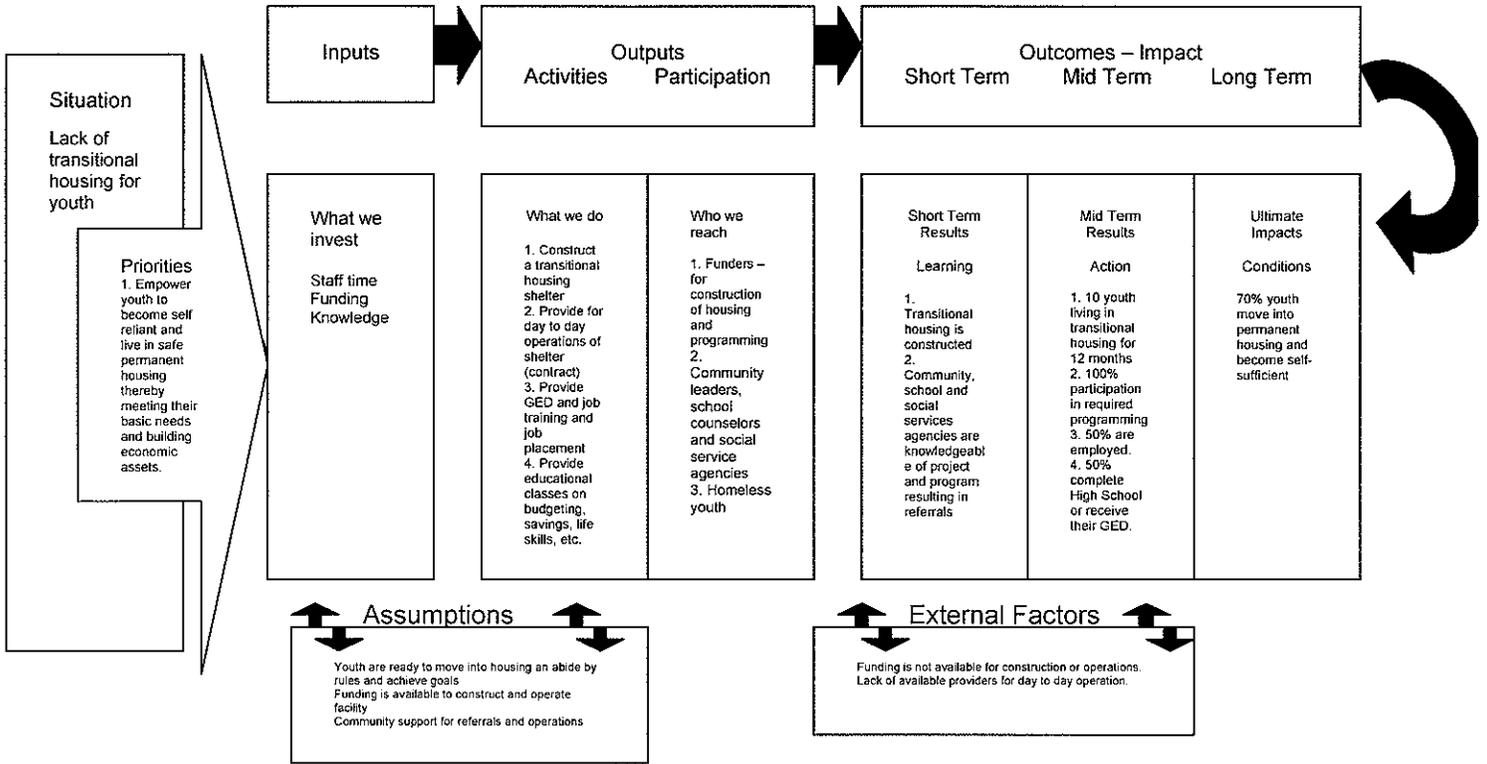
### EXAMPLES OF LOGIC MODELS

#### COMMUNITY SERVICES BLOCK GRANT LOGIC MODEL

STRATEGIC COMMITMENT: Assure that all people have their basic needs met.

PROBLEM	CONDITION	CAUSE(S)	OUTCOME(S)	INDICATOR(S)	TARGET(S)	STRATEGY(S)	PROGRAM(S)
Community, Family or Agency Issue, need or condition	What is the condition of poverty that will be addressed?	What is creating this problem?	What change do we want? What difference will we make?	How will we measure this change? When will we know if we have achieved it?	What is our goal?	What will our intervention be?	What funding sources will the agency secure to support this strategy?
A. Homeless youth are unable to meet their basic needs.	Inadequate housing availability	A1. Lack of transitional housing for youth to stay in for 12 – 18 months	A1. Obtain safe affordable housing	6.4a (number and percentage of families that obtain safe and stable housing) 1.2h (Obtain safe and affordable housing in support of employment stability) 2.1b (safe and affordable housing units created in the community)	10 youth  5 youth  5 units	Planning, funding and construction of the housing	Homeless Coalition, Charlotte County Human Services, Florida Department of Children and Families
	Inadequate education an illiteracy	A2. Lack of support systems or knowledge of support systems for homeless youth	A2. Homeless youth have increased knowledge of and a greater support system established to help them implement their goals and avoid risk taking behaviors.	1.3b.1 (Number and percentage able to complete and maintain a budget for over 90 days)  6.3b.1, 2 and 3 (youth improve physical health and development, youth improve social and emotional development, youth avoid risk taking behaviors over a period of time)	7	Life skills Education Financial Education Comprehensive Assessment Referral and Follow-up	Community Services Block Grant Homeless and Runaway Youth Program Department of Children and Families

# MISSOURI HOUSING TRUST FUND LOGIC MODEL



### What is a focus group?

A focus group is a small-group discussion guided by a trained leader. It is used to learn more about opinions on a designated topic, and then guide future action.

#### Examples:

- A focus group of parents of pre-schoolers meets to discuss child care needs. Parents share their views on local child care programs, and on what could be done to improve them.
- A group of senior citizens meets at the new senior center. What do they think of the programs being offered? What are their own suggestions and ideas?

An agency wants to open a group home for mentally handicapped adults in a quiet residential area. It convenes a group of prospective neighbors. What are their concerns? Can this work?

### How are focus groups different from regular “groups”?

A focus group is different in three ways:

1. The main difference is that it is focused. The group has a specific discussion topic. The group’s task is to stay on it, and not wonder all over the place.
2. The group had a trained leader, or facilitator. The leader’s job is to keep the group on course.
3. The group’s composition and the group discussion are carefully planned to create a nonthreatening environment, in which people are free to talk openly. Members are actively encouraged to express their own opinions, and also respond to other members, as well as to question posed by the leader.

Because focus groups are structured and directed, but also expressive, they can yield a lot of information in a relatively short time.

### Why are focus groups used?

Focus groups help people learn more about group or community opinions and needs. In this respect, they are similar to needs assessments surveys. But needs assessments surveys typically have written, closed-ended, relatively narrow questions which are quantitatively scored. The person being surveyed often responds with numerical rating, rather than with a verbal statement. Such surveys can be very useful; but they usually can’t capture all that a person is thinking or feeling. Responses in a focus group, on the other hand, are typically spoken, open-ended, relatively broad, and qualitative. They have more depth, nuance, and variety. Nonverbal communications and group interactions can also be observed.

Focus groups can therefore get closer to what people are really thinking and feeling, even though their responses may be harder -- or impossible -- to score on a scale.

Which is better? Both of these methods are useful. And both can be used together, to complement each other. Which should you use in a specific situation? That depends upon

your own needs and purposes, and the resources available to you. The next heading explains this further.

### **When should you use a focus group?**

- When you are considering the introduction of a new program or service
- When your main concern is with depth and opinion, or shading of opinion, rather than simply with whether people agree or disagree.
- When you want to ask questions that can't easily be asked or answered on a written survey.
- When you want to supplement the knowledge you can gain from written survey.
- When you know, or can find someone, who is an experienced and skilled group leader.
- When you have the time, knowledge, and resources to recruit a willing group to focus on participants.

#### **Try this exercise:**

Here are several situations when you might want to know more about community opinions before taking action. How useful would a focus group be in each case?

1. A new strain of flu is going around. Half of the town seems to be catching it. What should be done about it?
2. A wave of break-ins has hit a nearby neighborhood. How can this be stopped?
3. A new playground is being planned. What features should go into it?

Our viewpoints:

1. Controlling the flu is not a matter of citizen opinion, but rather of medical facts, and of public health prevention and treatment. A focus group is probably not helpful here.
2. Increased police presence may help; but a structured discussion among neighbors might hit upon other useful solutions. A focus group could be quite worthwhile.
3. Citizen input is definitely called for here. A focus group could be an ideal way for finding it out.

A focus group is not for every social situation. But it can be useful in many situations where action should be guided by public opinion.

### *The Pros and Cons of Groups*

Should you collect your opinions from groups, or from individuals? The focus groups are, of course, groups. Most surveys, though, cover one person at a time. One advantage of focus groups is depth and complexity of response, as mentioned before. And groups members can often stimulate new thoughts for each other, which might not have otherwise occurred. But there are some downsides, too. For example, focus groups usually take more time per respondent than individual surveys -- because the group has to be recruited, and because the group itself takes time. Some group members might feel hesitant about speaking openly. And the focus group leader may sometimes need to be paid.

Of course, it's also possible to combine the advantages of both methods, and interview one person at a time in depth. But this can be time-consuming, and take more resources than you have on hand.

Consider your own situation?  
How do these factors trade off?  
What is the best solution for you?

Suppose you decide to conduct a focus group. This could be a good decision. Now, how to do it? Here is step-by-step approach, with some comments attached. We think this may work for you.

## **How do you run a focus group?**

*Before you begin*

### **1. Recheck your goals. Ask:**

- "Why do I want to conduct a focus group?"
- "Why am I you doing this?"
- "What do I hope to learn?"

### **2. Consider other methods.**

Are you planning to use other methods for learning about opinions as well?

- If yes, which ones, and why?
- If no, is this the single best method to use to find out what you want?

*In other words, so far:*

*Think before you start.*

*Look before you leap.*

### **3. Find a good leader.**

This is not a casual matter: Your leader will determine the success of your group. What kind of leader do you want? Probably someone who:

- Has experience facilitating groups
- Knows something about the topic
- Will relate well to the focus group participants
- Will work together with you to give the outcomes you want

Take careful look around. Perhaps you can find the right leader within your own organization. It's possible you can do the job yourself (but don't overestimate [or underestimate] your own abilities). Depending on the situation, you might consider looking for some outside your organization, someone that specializes in facilitating these kinds of groups.

### **4. Find a recorder.**

A small but important point, often neglected. You want to make sure people's ideas don't get lost. Someone should be writing down what is said, in the same way as taking minutes at a meeting. Arrange for this in advance. (Alternatively, you can tape-record, with the groups permission. This will take more time -- to transcribe the tape, and interpret the transcription -- but you will have a more complete, accurate, and permanent record.)

### **5. Decide who should be invited.**

Ideally, those invited should be a representative sample of those whose opinions you are concerned about.

Suppose you're concerned about the opinions of public housing tenants. You would then want to spread your invitations across the different public housing facilities in your community -- not just the best, or the worst, or the most vocal.

Or suppose you are concerned about the opinions of Main Street shopkeepers. Get a complete list. Select a representative group, for example by size, type, or whether they

have local outside ownership. You probably want to hear from all kinds of businesses; so make sure you do.

You could even pull the names out of a hat. (This approaches a "random sample.") Or, better yet, if you had time, you could run several different groups, to include more people, and more different kinds of people.

6. **Decide and incentives.**

That is, should you offer an incentive for people to participate? Maybe not. In that case, why should people come? What's in it for them?

Possibly people will come just because they want to help. Or because they think they will meet other interesting people, or learn something, or just have fun. Maybe the novelty of the experience itself will be a motivator. And maybe all these reasons are true. (Or at least people believe them.)

But maybe those reasons aren't enough, and some other incentive is called for. Money is one; sometimes focus group members get paid, even a small amount. (Focus group leaders get paid, too.) If you can afford this, consider it. If you can't, then think about other possible incentives: food and drink (more than chips and soda?); public recognition; something to take home; a later training opportunity. What will do the job?

7. **Decide on the meeting particulars.**

Specifically:

- What day?
- What place?
- What time?
- How long?
- How many groups?

Pin these down before you start signing people up.

8. **Prepare your questions.**

When you go into the group, go in prepared. Don't wing it. Instead, you should make up (and write out in advance) a list of topics you want to and questions you want to ask. This doesn't mean you will recite your questions from your prepared list, one-at-a-time. Your question list is a guide, rather than an exact script; but has that guide with you.

9. **Recruit your members.**

Call them up. Write them a letter. Or find them.

*Remember:*

- Other things equal, personal contact work best.
- Stress your benefits. Why should people come?

10. **Double-check.**

Review the arrangements. Is everything ready to go?

"Preparation is \_\_\_% of success." (We don't know the exact percentage, but we know it's high!)

*When the group meets*

11. **Conduct the group.**

A common sequence of events for many focus groups goes something like this: (The leader usually takes responsibility for carrying them out.)

- Thank people for coming
- Review the purpose of the group, and the goals of the meeting. Set the stage.

- Go over the flow of the meeting – how it will proceed, and how the members can contribute. Lay out the ground rules. Encourage open participation...
- Set the tone. This is important, because probably few of your members will have been in a focus group before.
- Ask an opening question. This could be a very general question (“What are your general thoughts about X?”), or something more specific. Both choices are justifiable; and both types of question might be asked before the group ends.
- Make sure that all opinions on that question get a chance to be heard. How do you do this?

*Some common techniques:*

- Summarize what you think you have heard, and ask if the group agrees;
- Phrase the same question in a different way;
- Ask if anyone else has any comments on that question;
- Ask a follow-up question;
- Look around the room, and make brief eye contact, especially with those who may not have spoken.

**Remember #1:** Be sure to record. If the group is not being tape-recorded, someone should be writing the key points.

**Remember #2:** Of course, the leader’s job is to elicit opinion, and not judge it. All opinions should be supported. Judgments come later.

- Ask your next question -- and proceed with other questions in the same general manner.

*The paraphrasing of the questions, the follow-ups, the ordering of the questions, and how much time you spend on each one are points that the leader will have to decide - - sometimes on the spot. An experienced leader will be able to do this. This is why you have spent time looking for one!*

- When all your questions have been asked, and before the group ends, ask if anyone has any other comments to make. This can be an effective way of gathering other opinions that have not yet been voiced.
- Tell the members about any next steps that will occur, and what they can expect to happen now.
- Don’t forget to thank the group for coming!

*After the meeting*

## 12. Look at the data.

If you have tape-recorded, make a transcript. If not, make a written summary from the groups notes. But in any case, look closely at the information you have collected.

- What patterns emerge?
- What are the common themes?
- What questions arise?
- What conclusions seem true?

In some cases, you can devise and use a coding system to “score” the data and count the number of time a particular theme is express. Experience helps here. But whether you do this or not, try to have more than one person review the results independently. (Because even the best of us have our own biases.) Then come together to compare your interpretations and conclusions.

## 13. Share results with the group.

They gave you their time. The least you can do is to give them some feedback -- it’s an obligation that you have. This can be done by mail, phone, or email if you’d like.

Sometimes it's even possible to bring the group back for a second session, to review results, verify their accuracy, and/or explore other themes.

And note: Perhaps members have now become more interested in the issue, and would like to get more involved. Consider offering them an opportunity to do so. A focus group, indirectly, can be a recruiting tool.

#### 14. Use the results.

Of course, this isn't part of the group itself -- at least not directly. But collecting useful information was the reason you wanted to do a focus group in the first place. Now you've got what you wanted. You have the opportunity, and perhaps also the responsibility, to put it to use. You can improve the situation that originally motivated you, and made you think about a focus group at the very beginning.

#### What kind of questions do you ask in a focus group?

Below are some examples of general questions. These apply largely to groups discussing a current program or service, but they can be adjusted for planned (as vs. current) programs, as well as for groups dealing with other concerns. The precise language and order of presentation will depend on your topic and group, but some of these questions may be adapted to your own needs.

- "What are some of your thoughts about what's going on now?"
  - "Would you say you are satisfied with the current situation, with the way things are going on?"
  - (If so) "What are you satisfied about? Why is that?" (Or, "What's going well...?")
  - "Are there things you are dissatisfied about, that you would like to see changed?" (Or, "What's not going well...?")
  - (If so) "What are they? Why is that? How should they change? What kinds of things would you like to see happen?"
  - "How about this particular aspect (of the topic)? What do you think about that?"
  - *Repeat for different aspects of the topic, with variations in style. For example, if the main focus group topic was "community policing," some key aspects to cover might be visibility, sensitivity, interaction, respect, etc.*
  - "Some people have said that one way to improve X is to do Y.
  - Do you agree with this? (Or, "How do you feel about that?")
  - "Are there other recommendations that you have, or suggestions you would like to make?"
  - "Are there other things you would like to say before we wind up?"
  - Some "probes", or follow-ups, designed to get more information on a given question:
    - "Can you say more about that?"
    - "Can you give an example?"
    - "Jane say X. How about some other of you? What do you think?"
    - "How about you, Joe? (Or, "You folks in the corner over there...") Do you have some thoughts on this?"
    - "Does anyone else have some thoughts on that?"
-

Contributed by Bill Berkowitz and Jenette Nagy

### What is a needs assessment survey?

Very briefly, it's a way of asking group or community member what they see as the most important needs of that group or community. The results of the survey then guide future action. Generally, the needs that are rated most important are the ones that get addressed. Depending on your resource (time, money, and people) a needs assessment survey may take many different forms. It can be as informal as asking around with people you know in your community: your postal carrier, the people you work with, the woman at the corner gas station. Or, it could take the form of a professionally-written survey that is mailed to hundreds of people. In general, however, true needs assessment surveys have some common characteristics:

- They have pre-set list of questions to be answered
- They have pre-determined sample the number and types of people to answer these questions are chosen in advance.
- They are done by personal interview, phone, or written response (e.g., a mail-in survey).
- The results of the survey are tabulated, summarized, distributed, discussed, and (last, but not least) used.

### *What is a need?*

In most needs assessments surveys, a need means something that specifically relates to a particular group or community. It's not usually a universal need, such as the need for food or affection. But it's more than an individual need, as I need a new couch for the living room, or I really need a vacation. Those may truly be needs, but they are not generally the types of needs that are assessed in needs assessment survey.

Instead, such a survey usually asks about needs that concern your particular community or group. This could include hundreds of possibilities, ranging from trash on the streets to vandalism, or from stores moving out of downtown to ethnic or racial conflict. These are examples of needs that might be perceived as a group or community issue or problem.

- Note that some surveys are very **broad**, and ask about any and all kinds of needs. Others are **narrow**, and limit themselves to learning more about one or two. Broad and narrow surveys are both often done; both are worthwhile; which one to do depends on what you want to find out.

### Why should you do a needs assessment survey?

Try out these reasons. Do they make sense to you?

- To learn more about what your group or community needs are. A good survey can supplement your own sharp-eyed observations and experiences. It can give you detailed information from a larger and more representative group of people than you could get from observation alone.
- To get more honest and objective description of needs than people might tell you publicly.
- To become aware of possible needs that you never saw as particularly important or that you never even knew existed.

- To document your needs, as is required in many applications for funding, and as is most always helpful in advocating or lobbying for your cause.
- To make sure any actions you eventually do get involved in are in line with needs that are expressed by the community.

And also for two more reasons, which are less commonly understood:

- To get more group and community support for the actions you will soon undertake. That's because if people have stated a need for a particular course of action, they are more likely to support it. And, for the same reason...
- To get more people actually involved in the subsequent action itself.

### **Why should you do a needs assessment survey?**

Some good times to do a survey include:

- When your group is just starting out
- When there is doubt as to what the most important needs are
- When your group members disagree on this point among themselves
- When you need to convince outside funders or supporters that you are addressing the most important community problems (Sometimes, these assessments are required.)
- When the community asks you to do it
- When you want to be sure that you will have community support for whatever you choose to do

*Are there times when you shouldn't?*

There are. A needs assessment is not necessary before every action, and especially:

- When there is *absolutely no doubt* what the most important needs in the group or community are
- When it is urgent or act right now, without delay
- When a recent assessment has already been done, and it is clear that the needs have not changed
- When you feel the community would see an assessment as redundant or wasteful, and that it would be harmful to your cause

How do these factors bear upon your own situation now? Do you think things would work better if you had some needs assessment data to guide you?

**And please note:** There are other ways to learn about community needs. You can do **interviews** with community members, or conduct **observations**, or study community **records**. And certainly, you should always check about past surveys that might have been done before, and use them as best you can. Don't reinvent the wheel!

### **How do you carry out a needs assessment survey?**

*A step by step approach*

Here's an important point to consider: Most effective community actions start with thought. That thought takes place not in the community, but inside the thinker's head. Needs assessment surveys are no exception. So if you do a survey here are some internal steps you (or your group) should take, and decisions you should make, before any information is collected at all:

**Helpful hint:** An assessment can be done by one person, acting alone. But generally speaking, a needs assessment survey will be more effective and more useful if it is designed and carried out by a group. This is especially true when no one has special experience in this field. In most needs assessment cases, many heads will usually be better

than one. So try to assemble a small group of interested people to help you answer the questions below, make decisions, and carry out the job.

1. Ask yourself: What are my reasons for choosing to do this survey? Why am I getting involved in this? The answers may be immediately clear to you. They may also include many of the reason previously listed. But perhaps your reasons are not entirely clear. Asking these questions gives you the chance to become clearer.

2. Ask yourself: What are my goals in doing this survey? What do I want to get out of it? How will the results be used? Again, your goals (and uses) may be very apparent; they may also relate to your reason above. But you ought to be able to state them before you begin.

3. Ask yourself: Am I ready (or, is my group ready?) to conduct this survey? Am I prepared to do the work that needs to be done, with high-quality effort? Before you begin, make sure your answer is Yes.

**Our point of view:** These three questions may seem obvious or trivial; but they are neither. Much success in community work, as in life, depends on prior preparation, both technical and mental. **The better you are prepared, both technically and mentally, the more effective your work is likely to be.**

Now for the more technical side of things. We'll go through them, step by step.

4. Decide how much time do you have to do the survey, from start to finish? How much time can you allow? Your answer will depend upon what is already known; upon the size of your target group; upon the importance involved; and upon the recourses you have at your disposal. (How many people can help? How much money is available to spend?) If nothing is known, the community is large, resources are low, and importance is high, your survey may take considerable time, several months or even more. And properly so. But if the reverse is true, you could complete a good survey in a month or less. These figures are approximations. We would like to be more specific, but that is hard to do. There is no one universal answer to "How much time?" A minimum standard might be this:

**Collecting enough reliable information from a representative group so that you are sufficiently confident in using that information to guide future actions.** Apply this standard to your own situation. How much time to you think might be involved?

5. Decide: How many people are going to be asked? If you are surveying the needs of a small or even medium-sized group, you can (and should) include every single person. But suppose you have a neighborhood of 5,000 people, or larger community still; you probably will not be able to ask everyone directly. When the group is larger, you can make your survey available to everyone who wants to answer it. But a more objective technique, which will usually give you more reliable information, is to construct a sample a pre-determined percentage of the total group -- and to ask each member of the sample for their input.

6. Decide what kinds of people will be asked? For a smaller group, where you are asking everybody, this question will not arise. But with a larger group, when you are using a sample of the total population, you may want to be sure that certain parts of the population are included. For example, are you assessing community childcare needs? You'd then want to be sure to include parents of young children; and you might also survey or interview that group separately.

7. Decide what questions will be asked? These questions will depend upon the scope of the assessment. If you are asking about all possible needs in the community, then phrase your questions accordingly, and allow for a wide range of possible answers. On the other hand, if you are asking only about certain types of needs let's say transportation, or violence prevention then your questions will naturally be geared to transportation, or violence prevention issues. Either way, you have a choice between asking more quantitative, or close-ended questions, and more qualitative, or open-ended questions. Closed-ended questions involve a choice among fixed alternatives -- you might state your degree of agreement with certain questions, or place your preferences in rank order. Open-ended questions allow more freedom; they give those answering the chance to say anything they want, even though the answers may be less precise. In many cases, your survey can include both types of questions.

8. Decide who will ask the questions? If you do interviews, the more people asking, the more ground you can cover; but the more interviewers will have to be trained. And they will need to be trained to use a standard procedure, so that results don't vary just because the interviewers operated differently. If you use written surveys, this question is less relevant; but even here, those who give out and collect the surveys should be thoroughly and uniformly instructed. And remember: If you can, bring together a group to help you design the actual questions. Your group members will almost always think of good questions and ideas you wouldn't come up with alone.

9. Now that you've answered all the questions above, create a draft of the full survey. (Include the instructions; this is an often-neglected part of the survey work, but don't forget it. Your instructions will set the tone for those who will be responding.)

10. Then, try out the survey on a test group. The test group should ideally be composed of the same kinds of people who will be taking the full survey. Why a test group? Because they will let you know if your instructions are clear and if your questions make sense. Even if your survey is perfectly clear to you, it may not be clear to them! You need to find this out before the full survey gets administered. Don't bypass this step your test group is like a trial run, or dress rehearsal, which will help you get rid of the rough spots before you hit the big time.

11. Revise the survey on the basis of your test group feedback. Sometimes the test-and-revision process may need to be repeated more than once.

12. Finally! When you are satisfied that all necessary revisions have been made, administer the survey to the people you have chosen.

13. Tabulate your results. For closed-ended questions, this can be a matter of simple addition. For open-ended questions, you can code the results into categories. What categories to use? Get some feedback from others, because the categories you decide on will shape how you interpret the data which is the next step.

# Analyzing Root Causes of Problems: The “But Why?” Technique

THE COMMUNITY  
TOOLBOX, UNIVERSITY  
OF KANSAS

Contributed by Christine Lopez, Adapted from Altman et al Edited by  
Steve Fawcett

## What are “root causes?”

Root causes are the basic reasons behind the problem or issue you are seeing in the community. Trying to figure out why the problem has developed is an essential part of the “problem solving process” in order to guarantee the right responses and also help citizens “own” the problems.

## What is the “but why?” technique?

The “But why?” technique is one method used to identify underlying causes of a community issue. These underlying factors are called “root causes.”

The “But why?” technique examines a problem by asking questions to find out what caused it. Each time an answer is given, a follow-up “But why?” is asked.

For example, if you say that too many people in poor communities have problems with alcoholism, you should ask yourself “But why?” Once you come up with an answer to that question, probe the answer with another “But why?” question until you reach the root of the problem, the root cause.

## Why should you identify root causes?

Identifying genuine solutions to a problem means knowing what the real causes of the problem are. Taking action without identifying what factors contribute to the problem can result in misdirected efforts, and that waste time and resources. However, by thoroughly studying the cause of the problem, you can build ownership, that is, by experiencing the problem you will understand it better, and be motivated to deal with it.

The “But why?” technique can be used to discover basic or “root” causes either in individuals or broader social systems.

1. It can be used to find which *individual* factors could provide targets of change for your cause, such as levels of knowledge, awareness, attitudes, and behaviors.

- Do people need more knowledge about nutrition?
- Do children need to learn refusal skills to avoid smoking?
- Do teenagers need to learn how to use contraceptives?

2. It can explore *social* causes. For example, it could help us determine why a certain neighborhood seems to have a higher rate of a specific problem. These social causes divide into three main sub-groups:

- Cultural factors, such as customs, beliefs, and values;
- Economic factors, such as money, land, and resources;
- Political factors, such as decision-making power

3. It can uncover multiple solutions for a certain problem and allow the user to see alternatives that he or she might not have seen before. It increases the chances of choosing the right solution, because many aspects of the problem are explored during the “But why?” exercise.

### **When should you identify root causes?**

- Whenever you are faced with addressing a challenging community problem. Of course, the “But why?” technique is not always your best bet and should not be used 100% of the time. It’s extremely efficient to find a variety of solutions and is a quick inexpensive technique that can be done by anyone, at anytime, anywhere. For some issues, however, you should use more sophisticated methods, such as surveys, interviews and data collecting.
- When there is support for a “solution” that does not seem to get the real causes of the problem. For example, if there is hunger in community, let’s distribute free turkey at Thanksgiving.
- When there is ignorance or denial of why a community problem exists.

### **How does the “but why” technique work?**

#### **Technique Guide**

Here’s how it works. A group examines a community problem by asking what caused it. Each time someone gives an answer, the “asker” continues to probe, mostly by asking “But why?” or “How could that have been prevented?” Examples:

#### **Problem:**

**Too many (too few) people are \_\_\_\_\_.**

*Q: But why?*

**A. Because....**

*Q: But why?*

**A. Because....**

*Q: Could that have been prevented?*

**A. Yes**

*Q: How?*

*Q: But why?*

**A. Because...**

*Q: But why?*

**A. Because....**

*Q: But why?*

*(and so forth)*

1. First, invite people who are both affected by the problem and are in a position to contribute to the solution (see Chapter 18, Section 3: *Identifying Targets and agents of*

*Change: Who Can Benefit and Who can Help*) to brainstorm possible causes. The more representative the working group is, the more likely it is for the root causes to be uncovered.

2. The working group should then examine a community problem, such as substance abuse or violence, by asking what caused it. Each time someone give an answer, the groups ask, "But why?" Here's an example:

**Problem:**

**A child has an infected foot.**

*Q: But why?*

**A. She stepped on broken glass while walking.**

*Q: Could that have been prevented?*

**A. Yes**

*Q: How?*

**A. She could have been wearing shoes.**

*Q: But why doesn't the child have shoes?*

**A. Because the family can't afford shoes.**

*Q: But why?*

**A. The father or mother has no job.**

*Q: But why?*

(and so forth)

In this example, the "But why?" analysis leads to at least two very different conclusions. The criterion for choice between them is to look into the environment of each one. Many solutions may apply to your problem, so it's up to you to find one that fits it better. The "But why?" analysis by itself doesn't lead automatically to the best solution. It just points out many paths your may take.

## **Resources**

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Charlotte County Department of Human Services  
Family Services Division

Community Needs Assessment Survey

*Your View IS IMPORTANT to our Agency and Your Community*

We would like to know your opinion regarding the causes of poverty in your local area. This information will be used in our planning process to help us decide community priorities and needs for services. There are not any wrong or right answers and space has been provided to allow for comments.

Please feel free to explain your choices; any unique features of our County or any information you think will be helpful for us. This information will be used to better analyze our survey results.

**Where you live**

- Port Charlotte
- Punta Gorda
- Englewood

**Your Age**

- 17 & Younger
- 18 – 29
- 30 – 44
- 45 – 64
- 65 & over

**Household Type**

- One person
- Single Parent
- Two Adults
- Husband / Wife and children
- Non-related persons and children

1. Is **EMPLOYMENT** an issue in this area?  YES  NO

Why? Place an X by the three most important reasons:

- |   |  |
|---|--|
| <input type="checkbox"/> Lack of skills/education to obtain a job | <input type="checkbox"/> Lack of child care (work related)     |
| <input type="checkbox"/> Unable to find jobs in area              | <input type="checkbox"/> Unable to fill out Applications       |
| <input type="checkbox"/> No where to look for jobs                | <input type="checkbox"/> Lack computer skills                  |
| <input type="checkbox"/> Employer/jobs are leaving the area       | <input type="checkbox"/> Cost of child care (work related)     |
| <input type="checkbox"/> Few jobs for people with limited skills  | <input type="checkbox"/> Lack of transportation (work related) |
| <input type="checkbox"/> Lack of good paying jobs w/benefits      | <input type="checkbox"/> Cost of transportation (work related) |
| <input type="checkbox"/> Long commute to jobs                     | <input type="checkbox"/> Don't interview well                  |
| <input type="checkbox"/> Don't have/know how to create a resume   | <input type="checkbox"/> Other, specify _____                  |

Comments:

2. Is **EDUCATION** an issue in this area?  YES  NO

Why? Place an X by the three most important reasons:

- |   |  |
|---|--|
| <input type="checkbox"/> No high school diploma               | <input type="checkbox"/> Lack of computer skills                             |
| <input type="checkbox"/> Lack of vocational skills or college | <input type="checkbox"/> Lack of transportation (school related)             |
| <input type="checkbox"/> Lack of GED/Adult Basic Education    | <input type="checkbox"/> Cost of transportation (school related)             |
| <input type="checkbox"/> Class availability/ not convenient   | <input type="checkbox"/> Lack of child care (school related)                 |
| <input type="checkbox"/> Threats of violence in schools       | <input type="checkbox"/> Lack of financial aid/how to apply and availability |
| <input type="checkbox"/> No after school programs for youth   | <input type="checkbox"/> Don't know how to communicate with school staff     |
| <input type="checkbox"/> Need computer access at home         | <input type="checkbox"/> Lack of training for work                           |
| <input type="checkbox"/> Other, specify _____                 |  |

Comments:

3. Is **HOUSING** an issue in this area?  YES  NO

Why? Place an X by the three most important reasons:

- |  |   |
|--|---|
| <input type="checkbox"/> Cost of rent/house payments                 | <input type="checkbox"/> Cost of utility/rent deposits                                      |
| <input type="checkbox"/> Lack of down payment on a house             | <input type="checkbox"/> Housing size doesn't meet family needs                             |
| <input type="checkbox"/> Housing repairs needed (interior, exterior) | <input type="checkbox"/> Lack of temporary emergency housing                                |
| <input type="checkbox"/> Credit Issues                               | <input type="checkbox"/> Affordable housing not available                                   |
| <input type="checkbox"/> Don't know how to buy a home                | <input type="checkbox"/> Housing needs weatherization (insulation, new windows/doors, etc.) |
| <input type="checkbox"/> Don't know my rights as a renter            |   |

Other, specify \_\_\_\_\_

Comments:

4. Is **NUTRITION** an issue in this area?  YES  NO

Why? Place an X by the three most important reasons:

- |   |   |
|---|---|
| <input type="checkbox"/> Food resources are not available                   | <input type="checkbox"/> Not enough income for nutritious meals         |
| <input type="checkbox"/> Don't use available food pantries                  | <input type="checkbox"/> Lack of transportation to store or food pantry |
| <input type="checkbox"/> Food Stamp allotments run out                      | <input type="checkbox"/> Population is obese                            |
| <input type="checkbox"/> Not eligible for food stamps                       | <input type="checkbox"/> Don't know how to apply for food stamps        |
| <input type="checkbox"/> Don't know how to buy and prepare nutritious meals | <input type="checkbox"/> Not enough time to prepare nutritious meals    |

Other, specify \_\_\_\_\_

Comments:

5. Is **USE OF INCOME** an issue in this area?  YES  NO

Why? Place an X by the three most important reasons:

- |   |  |
|---|--|
| <input type="checkbox"/> Lack of knowledge of possible resources    | <input type="checkbox"/> Difficulty setting up a budget                |
| <input type="checkbox"/> Don't know how to save money               | <input type="checkbox"/> Difficulty with money management (bad credit) |
| <input type="checkbox"/> Difficulty maintaining a budget            | <input type="checkbox"/> Don't know about Earned Income Tax Credit     |
| <input type="checkbox"/> Don't know how to address credit issues    | <input type="checkbox"/> Don't know how to get/enforce child support   |
| <input type="checkbox"/> Don't know if I qualify for a bank account | <input type="checkbox"/> Other, specify _____                          |

Comments:

6. Is **TRANSPORTATION** an issue in this area?  YES  NO

Why? Place an X by the three most important reasons:

- |   |   |
|---|---|
| <input type="checkbox"/> Don't know how to buy a car/vehicle                                    | <input type="checkbox"/> Lack of credit to buy a car/vehicle  |
| <input type="checkbox"/> Cost of buying/or down payment required                                | <input type="checkbox"/> Cost of car repairs  |
| <input type="checkbox"/> Class availability/ not convenient                                     | <input type="checkbox"/> Public Transportation hours not convenient   |
| <input type="checkbox"/> Cost of maintaining car/vehicle (gas, insurance, license plates, etc.) | <input type="checkbox"/> Lack of help to learn to drive and get a license (someone to teach me, car to practice and take test with, etc.) |

Comments:

7. The following are **EMERGENCY SITUATIONS** that seem to be particular problems in this area. Place an X by the three most important reasons:

- |  |  |
|--|--|
| <input type="checkbox"/> Lack of food                          | <input type="checkbox"/> Medical emergency resources (not covered by insurance, obtaining service, transportation) |
| <input type="checkbox"/> Lack of emergency shelters            | <input type="checkbox"/> Mental Health related crisis  |
| <input type="checkbox"/> Lack of income for prescription drugs | <input type="checkbox"/> Alcohol, drug abuse and/or gambling   |
| <input type="checkbox"/> Lack of income for utilities/fuel     | <input type="checkbox"/> Lack of healthcare providers – local services   |
| <input type="checkbox"/> No health insurance                   | <input type="checkbox"/> Legal assistance, specify _____   |
| <input type="checkbox"/> Child abuse/neglect in household      |  |

Comments:

8. What would it take to end poverty in your area?

9. What services does your community need?

10. What would you like to see DHS do to help you and/or your household (ex. Specific workshops, programs, classes, other assistance not currently available).

11. What 3 things would you like information on that can improve your situation and your family's lives?

12. What are the 3 biggest challenges for the following populations:

<b>Population</b>	<b>Challenge #1</b>	<b>Challenge #2</b>	<b>Challenge #3</b>
<b>Youth</b>			
<b>Single Parents</b>			
<b>Families</b>			
<b>Elderly</b>			

*Thank you for participating in our survey!*

## **Appendix B**

Survey Instruments

Survey Results

Needs Assessment Data



Charlotte County Department of Human Services
Family Services Division

Community Needs Assessment Survey

Your View IS IMPORTANT to our Agency and Your Community

We would like to know your opinion regarding the causes of poverty in your local area. This information will be used in our planning process to help us decide community priorities and needs for services. There are not any wrong or right answers and space has been provided to allow for comments.

Please feel free to explain your choices; any unique features of our County or any information you think will be helpful for us. This information will be used to better analyze our survey results.

Where you live

- Port Charlotte
Punta Gorda
Englewood

Your Age

- 17 & Younger
18 - 29
30 - 44
45 - 64
65 & over

Household Type

- One person
Single Parent
Two Adults
Husband / Wife and children
Non-related persons and children

1. Is EMPLOYMENT an issue in this area? YES NO

Why? Place an X by the three most important reasons:

- Lack of skills/education to obtain a job
Unable to find jobs in area
No where to look for jobs
Employer/jobs are leaving the area
Few jobs for people with limited skills
Lack of good paying jobs w/benefits
Long commute to jobs
Don't have/know how to create a resume
Lack of child care (work related)
Unable to fill out Applications
Lack computer skills
Cost of child care (work related)
Lack of transportation (work related)
Cost of transportation (work related)
Don't interview well
Other, specify

Comments:

2. Is EDUCATION an issue in this area? YES NO

Why? Place an X by the three most important reasons:

- No high school diploma
Lack of vocational skills or college
Lack of GED/Adult Basic Education
Class availability/ not convenient
Threats of violence in schools
No after school programs for youth
Need computer access at home
Other, specify
Lack of computer skills
Lack of transportation (school related)
Cost of transportation (school related)
Lack of child care (school related)
Lack of financial aid/how to apply and availability
Don't know how to communicate with school staff
Lack of training for work

Comments:

3. Is HOUSING an issue in this area? YES NO

Why? Place an X by the three most important reasons:

- Cost of rent/house payments
Lack of down payment on a house
Housing repairs needed (interior, exterior)
Credit Issues
Don't know how to buy a home
Don't know my rights as a renter
Other, specify
Cost of utility/rent deposits
Housing size doesn't meet family needs
Lack of temporary emergency housing
Affordable housing not available
Housing needs weatherization (insulation, new windows/doors, etc.)

Comments:

4. Is NUTRITION an issue in this area?  YES  NO

Why? Place an X by the three most important reasons:

- |   |   |
|---|---|
| <input type="checkbox"/> Food resources are not available                   | <input type="checkbox"/> Not enough income for nutritious meals         |
| <input type="checkbox"/> Don't use available food pantries                  | <input type="checkbox"/> Lack of transportation to store or food pantry |
| <input type="checkbox"/> Food Stamp allotments run out                      | <input type="checkbox"/> Population is obese                            |
| <input type="checkbox"/> Not eligible for food stamps                       | <input type="checkbox"/> Don't know how to apply for food stamps        |
| <input type="checkbox"/> Don't know how to buy and prepare nutritious meals | <input type="checkbox"/> Not enough time to prepare nutritious meals    |
| <input type="checkbox"/> Other, specify _____                               |   |

Comments:

5. Is USE OF INCOME an issue in this area?  YES  NO

Why? Place an X by the three most important reasons:

- |   |  |
|---|--|
| <input type="checkbox"/> Lack of knowledge of possible resources    | <input type="checkbox"/> Difficulty setting up a budget                |
| <input type="checkbox"/> Don't know how to save money               | <input type="checkbox"/> Difficulty with money management (bad credit) |
| <input type="checkbox"/> Difficulty maintaining a budget            | <input type="checkbox"/> Don't know about Earned Income Tax Credit     |
| <input type="checkbox"/> Don't know how to address credit issues    | <input type="checkbox"/> Don't know how to get/enforce child support   |
| <input type="checkbox"/> Don't know if I qualify for a bank account | <input type="checkbox"/> Other, specify _____                          |

Comments:

6. Is TRANSPORTATION an issue in this area?  YES  NO

Why? Place an X by the three most important reasons:

- |   |   |
|---|---|
| <input type="checkbox"/> Don't know how to buy a car/vehicle                                    | <input type="checkbox"/> Lack of credit to buy a car/vehicle  |
| <input type="checkbox"/> Cost of buying/or down payment required                                | <input type="checkbox"/> Cost of car repairs  |
| <input type="checkbox"/> Class availability/ not convenient                                     | <input type="checkbox"/> Public Transportation hours not convenient   |
| <input type="checkbox"/> Cost of maintaining car/vehicle (gas, insurance, license plates, etc.) | <input type="checkbox"/> Lack of help to learn to drive and get a license (someone to teach me, car to practice and take test with, etc.) |
| <input type="checkbox"/> Other, specify _____   |   |

Comments:

7. The following are EMERGENCY SITUATIONS that seem to be particular problems in this area. Place an X by the three most important reasons:

- |  |  |
|--|--|
| <input type="checkbox"/> Lack of food                          | <input type="checkbox"/> Medical emergency resources (not covered by insurance, obtaining service, transportation) |
| <input type="checkbox"/> Lack of emergency shelters            | <input type="checkbox"/> Mental Health related crisis  |
| <input type="checkbox"/> Lack of income for prescription drugs | <input type="checkbox"/> Alcohol, drug abuse and/or gambling   |
| <input type="checkbox"/> Lack of income for utilities/fuel     | <input type="checkbox"/> Lack of healthcare providers – local services   |
| <input type="checkbox"/> No health insurance                   | <input type="checkbox"/> Legal assistance, specify _____   |
| <input type="checkbox"/> Child abuse/neglect in household      |  |
| <input type="checkbox"/> Other, specify _____                  |  |

Comments:

8. What would it take to end poverty in your area?

9. What services does your community need?

10. What would you like to see DHS do to help you and/or your household (ex. Specific workshops, programs, classes, other assistance not currently available).

11. What 3 things would you like information on that can improve your situation and your family's lives?

12. What are the 3 biggest challenges for the following populations:

Population	Challenge #1	Challenge #2	Challenge #3
Youth			
Single Parents			
Families			
Elderly			

Thank you for participating in our survey!



Charlotte County Family Services Center  
2010 Community Needs Assessment Survey Results

Overview:

Results:

The following represents the answers and percentages of responses to the twenty four questions:

Q1. Where do you live?

- 59 (48.76%) indicated that they live in Port Charlotte.
- 47 (38.84%) indicated that they live in Punta Gorda.
- 15 (12.40%) indicated that they live in Englewood.

Q2. What is your age?

- 1 (0.82%) person indicated that they in the age category of 17 & younger.
- 26 (21.31%) people indicated that they in the age category of 18 to 29.
- 50 (40.98%) people indicated that they in the age category of 30 to 44.
- 39 (31.97%) people indicated that they in the age category of 45 to 64.
- 6 (4.92%) people indicated that they in the age category of 65 and over.

Q3. What is your household type?

- 26 (21.49%) people indicated that they live in a one person household.
- 35 (28.93%) people indicated that they live in a single parent household.
- 24 (19.83%) people indicated that they live in a household with two adults.
- 29 (23.97%) people indicated that they live in a household where there is a husband, wife and children.
- 4 (3.31%) people indicated that they live in a household with non-related persons and children.
- 3 (2.48%) people did not respond.

Q4. Is employment an issue in this area?

- 91 (75.21%) people indicated that there is an issue with employment.

- 21 (17.36%) people indicated that there is not an issue with employment.
- 1 (0.83%) person replied with both, saying that there is an issue with employment, while at the same time, there is not.
- 8 (6.61%) people did not respond.

Q5. Why is employment an issue in this area?

- 9 (3.02%) people indicated that it is due to a lack of skills and education to obtain a job.
- 75 (25.17%) people indicated that it is due to the inability to find jobs in the area.
- 9 (3.02%) people indicated that it is due to having no place to look for jobs.
- 23 (7.72%) people indicated that it is due to employers and jobs leaving the area.
- 25 (8.39%) people indicated that it is due to the lack of jobs for people with limited skills.
- 41 (13.76%) people indicated that it is due to the lack of good paying jobs with benefits.
- 14 (4.70%) people indicated that it is due to long commutes to get to work.
- 2 (0.67%) people indicated that it is due to lack of having and/or not knowing how to create a resume.
- 1 (0.34%) person indicated that it is due to a lack of child care.
- 3 (1.01%) people indicated that it is due to the inability to fill out applications.
- 12 (4.03%) people indicated that it is due to a lack of computer skills.
- 15 (5.03%) people indicated that it is due to the cost of child care.
- 10 (3.36%) people indicated that it is due to lack of transportation.
- 5 (1.68%) people indicated that it is due to the cost of transportation.
- 13 (4.36%) people indicated that it is due to the inability to interview well.
- 24 (8.05%) people responded with other.
- 17 (5.70%) people did not respond.

Q6. Is education an issue in this area?

- 28 (23.14%) people indicated that there is an issue with education.
- 82 (67.77%) people indicated that there is not an issue with education.
- 11 (9.09%) people did not respond.

Q7. Why is education an issue in this area?

- 10 (5.35%) people indicated that it is due to not having a high school diploma.
- 13 (6.95%) people indicated that it is due to a lack of vocational skills or

- college.
- 7 (3.74%) people indicated that it is due to a lack of GED/Adult Basic Education.
- 7 (3.74%) people indicated that it is due to a non convenience and class availability.
- 3 (1.60%) people indicated that it is due to threats of violence in schools.
- 6 (3.21%) people indicated that it is due to lack of after school programs for youth.
- 11(5.88%) people indicated that it is due to a lack of in-home computer access.
- 9 (4.81%) people indicated that it is due to a lack of computer skills.
- 4 (2.14%) people indicated that it is due to a lack of transportation.
- 11 (5.88%) people indicated that it is due to a lack of child care.
- 7 (3.74%) people indicated that it is due to a lack of financial aid/ how to apply and availability.
- 2 (1.07%) people indicated that it is due to the inability to communicate with school staff.
- 5 (2.67%) people indicated that it is due to a lack of training for work.
- 8 (4.28%) people responded with other.
- 80 (42.78%) people did not respond.

Q8. Is housing an issue in this area?

- 62(51.67%) people indicated that there is an issue with housing.
- 50 (41.67%) people indicated that there isn't an issue with housing.
- 8 (6.67%) people did not respond.

Q9. Why is housing an issue in this area?

- 50 (21.37%) people indicated that it is due to the cost or rent/house payments.
- 21 (8.97%) people indicated that it is due to a lack of money for a down payment on a house.
- 8 (3.42%) people indicated that it is due to needed housing repairs.
- 26 (11.11%) people indicated that it is due to credit issues.
- 2 (0.85%) people indicated that it is due to a lack of knowledge to buy a home.
- 5 (2.14%) people indicated that it is due to a lack of knowing the rights as a renter.
- 37 (15.81%) people indicated that it is due to the cost of utilities and rent deposits.
- 6 (2.56%) people indicated that it is due to housing sizes not meeting family needs.
- 6 (2.56%) people indicated that it is due to a lack of temporary emergency housing.
- 17 (7.26%) people indicated that it is due to a lack of affordable housing.

2 (0.85%) people indicated that it is due to weatherization needs on homes.

4 (1.71%) people responded with other.

50 (21.37%) people did not respond.

Q10. Is nutrition an issue in this area?

36 (29.75%) people indicated that there is an issue with nutrition.

68 (56.20%) people indicated that there is not an issue with nutrition.

17 (14.05%) people did not respond.

Q11. Why is nutrition an issue in this area?

4 (2.50%) people indicated that it is due to unavailable food resources.

7 (4.38%) people indicated that it is due to not using available food pantries.

14 (8.75%) people indicated that it is due to running out of Food Stamp allotments.

15 (9.38%) people indicated that it is due to ineligibility of Food Stamps.

2 (1.25%) people indicated that it is due to lack of knowledge on how to buy and prepare nutritious meals.

26 (16.25%) people indicated that it is due to lack of income to buy nutritious meals.

5 (3.13%) people indicated that it is due to lack of transportation to a store or food pantry.

5 (3.13%) people indicated that it is due to an obese population.

2 (1.25%) people indicated that it is due to lack of knowledge to apply for Food Stamps.

1 (0.63%) person indicated that it is due to lack of time to prepare nutritious meals.

7 (4.38%) people responded with other.

72 (45.00%) people did not respond.

Q12. Is use of income an issue in this area?

52 (42.98%) people indicated that there is an issue with use of income.

49 (40.50%) people indicated that there is not an issue with use of income.

19 (15.70%) people did not respond.

1 (0.83%) person replied with both, saying that there is an issue with Use of income, while at the same time, there is not.

Q13. Why is use of income an issue in this area?

20 (10.42%) people indicated that it is due to a lack of knowledge of

possible resources.

11 (5.73%) people indicated that it is due to lack of knowledge on how to save money.

29 (15.10%) people indicated that it is due to a difficulty in maintaining a budget.

17 (8.85%) people indicated that it is due to a lack of knowledge on how to address credit issues.

2 (1.04%) people indicated that it is due to not knowing if they qualify for a bank account.

13 (6.77%) people indicated that it is due to a difficulty in setting up a budget.

24 (12.50%) people indicated that it is due to a difficulty in money management.

3 (1.56%) people indicated that it is due to a lack of knowledge about Earned Income Tax Credit.

5 (2.60%) people indicated that it is due to a lack of knowing how to obtain/enforce child support.

6 (3.13%) people responded with other.

62 (32.29%) people did not respond.

Q14. Is transportation an issue in this area?

58 (47.93%) people indicated that there is an issue with transportation.

46 (38.02%) people indicated that there is not an issue with transportation.

17 (14.05%) people did not respond.

Q15. Why is transportation an issue in this area?

2 (0.92%) people indicated that this is due to lack of knowing on how to purchase a car/vehicle.

27 (12.44%) people indicated that this is due to the cost of buying a car and/or the down payment required.

1 (0.46%) people indicated that this is due to non convenience and class availability.

44 (20.28%) people indicated that this is due to the cost of maintaining a car/vehicle.

27 (12.44%) people indicated that this is due to the cost of car repairs.

21 (9.68%) people indicated that this is due to a lack of credit to buy a car.

22 (10.14%) people indicated that this is due to non convenient public transportation hours.

2 (0.92%) people indicated that this is due to a lack of help to learn to drive and obtain a license.

14 (6.45%) people responded with other.

57 (26.27%) people did not respond.

Q16. Emergency Situations that seem to be a particular problem in this area:

- 24 (8.33%) people indicated that a lack of food availability is a large problem.
- 16 (5.56%) people indicated that a lack of emergency shelters is a large problem.
- 32 (11.11%) people indicated that a lack of income for prescription drugs is a large problem.
- 71 (24.65%) people indicated that a lack of income for utilities and fuel is a large problem.
- 56 (19.44%) people indicated that a lack of health insurance is a large problem.
- 2 (0.69%) people indicated that child abuse/neglect in a household is a large problem.
- 20 (6.94%) people indicated that lack of medical resources is a large problem.
- 15 (5.21%) people indicated that mental health related crises are a large problem.
- 14 (4.86%) people indicated that alcohol, drug abuse, and/or gambling is a large problem.
- 17 (5.90%) people indicated that a lack of healthcare providers is a large problem.
- 3 (1.04 %) people indicated that legal assistance is a large problem.
- 1 (0.35%) person responded with other.
- 17 (5.90%) people did not respond.

Q17. What would it take to end poverty in your area?

- 71 (58.20%) people indicated that more job opportunities would end poverty.
- 20 (16.39%) people responded with other.
- 31 (25.41%) people did not respond.

Q18. What services does your community need?

- 16 (11.51%) people indicated that their community needs more job opportunities.
- 16 (11.51%) people indicated that their community needs an improved transportation system.
- 44 (31.65%) people responded with other.
- 63 (45.32%) people did not respond.

Q19. What would you like to see DHS do to help you and/or your household?

- 16 (13.11%) people indicated that they would like to see more workshops, programs and classes.
- 28 (22.95%) people responded with other.

78 (63.93%) people did not respond.

Q20. What things would you like information on to improve your situation?

- 27 (16.98%) people indicated that they would like information on job opportunities.
- 7 (4.40%) people indicated that they would like information on childcare.
- 5 (3.14%) people indicated that they would like information on discount public transportation.
- 5 (3.14%) people indicated that they would like information on housing.
- 2 (1.26%) people indicated that they would like information on car assistance.
- 7 (4.40%) people indicated that they would like information on bill and utilities assistance.
- 5 (3.14%) people indicated that they would like information on career counseling and training.
- 6 (3.77%) people indicated that they would like information on budget classes.
- 13 (8.18%) people indicated that they would like information on medical coverage, healthcare, and medical resources.
- 3 (1.89%) people indicated that they would like information on Food Stamps and food assistance.
- 9 (5.66%) people responded with other.
- 70 (44.03%) people did not respond.

Q21. What are the biggest challenges for the youth population?

- 20 (12.42%) people indicated that the youth population's biggest challenge is youth and summer programs.
- 9 (5.59%) people indicated that the youth population's biggest challenge is job availability.
- 11 (6.83%) people indicated that the youth population's biggest challenge is drugs and alcohol.
- 33 (1.86%) people indicated that the youth population's biggest challenge is financial support.
- 11 (6.83%) people indicated that the youth population's biggest challenge is education.
- 4 (2.48%) people indicated that the youth population's biggest challenge is guidance and counseling.
- 15 (9.32%) people indicated that the youth population's biggest challenge is behavioral issues.
- 6 (9.32%) people responded with other.
- 82 (50.93%) people did not respond.

Q22. What are the biggest challenges for the single parent population?

- 16 (12.42%) people indicated that the biggest challenge for single parents is finances and income.
- 8 (5.59%) people indicated that the biggest challenge for single parents is childcare.
- 5 (6.83%) people indicated that the biggest challenge for single parents is housing.
- 19 (11.59%) people indicated that the biggest challenge for single parents is job opportunities.
- 4 (2.44%) people indicated that the biggest challenge for single parents is education.
- 6 (3.66%) people indicated that the biggest challenge for single parents is health insurance.
- 7 (4.27%) people indicated that the biggest challenge for single parents is parenting and single parent assistance.
- 5 (3.05%) people indicated that the biggest challenge for single parents is bill assistance.
- 8 (4.88%) people responded with other.
- 86 (52.44%) people did not respond.

Q23. What are the biggest challenges for families?

- 2 (2.17%) people indicated that the biggest challenge for families is public transportation.
- 8 (8.70%) people indicated that the biggest challenge for families is finances and income.
- 3 (3.26%) people indicated that the biggest challenge for families is jobs and unemployment.
- 5 (5.43%) people indicated that the biggest challenge for families is healthcare.
- 5 (5.43%) people indicated that the biggest challenge for families is housing.
- 4 (4.35%) people indicated that the biggest challenge for families is food assistance.
- 2 (2.17%) people indicated that the biggest challenge for families is helpful programs.
- 3 (3.26%) people responded with other.
- 60 (65.22%) people did not respond.

Q24. What are the biggest challenges for the elderly?

- 8 (5.03%) people indicated that the biggest challenge for the elderly is prescription assistance.
- 15 (9.43%) people indicated that the biggest challenge for the elderly is health insurance.
- 7 (4.40%) people indicated that the biggest challenge for the elderly is housing.

- 3 (1.89%) people indicated that the biggest challenge for the elderly is food assistance and Food Stamps.
- 9 (5.66%) people indicated that the biggest challenge for the elderly is transportation.
- 12 (7.55%) people indicated that the biggest challenge for the elderly is income and finances.
- 5 (3.14%) people indicated that the biggest challenge for the elderly is jobs.
- 5 (3.14%) people indicated that the biggest challenge for the elderly is family support, lack of support and companionship.
- 5 (3.14%) people responded with other.
- 90 (56.60%) people did not respond.

1. Where do the clients you serve reside?

		Response Percent	Response Count
Port Charlotte		87.2%	41
Punta Gorda		89.4%	42
Englewood (Charlotte County)		72.3%	34
Englewood (Sarasota County)		12.8%	6
North Port		17.0%	8
<b>answered question</b>			<b>47</b>
<b>skipped question</b>			<b>0</b>

2. What is the primary age group of your clients?

		Response Percent	Response Count
17 & Younger		12.8%	6
18 - 29		23.4%	11
30 - 44		36.2%	17
45 - 64		31.9%	15
65 & Older		10.6%	5
All of the above		46.8%	22
<b>answered question</b>			<b>47</b>
<b>skipped question</b>			<b>0</b>

### 3. What is the nature of the services you provide?

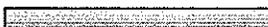
		Response Percent	Response Count
Food Pantry		23.4%	11
Rent/Mortgage Assistance (ongoing)		10.6%	5
Rent/Mortgage Assistance (one-time)		10.6%	5
Emergency Assistance (rent, food, utilities, etc.)		23.4%	11
Employment and Workforce Programs		14.9%	7
Adult Literacy, Adult Basic Education or GED		10.6%	5
Family Literacy		0.0%	0
English for Speakers of Other Languages		0.0%	0
Housing Assistance		21.3%	10
Financial Literacy		10.6%	5
Health and Nutrition (clinical services)		6.4%	3
Health and Nutrition (counseling services)		8.5%	4
Mental Health		10.6%	5
Substance Abuse Prevention or Intervention		12.8%	6
Prescription Assistance		10.6%	5
Youth Development		12.8%	6
Community Corrections or Reentry		6.4%	3
Before school or After School care		6.4%	3
Early Childhood Education		0.0%	0

Other (please specify)	<input checked="" type="checkbox"/>	59.6%	28
		<b>answered question</b>	<b>47</b>
		<b>skipped question</b>	<b>0</b>

**4. Is EMPLOYMENT an issue to the population you serve?**

		Response Percent	Response Count
Yes	<input checked="" type="checkbox"/>	95.7%	44
No	<input type="checkbox"/>	4.3%	2
		<b>answered question</b>	<b>46</b>
		<b>skipped question</b>	<b>1</b>

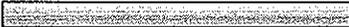
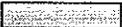
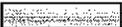
**5. You have indicated that EMPLOYMENT is an issue to the population you serve. Please select the THREE most important reasons this is an issue in Charlotte County:**

		<b>Response Percent</b>	<b>Response Count</b>
Lack of skills/education to obtain a job		40.9%	18
<b>Unable to find jobs in the area</b>		<b>75.0%</b>	<b>33</b>
Clients don't know where to look for jobs		0.0%	0
Employers/jobs are leaving the area		15.9%	7
There are not enough jobs for people with limited skills		36.4%	16
Lack of good paying jobs with benefits		22.7%	10
Long commute to jobs		0.0%	0
Client's don't know how to create a resume		2.3%	1
Client's don't know how to fill out applications		0.0%	0
Lack of child care		15.9%	7
Lack of computer skills		4.5%	2
Cost of child care		20.5%	9
Lack of transportation		43.2%	19
Cost of transportation		6.8%	3
Client's do not interview well		6.8%	3
Other (please specify)		9.1%	4
<b>answered question</b>			<b>44</b>
<b>skipped question</b>			<b>3</b>

**6. Is EDUCATION an issue for the population you serve?**

		<b>Response Percent</b>	<b>Response Count</b>
Yes		80.4%	37
No		19.6%	9
		<b>answered question</b>	<b>46</b>
		<b>skipped question</b>	<b>1</b>

**7. You have indicated that EDUCATION is an issue to the population you serve. Please select the THREE most important reasons this is an issue in Charlotte County:**

		Response Percent	Response Count
No High School diploma		40.5%	15
Lack of vocational skills or college		56.8%	21
Lack of GED/Adult Basic Education		27.0%	10
Classes are not available		2.7%	1
Classes are not held at convenient times and locations		8.1%	3
Threats of violence in schools		0.0%	0
No after school programs for youth		5.4%	2
Need computer access at home		10.8%	4
Lack of computer skills		18.9%	7
Lack of transportation to school		18.9%	7
Cost of transportation to school		2.7%	1
Lack of child care during school hours		13.5%	5
Cost of child care during school hours		21.6%	8
Lack of financial aid / how to apply and availability		21.6%	8
Don't know how to communicate with school staff		2.7%	1
Lack of training for work		43.2%	16
Other (please specify)		13.5%	5
<b>answered question</b>			<b>37</b>
<b>skipped question</b>			<b>10</b>

**8. Is HOUSING an issue to the population you serve?**

		<b>Response Percent</b>	<b>Response Count</b>
<b>Yes</b>	<input checked="" type="checkbox"/>	<b>89.1%</b>	<b>41</b>
<b>No</b>	<input type="checkbox"/>	<b>10.9%</b>	<b>5</b>
		<b>answered question</b>	<b>46</b>
		<b>skipped question</b>	<b>1</b>

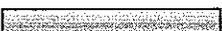
9. You have indicated that HOUSING is an issue to the population you serve. Please select the THREE most important reasons this is an issue in Charlotte County:

		Response Percent	Response Count
Cost of rent/house payments	<input type="checkbox"/>	70.7%	29
Lack of down payment on a house	<input type="checkbox"/>	12.2%	5
Lack of deposits for rental	<input type="checkbox"/>	36.6%	15
Housing repairs needed (interior or exterior)	<input type="checkbox"/>	4.9%	2
Credit issues	<input type="checkbox"/>	39.0%	16
Client's do not know how to buy a home	<input type="checkbox"/>	0.0%	0
Client's do not know their rights as a renter	<input type="checkbox"/>	4.9%	2
Cost of utility deposits	<input type="checkbox"/>	26.8%	11
Housing size does not meet family needs	<input type="checkbox"/>	7.3%	3
Lack of temporary emergency housing	<input type="checkbox"/>	22.0%	9
Affordable housing not available	<input type="checkbox"/>	58.5%	24
Housing needs weatherization (insulation, new windows/doors, etc.)	<input type="checkbox"/>	0.0%	0
Other (please specify)	<input type="checkbox"/>	17.1%	7
<b>answered question</b>			<b>41</b>
<b>skipped question</b>			<b>6</b>

**10. Is NUTRITION an issue for the population you serve?**

		<b>Response Percent</b>	<b>Response Count</b>
<b>Yes</b>	<input type="checkbox"/>	<b>73.9%</b>	<b>34</b>
<b>No</b>	<input type="checkbox"/>	<b>26.1%</b>	<b>12</b>
		<b>answered question</b>	<b>46</b>
		<b>skipped question</b>	<b>1</b>

11. You have indicated that NUTRITION is an issue to the population you serve. Please select the THREE most important reasons this is an issue in Charlotte County:

		Response Percent	Response Count
Food resources are not available		23.5%	8
Client's do not use available food pantries		5.9%	2
Food Stamp allotments run out		35.3%	12
Client's not eligible for food stamps		35.3%	12
Clients do not know how to buy and prepare nutritious meals		58.8%	20
<b>Not enough income for nutritious meals</b>		<b>64.7%</b>	<b>22</b>
Lack of transportation to store or food pantry		29.4%	10
Population is obese		8.8%	3
Clients do not know how to apply for food stamps		14.7%	5
Not enough time to prepare nutritious meals		8.8%	3
Other (please specify)		14.7%	5
		<b>answered question</b>	<b>34</b>
		<b>skipped question</b>	<b>13</b>

**12. Is USE OF INCOME an issue for the population you serve?**

		<b>Response Percent</b>	<b>Response Count</b>
<b>Yes</b>	<input type="checkbox"/>	<b>84.8%</b>	<b>39</b>
<b>No</b>	<input type="checkbox"/>	<b>15.2%</b>	<b>7</b>
		<b>answered question</b>	<b>46</b>
		<b>skipped question</b>	<b>1</b>

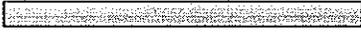
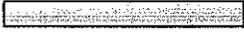
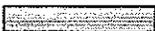
**13. You have indicated that USE OF INCOME is an issue to the population you serve. Please select the THREE most important reasons this is an issue in Charlotte County:**

		Response Percent	Response Count
Lack of knowledge of possible resources		43.6%	17
Client's do not know how to save money		25.6%	10
<b>Client's have difficulty maintaining a budget</b>		<b>79.5%</b>	<b>31</b>
Client's do not know how to address credit issues		10.3%	4
Clients do not have access to or qualify for bank accounts		10.3%	4
Client'd do not know how to set up a budget		43.6%	17
Client's have difficulty with money management (bad credit)		56.4%	22
Clients do not know about Earned Income Tax Credit (EITC)		7.7%	3
Clients do not have assistance in filing thier annual tax return		0.0%	0
Clients do not know how to get/enforce child support		15.4%	6
Other (please specify)		7.7%	3
		<b>answered question</b>	<b>39</b>
		<b>skipped question</b>	<b>8</b>

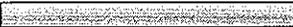
**14. Is TRANSPORTATION an issue to the population you serve?**

		Response Percent	Response Count
Yes		89.1%	41
No		10.9%	5
<b>answered question</b>			<b>46</b>
<b>skipped question</b>			<b>1</b>

**15. You have indicated that TRANSPORTATION is an issue to the population you serve. Please select the THREE most important reasons this is an issue in Charlotte County:**

		Response Percent	Response Count
Clients do not know how to buy a car/vehicle		0.0%	0
Cost of buying or down payment required		58.5%	24
Cost of maintaining car/vehicle (gas, insurance, license plates, etc.)		65.9%	27
Lack of credit to buy a car/vehicle		39.0%	16
<b>Public transportation hours not convenient</b>		<b>78.0%</b>	<b>32</b>
Cost of car repairs		29.3%	12
Lack of help to learn to drive and get a license (someone to teach them, car to practice and take test with, etc.)		4.9%	2
Other (please specify)		24.4%	10
<b>answered question</b>			<b>41</b>
<b>skipped question</b>			<b>6</b>

16. The following are EMERGENCY SITUATIONS that have been identified as particular problems in Charlotte County. Based upon your experience and the client issues you have seen recently, please select the THREE most important reasons for emergency situations:

		Response Percent	Response Count
Lack of food		15.2%	7
Lack of emergency shelters		47.8%	22
Lack of income for prescription drugs		28.3%	13
Lack of income for utilities/fuel		34.8%	16
No health insurance		32.6%	15
Child abuse/neglect in household		6.5%	3
Medical emergency resources (not covered by insurance, obtaining service, transportation to provider)		21.7%	10
Mental Health related crisis		32.6%	15
Alcohol, substance abuse and/or gambling addiction		45.7%	21
Lack of healthcare providers in Charlotte County		8.7%	4
Criminal activity resulting in family crisis		19.6%	9
Other (please specify)		6.5%	3
<b>answered question</b>			<b>46</b>
<b>skipped question</b>			<b>1</b>

<b>17. What would it take to end poverty in Charlotte County?</b>	
	<b>Response Count</b>
	39
<b>answered question</b>	<b>39</b>
<b>skipped question</b>	<b>8</b>

<b>18. What do you see as services that Charlotte County needs but are not currently being provided?</b>	
	<b>Response Count</b>
	39
<b>answered question</b>	<b>39</b>
<b>skipped question</b>	<b>8</b>

<b>19. What would you like to see Charlotte County Human Services do to help the community with these needs (ex. specific workshops, programs, classes, other assistance not currently provided)?</b>	
	<b>Response Count</b>
	34
<b>answered question</b>	<b>34</b>
<b>skipped question</b>	<b>13</b>

20. Do you think that human services providers in Charlotte County have an understanding of what resources are available in the community and what each provider offers?

	Response Percent	Response Count
Yes	77.3%	34
No	22.7%	10
<b>answered question</b>		<b>44</b>
<b>skipped question</b>		<b>3</b>

21. Do you think that services in Charlotte County are well coordinated?

	Response Percent	Response Count
Yes	51.2%	22
No	48.8%	21
<b>answered question</b>		<b>43</b>
<b>skipped question</b>		<b>4</b>

22. Would you like to be added to our mailing list for program updates?

	Response Percent	Response Count
Yes	62.8%	27
No	37.2%	16
<b>answered question</b>		<b>43</b>
<b>skipped question</b>		<b>4</b>

**23. Please provide us with your contact information**

		Response Percent	Response Count
Organization	<input type="text"/>	93.3%	14
Name	<input type="text"/>	93.3%	14
Title	<input type="text"/>	93.3%	14
Email Address	<input type="text"/>	86.7%	13
	answered question		15
	skipped question		32

**3. What is the nature of the services you provide?**

	Other (please specify)	
1	Neighborhood Accountability Board Juvrnile Diversion Program	Aug 24, 2010 7:37 PM
2	Car repairs	Aug 24, 2010 8:10 PM
3	Safe Shelter; Civil Legal Assistance; Criminal Court Advocacy; Counseling	Aug 24, 2010 10:24 PM
4	Provide services to victims of domestic violence/sexual assault	Aug 25, 2010 11:14 AM
5	ACCESS Food Stamps Medicaid	Aug 25, 2010 11:32 AM
6	shelter, transitional housing, DCF Access, community referral resource	Aug 25, 2010 11:33 AM
7	Clothing	Aug 25, 2010 12:02 PM
8	We do refer our clients to other services like, ELC, Housing Assistance and so on	Aug 25, 2010 12:08 PM
9	pregnancy and infant health services for pregnant women and infants to age 3 yrs.	Aug 25, 2010 12:59 PM
10	transitional housing mostly homeless from jail or prison	Aug 25, 2010 1:39 PM
11	Education for Homeless Students/Services	Aug 25, 2010 1:50 PM
12	health related	Aug 25, 2010 2:24 PM
13	education and support for families affected by mental illness	Aug 25, 2010 2:55 PM
14	Tutoring through SES program grant funding for Title 1 applicants only	Aug 25, 2010 3:52 PM
15	no rent assistance - only food and utilities & Rx - Emer ONLY	Aug 25, 2010 4:13 PM
16	Visit Incarcerated men at Charlotte Correctional Institute. Teach better decision making.	Aug 25, 2010 8:10 PM
17	Alcohol Prevention programs in middle and high schools, parenting programs, 55 and older alcohol prevnention programs, character building programs for elementary schools. We work closely with Drug Free Charlotte County.	Aug 25, 2010 8:10 PM
18	Cash assistance (TANF), Food Stamps, Medicaid programs	Aug 25, 2010 8:38 PM
19	clothing, household goods, furniture	Aug 25, 2010 10:57 PM

### 3. What is the nature of the services you provide?

Other (please specify)		
20	Services to persons with disabilities to assist them in achieving or maintaining their independence in the least restrictive environment possible	Aug 26, 2010 1:53 PM
21	Disability advocacy	Aug 26, 2010 2:11 PM
22	Family Restoration Healing teens	Aug 26, 2010 4:31 PM
23	Social Security and Health insurance application assistance	Aug 27, 2010 4:39 PM
24	Mass distribution of USDA Jan, March, May, July, September, November 11:00am to 12:30pm our food pantry has evening hours	Aug 27, 2010 10:22 PM
25	substance abuse recovery housing	Aug 28, 2010 3:21 PM
26	Independent Living Skill Training for people with disabilities	Aug 30, 2010 12:47 PM
27	Independent Living Skills	Sep 3, 2010 4:55 PM
28	furniture, clothing spiritual (in hospital) and prison ministries, plus limited medical, dental and travel assistance	Sep 6, 2010 10:04 PM

### 1. You have indicated that EMPLOYMENT is an issue to the population you

Other (please specify)		
1	ECONOMY - NATION WIDE	Aug 25, 2010 12:33 PM
2	Most of our residents have felony or drug charges and cannot be hired at many places that have jobs available.	Aug 25, 2010 1:41 PM
3	No effort is made by the state to prepare men for re-entry to society. Most are there because they don't understand what society wants from them.	Aug 25, 2010 8:15 PM
4	No Public Transportation (no county bus/transit system) is a major issues here	Aug 25, 2010 8:43 PM

### 1. You have indicated that EDUCATION is an issue to the population you serve.

Other (please specify)		
1	The way the job market is in this area is more medical, we do have alot of felons in this area	Aug 25, 2010 12:10 PM
2	Many of our residents would continue education but it comes to a choice of either working to live or schooling and no way to support themselves.	Aug 25, 2010 1:43 PM
3	lack of motivation	Aug 25, 2010 2:25 PM
4	No training available to inmates.	Aug 25, 2010 8:17 PM
5	Lack of Independent Living Skills Training (life experiences)	Sep 3, 2010 5:00 PM

### 1. You have indicated that HOUSING is an issue to the population you serve.

Other (please specify)		
1	can not pass back ground checks	Aug 25, 2010 11:36 AM
2	convicted felon status prevents attaining affordable housing	Aug 25, 2010 1:26 PM

**1. You have indicated that HOUSING is an issue to the population you serve.**

Other (please specify)		
3	Our housing is transitional and does not qualify for many agency assistances because we do not have leases.	Aug 25, 2010 1:45 PM
4	all the above but worse yet, society will not give them a second chance	Aug 25, 2010 8:19 PM
5	Housing accessible to persons w/disabilities	Aug 26, 2010 2:13 PM
6	history of felony or other arrests	Aug 26, 2010 4:15 PM
7	knowledge of Independent Living Skills	Sep 3, 2010 5:01 PM

**1. You have indicated that NUTRITION is an issue to the population you serve.**

Other (please specify)		
1	Even our Food pantries are not stocked enough to help all those families in need	Aug 25, 2010 12:14 PM
2	we service homeless, disabled, and senion citizens in our Hot Meals Program- transportation and physical ability to come is an issue	Aug 25, 2010 4:35 PM
3	Charlotte County Comissioners don't care!	Aug 25, 2010 8:22 PM
4	mistake not an issue	Aug 28, 2010 3:24 PM
5	Determining healthy choices for consumers and families of consumers	Sep 3, 2010 5:07 PM

**1. You have indicated that USE OF INCOME is an issue to the population you**

Other (please specify)		
1	Gambling Issues	Aug 25, 2010 11:56 AM
2	Overall lack or of limited incomes	Aug 25, 2010 9:34 PM
3	Consumers do not control their own budget. Usually a parent or caregiver does this.	Sep 3, 2010 5:09 PM

**1. You have indicated that TRANSPORTATION is an issue to the population you**

Other (please specify)		
1	There is no bus system in the county that works correctly and the cost is to much	Aug 25, 2010 12:16 PM
2	Public transportation is not set up on fixed route/fixed time schedule.	Aug 25, 2010 12:36 PM
3	Cost of our public transportation (as it is) is prohibitive for those job searching. Although dial-a-ride serves a purpose, it is not a good job searching tool because of scheduling and cost. Also, most of our residents cannot get a license due to past fines which cannot be paid without a job. We need a public transit system which is affordable and flexible.	Aug 25, 2010 1:49 PM
4	Lack of regular public transportation-48 hours to set up a ride!	Aug 25, 2010 1:57 PM
5	One man lives in the Coalition shelter and needs Dialissis transportation cannot/will not be made available.	Aug 25, 2010 8:25 PM

**1. You have indicated that TRANSPORTATION is an issue to the population you**

Other (please specify)		
6	No real transit system for the county - dial a-ride does not equate to a public bus system; Lack of income to afford to purchase and maintain a person vehicle/care	Aug 25, 2010 9:37 PM
7	Lack of accessible public transportation.	Aug 26, 2010 1:57 PM
8	Lack of fixed routes	Aug 26, 2010 2:16 PM
9	Dial a Ride requires two days advance notice for pick up	Aug 26, 2010 4:18 PM
10	No income for public transportation	Aug 27, 2010 4:49 PM

**1. The following are EMERGENCY SITUATIONS that have been identified as**

Other (please specify)		
1	Lack of income for all things really	Aug 25, 2010 12:17 PM
2	Lack of Income to pay RENT	Aug 25, 2010 2:21 PM
3	Lack Of Employment	Aug 31, 2010 7:07 PM

**1. What would it take to end poverty in Charlotte County?**

Response Text		
1	More businesses, bigger companies brings employment. Educating young adults.	Aug 24, 2010 7:53 PM
2	More jobs and better pay!	Aug 24, 2010 8:21 PM
3	A miracle. There are so many issues to tackle.	Aug 24, 2010 9:54 PM
4	Jobs, affordable housing, transportation, education and child care.	Aug 25, 2010 11:20 AM
5	More jobs	Aug 25, 2010 11:40 AM
6	a community wide effort to institute a 10 yr plan to end homelessness, with cooperation from the county commission	Aug 25, 2010 11:40 AM
7	Create more jobs/education/training.	Aug 25, 2010 11:58 AM
8	Job creation and training programs to assist in getting and holding a job.	Aug 25, 2010 12:09 PM
9	Education	Aug 25, 2010 12:15 PM
10	More jobs, people being trained to do those jobs, income no less than 17,000.00 a year. Employers giving people chances regardless of a degree and use the life skills they might have	Aug 25, 2010 12:21 PM
11	Fixed route transportation. More employment opportunitites-bringing in more businesses.	Aug 25, 2010 12:39 PM
12	People in Charlotte county need stable, affordable housing. They need job oportunities. We need a stronger more diversified economy.	Aug 25, 2010 1:15 PM
13	More employment opportunities, public transportation routes, affordable housing	Aug 25, 2010 1:15 PM
14	More employment opportunities and more affordable (really affordable) housing	Aug 25, 2010 1:22 PM
15	Job creation Job training	Aug 25, 2010 1:36 PM
16	Livable Wage, Decent Housing and people caring about people.	Aug 25, 2010 1:54 PM

## 1. What would it take to end poverty in Charlotte County?

	Response Text	
17	More employers willing to hire those with felony or drug charges. More affordable housing for low income families who have had evictions or felony charges in their past.	Aug 25, 2010 1:55 PM
18	Economic Initiatives: to bring more industries to the area, specially clean technology.	Aug 25, 2010 2:04 PM
19	County Government will HAVE to work with private agencies cooperatively.	Aug 25, 2010 2:23 PM
20	a better understanding and compassion on the part of more fortunate residents on what is at the root of poverty and how poverty impacts their life- i.e. crime This education is especially needed for policy makers and those who have the power to make significant changes.	Aug 25, 2010 2:34 PM
21	Affordable public transportation would help the most disadvantaged.	Aug 25, 2010 3:10 PM
22	Unemployment rate to decrease More job skill training available with potential jobs awaiting after their training	Aug 25, 2010 4:58 PM
23	More employers and more jobs.	Aug 25, 2010 5:39 PM
24	Have more emergency shelters, have better mental health counselors, have more convenient public transportation and have an easier way for the community to access this information.	Aug 25, 2010 8:02 PM
25	More jobs in the area and better education of the population of which jobs are available/	Aug 25, 2010 8:13 PM
26	More good paying jobs. I see electricians and carpenters who cannot get a job. These are people with skills!	Aug 25, 2010 8:31 PM
27	Jobs and training. Comissioners turned away interested businesses like Walmart Distribution Ctr.	Aug 25, 2010 8:34 PM
28	Stable Job market with jobs that pay above minimum wage, transportation and reasonable day care	Aug 25, 2010 8:48 PM
29	Brining in industry and jobs	Aug 25, 2010 9:41 PM
30	jobs and training	Aug 25, 2010 11:05 PM
31	Years of hard work	Aug 26, 2010 1:59 PM
32	Get rid of the drug and alochol problem	Aug 26, 2010 4:41 PM
33	New Emplooyers	Aug 26, 2010 8:54 PM
34	To create more jobs and create more resources for people to utilize.	Aug 27, 2010 4:52 PM
35	A lot more than we are ever going to be able to do. The most we can hope for is to relieve some of it with what we are able to do.	Aug 27, 2010 10:33 PM
36	more services to help those who do not have skills need to obtain employment	Aug 28, 2010 3:26 PM
37	more job and job training	Aug 31, 2010 7:08 PM
38	Not going to end but, proper housing is necessary. Living in bushes is inhumane.	Sep 3, 2010 5:19 PM
39	colloborative effort between local governments and non-profits to develop a longterm plan to deal with the sysmetic issues.	Sep 6, 2010 10:16 PM

## 2. What do you see as services that Charlotte County needs but are not

	Response Text	
1	Publice transportation is needed	Aug 24, 2010 7:53 PM
2	The following services end 9/30 and need to be extended: car repairs, education and childcare assistance	Aug 24, 2010 8:21 PM

## 2. What do you see as services that Charlotte County needs but are not

	Response Text	
3	Viable Public Transportation	Aug 24, 2010 10:30 PM
4	Jobs, affordable housing, transportation, education and child care.	Aug 25, 2010 11:20 AM
5	Regular public transportation	Aug 25, 2010 11:40 AM
6	permanent housing resources	Aug 25, 2010 11:40 AM
7	None	Aug 25, 2010 11:58 AM
8	Housing for homeless and access to alcoho/substance abuse programs.	Aug 25, 2010 12:09 PM
9	Public Transpertation at a desent cost, that will work for the public, More education on how to manage money with or with out a bank account, low income housing that is not 725.00 for a crapy two bedroom apartment in a bad neighborhood	Aug 25, 2010 12:21 PM
10	Fixed route transportation.	Aug 25, 2010 12:39 PM
11	Job Placement. I also think the County could reduce the number of duplicate service providers.	Aug 25, 2010 1:15 PM
12	fixed-route public transportation, dental services for Medicaid participants	Aug 25, 2010 1:15 PM
13	Dental services	Aug 25, 2010 1:22 PM
14	transportation, housing to those with less than perfect backgrounds	Aug 25, 2010 1:30 PM
15	Public transportation	Aug 25, 2010 1:36 PM
16	With the funds that are available at this time, they are doing the best that they can.	Aug 25, 2010 1:54 PM
17	Follow up with families that get certain types of assistance to insure that don't stay in a cycle of needing the same types of assistance. A form of case management - almost like probation reporting.	Aug 25, 2010 1:55 PM
18	Affordable after school services and day care services.	Aug 25, 2010 2:04 PM
19	Services for the mentally ill, severely developmentally disabled, and chronically homeless.	Aug 25, 2010 2:23 PM
20	Resume and cover letter assistance. Providing access to jobs for professionals, state and/or nationwide-Comprehensive employment assistance for educated populace	Aug 25, 2010 2:34 PM
21	Affordable, reliable public transportation.	Aug 25, 2010 3:10 PM
22	Better public transportation-we need to have a better bus transit system in place other than Dia-A-Ride hours available. More affordable housing available without being placed on a extensive waiting list	Aug 25, 2010 4:58 PM
23	Fixed route bus service. Reliable public transportation. Economic development.	Aug 25, 2010 5:39 PM
24	More public transportation than what's available now at a very low cost or no cost.	Aug 25, 2010 8:02 PM
25	More after school programs	Aug 25, 2010 8:13 PM
26	Emergency shelters, help paying utility bills. Child care.	Aug 25, 2010 8:31 PM
27	Make Charlotte County attractive to businesses by offering incentives to businesses. Advertise	Aug 25, 2010 8:34 PM
28	Public Transpotation, Subsidized child Care, Health care	Aug 25, 2010 8:48 PM
29	A Public Transit system - buses with routes similar to Lee Tran or the SCAT	Aug 25, 2010 9:41 PM
30	Transportation and Accessible housing	Aug 26, 2010 1:59 PM
31	Teaching parents their responsibilities raising their children	Aug 26, 2010 4:41 PM
32	Central Sewer to stimulate business growht	Aug 26, 2010 8:54 PM
33	better transportation system and affordable housing	Aug 26, 2010 10:35 PM
34	Public transportation- fixed route bus system, and emergency shelter.	Aug 27, 2010 4:52 PM

## 2. What do you see as services that Charlotte County needs but are not

	Response Text	
35	Bus service. A service where people with low incomes especially those on SNAP can purchase sanitary supplies, toilet paper shampoo, etc that they can not get with SNAP as the money they have barely covers other things like rent and utilities.	Aug 27, 2010 10:33 PM
36	dental programs, public bus system other than dial a ride	Aug 28, 2010 3:26 PM
37	assistance with purchacing affordable vehicles of fixing vehiclles	Aug 31, 2010 7:08 PM
38	On the job training opportunities. Companies to open their doors to training individuals.	Sep 3, 2010 5:19 PM
39	Lack of leadership -limit or no support to ehlp the poor and needy especiall at the county level.	Sep 6, 2010 10:16 PM

## 3. What would you like to see Charlotte County Human Services do to help the

	Response Text	
1	help young adults prepare for college, and offer training in computer, networking	Aug 24, 2010 7:53 PM
2	Budget management classes for adults and youth. Workshops to aid people in applying for education grants.	Aug 24, 2010 8:21 PM
3	Must continue to offer all kinds of programs and activities to help the needs of the community.	Aug 24, 2010 9:54 PM
4	Fund direct client services.	Aug 24, 2010 10:30 PM
5	Free computer classes, tax credits for business that hire welfare recipients, car repair program	Aug 25, 2010 11:20 AM
6	Job skills training targeted to the available jobs in the county	Aug 25, 2010 11:40 AM
7	expand services through HPRP, not proceed with case management to a limited number of individuals	Aug 25, 2010 11:40 AM
8	Job training, resume assistance, alcohol/substance abuse counseling	Aug 25, 2010 12:09 PM
9	Human Services is currently out of funding and they just need more funding to help those who truly need the help, not those who don't want to work.	Aug 25, 2010 12:21 PM
10	Classes.	Aug 25, 2010 12:39 PM
11	I would like to see more ways to help teach people to fend for them selves versus providing a bail out.	Aug 25, 2010 1:15 PM
12	Educational Programs to become more self-sufficient	Aug 25, 2010 1:22 PM
13	adequate public transportation	Aug 25, 2010 1:30 PM
14	Educate Commissioners on the need	Aug 25, 2010 1:36 PM
15	Specific Workshops to address the various needs of different Age groups.	Aug 25, 2010 1:54 PM
16	Have more money to help with a wider variety of needs. Have more staff available to help people in emergency situations.	Aug 25, 2010 1:55 PM
17	To have accesibility to parents/guardians of computers/information about services in our 20 schools	Aug 25, 2010 2:04 PM
18	Stop hording resources for unnecessary programming and work with the agencies that are serving those in need.	Aug 25, 2010 2:23 PM
19	Re-vamp career/employment services. Do a poverty workshop with county council. Bring in council leaders from other communities who "get it," and perhaps psychologist/sociologists, experts on homelessness, addiction etc who can effectively engage them and possib;y open their minds.	Aug 25, 2010 2:34 PM

### 3. What would you like to see Charlotte County Human Services do to help the

	Response Text	
20	We have a number of people who are involved with the criminal justice system who are not able to get to their programs or pay for their treatment (substance abuse, domestic violence). Perhaps they can attend these programs and get transportation and "pay" for it by doing community service.	Aug 25, 2010 3:10 PM
21	Classes for job training	Aug 25, 2010 4:58 PM
22	Credit Counseling and Budgeting Classes, Home Ownership Classes, Finding Financial Aid and Grants for Education.	Aug 25, 2010 8:02 PM
23	Offer more locations for parenting programs and childcare for those attending.	Aug 25, 2010 8:13 PM
24	Attract good companies to the area to create jobs.	Aug 25, 2010 8:31 PM
25	make training available to all who desire work and educate businesses about former inmates to reduce fear.	Aug 25, 2010 8:34 PM
26	Need to draw down funding for programs in these areas	Aug 25, 2010 8:48 PM
27	Find funding for a bus/public transit system that operates 7 days a week with scheduled stops and times that cover the entire county. Dial-A-Ride does not accommodate this and without such people cannot look for and obtain jobs, shop, etc.	Aug 25, 2010 9:41 PM
28	Expand the public transportation system and explore subgrants with CDBG funds to organizations who serve persons with disabilities	Aug 26, 2010 1:59 PM
29	Christian parenting classes, Christian counseling or lay ministries	Aug 26, 2010 4:41 PM
30	more financial assistance is great needed for rental/mortgage assistance and utility assistance.	Aug 27, 2010 4:52 PM
31	Have more than one day leeway for health department appointments. Even if you call at 8am you have to wait on the phone for 5 to 15 minutes then all appointments for the next day are gone in 20 minutes.	Aug 27, 2010 10:33 PM
32	a lot of our clients need dental assistance and there is hardly any help available for those services	Aug 28, 2010 3:26 PM
33	Partner with large organizations to provide employment training/opportunities. Help people when their air conditioning breaks down. Homeless shelters/food.	Sep 3, 2010 5:19 PM
34	Develop a 10 year plan to deal with underlying problems that poor and needy. Important that both necessary resources and long term follow up care takes place. There must be accountability by government, no, profits and people in need.	Sep 6, 2010 10:16 PM

### 1. Please provide us with your contact information

	Organization	
1	Macedonia Human Services Cultural Training Center, Inc.	Aug 25, 2010 4:59 PM
2	Career and Service Center	Aug 25, 2010 5:39 PM
3	Punta Gorda Housing Authority	Aug 25, 2010 8:03 PM
4		Aug 25, 2010 8:35 PM
5	Department of Children & Families	Aug 25, 2010 8:49 PM
6	St. Vincent de Paul, Sacred Heart Punta Gorda	Aug 25, 2010 11:06 PM
7	Charlotte Behavioral Health Care	Aug 26, 2010 4:20 PM
8	HOuse of Hope Sun Coast FL	Aug 26, 2010 4:42 PM
9	CBHC	Aug 26, 2010 10:36 PM
10	Charlotte Behavioral Health Care	Aug 27, 2010 4:54 PM

## 1. Please provide us with your contact information

	Organization	
11	Community Resource Center	Aug 27, 2010 10:34 PM
12	Mission Unity Inc	Aug 28, 2010 3:27 PM
13	Charlotte County Homeless Coalition	Aug 31, 2010 7:09 PM
14	Center for Independent Living	Sep 3, 2010 5:20 PM
15	St. Vincent De Paul - District Council, Char. Co.	Sep 6, 2010 10:18 PM

## 1. Please provide us with your contact information

	Name	
1	Cheryl LaVecchio	Aug 25, 2010 4:59 PM
2	Debbie Guilbault	Aug 25, 2010 5:39 PM
3	Stephanie M. Cox	Aug 25, 2010 8:03 PM
4	Thomas M. Schubauer	Aug 25, 2010 8:35 PM
5	Susan Wright	Aug 25, 2010 8:49 PM
6	Elaine Vogel	Aug 25, 2010 11:06 PM
7	Sharon Salter, LMHC	Aug 26, 2010 4:20 PM
8	Lisa Pape	Aug 26, 2010 4:42 PM
9	Gina Wynn	Aug 26, 2010 10:36 PM
10	Megan Burkard	Aug 27, 2010 4:54 PM
11	Sana Davis	Aug 27, 2010 10:34 PM
12		Aug 28, 2010 3:27 PM
13	Luz A Torres	Aug 31, 2010 7:09 PM
14	Gina Hemp	Sep 3, 2010 5:20 PM
15	Joseph Sabatino	Sep 6, 2010 10:18 PM

## 1. Please provide us with your contact information

	Title	
1	Grant Program Director	Aug 25, 2010 4:59 PM
2	Center Supervisor	Aug 25, 2010 5:39 PM
3	Section 8 Family Self Sufficiency Coordinator	Aug 25, 2010 8:03 PM
4	Mr.	Aug 25, 2010 8:35 PM
5	Program Administrator	Aug 25, 2010 8:49 PM
6	President	Aug 25, 2010 11:06 PM
7	Mental Health Court Program Manager	Aug 26, 2010 4:20 PM
8	President/Founder	Aug 26, 2010 4:42 PM
9	Director of Residential and Case Management Services	Aug 26, 2010 10:36 PM
10	Adult Case Manager	Aug 27, 2010 4:54 PM
11	President-Executive Director	Aug 27, 2010 10:34 PM
12		Aug 28, 2010 3:27 PM
13	Case Manager	Aug 31, 2010 7:09 PM

## 1. Please provide us with your contact information

	Title	
14	Employment Specialist	Sep 3, 2010 5:20 PM
15	President, District Council	Sep 6, 2010 10:18 PM

## 1. Please provide us with your contact information

	Email Address	
1	cheryllv@centurylink.net	Aug 25, 2010 4:59 PM
2		Aug 25, 2010 5:39 PM
3	stephanie@puntagordaha.org	Aug 25, 2010 8:03 PM
4	tschubauer@comcast.net	Aug 25, 2010 8:35 PM
5	susan_wright@dcf.state.fl.us	Aug 25, 2010 8:49 PM
6	elainevogel@embarqmail.com	Aug 25, 2010 11:06 PM
7	ssalter@cbhcfl.org	Aug 26, 2010 4:20 PM
8	lisapape@houseofhopesuncoastfl.org	Aug 26, 2010 4:42 PM
9	gwynn@cbhcfl.org	Aug 26, 2010 10:36 PM
10	mburkard@cbhcfl.org	Aug 27, 2010 4:54 PM
11	CRC5400@yahoo.com	Aug 27, 2010 10:34 PM
12		Aug 28, 2010 3:27 PM
13	luz.torres@cchomelesscoalition.org	Aug 31, 2010 7:09 PM
14	ghemp@cilfl.org	Sep 3, 2010 5:20 PM
15	jsabot2003@yahoo.com	Sep 6, 2010 10:18 PM

1. Is EMPLOYMENT an issue to residents living in poverty?

	Response Percent	Response Count
Yes	100.0%	5
No	0.0%	0
<b>answered question</b>		<b>5</b>
<b>skipped question</b>		<b>0</b>

2. You have indicated that **EMPLOYMENT** is an issue for residents in poverty. Please select the **THREE** most important reasons this is an issue in Charlotte County:

	Response Percent	Response Count
Lack of skills/education to obtain a job	20.0%	1
Unable to find jobs in the area	80.0%	4
Don't know where to look for jobs	0.0%	0
Employers/jobs are leaving the area	60.0%	3
There are not enough jobs for people with limited skills	40.0%	2
Lack of good paying jobs with benefits	80.0%	4
Long commute to jobs	0.0%	0
Don't know how to create a resume	0.0%	0
Don't know how to fill out applications	0.0%	0
Lack of child care	0.0%	0
Lack of computer skills	0.0%	0
Cost of child care	20.0%	1
Lack of transportation	0.0%	0
Cost of transportation	0.0%	0
Poor interview skills	0.0%	0
Other (please specify)	0.0%	0
	<b>answered question</b>	<b>5</b>
	<b>skipped question</b>	<b>0</b>

**3. Is EDUCATION an issue for residents in poverty?**

		<b>Response Percent</b>	<b>Response Count</b>
Yes		100.0%	5
No		0.0%	0
		<b>answered question</b>	<b>5</b>
		<b>skipped question</b>	<b>0</b>

**4. You have indicated that EDUCATION is an issue for residents in poverty. Please select the THREE most important reasons this is an issue in Charlotte County:**

		<b>Response Percent</b>	<b>Response Count</b>
No High School diploma		40.0%	2
<b>Lack of vocational skills or college</b>		<b>60.0%</b>	<b>3</b>
Lack of GED/Adult Basic Education		40.0%	2
Classes are not available		0.0%	0
Classes are not held at convenient times and locations		0.0%	0
Threats of violence in schools		0.0%	0
No after school programs for youth		0.0%	0
Need computer access at home		0.0%	0
Lack of computer skills		20.0%	1
Lack of transportation to school		40.0%	2
Cost of transportation to school		0.0%	0
Lack of child care during school hours		20.0%	1
Cost of child care during school hours		20.0%	1
Lack of financial aid / how to apply and availability		20.0%	1
Don't know how to communicate with school staff		0.0%	0
Lack of training for work		20.0%	1
Other (please specify)		20.0%	1
<b>answered question</b>			<b>5</b>
<b>skipped question</b>			<b>0</b>

**5. Is HOUSING an issue for residents in poverty?**

		<b>Response Percent</b>	<b>Response Count</b>
Yes	<input type="checkbox"/>	60.0%	3
No	<input type="checkbox"/>	40.0%	2
<b>answered question</b>			<b>5</b>
<b>skipped question</b>			<b>0</b>

6. You have indicated that HOUSING is an issue for residents in poverty. Please select the THREE most important reasons this is an issue in Charlotte County:

	Response Percent	Response Count
Cost of rent/house payments	100.0%	3
Lack of down payment on a house	0.0%	0
Lack of deposits for rental	33.3%	1
Lack of knowledge on how to buy a home	0.0%	0
Lack of knowledge on rights as a renter	0.0%	0
Housing repairs needed (interior or exterior)	0.0%	0
Credit issues	33.3%	1
Cost of utility deposits	66.7%	2
Housing size does not meet family needs	0.0%	0
Lack of temporary emergency housing	0.0%	0
Affordable housing not available	33.3%	1
Housing needs weatherization (insulation, new windows/doors, etc.)	0.0%	0
Other (please specify)	33.3%	1
	<b>answered question</b>	<b>3</b>
	<b>skipped question</b>	<b>2</b>

**7. Is NUTRITION an issue for residents in poverty?**

		<b>Response Percent</b>	<b>Response Count</b>
<b>Yes</b>	<input type="checkbox"/>	60.0%	3
<b>No</b>	<input type="checkbox"/>	40.0%	2
		<b>answered question</b>	<b>5</b>
		<b>skipped question</b>	<b>0</b>

8: You have indicated that NUTRITION is an issue for residents in poverty. Please select the THREE most important reasons this is an issue in Charlotte County:

	Response Percent	Response Count
Food resources are not available	0.0%	0
Available food pantries not well utilized	0.0%	0
Food Stamp allotments run out	0.0%	0
High population not eligible for food stamps	66.7%	2
Lack of knowledge of how to buy and prepare nutritious meals	33.3%	1
Not enough income for nutritious meals	66.7%	2
Lack of transportation to store or food pantry	66.7%	2
Population is obese	33.3%	1
Lack of knowledge of how to apply for food stamps	0.0%	0
Not enough time to prepare nutritious meals	0.0%	0
Other (please specify)	33.3%	1
	<b>answered question</b>	<b>3</b>
	<b>skipped question</b>	<b>2</b>

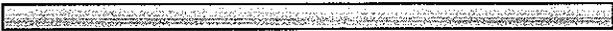
9. Is USE OF INCOME an issue for residents in poverty?

		Response Percent	Response Count
Yes		60.0%	3
No		40.0%	2
		answered question	5
		skipped question	0

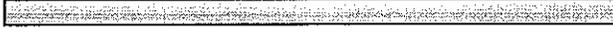
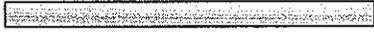
10. You have indicated that USE OF INCOME is an issue for residents in poverty. Please select the THREE most important reasons this is an issue in Charlotte County:

	Response Percent	Response Count
Lack of knowledge of possible resources	0.0%	0
Lack of knowledge of how to save money	100.0%	3
Difficulty maintaining a budget	100.0%	3
Lack of knowledge of how to address credit issues	0.0%	0
Do not have access to or qualify for bank accounts	33.3%	1
Do not know how to set up a budget	33.3%	1
Difficulty with money management (bad credit)	33.3%	1
Lack of knowledge about Earned Income Tax Credit (EITC)	0.0%	0
Assistance in filing annual tax returns is not available	0.0%	0
Lack of knowledge of how to get/enforce child support	0.0%	0
Other (please specify)	0.0%	0
<b>answered question</b>		<b>3</b>
<b>skipped question</b>		<b>2</b>

**11. Is TRANSPORTATION an issue for residents in poverty?**

		Response Percent	Response Count
Yes		100.0%	5
No		0.0%	0
<b>answered question</b>			<b>5</b>
<b>skipped question</b>			<b>0</b>

**12. You have indicated that TRANSPORTATION is an issue for residents in poverty. Please select the THREE most important reasons this is an issue in Charlotte County:**

		Response Percent	Response Count
Lack knowlege of how to buy a car/vehicle		0.0%	0
Cost of buying or down payment required		80.0%	4
Cost of maintaining car/vehicle (gas, insurance, license plates, etc.)		100.0%	5
Lack of credit to buy a car/vehicle		20.0%	1
Public transportation hours not convenient		60.0%	3
Cost of car repairs		40.0%	2
Lack of help to learn to drive and get a license (someone to teach them, car to practice and take test with, etc.)		0.0%	0
Other (please specify)		0.0%	0
<b>answered question</b>			<b>5</b>
<b>skipped question</b>			<b>0</b>

13. The following are EMERGENCY SITUATIONS that have been identified as particular problems in Charlotte County. Based upon your experience and the issues you have seen recently, please select the THREE most important reasons for emergency situations:

	Response Percent	Response Count
Lack of food	0.0%	0
Lack of emergency shelters	40.0%	2
Lack of income for prescription drugs	0.0%	0
Lack of income for utilities/fuel	20.0%	1
No health insurance	40.0%	2
Child abuse/neglect in household	20.0%	1
Medical emergency resources (not covered by insurance, obtaining service, transportation to provider)	20.0%	1
<b>Mental Health related crisis</b>	<b>100.0%</b>	<b>5</b>
Alcohol, substance abuse and/or gambling addiction	60.0%	3
Lack of healthcare providers in Charlotte County	0.0%	0
Criminal activity resulting in family crisis	0.0%	0
Other (please specify)	0.0%	0
	<b>answered question</b>	<b>5</b>
	<b>skipped question</b>	<b>0</b>

14. What would it take to end poverty in Charlotte County?

Response  
Count

3

answered question

3

skipped question

2

15. What do you see as services that Charlotte County needs but are not currently being provided?

Response  
Count

3

answered question

3

skipped question

2

16. What would you like to see Charlotte County Human Services do to help the community with these needs (ex. specific workshops, programs, classes, other assistance not currently provided)?

Response  
Count

2

answered question

2

skipped question

3

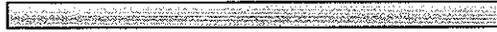
**17. Do you think that human services providers in Charlotte County have an understanding of what resources are available in the community and what each provider offers?**

		Response Percent	Response Count
Yes		100.0%	5
No		0.0%	0
answered question			5
skipped question			0

**18. Do you think that services in Charlotte County are well coordinated?**

		Response Percent	Response Count
Yes		80.0%	4
No		20.0%	1
answered question			5
skipped question			0

**19. Would you like to be added to our mailing list for program updates?**

		Response Percent	Response Count
Yes		20.0%	1
No		80.0%	4
answered question			5
skipped question			0

**20. Please provide us with your contact information**

	Response Percent	Response Count
Organization	0.0%	0
Name	0.0%	0
Title	0.0%	0
Email Address	0.0%	0
	<b>answered question</b>	<b>0</b>
	<b>skipped question</b>	<b>5</b>

**1. You have indicated that EDUCATION is an issue for residents in poverty.**

Other (please specify)  
 1 cost of education Sep 15, 2010 7:22 PM

**1. You have indicated that HOUSING is an issue for residents in poverty. Please**

Other (please specify)  
 1 cost of maintaining household, utilities, taxes, repairs Sep 15, 2010 7:23 PM

**1. You have indicated that NUTRITION is an issue for residents in poverty.**

Other (please specify)  
 1 cost of food, money is spent on other necessities e.g. housing & medical Sep 15, 2010 7:26 PM

**1. What would it take to end poverty in Charlotte County?**

Response Text  
 1 jobs and education Sep 8, 2010 2:19 AM  
 2 jobs Sep 15, 2010 7:35 PM  
 3 A robust job market. Sep 17, 2010 6:57 PM

## 2. What do you see as services that Charlotte County needs but are not

	Response Text	
1	jobs	Sep 8, 2010 2:19 AM
2	public transportation	Sep 15, 2010 7:35 PM
3	None that would reduce poverty.	Sep 17, 2010 6:57 PM

## 3. What would you like to see Charlotte County Human Services do to help the

	Response Text	
1	need more help finding living quarters	Sep 8, 2010 2:19 AM
2	I am not sure that there is really anything local government can provide beyond what they already provide to end poverty.	Sep 17, 2010 6:57 PM

## 2010 COMMUNITY NEEDS ASSESSMENT DATA RESULTS

HEALTH	TOTAL
Medicaid/Medicare Provider	324
Specialist-	
0-Teen	1
0-14	36
15-17	93
18-19	
OB/GYN (Medicaid)	5
Dentist (Medicaid)	1
Hospitals (Medicaid)	3
Federally Qualified Health Clinic	1
Mental Health Facilities	2
Alcohol, Drug Facilities	2
Local Health Department (Locations)	3
Faith Based Providers (Virginia B. Andes)	1
Medicaid Enrollment	
Licensed Mental Health Counselors	10
In-Home Health Care Agencies	13
EDUCATION	TOTAL
	YEAR
Drop Out Rate	2008-2009
	2.9%
Continued Education	2008-2009
	58.1%
Continued Ed. While Employed	2008-2009
	52.0%
Homeless Students	2009-2010
	335
Teen Birth	2008
	202
Head Start Eligible	2009-2010
	295
Early Start	2009-2010
	60
VPK	2008-2009
	902
First Steps	2009-2010
	0
ESE	2009-2010
	3,351 w/ 366 Gifted
Home Schooled Students	2009-2010
	412
Enrolled Total Students	16,684
<b>High School Graduation Rate</b>	<b>2008-2009</b>
	<b>84.3%</b>
CHILDCARE	TOTAL
Licensed Facilities in Charlotte County	101
Waiting List for Subsidized Childcare	13 (Age 0-5)
<b>Average Cost of Childcare:</b>	<b>\$125 (Wkly-1child)</b>

<b>UNEMPLOYMENT RATES (AUGUST 2010)</b>		<b>TOTAL</b>
Charlotte County		13.0%
State of Florida	1	2.0%
<b>Average Annual Wage</b>		<b>\$30,965</b>

<b>NUTRITION</b>	<b>YEAR</b>	<b>TOTAL</b>
WIC-	2008-2009	
Individual		2,964
Eligible		3,318
Served		87%
Food Stamps	2010	9,073 (Household)
Super Markets-		
Englewood		7
Port Charlotte		17
Punta Gorda		8
Farmers Markets/Produce		4 (FM); 2 (Prod)
Free/Reduced Lunch	2008-2009	8,324
	2009-2010	9,861
Seniors-		
Congregate Meals	2009	190
Home Delivered Meals		229

<b>HOUSING</b>	<b>YEAR</b>	<b>TOTAL</b>
Average Cost of Homes		\$97,000
Foreclosures	2009	↓33%
	2009-2010	210
Section 8 Waiting List	Current	366
Public Housing Waiting List	Current	253
<b><i>There is a currently 3-5 year waiting period</i></b>		
Emergency Utility Assistance		3,434
Low Income Energy Program Assistance		2,139
Average Emergency Utility Assistance Payments		\$280.89 (04/10)
Summer		\$273
Winter		\$295

**TRANSPORTATION****TOTAL**

Public Trans. trends	18,963
Dial-A-Ride	30,909
Sunshine Ride	13,637
<b>Total Rides</b>	<b>44,546</b>

**SURVEY RESULTS**

	<b>Priority Area #1</b>	<b>Priority Area #2</b>	<b>Priority Area #3</b>
<b>Partner Survey</b>	Unable to find jobs	Lack of transportation	Lack of skills/education to get jobs
<b>Elected Officials</b>	Unable to find area jobs	Lack of good pay/benefits	Employers/jobs leaving
<b>Clients</b>	Unable to find jobs	Lack of good pay/benefits	Few jobs for those w/ limited skills

## **Appendix C**

FSSP Outcome Scales

FSSP Forms



# Charlotte County Human Services Family Self-Sufficiency Program

## Employment Outcome Scale

Outcome Level:  Family  Agency  Community

Benchmarks	Outcomes
Thriving	Full-Time Work in profession of choice above minimum wage with benefits (10A)  Self-employed in profession of choice with regular contracts and self-employment benefits (10B)
Independent Safe	Full-Time work at above minimum wage without benefits (8A)  Self-employed (limited profession) without benefits (8B)
Independent Stable	Full-Time employment at minimum wage with benefits (6A)  Self-employed without benefits (6B)  Full-Time employment at minimum wage without benefits (5)
Independent	<b>Prevention Line</b>
Vulnerable	Part-Time or seasonal employment with benefits (4A)  Self-employed limited work with benefits (4B)  Self-employed limited work without benefits (3A)
Dependent	Part-Time employment without benefits (3B)
In-Crisis	Unemployed with work history & skills (2)  Self-employed – no work (1)  Unemployed without work history or skill (0)
Dependent	

# Charlotte County Human Services Family Self-Sufficiency Program

## Income Outcome Scale

Outcome Level:  Family  Agency  Community

Benchmarks	Outcomes
Thriving	>200% FPL (9 – 10)
Independent	
Safe	176% FPL – 200% FPL (7-8)
Independent	
Stable	126% FPL – 175% FPL (5-6)
Independent	
<b>Prevention Line</b>	
Vulnerable	100% FPL – 125% FPL (3-4)
Dependent	
In-Crisis	50% FPL – 100% FPL (1-2)
Dependent	0% FPL – 49% FPL (0)

# Charlotte County Human Services Family Self-Sufficiency Program

## Housing Outcome Scale

Outcome Level:  Family  Agency  Community

Benchmarks	Outcomes
Thriving	Housing of Choice – Non-Subsidized
Independent	Safe and secure non-subsidized housing of choice (Home, Condominium, Co-op); owner (10A) Safe and secure non-subsidized housing of choice; renter (10B)
Safe	Limited Choice of Housing – Non-Subsidized
Independent	Safe and secure non-subsidized housing, choices limited due to moderate income; owner. (8A) Safe and secure non-subsidized housing, choices limited due to moderate income; renter. (8B)
Stable	Limited Choice of Housing – Subsidized
Independent	Safe and secure subsidized Section 8 housing. (6A) Safe and secure subsidized rental apartment. (6B) Safe and secure subsidized public housing. (6C) Safe and secure permanent living arrangements with others. (5)
Prevention Line	
Vulnerable	Temporary Housing or At-Risk of Losing Housing
Dependent	Safe and secure transitional housing. (4A) Living with others – temporary arrangements (4B) Unaffordable ownership or rental (3)
In-Crisis	Dangerous or No Housing
Dependent	Safe Shelter (2) Unsafe Shelter (1A) Substandard or unsafe ownership or rental (1B) Homeless (0)

# Charlotte County Human Services Family Self-Sufficiency Program

## Nutrition Outcome Scale

Outcome Level:  Family  Agency  Community

Benchmarks	Outcomes
Thriving	Sufficient food and supply for future, knowledge of healthful food preparation and nutrition quality (10)
Independent	
Safe	Access to fresh produce and demonstrated understanding of levels of nutrition by food group.
Independent	
Stable	Access to ample food with limited supply of fresh fruits and vegetables.
Independent	
Prevention Line	
Vulnerable	Food stamps affords for the purchase of food for the family, children receive free or reduced lunch.
Dependent	
In-Crisis	Unemployed with work history & skills (2)
	Self-employed – no work (1)
	Unemployed without work history or skill (0)
Dependent	



NAME: \_\_\_\_\_ APPLICATION DATE: \_\_\_\_\_

APPROVED

DENIED (Reason stated on Income Worksheet)

**ALL PROGRAMS:**

- Application completed, signed, dated by Program Specialist and Client
- Data entry correct and complete
- Name/address on vendor obligation/bill/lease match application  
(If it does not match, explanation is provided)
- All income worksheet fields including child support are addressed
- Income verification for all H/H members for month prior to application/  
Self Declaration Form/Zero Income Statement completed YES \_\_\_\_\_ NO \_\_\_\_\_
- Income and CMTools worksheets show income/benefit calculations YES \_\_\_\_\_ NO \_\_\_\_\_
- If approved and maximum benefit does not meet total need, H/H has provided  
documentation that crisis will be resolved thru own resources or 3rd party

**IF BENEFIT IS APPROVED – COMPLETE APPROPRIATE PROGRAM BLOCK:**

PROGRAM: LIHEAP

- Homeowner note on worksheet
- Verbal or written commitment to vendor
- Referral made to weatherization agency

\*\*\*\*\* **(CRISIS OR DISASTER RECORD)** \*\*\*\*\*

- H/H has Final or Disconnect Notice

PROGRAM: CSBG HOUSING & FAMILY ASSISTANCE

- H/H has a documented crisis
- IRS W-9 has been obtained

**CLIENT MUST COMPLETE ONE OF THE FOLLOWING:**

- Three month budget completed
- Work registration and log completed and signed

PROGRAM: HEARTSHIP COUNTY WATER

- H/H has urgent notice
  - Benefit does not exceed \$90
  - H/H crisis is documented
- Name of Water Company: \_\_\_\_\_

PROGRAM WORKER: A.C. S.C. K.H. E.L. V.L.

- Approval Letter
- Remittance advice, voucher & check request to finance (Not CCU)
- Faxed to Vendor (Utilities)
- Denial Letter/Appeal

H/E \$ \_\_\_\_\_  
 CRISIS \$ \_\_\_\_\_  
 DISASTER \$ \_\_\_\_\_  
 CSBG \$ \_\_\_\_\_  
 H&F \$ \_\_\_\_\_  
 HEARTSHIP \$ \_\_\_\_\_  
 COUNTY \$ \_\_\_\_\_

FILE REVIEWED BY: \_\_\_\_\_ DATE: \_\_\_\_\_



# Initial Assessment and Income Worksheet

NAME \_\_\_\_\_ Phone # \_\_\_\_\_

Program: CSBG      LIHEAP      HEARTSHIP      COUNTY      HCRA

Date Requested: \_\_\_\_\_ Decision/Determination: \_\_\_\_\_ Benefit: \$ \_\_\_\_\_

Initial Assessment/Crisis/Comments:

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Child Support :

**OTHER AGENCY COMMITMENTS:**

Agency _____	Amount _____
<b>TOTAL: _____</b>	

Vendor Contact: Date \_\_\_\_\_

Agree with \$ and time frame Y \_\_\_\_\_ N \_\_\_\_\_

Discussion with client about follow-up \_\_\_\_\_

H/H Size: # Adults/Children \_\_\_\_\_ / \_\_\_\_\_ Total H/H Income: \_\_\_\_\_ Program Limit: \_\_\_\_\_

Household Member:					
Source:					
Date Rec'd/Amount:					
Date Rec'd/Amount:					
Date Rec'd/Amount:					
Other Income:					
Assets:					
Total Gross:					

Program Specialist: \_\_\_\_\_ Date: \_\_\_\_\_

Edit Staff: \_\_\_\_\_ Date: \_\_\_\_\_



## Family Self-Sufficiency Program

Name: \_\_\_\_\_

Date: \_\_\_\_\_

### Income

1. Do you have income from a job?
2. If you are disabled or retired, do you have an income?
3. Is there any income from any source in your household?

YES	NO	N/A

### Employment

1. Do you have a job?
2. If you have a job, is it a part-time job?

YES	NO	N/A

### Housing

1. Do you have permanent housing?
2. Is your housing affordable and safe?

YES	NO	N/A

### Education

1. Are you able to read and write?
2. Do you have a high school diploma or G.E.D.?

YES	NO	N/A

### Transportation

1. Do you have reliable transportation?
2. Do you rely on Dial-A-Ride or Sunshine Ride?
3. If so, does the bus get you where you need to go?

YES	NO	N/A

### Childcare

1. Do you have affordable Childcare?
2. Do you need Childcare?

YES	NO	N/A

### Healthcare

1. Do you have Health Insurance?
2. Do you have access to primary healthcare?

YES	NO	N/A

### Food & Nutrition

1. Do you have adequate food in your house?
2. Are you hungry?

YES	NO	N/A

Notes: \_\_\_\_\_

\_\_\_\_\_

Prepared by: \_\_\_\_\_  
(Program Specialist)

Date: \_\_\_\_\_



Appointment Date: \_\_\_\_\_ Time: \_\_\_\_\_ Program Specialist: \_\_\_\_\_

512 E. Grace Street  
Punta Gorda, FL 33950  
(941) 833-6500

or

21450 Gibraltar Drive  
(Suite 15 – 2nd Floor)  
Port Charlotte, FL 33952  
(941) 613-1440

This program is funded by the Community Services Block Grant (CSBG) and the Family Housing Assistance Program. Assistance with Rent or Mortgage payments is granted only one time in five (5) years.

**THE FOLLOWING DOCUMENTATION IS NEEDED TO COMPLETE YOUR APPLICATION:**

- 1) **Proof of Charlotte County Residence:** One of the following is needed and must show current address: Driver's License, State of Florida ID Card, Rent or Lease Agreement, Voter's Registration Card, Automobile Registration, or School Registration. Bills with your address on them are NOT proof of residency.
- 2) **Picture Identification:** All adults in household
- 3) **Dates of Birth:** All members in household
- 4) **Social Security Cards:** All members in household
- 5) **Proof of Income for All Household Members:** All income received in the **month prior** to your application, including Wages, Retirement, Pensions, Worker's Comp, Unemployment Compensation, Self Employment Income, Veteran's Benefits, Disability Insurance, Child Support, Alimony or TANF(cash assistance from state), Social Security and/or SSI gross benefit award letter (CURRENT year), verification of Financial Aid and Scholarships.

All family members 18 and over not coming to the appointment, who are not working or drawing income of any kind need to prepare a written statement with the following information: Their full name, how long they have been unemployed, how their bills are being paid, social security number and signature.

- 6) **Current Food Stamp Letter:** showing case number
- 7) **Documented Crisis**
- 8) **Lease and Landlord Letter:**  
If assistance is for your current residence: a letter is needed with name/address/phone number of your landlord/property manager and the amount that is overdue.  
If assistance is for your new residence: a letter is needed with name/address/phone number of your landlord/property manager with a break down of first and last month's rent and security deposit.
- 9) **Mortgage Papers**



5. If home energy is included in your rent, provide landlord's name and telephone number and attach a letter from the landlord confirming that your rent includes utilities. \_\_\_\_\_

6. If you share your living or mailing address with others who are not part of your household, list their names:  
\_\_\_\_\_

7. If you or anyone in your home is not a U.S citizen or an alien lawfully admitted for permanent residence, give person's name and alien status under the Immigration and Naturalization Act:

Name: \_\_\_\_\_ Alien Status: \_\_\_\_\_ Name: \_\_\_\_\_ Alien Status: \_\_\_\_\_

8. If you live in a government subsidized housing project, Section 8 housing, dormitory, nursing home, adult foster home, or any kind of group living facility, list the name and address of the place where you live: \_\_\_\_\_

9. Are you or is any member of your household a member of the Porch Creek Tribe? Yes \_\_\_\_\_ No \_\_\_\_\_

10. Do any of the following situations currently apply to you? (Check appropriate box below):

- |   |   |
|---|---|
| <input type="checkbox"/> My electricity has been disconnected               | <input type="checkbox"/> I have little or no propane, fuel oil or wood for heat |
| <input type="checkbox"/> My current electric bill is delinquent             | <input type="checkbox"/> I have a shut-off notice from my gas company           |
| <input type="checkbox"/> I have a shut-off notice from the electric company | <input type="checkbox"/> My current natural gas bill is delinquent              |
| <input type="checkbox"/> None of the above                                  | <input type="checkbox"/> Other energy crisis - describe: _____                  |

Provide information about the primary source to **HEAT** your home below. Give only one company.

Energy Source	Company's Name	Account Name	Account Number	Co's Telephone No.
Electric				
Natural Gas				
Propane				
Fuel Oil				
Wood				
Other - Specify				

Provide information about the primary source to **COOL** your home below. Give only one company

Energy Source	Company's Name	Account Name	Account Number	Co's Telephone No.
Air Conditioning				
Fans				

Provide information about your electric company if not mentioned above

Company's Name	Account Name	Account Number	Co's Telephone No.

The information above is, to the best of my knowledge, true and complete. I understand that this is a first come, first served program and that persons who supply all the information needed to process their application will be served first. I authorize the agency to make benefit payments directly to my energy supplier. I am aware that after I have provided all of the information requested, and if I am applying for crisis assistance, the agency has 48 hours (18 hours if my situation is life threatening), to approve or deny my application and, if I am applying for Home Energy Assistance, the agency has 45 days to approve or deny my application. I am also aware that if I am not approved or denied within the time allowed, or not approved for the correct amount, I have a right to a hearing.

\_\_\_\_\_  
Applicant's Signature Date

\_\_\_\_\_  
Program Specialist Date

\_\_\_\_\_  
Supervisor/Edit Staff Date



# Household Budget

Name: \_\_\_\_\_

EXPENSES	Month 1	Month 2	Month 3	INCOME	Month 1	Month 2	Month 3
Rent/Mortgage				Paychecks (Net)			
Food				Child Support			
Electricity				Pension			
Propane Gas				VA Pension			
Water/Sewer				AFDC			
Child Support				Social Security			
Child Care				SSI			
Telephone				Unemployment			
Cable				Worker's Comp			
Internet Access				Food Stamps			
Clothes				Other Income			
Diapers				<b>TOTALS</b>			
Laundry							
Car Payment							
Car Insurance							
Car Repairs							
Gasoline for Car							
Furniture							
Life Insurance							
Credit Cards							
Loans							
Other							
<b>TOTALS</b>							

RECAP			
	Month 1	Month 2	Month 3
Income			
- Expenses			
<b>Balance</b>			

*This is my plan for the future:*

\_\_\_\_\_

SIGNATURE: \_\_\_\_\_

DATE: \_\_\_\_\_



MEMORANDUM OF UNDERSTANDING  
BETWEEN  
CHARLOTTE COUNTY DEPARTMENT OF HUMAN SERVICES  
AND

PERTAINING TO  
PAYMENT AND REFUND OF SECURITY DEPOSIT

This Memorandum of Understanding is between the Charlotte County Department of Human Services and \_\_\_\_\_ (Owner), the owner of rental property located at \_\_\_\_\_.

The Department agrees to provide to Owner, on behalf of \_\_\_\_\_ (Tenant), a Security Deposit in the amount of \_\_\_\_\_ as required by the Lease Agreement dated \_\_\_\_\_ (Lease) which is attached hereto.

It is hereby understood that the Department's assistance is granted on a one-time basis to assist the Tenant in securing housing. It is further understood that the Department has not participated in the selection of the rental property, and is not responsible for any further contribution to Owner on behalf of Tenant. The Department's contribution is limited to the total amount specified above.

Owner shall maintain the Security Deposit in an escrow account in accordance with the Lease and state law. Upon the termination of the Lease, Owner shall refund the Security Deposit in full to the Department. Owner may only retain all, or a portion, of the Security Deposit if such retention is permitted under the terms of the Lease and state law, and only in accordance with such terms and law. It is understood that Department's liability for repairs of any rental property damage is limited to the amount specified above for Security Deposit.

State of Florida

Charlotte of Charlotte

On this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_, before me, the undersigned notary public, personally appeared known to be the person(S) whose name(S) is/are subscribed to the within instrument and acknowledged that he/she/they executed the same for the purposes therein contained.

\_\_\_\_ Personally known OR  
\_\_\_\_ Produced ID-Type of ID \_\_\_\_\_

\_\_\_\_\_  
Notary Public

CHARLOTTE COUNTY HUMAN  
SERVICES DEPARTMENT

OWNER

By: \_\_\_\_\_  
Althea Connor, Program Supervisor

By: \_\_\_\_\_

Title: \_\_\_\_\_



## **THIS NOTICE DESCRIBES HOW MEDICAL INFORMATION ABOUT YOU MAY BE USED AND DISCLOSED AND HOW YOU CAN GET ACCESS TO THIS INFORMATION**

This document shall serve as Charlotte County Department of Human Services' (CCDHS) policy on the privacy of client Protected Health Information (PHI) under the Health Insurance Portability and Accountability Act of 1996 (HIPAA) and as a supplement to Charlotte County's Notice of Privacy Practices.

CCDHS will administer protected client health information in accordance with HIPAA regulations. To that end, all members of the Department's workforce who have access to PHI must comply with this Privacy Policy. For purposes of this Policy, the Department's workforce includes individuals who would be considered part of the workforce under HIPAA such as employees, volunteers, trainees, and other persons whose work performance is under the direct control of the Department, or whether or not they are paid by the Department or County.

### **PROTECTED HEALTH INFORMATION (PHI)**

The final rule defines PHI as individually identifiable health information that is transmitted by electronic media; maintained in any electronic medium such as magnetic tape, disc, optical file; or transmitted or maintained in any other form or medium (i.e. paper, voice, internet, fax, etc.).

**INDIVIDUAL IDENTIFIABLE INFORMATION** about an individual includes, but is not limited to: (a) first and last name; (b) home or other physical address including street name and name of city and town; (c) email address; (d) telephone number; (e) Social Security Number; or (f) any information that is combined with any of (a) through (e) above that relates to the past, present or future physical or mental health or condition of an individual: the provision of health care to an individual; or the past, present or future payment for the provision of health care to an individual.

Charlotte County Department of Human Services will apply reasonable safeguards to protect Personal Health Information (PHI) from breaches of privacy and unintentional disclosures.

### **USES AND DISCLOSURES OF PHI**

Charlotte County Department of Human Services will use and disclose PHI only as permitted under HIPAA. CCDHS as a Human Services provider may receive protected health information (PHI) regarding clients as needed to enroll clients in a service care plan or to receive specific benefits. CCDHS may receive information directly from clients in coordinating the receipt of services such as eligibility determination, claims issues, treatment and care plans, billing and similar services.

### **MINIMAL DISCLOSURE OF PROTECTED HEALTH INFORMATION (PHI)**

CCDHS takes steps to limit the amount of Protected Health Information we disclose or request to the minimum necessary. To help ensure that only the minimum amount necessary is provided, CCDHS staff are required to verify the extent of information required before providing the information. Similarly, when requesting information from entities outside of the Department, staff will limit their request to only the amount of information that is necessary for completing the task at hand. CCDHS will not disclose PHI to outside entities for marketing or business purposes.

### **LIMITED EMPLOYEE ACCESS TO PROTECTED PERSONAL HEALTH INFORMATION (PHI)**

CCDHS further protects PHI in our offices from unintentional disclosure by identifying those individuals who are permitted to handle such information and helping to ensure through technical, organizational, and electronic mechanisms that guidelines for handling, uses, and disclosure of information are followed.

## **AUTHORIZATION AND CONSENT**

Charlotte County Department of Human Services may not use or disclose protected health information for purposes other than enrollment, services, payment, operations and disclosures required by HIPAA law without a valid authorization. The authorization is a document requested and signed by the client for a specified purpose and time frame.

## **INDIVIDUAL RIGHTS**

With respect to any client's protected health information, the client has the right to:

- A. Request restrictions on uses and disclosures.
- B. Receive copies of and review original confidential communications;
- C. Inspect and receive a copy of his/her protected health information;
- D. Receive an accounting of any disclosures;
- E. Amend any records that contain PHI; and
- F. Receive a paper copy of the notice of the Charlotte County Human Services Privacy Policy.

## **PRIVACY OFFICIAL**

Bob Pryor, Risk Manager is the Privacy Official for the County. The Privacy Official is responsible for the development and implementation of policies and procedures relating to privacy, including but not limited to the County's Privacy Policies.

## **CONTACT PERSON**

Victoria Carpenter, Director of Charlotte County Human Services, will serve as the Contact Person for clients who have questions, concerns, or complaints about the privacy of their PHI.

## **COMPLAINT PROCESS**

Charlotte County Department of Human Services takes privacy concerns seriously. If a client believes that CCDHS has not complied with this Privacy Policy with respect to his or her personal health or confidential information, or if the client has other related inquiries or concerns, the client is encouraged to put his or her concern in writing to the PHI Contact Person, Victoria Carpenter, Director of Human Services. After review of a complaint, should the client and the Contact Person not be able to reach a resolution to the issue, the complaint may then be brought by the client before a Privacy Complaint Board for final resolution. The client also has the right, at any point, to notify the Secretary of the U.S. Department of Health and Human Services of his or her complaint.

## **REFRAINING FROM INTIMIDATION**

Charlotte County Human Services' workforce will not engage in intimidating or retaliatory acts against any person complaining about or reporting a privacy violation. Clients will not be subject to intimidation or retaliatory acts for reporting perceived privacy violations.

## **SANCTIONS**

Charlotte County Department of Human Services holds its employees accountable for deviations from this Privacy Policy and its accompanying procedures. Employees are accountable for uses and disclosures of information that may jeopardize the privacy of the information that the County receives and maintains. Privacy compliance is considered a core competency and is one of the standards a Charlotte County employee is measured against. Failure to comply with Charlotte County's Privacy Policy may result in disciplinary action, up to and including termination of employment. Volunteers and other workforce staff may be dismissed for non-compliance with policy requirements.

## **MITIGATION**

Charlotte County Department of Human Services will mitigate, to the extent possible, any harmful effects that become known to it of a use or disclosure of an individual's PHI in violation of the policies and procedures set forth in this Policy. As a result, if a client becomes aware of a disclosure of protected health information, either by an employee or other department staff that is not in compliance with this Policy, immediately notify the Department Contact Person so that the appropriate steps to mitigate the harm to the client can be taken.



## Acknowledgement

I acknowledge that I have received the enclosed Privacy Policy from Charlotte County Human Services.

\_\_\_\_\_  
Print Name (Client)

\_\_\_\_\_  
Signature (Client)

\_\_\_\_\_  
Date

If a Personal Representative's signature appears above, please explain Personal Representative's relationship to client:

\_\_\_\_\_  
Relationship to Client



## Authorization for Release of Information

I hereby give my consent to release all information requested by Charlotte County Human Services. This information is to be used by Charlotte County Human Services to determine eligibility for assistance that I have requested. To the best of my knowledge, the information I give is true and complete.

I agree to provide documentation to show that I am eligible or will give the names of persons or places that I know of that may be called for the necessary information. I also agree that the Department of Human Services may check information that I provide and that they may call present or past employers, if it relates to my eligibility. The Department of Human Services may get data from any source that affects my eligibility for any program. This data may cover medical and personal protected information. For this purpose we need to obtain your informed consent to the uses and disclosures of your protected medical and personal information.

I hereby give my permission to Charlotte County Human Services to release my name, address, phone number, date of birth, other demographic information and social information as deemed necessary by Charlotte County Human Services to determine eligibility for assistance that I have requested. I also authorize any funding agencies within this network to review any files and paperwork documenting services delivered to me in order to monitor quality and appropriateness of service and accuracy of payments. I authorize the release of my protected information specifically to the following sources:

SOURCE OF INFORMATION

DATE PERMISSION GRANTED

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This consent is given by me and will be valid for one year until \_\_\_\_\_  
unless revoked by me at any time, in writing.

\_\_\_\_\_  
Print Name (Client)

\_\_\_\_\_  
Signature (Client)

\_\_\_\_\_  
Date





**This information is being provided to Charlotte County  
Department of Human Services to determine eligibility for assistance.**

\_\_\_\_\_  
Client Name

\_\_\_\_\_  
Client Address

I provide the following help for the above named person:

\_\_\_\_\_  
\_\_\_\_\_

Average dollar amount of assistance provided monthly: \$ \_\_\_\_\_

I have been providing this assistance since: \_\_\_\_\_

I will continue providing this assistance until: \_\_\_\_\_

Print Name: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Relationship to applicant: \_\_\_\_\_



# Verification of Employment Termination

This information is being provided to Charlotte County  
Department of Human Services to determine eligibility for assistance.

Former Employee Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Date Employment Terminated: \_\_\_\_\_

Reason for Termination: \_\_\_\_\_

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Employer Representative \_\_\_\_\_  
(Print Name)

Date \_\_\_\_\_

Title of Representative \_\_\_\_\_

Employer Representative \_\_\_\_\_  
(Signature)

Employer Telephone # \_\_\_\_\_



This information is being provided to Charlotte County  
Department of Human Services to determine eligibility for assistance.

EMPLOYEE NAME \_\_\_\_\_

OCCUPATION/TITLE \_\_\_\_\_

Date of hire or return to work: \_\_\_\_\_

Gross Wages: Weekly: \_\_\_\_\_ or Hourly: \_\_\_\_\_

Average # of hours worked per week: \_\_\_\_\_

Wait Staff average weekly tips: \_\_\_\_\_

Date of first paycheck: \_\_\_\_\_

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Employer Representative \_\_\_\_\_  
(Print Name)

Date \_\_\_\_\_

Title of Representative \_\_\_\_\_

Employer Representative \_\_\_\_\_  
(Signature)

Employer Telephone # \_\_\_\_\_



This information is being provided to Charlotte County  
Department of Human Services to determine eligibility for assistance.

Documentation of Gross Income is needed for:

CLIENT NAME \_\_\_\_\_

CLIENT ADDRESS \_\_\_\_\_

NAME OF EMPLOYER \_\_\_\_\_

Please provide Gross Income for the following calendar period:

Beginning: \_\_\_\_\_

Ending: \_\_\_\_\_

Gross Income: \_\_\_\_\_

Employer Representative \_\_\_\_\_  
(Print Name)

Date \_\_\_\_\_

Title of Representative \_\_\_\_\_

Employer Representative \_\_\_\_\_  
(Signature)

Employer Telephone # \_\_\_\_\_



# Zero Income Statement

Print Name: \_\_\_\_\_

The number of people who live in my house is: \_\_\_\_\_

I have been without income since: \_\_\_\_\_

Describe how your housing, food, utilities and transportation are provided:

HOUSING:

---

---

---

FOOD:

---

---

---

UTILITIES:

---

---

---

TRANSPORTATION:

---

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date



## Appeal Procedures Public Benefit Programs

Charlotte County Department of Human Services  
512 E. Grace Street, Punta Gorda, FL 33950  
Phone: (941) 833-6500 Fax: (941) 833-6565

### APPEAL PROCEDURES FOR PUBLIC BENEFIT PROGRAMS

Applicants have the right to appeal when they are denied benefits. If you wish to appeal this decision you must notify the Director of the Charlotte County Department of Human Services within 10 days of receiving this notice.

Your appeal must be in writing and must contain the following information:

1. Your name, address, phone and Social Security number.
2. A statement as to why you believe the agency decision is in error.
3. Any additional information you wish to have considered.

When the Director receives your written appeal, a review of your application will be conducted and a decision will be made within 10 working days of your appeal. You will receive a written notification of this decision. This decision is final.

You may reapply for services at any time and a new application will be needed.

If you wish to submit a new application, call the Department of Human Services at (941) 833-6500 to request an appointment. You will be asked to bring the following:

1. Documentation of income for yourself and other household members.
2. Identification to confirm Charlotte County residency.
3. Other information needed to determine eligibility for assistance.



## Appeal Procedures LIHEAP & CSBG PROGRAMS

Charlotte County Department of Human Services  
512 E. Grace Street, Punta Gorda, FL 33950  
Phone: (941) 833-6500 Fax: (941) 833-6565

### Appeal Procedures for LIHEAP & CSBG Programs

Applicants have the right to appeal when they are denied benefits. If you wish to appeal this decision you must notify the Director of the Charlotte County Department of Human Services within 10 days of receiving this notice.

Your appeal must be in writing and must contain the following information:

1. Your name, address, phone and Social Security number.
2. A statement as to why you believe the agency decision is in error.
3. Any additional information you wish to have considered.

When the Director receives your written appeal, a review of your application will be conducted and a decision will be made within 10 working days of your appeal. You will receive a written notification of this decision.

You may reapply for services at any time and a new application will be needed.

If you wish to submit a new application, call the Department of Human Services at (941) 833-6500 to request an appointment. You will be asked to bring the following:

1. Documentation of income for yourself and other household members.
2. Most current utility or home energy /utility assistance bill.
3. Identification to confirm Charlotte County residency.
4. Other information needed to determine eligibility for assistance.



**WHY IS CHARLOTTE COUNTY DEPARTMENT OF HUMAN SERVICES  
COLLECTING YOUR SOCIAL SECURITY NUMBER?**

Your social security number is confidential under law. We may not collect your social security number unless we explain to you in writing the reason we need it.

The Charlotte County Department of Human Services is collecting your social security number as part of its responsibility to conduct assessments. We do this in order to determine benefits or services, including federal benefits that may be right for you. If there is any other reason, it will be listed below:

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We will not use or give out your social security number for any other reason, including referrals to other agencies, unless you have signed a separate form consenting to the release of information to another agency.



\_\_\_\_\_  
Last Name

\_\_\_\_\_  
First Name

\_\_\_\_\_  
Phone #

\_\_\_\_\_  
Date and outcome of phone contact

\_\_\_\_\_  
Date letter sent (if not response to phone call)

-How is budget working? \_\_\_\_\_

-Is anyone in the household employed? Y / N ; Who? \_\_\_\_\_

-Where/when/salary? \_\_\_\_\_

-Are there any benefits? \_\_\_\_\_

-What other income is in the household? \_\_\_\_\_

-Is your household situation stable? \_\_\_\_\_

-OUTCOME Measure/s reported in CMTools and date: \_\_\_\_\_

Prepared by: \_\_\_\_\_

(Program Specialist)

(Date)



## **Appendix D**

### References

## References

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US Census Bureau. 2000 Census and 2009 Estimates.

US Census Bureau. 2008 American Community Survey

Southwest Florida Regional Planning Council. Projected County, Region and State Growth in SWFL.

The Florida Legislature, Office of Economic and Demographic Research

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