

2007-2010
Strategic Plan
YEAR ONE FOCUS – 3rd Quarter Report

Goal I. Community Engagement: Educate, advocate and lead to increase community engagement in issues of poverty.

Outcomes:

<p>A. All 12 City governments are engaged in reducing conditions of poverty.</p> <ul style="list-style-type: none"> Research and document current involvement of Washington County cities with Community Action and issues of poverty. (Renée) 		
<i>Activity</i>	<i>Time Frame</i>	<i>Progress Report</i>
Perform a Web & records search of each city's involvement with issues of poverty and collect documentation.	12-31-07	2 Q: Internal documents have been collected; A form has been created for the Web search and the Web search is underway.
		3 Q: DONE. WEB search completed. Filed with City profiles.
Document each City's involvement with Community Action through records search and <i>interviews with staff.</i>	12-31-07	2 Q: Determined the need for a survey tool to be <i>used by</i> directors, managers, and supervisors to identify current relationships/partnerships with cities & to gather information on financial support from city partners.
		3Q: RB & FS will prepare a survey tool by 6/30/08 for staff input. Financial support from city partners has been documented..

N/A = No Activity

- Establish city profiles, including poverty demographics, service statistics, leadership and key partnerships with Community Action. (Renée)

<i>Activity</i>	<i>Time Frame</i>	<i>Progress Report</i>
Establish a system to gather and organize city information.	9-30-07	Q 2: DONE. A system has been established for collecting individual city information. Agency files have been consolidated and new information is being added as it becomes available.
Create demographic summaries for each city, include information on staff, board and donors.	12-31-07	Q 2: Sources have been identified for general demographic information.
		Q 3: Staff, Board and donor demographic summaries will be collected from HR (staff), Natalie (board), Development (donors) and assignments have been made.

N/A = No Activity

<ul style="list-style-type: none"> • Create plans for engagement of at least 3 cities. (Jerralynn) 		
<i>Activity</i>	<i>Time Frame</i>	<i>Progress Report</i>
Arrange for a Community Action presentation to at least 8 cities.	4 by 12-31-07 4 by 6-30-08	Q 2: November: Beaverton School Board (FS & JN)
		Q 3: January - Tigard-Tualatin School Board (FS & JN) February – Tualatin City Council (LB & JN) March – Beaverton Social Services Committee (JN)
Meet separately with the leadership of Tigard, Beaverton and Tualatin to discuss partnership, city priorities and future collaboration.	2-28-08	Q 2: October - Jerralynn and Renee met with Beaverton Mayor and Councilor Cathy Stanton (I&R support, Multi-Service Center, joint meeting with Mayors on CA Board). November - Jerralynn and Lisa met with Tualatin Mayor and Councilor Monique (involvement with Board, potential for greater collaboration, presentation to the City).
		Q 3: N/A
Develop a written plan for engagement with the above three cities.	6-30-08	Q 2: N/A
		Q 3: N/A

B. Top 20 businesses are significant partners with Community Action. <ul style="list-style-type: none"> • Identify and research top 20 employers in terms of workforce. (Lisa) 		
<i>Activity</i>	<i>Time Frame</i>	<i>Progress Report</i>
Contact Chambers, Business Journal and Westside Economic Alliance to identify the top 20 businesses in Washington County in terms of number of local employees.	12-31-07	Q 2: Research of on-line and print sources for business and economic data has taken place.
		Q 3: Determining a methodology for organizing data about the top 20 businesses.

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N/A = No Activity

<ul style="list-style-type: none"> Establish corporate profiles of community involvement and giving, leadership and partnerships with Community Action. (Lisa) 		
<i>Activity</i>	<i>Time Frame</i>	<i>Progress Report</i>
Create portfolios for each business and perform Web and records search to obtain key information for creating a comprehensive profile.	2-28-08	Q 2: Profile formatting is being developed and incorporated into the main database.
		Q 3: Integrate key identifiers into existing data base that will allow us to pull comprehensive reports.
<ul style="list-style-type: none"> Research and document current involvement of top employers with Community Action and issues of poverty. (Lisa) 		
<i>Activity</i>	<i>Time Frame</i>	<i>Progress Report</i>
Research development data base and hard files for history of involvement.	1-31-08	Q 2: Historical data (1990 – 2007) has been pulled from the data base and assessment is underway.
		Q 3: N/A
Survey staff and board for connections and other involvements.	1-31-08	Q 2: N/A
		Q 3: N/A
<ul style="list-style-type: none"> Create individual plans for engagement and implement with five corporations. (Lisa) 		
<i>Activity</i>	<i>Time Frame</i>	<i>Progress Report</i>
Select five corporations based on assessment of readiness to forge a stronger partnership.	3-15-08	Q 2: N/A
		Q 3: N/A
Meet with the key leaders in each of the five corporations to discuss their interests and priorities and the potential for future collaborations.	5-15-08	Q 2: N/A
		Q 3: N/A

N/A = No Activity

C. Faith based partnerships with Community Action increased by 50%.		
<ul style="list-style-type: none"> Research and document current involvement of faith-based organizations with Community Action and issues of poverty. (Lisa) 		
<i>Activity</i>	<i>Time Frame</i>	<i>Progress Report</i>
Research development data base and hard files for history of involvement.	2-28-08	Q 2: Historical data has been gathered.
		Q 3: N/A
<ul style="list-style-type: none"> Establish individual profiles of community involvement and giving, leadership and partnerships with Community Action. (Lisa) 		
<i>Activity</i>	<i>Time Frame</i>	<i>Progress Report</i>
Create files for each faith based partner and include key information for creating a comprehensive profile of involvement.	3-31-08	Q 2: Profile formatting is being developed and incorporated into the main database.
		Q 3: N/A
<ul style="list-style-type: none"> Survey current board and staff member connections with faith based organizations. (Farzana) 		
<i>Activity</i>	<i>Time Frame</i>	<i>Progress Report</i>
Develop survey tool.	11/3/07	Q 2: DONE. Developed the survey tool in English and Spanish
Work with staff and Board to complete the survey.	12/31/07	Q 2: Distributed the survey to staff and board members electronically. Pacific University students collected the completed surveys.
		Q 3: DONE. Distributed the survey to staff at Head Start All Staff. Farzana and a group of 6 students compiled the data using Statistical Program for Social Services (SPSS) software. The results were presented in a PowerPoint presentation. The completed report included current status of involvement of faith based organizations with Community Action and recommendations for increasing future involvement.

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N/A = No Activity

• Create plans for growth to increase faith-based partnerships by 15%. (Directors)		
<i>Activity</i>	<i>Time Frame</i>	<i>Progress Report</i>
Create a team and evaluate the effectiveness of current involvement.	4-30-08	Q 2: N/A
		Q 3: N/A
Recommend strategies to grow faith based partnerships in a manner that is mutually meaningful and sustainable.	5-31-08	Q 2: N/A
		Q 3: N/A
Implement at least one strategy.	6-30-08	Q 2: N/A
		Q 3: N/A

N/A = No Activity

Goal II. Family Self-Sufficiency: Increase our leadership and effectiveness in reducing conditions of poverty.
Outcomes:

A. At least 10% more families served receive comprehensive services.		
• Determine scope of project. (Renée)		
<i>Activity</i>	<i>Time Frame</i>	<i>Progress Report</i>
Utilize IS Committee to research and assess the scope of a comprehensive client data base.	12-31-07	Q 2: Presented project to committee. Committee identified concerns and determined that additional program information was needed. Decision made to research a model in Eugene.
		Q 3: Committee has identified common intake/data elements and determined that OPUS & Service Point will be able to communicate with each other. Opening Doors data can be added to Service Point, allowing for an unduplicated count of all programs except Head start, I&R and CCR&R. Committee is working to resolve the issue of PROMIS (Head Start) communicating with Service Point/OPUS.

• Identify potential resources. (Renée)		
<i>Activity</i>	<i>Time Frame</i>	<i>Progress Report</i>
Research private and public resources needed to support the data base project.	3-31-08	Q 2: N/A until the scope of work is determined.
		Q 3: N/A until the scope of work is determined.

N/A = No Activity

B. Establish a Beaverton Multi-Service Center to improve access to Community Action services.		
• Determine scope of project. (Directors)		
<i>Activity</i>	<i>Time Frame</i>	<i>Progress Report</i>
Schedule a planning retreat for the directors to determine the size and requirements for the facility.	12-31-07	Q 2: DONE. Scheduled for January 29, 2008.
		Q 3: DONE Determined the need for 8,000 sq ft for CDC and a total of 15,000 sq ft for total facility with 72+ parking.
Hold focus group discussions with key staff to confirm requirements and to identify potential partners.	2-28-08	Q 2: N/A
		Q 3: N/A
Develop draft budget based on requirements.	5-31-08	Q 2: N/A
		Q 3: N/A

• Identify potential resources and partners.		
<i>Activity</i>	<i>Time Frame</i>	<i>Progress Report</i>
Research potential private and public funders. (Renée)	12-31-07	Q 2: In discussions with Bethany Development, City of Beaverton and Tualatin Valley Housing Partners to tie into a project led by TVHP (Angel Street Project).
		Q 3: Contacted City of Beaverton re: use of CDBG funds for this potential project. Received input that they would support the project, but they have limited funds.
Meet with Mayor to engage in the project and identify interest and concerns. (Jerralynn)	10-31-07	Q 2: Met with Mayor in October. He expressed support and willingness to work with us as needed.
		Q 3: City requested that we keep them informed of progress.
Meet with potential partners to determine level of interest. (Jerralynn)	3-31-08	Q 2: Met in December with TVHP and Lifeworks. There is strong interest in co-locating in a TVHP housing project.
		Q 3: Lifeworks expressed interest in sub-leasing from us.

N/A = No Activity

C. 80% of all eligible Head Start children are served.

- Convert 9 single classrooms into double sessions serving 162 additional children in phase-one of state expansion. (Farzana)

<i>Activity</i>	<i>Time Frame</i>	<i>Progress Report</i>
Contact school districts with expansion information.	8-31-07	Q 2: DONE. Provided School Districts with expansion info and converted 9 classrooms to double sessions. By the start of school in September we had added 162 kids and were fully enrolled for a total of 807 students. Issues to address before expanding further: (1) the program already experienced 25% growth and needs to stabilize; determine the need for additional space; obtain commitment of space: assume adequate pool of candidates to fully staff classrooms; determine the need for additional buses; (2) focus will be on the upcoming Federal Monitoring Review; determine additional infrastructure needs.
		Q 3: N/A
Review transportation and meal time schedules for added classrooms.	8-31-07	Q 2: The expansion resulted in increased transportation needs that could not be met with existing fleet of 11 buses; 3 sites were asked to self-transport; one bus was ordered and received in December 2007; contracted with school districts for additional meals.
		Q 3: N/A

- Develop and implement a child recruitment plan for targeted sites. (Farzana)

<i>Activity</i>	<i>Time Frame</i>	<i>Progress Report</i>
Targeted mailing of flyers to zip codes; work with policy council parents for distribution of flyers; participate in community activities.	8-31-07	Q 2: DONE. Mailed 10,000 flyers to targeted zip codes, distributed additional flyers door to door. Resulting in full enrollment on the first day of class.
		Q 3: N/A

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N/A = No Activity

Develop a PSA for radio outreach.	8-31-07	Q 2: DONE. Developed a public service announcement in Spanish & English with KUIK which was broadcasted 3 times.
		Q 3: N/A
<ul style="list-style-type: none"> Recruit and hire approximately 35-40 new staff and expand administrative capacity to support the growth. 		
<i>Activity</i>	<i>Time Frame</i>	<i>Progress Report</i>
Increase HR staff by 1 FTE.	7-31-07	Q 2: August: hired an additional HR professional to focus on recruitment. December: Resignation of HR Director.
		Q 3: Recruiting for HR Director.
Implement new recruitment activities.	7-31-07	Q 2: Worked with a group of graduate students from Pacific University to evaluate our current recruitment and hiring system. Determined the need for advertising at Hispanic websites and universities.
		Q 3: N/A
Increase Administrative Capacity by 1.75 FTE (John)	12-31-07	Q 2: In process.
		Q 3: Hired 2 Program Assistants and started hiring for 1 additional Bookkeeper (3FTE total).
Search for new warehouse space for storage and administrative offices (John)	6-30-08	Q 2: N/A
		Q 3: Revamped old warehouse to allow for more storage eliminating the need for a bigger facility. Forest Grove Administrative office was identified as a site to close down and consolidate into our Beaverton site.

N/A = No Activity

<ul style="list-style-type: none"> Strengthen partnerships with Hillsboro, Beaverton, and Tigard-Tualatin School Districts to secure future space. (Farzana) 		
<i>Activity</i>	<i>Time Frame</i>	<i>Progress Report</i>
Participate in regular meetings with key staff at various school districts.	Ongoing throughout the year.	Q 2: Met with Beaverton Superintendent, Board Chair & Regional Administrator; made a presentation to Beaverton school Board; Beaverton Regional Administrator attended PYSK; Hillsboro Superintendent and Regional Administrator attended PYSK; H.S. Staff attended School District Pre-service; H.S. classrooms invited school personnel to their open houses; Community action board members read to H.S. children at all sites.
		Q 3: Collaboration with school district to transition children into kindergarten. Attended Beaverton School District Partnership Breakfast. Beaverton Superintendent read to H.S. children.

N/A = No Activity

Goal III. Operational Excellence: Deliver on our mission through operational excellence.

Outcomes:

A. The agency is deficit free and has \$1.25 million for operating capital.		
<ul style="list-style-type: none"> Utilize surplus unrestricted funds and county match to reduce deficit by \$120,000. (John) 		
<i>Activity</i>	<i>Time Frame</i>	<i>Progress Report</i>
Monitor Receipt of \$60,000 from WA County	9-30-07	Q 2: Received August 2007.
Have Board Designate next \$60,000 Unrestricted	6-30-08	Q 2:N/A
		Q 3: N/A

<ul style="list-style-type: none"> Bring lawsuit to closure. Jerralynn 		
<i>Activity</i>	<i>Time Frame</i>	<i>Progress Report</i>
Monitor progress to assure completion to mediation/arbitration	12-31-07	Q 2: DONE. Mediation completed and lawsuit favorably resolved in November; received \$395,000 in December. This has virtually eliminated our deficit and created at least \$1.25 million for operating capital.
		Q 3: N/A

<ul style="list-style-type: none"> Raise an additional \$50,000 in unrestricted surplus. (Lisa) 		
<i>Activity</i>	<i>Time Frame</i>	<i>Progress Report</i>
Implement strategies to exceed goals for direct mail appeals & major gifts.	6-30-08	Q 2: Assessed current strategies & donors.

N/A = No Activity

		Q 3: Prospect mailing to 250 businesses for dinner sponsorship, resulted in one new \$2500 sponsor. Added donation envelope back into newsletter. Doubled number of dinner invitations sent by developing strategic list of top prospects. Developed new partnership with Best Buy resulting in \$5,000 donation.
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B. The agency strives to utilize and develop employees to full potential and at least 10% are prepared to move into positions of greater responsibility.

- Educate staff leadership on succession planning. (Jerralynn)

<i>Activity</i>	<i>Time Frame</i>	<i>Progress Report</i>
Organize a management training on the concept of Succession Planning.	12-31-07	Q 2: DONE. Jerralynn presented an orientation to managers on Succession Planning on December 13.
		Q 3: N/A
Include an orientation to succession planning at the Fall All Staff.	11-30-07	Q 2: DONE. Jerralynn presented the concept to all staff as part of our 2007-10 Strategic Plan on December 7.
		Q 3: N/A

- Develop succession plan and timeframe for implementation.

<i>Activity</i>	<i>Time Frame</i>	<i>Progress Report</i>
Organize a directors retreat to plan the elements of a succession plan for Community Action. (Jerralynn)	3-31-08	Q 2: N/A
		Q 3: N/A
Develop a draft document for board review and approval. (Jerralynn)	6-30-08	Q 2: N/A
		Q 3: N/A

N/A = No Activity

<ul style="list-style-type: none"> Develop a performance evaluation tool that focuses on competencies, measurements and staff development. (HR Director) 		
<i>Activity</i>	<i>Time Frame</i>	<i>Progress Report</i>
Finalize an evaluation tool, finish testing it and distribute to Directors to use.	3-31-08	Q 2: Jerralynn is testing the tool with 4 staff; issues are being identified.
		Q 3: Testing continues.
Organize a Management Training on our new performance review process and tool.	5-31-08	Q 2: N/A
		Q 3: N/A

C. The agency has effective processes to assure sustainable operational systems and to meet standards of organizational excellence.		
<ul style="list-style-type: none"> Educate staff leadership and Board on Community Action's Standards of Excellence. (Renée) 		
<i>Activity</i>	<i>Time Frame</i>	<i>Progress Report</i>
Arrange for key leadership to receive "train the trainers" training on the national Community Action Standards of Excellence.	1-31-08	Q 2: Attended the Standards of Excellence/Pathways training in Chicago in October.
		Q 3: N/A
Organize a Management staff training on the national Standards of Excellence.	3-31-08	Q 2: Renée provided an orientation regarding the Standards of Excellence to the managers group on 12/13/07. Determined the need for additional in-depth training to follow.
		Q 3: N/A

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N/A = No Activity

• Conduct agency performance audit to identify gaps. (Farzana)		
<i>Activity</i>	<i>Time Frame</i>	<i>Progress Report</i>
Utilize CAP-LAW audit tool to perform internal audit.	12-31-07	Q 2: The tool was ordered and received; it was determined that the Board Exec Committee & Directors should perform the internal audit as a team.
		Q 3: N/A

• Review current program funding requirements and compare to the standards of excellence to identify gaps. (Directors)		
<i>Activity</i>	<i>Time Frame</i>	<i>Progress Report</i>
Gather current funding requirements.	12-31-07	Q 2: Determined from the Standards of Excellence training that this activity will occur during the Pathways process, and is not a necessary step.
		Q 3: N/A
Utilize Standards of Excellence tools to compare.	3-31-08	Q 2: N/A
		Q 3: N/A