

## COMMUNITY ACTION ORGANIZATION QUARTERLY PROGRESS REPORT

DATE COMPLETED May 10, 2002 REPORTING PERIOD July1, 2001-March 31, 2002 COMPLETED BY Jennifer Choban

### GOALS AND STRATEGIES

**Strategic Goal I: Early childhood and family development services are responsive to the needs of the community.**

**2001-2004 Strategic Focus: Enhance the future success of over 3,000 low-income children by promoting their healthy development:**

	<u>PROGRESS TO DATE</u>	<u>CHALLENGES &amp; ADJUSTMENTS</u>
1. Provide comprehensive outreach and advocacy services to support the pre-natal needs of 275 low-income, at-risk pregnant women to assure a 95% healthy birthrate.	R 76 new clients entered the Opening Doors program during the quarter for a total of 277. 94% of the 204 infants who have exited the program had a healthy birthweight.	The 95% healthy birthrate objective exceeds the expectation that we use for our funders by 5% and therefore, should be adjusted to 90%.
2. Provide comprehensive infant and toddler development services that address the needs of 40 low-income children.	M	
3. Develop services that meet the special needs of 77 homeless infants, toddlers and children.	R 184 homeless school aged children were received services in school, and 148 children in the shelter received child development support.	The Homeless Children's Program Jesuit Volunteer position continues to provide service to the children at the shelter including Head Start and the afterschool program. The goal refers to providing child care for 77 shelter children. The Homeless Children's Program Coordinator began work on June 1 <sup>st</sup> and is working on arranging for child care.

**GOALS AND STRATEGIES**

**Strategic Goal I: Early childhood and family development services are responsive to the needs of the community.**

**2001-2004 Strategic Focus: Enhance the future success of over 3,000 low-income children by promoting their healthy development:**

	<b><u>PROGRESS TO DATE</u></b>	<b><u>CHALLENGES &amp; ADJUSTMENTS</u></b>
4. Provide comprehensive part day, pre-kindergarten services to promote school readiness for 462 three and four year old children from low-income families.	M	
5. Increase low-income families' access to quality childcare by:		
a) expanding full day full year Head Start from 16 to 102 children,	M	
b) continuing to provide school age care to 150 children	M	
c) increasing child care referrals and provider training by 10%.	R	A total of 2,098 referrals (target 2,629) have been given and 1,153 providers have received training (target 665).  The demand for child care referrals is responsive to the economy. We provided less referrals than previously expected due to the high rate of unemployment. The significant increase in the number of individuals being trained is related to legislation which now requires providers to obtain a specified number of hours of ongoing training.

**GOALS AND STRATEGIES**

**Strategic Goal II: The community and CAO have adequate capacity to prevent homelessness, provide shelter and affordable housing.**

**2001-2004 Strategic Focus: Implement services to increase long-term housing stability for homeless families.**

	<b><u>PROGRESS TO DATE</u></b>	<b><u>CHALLENGES &amp; ADJUSTMENTS</u></b>
1. Increase landlord partnerships from 4 to 15 to link more homeless families with affordable housing.	R Twenty new partnerships for a total of twenty-five.	Sharp increase after hiring the Housing Program Specialist to work specifically with landlords.
2. Implement a system to track self-sufficiency outcomes for homeless families.	R Staff are working on the HMIS (Homeless Management Information System) committee of the Washington County Continuum of Care. OPUS and Housing Connections are being considered.	There are many options and concerns. Also, HUD is ambiguous about the HMIS requirements.
3. Increase effectiveness of the Housing Stabilization Program to assist 40 households in achieving increased levels of self-sufficiency.	R X households received assistance through HSP.	Jodie Jones conducted a training on date. We have also learned that case management can be used to meet the HSP match requirement.

**GOALS AND STRATEGIES**

**Strategic Goal III: Comprehensive information & referral services are available to all community members.**

**2001-2004 Strategic Focus: Increase access to needed information and referral by enhancing the Web based FIND model and increasing utilization.**

	<b><u>PROGRESS TO DATE</u></b>	<b><u>CHALLENGES &amp; ADJUSTMENTS</u></b>
1. Increase the number of trained partner sites from 4 to 12, and insure that all CAO client serving staff are trained.	J	
2. Support the development of a statewide I&R system that meets the needs of Washington county residents.	J	
3. In collaboration with Tuality Healthcare and the Hillsboro Vision West program, expand the I & R database to include health related resources.	J	

**GOALS AND STRATEGIES**

**Strategic Goal IV: Low-income people in crisis obtain services they require.**

**2001-2004 Strategic Focus: Implement a sustainable integrated model for delivering energy and emergency services, and increase the number of households served from 5,824 to 10,000 annually.**

	<b><u>PROGRESS TO DATE</u></b>	<b><u>CHALLENGES &amp; ADJUSTMENTS</u></b>
1. Effectively address the emergency, energy and weatherization needs of low-income families by creating an integrated staffing and service delivery model.	R An integrated program model has evolved which accommodates the growth in both energy assistance and weatherization.	Space was an issue, but has been resolved.
2. Provide comprehensive energy services to 8,228 low-income families.	R Served 7,923 households: 99 received comprehensive weatherization; 150 self-help weatherization; 7,674 energy assistance.	Waiver and Emergency funds were not released by the Federal Government during the program year.

<b><u>GOALS AND STRATEGIES</u></b>			
<b>Strategic Goal V: The community is engaged in issues and activities that reduce or alleviate the effects of poverty.</b>			
<b>2001-2004 Strategic Focus A: Increase agency visibility and support by implementing a comprehensive marketing and public relations plan.</b>			
		<b><u>PROGRESS TO DATE</u></b>	<b><u>CHALLENGES &amp; ADJUSTMENTS</u></b>
1. Utilizing outside expertise, evaluate current efforts and develop a marketing and public relations plan that increases effectiveness of tools and scope of exposure.	S	Made public relations materials available agency-wide by adding pr info to centrally located hr and fiscal literature	Need to make materials available on the common file (electronically)
2. Increase print media coverage from 47 articles to 60 and schedule 36 public speaking engagements.	S	This quarter: 15 articles 10 speaking engagements reaching 264 people  To date: 63 articles and 41 speaking engagements	Next year will plan church speaking engagements during quarterly Westco fund drives
3. Solicit outside expertise to improve CAO's website as a tool for increasing community involvement.	S	No additional movement here	

**GOALS AND STRATEGIES**

**Strategic Goal V: The community is engaged in issues and activities that reduce or alleviate the effects of poverty.**

**2001-2004 Strategic Focus B: Achieve agency mission through strategic recruitment of volunteers and in-kind gifts.**

	<b><u>PROGRESS TO DATE</u></b>	<b><u>CHALLENGES &amp; ADJUSTMENTS</u></b>
1. Deploy 1,500 volunteers to donate 9,000 hours of service to help carry out CAO's mission while building understanding and long-term involvement.	S Deployed 2,213 volunteers who donated 13,619 hours this quarter. Year to date: 3,277 volunteers, 18,926 hours.	Some programs submit volunteer sheets in June that reflect the entire year of activity, causing a spike in fourth quarter results. Head Start admin staff will remind teachers quarterly to submit forms.
2. Improve tracking system to capture in-kind gift and volunteer data.	S	See above
3. Acquire \$200,000 in in-kind support with at least \$40,000 targeted for budget relief.	S Obtained \$64,550 in G-I-K this quarter, \$178, 184 for the year.	

**GOALS AND STRATEGIES**

**2001-2004 Strategic Goal VI: The CAO Board provides effective leadership and governance for the organization.**

**2001-2004 Strategic Focus: Enhance ability of CAO to accomplish this strategic plan.**

		<b><u>PROGRESS TO DATE</u></b>	<b><u>CHALLENGES &amp; ADJUSTMENTS</u></b>
1. Identify and match board members' interests for involvement in CAO with priority activities that advance CAO's mission.	N	Met w/new board member from Intel, placed him on dev/marketing committee per his request Supported board members hosting guests at spring fundraisers Supported PGE board member who co-hosted tour of weatherization program Engaged board member in dev. Office work per her request	
2. Provide board training on governance, financial and program areas.	N		



<p>3. Increase board visibility both internally and externally.</p>	<p>N</p>	<p>Introduced PGE board member to landlords at weatherization tour            Tracked state rep candidate's/board member's media            Supported board member/Centro board chair at his fundraising event</p>	
<p>4. Achieve 100% Board participation in fund development.</p>	<p>S</p>	<p>Obtained gifts/pledges from 2 board members</p>	<p>Board participation/membership is a moving target; will calculate participation rate according to who was on the board as of July of each year</p>

**GOALS AND STRATEGIES**

**2001-2004 Strategic Goal VII: CAO is financially healthy.**

**2001-2004 Strategic Focus A: Reduce agency deficit by 75% and long-term debt burden by 30%.**

	<u>PROGRESS TO DATE</u>	<u>CHALLENGES &amp; ADJUSTMENTS</u>
5. Develop improved reporting processes and provide the training needed by the board to fulfill their fiduciary responsibilities.	J  <i>Done</i>	
6. Provide the training and tools needed by managers to reduce the agency's deficit by 25% from \$279,077 to \$209,308 by year-end.	J  <i>Forecasting report</i>	

**GOALS AND STRATEGIES**

**2001-2004 Strategic Goal VII: CAO is financially healthy.**

**2001-2004 Strategic Focus B: Increase and sustain private financial support at \$1 million annually.**

		<b><u>PROGRESS TO DATE</u></b>	<b><u>CHALLENGES &amp; ADJUSTMENTS</u></b>
1. Transition to a mission driven model for raising private funds.	S	Hosted 3 program tours Hosted second "ask" event April 2 resulting in \$127,361 in gifts and pledges Hosted annual corporate dinner event May 2 resulting in a total of \$40,562	Emphasized corporate volunteerism at dinner Dinner proceeds down considerably; reasons include economy and not enough staff follow up due to attentions being divided among ask and dinner events
2. Build on existing efforts by increasing contact with donors to successfully obtain \$325,000 from foundations, \$146,000 from corporations, \$122,000 from major gifts from individuals, \$115,000 from events, \$41,000 from appeals, \$196,000 from United Way, and \$55,000 from community-sponsored projects.	S	Foundations: \$48,642 Individuals: \$0 Events: \$27,638 Appeals: \$5,182 United Way: \$48,764 Community: \$19,106 Corporations: \$38,561  \$187,895 cash this quarter; \$867,453 for the year.	

**GOALS AND STRATEGIES**

**2001-2004 Strategic Goal VIII: Effective administrative systems and centralized support services are in place to operate the agency.**

**2001-2004 Strategic Focus A: Increase human resources support to employees and legal protections to the agency.**

	<b><u>PROGRESS TO DATE</u></b>	<b><u>CHALLENGES &amp; ADJUSTMENTS</u></b>
1. Gather and evaluate information needed to establish a sustainable compensation and benefits program that is responsive to employees needs.	W No change	Finding the time to pull the survey data together – have 1/3 of reports completed
2. Update employee policy and procedure handbook and disseminate.	W Draft submitted to HR employee focus group for initial feedback and to the attorney for legal feedback.	
3. Establish a salary administration system that facilitates competitive and appropriate pay practices.	W Implemented a temporary “migration” plan to move salaries to market data.	
4. Provide at least three trainings in management of human resources system.	W Completed through leadership meetings.	

**GOALS AND STRATEGIES**

**2001-2004 Strategic Goal VIII: Effective administrative systems and centralized support services are in place to operate the agency.**

**2001-2004 Strategic Focus B: Increase capacity to support and use technology, and manage data.**

	<b>PROGRESS TO DATE</b>	<b>CHALLENGES &amp; ADJUSTMENTS</b>
1. Obtain private support to underwrite technology capacity building plan.	S Obtained \$15,000 in cash and \$15,242 in products from Intel corporation	Need to find right foundation fit to submit technology proposal
2. Implement a plan to enhance server capacity, infrastructure support, off site and work at home connectivity and increased training and technical support.	J	
3. Begin development of a CAO client database.	J	

**GOALS AND STRATEGIES**

**2001-2004 Strategic Goal VIII: Effective administrative systems and centralized support services are in place to operate the agency.**

**2001-2004 Strategic Focus C: Increase support to facilities and work spaces.**

	<b><u>PROGRESS TO DATE</u></b>	<b><u>CHALLENGES &amp; ADJUSTMENTS</u></b>
1. Evaluate need for improvements in facilities and work spaces, develop a plan to address and increase staffing for on-going support.	J	
2. Evaluate space options to provide CAO program services in the south county area.	N	
3. Establish an ad-hoc committee to evaluate and plan for Shelter Home improvements.	N	