

**COMMUNITY ACTION ORGANIZATION  
QUARTERLY PROGRESS REPORT**

DATE COMPLETED January 14, 2002 REPORTING PERIOD July 1, 2001- September 30, 2001 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:**

	<b><u>PROGRESS TO DATE</u></b>	<b><u>CHALLENGES &amp; ADJUSTMENTS</u></b>
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.	59 new clients entered the Opening Doors program during the first quarter for a total of 65. 91% of the 64 infants who 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.	Early Head Start center opened on 09/10/01 with 24 children enrolled.	We plan to serve 16 children in a home based model (weekly home visits) once staff is hired.
3. Develop services that meet the special needs of 77 homeless infants, toddlers and children.	28 homeless school aged children were received services in school, and 26 children in the shelter received child development support.	The Coordinator position, which is responsible for development and oversight of needed services, has not yet been filled.
4. Provide comprehensive part day, pre-kindergarten services to promote school readiness for 462 three and four year old children from low-income families.	419 children enrolled into 26 classes, which opened on September 19 <sup>th</sup> .	Our goal is to fully enroll to 462 within 30 days (by October 19 <sup>th</sup> ). Two centers that had one class last year now have two classes that were added after early enrollment was done. These classes may be hard to fill. Not all classes full due to last minute changes.

**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>
<p>5. Increase low-income families' access to quality child care by expanding full day full year Head Start from 16 to 102 children, continuing to provide school age care to 150 children and increasing child care referrals and provider training by 10%.</p>	<p><i>HS:</i> 100 3-5 year olds are enrolled in full day full year Head Start.</p> <p><i>AKD:</i> A Kid's Domain provided summer child care for 28 migrant families and is now providing before and after school care for 107 children.</p> <p><i>CCR&amp;R:</i> For the first quarter there were 651 (9% increase from first qtr last year) referrals and 251 providers trained (32% increase).</p>	<p><i>HS:</i> The 24 infants and toddlers in Early Head Start (See #2) are also receiving full time child care. Thus the total number of under-five children in full time child care Head Start will be 126.</p> <p><i>AKD:</i> Most of the children in the summer program are continuing in the school age program so the unduplicated count is now 85 families.</p>

**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.	Nothing to report at this time.	The Ready to Rent program was not in operation during this quarter. First session is scheduled to begin in January.
2. Implement a system to track self-sufficiency outcomes for homeless families.	Nothing to report at this time.	
3. Increase effectiveness of the Housing Stabilization Program to assist 40 households in achieving increased levels of self-sufficiency.	27 new families received assistance through the HSP; working with partners to increase program effectiveness.	HSP is a challenging program to operate. At the time of this report funds have been expended.

**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>PROGRESS TO DATE</b>	<b>CHALLENGES &amp; ADJUSTMENTS</b>
1. Increase the number of trained partner sites from 4 to 12, and insure that all CAO client serving staff are trained.	Provided training to 4 partner sites and agency wide training has been provided.	
2. Support the development of a statewide I&R system that meets the needs of Washington county residents.	Regularly attend statewide 211 planning meetings and host the 211 NIRA Listserv.	At this point, the meetings have been somewhat disjointed and progress seems unclear. United Way has expressed interest in this project. It might be necessary to join the formal task force when/if created.
3. In collaboration with Tuality Healthcare and the Hillsboro Vision West program, expand the I & R database to include health related resources.	Actively working with Tuality who has designated a person to contribute 8 hours per week to add health information to the database. Long term partnership is likely.	

**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.	Planned for new staffing and service delivery model.	Plans will be implemented once we have confirmation of increased funding levels.
2. Provide comprehensive energy services to 8,228 low-income families.	Served 1,065 households: 16 received comprehensive weatherization; 4 self-help weatherization; 1,045 energy assistance.	Numbers indicate that we are on track based on seasonal use.

**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 A: Increase agency visibility and support by implementing a comprehensive marketing and public relations plan.**

	<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.	Incorporated coaching from Raising More Money model and the New United Way outcome language to draft "key messages" to use in plan	Need to devote the time to gather outside expertise to help us write a complete plan.
2. Increase print media coverage from 47 articles to 60 and schedule 36 public speaking engagements.	14 printed articles obtained (23% of goal) with attached "Community Action" to the program name/efforts more often.  9 speaking engagements (25% of goal)	Educated staff about the importance of identifying themselves and the program with the larger entity.
3. Solicit outside expertise to improve CAO's website as a tool for increasing community involvement.	Recruited volunteers from Microsoft and Webtrends and met three times to set criteria for revamping website	It's difficult to get this group of staff and volunteers together; will try and have draft ready by spring 2002

**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.	118 volunteers deployed (14% of goal) who donated 1221 hours (14% of goal)  Six community service volunteers provided 291 hours of facilities/maintenance work, the equivalent of seven weeks of free labor.	It appears that we are behind goals at this point. However, it may be that programs are behind in reporting out their stats (that will be reflected next quarter).
2. Improve tracking system to capture in-kind gift and volunteer data.	Adjusted in-kind tracking system to capture "budget relief" gifts.	
3. Acquire \$200,000 in in-kind support with at least \$40,000 targeted for budget relief.	\$42,740 contributed this quarter in in-kind gifts of which \$12,227 is "budget relief"	Modified donation forms to include budget relief box to mark; need to educate staff about what is budget relief and defining budget relief so we can be consistent when categorizing gifts.

**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>PROGRESS TO DATE</b>	<b>CHALLENGES &amp; ADJUSTMENTS</b>
1. Identify and match board members' interests for involvement in CAO with priority activities that advance CAO's mission.	All board members have been assigned to a committee.	Need to meet individually to determine unique interests.
2. Provide board training on governance, financial and program areas.	Two board members attended intensive training in fund raising. One board member attended National Community Action Conference.	
3. Increase board visibility both internally and externally.	Involved board members in grand opening of Early Head Start, Wine Raffle drawing, program tours and SVP site visit.	
4. Achieve 100% Board participation in fund development	19% of the board have made their gift.	



**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%.**

	<b><u>PROGRESS TO DATE</u></b>	<b><u>CHALLENGES &amp; ADJUSTMENTS</u></b>
1. Develop improved reporting processes and provide the training needed by the board to fulfill their fiduciary responsibilities.	Contracted with new auditing firm who has agreed to assist with reporting training.	Need to complete audit first.
2. 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.	New budgets have been set up in the accounting system.	

**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>PROGRESS TO DATE</b>	<b>CHALLENGES &amp; ADJUSTMENTS</b>
1. Transition to a mission driven model for raising private funds.	Conducted four program tours (points of entry). Educated program staff about the importance of budget relief and gave them tools, such as wish lists, to empower them to solicit budget relief gifts. Began marketing adopt-a-program to partnering corporations before holiday rush. Planned for first ever fundraising breakfast to bring together those who support our mission and ask for their financial support.	Lost 1 FTE in August (.25 of development workforce)
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.	Foundations: \$22,000 (15%) Corporations: \$58,759 (40%) Individuals: \$0 Events: \$9,992 (9%) Appeals: \$1,263 (19%) United Way: \$196,837 (100%) Community: \$42,227 (77%) = Total of \$331,078 (33% of goal)	Same as above

**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.	Recruited an HR professional (with William Mercer) to the board Personnel committee. A 3 year work plan was developed to identify and implement benefit strategies. Began plans for an employee opinion survey to be written & distributed prior to December 21 <sup>st</sup> .	The challenges were to provide data for analysis; creating a survey instrument that would generate feedback that would be useful for several years to obtain comparative data as strategies were implemented. This was resolved with the help of an additional professional from Wm. Mercer who volunteered develop the survey instrument structure.
2. Update employee policy and procedure handbook and disseminate.	Completed and reviewed 3 <sup>rd</sup> draft of new policies and reviewed with Exec. Dir.	Hard to get large blocks of time necessary to devote to this project. A lot of work done at home.

**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>
3. Establish a salary administration system that facilitates competitive and appropriate pay practices.	<p>Researched current salary scale &amp; analyzed current salaries to confirm and/or correct pay and placement in the scale.</p> <p>Provided training to Directors on concepts of compensation. Began development on 2 tools that could be used by supervisors in hiring and appraisal process.</p> <p>Implemented and modified Head Start the teacher incentive program.</p>	<p>Current salary scale was hard to understand at first, especially the co-mingling of actual salary with mathematical 80% calculation.</p> <p>Everyone has some ideas of what they want a compensation plan to do – the challenge is to align the differences into a workable process and meet their needs.</p> <p>Current scale has been advanced each year by the “COLA” percentage as were individual salaries resulting in no advancement of an individual within a range; creates several challenges: creating advancement of individuals within the current scale so we are paying employees at market; create a salary pay range that allows competitive hiring and pay within the range.</p>
4. Provide at least three trainings in management of human resources system.	Nothing to report at this time.	

**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><u>PROGRESS TO DATE</u></b>	<b><u>CHALLENGES &amp; ADJUSTMENTS</u></b>
1. Obtain private support to underwrite technology capacity building plan.	Submitted \$250,000 technology capacity grant to M.J. Murdock Charitable Trust.	
2. Implement a plan to enhance server capacity, infrastructure support, off site and work at home connectivity and increased training and technical support.	Have installed and upgraded agency side.	Need staff and training to implement offsite component.
3. Begin development of a CAO client database.	Nothing to report at this time.	

**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.	Hired .5 FTE for additional support.	
2. Evaluate space options to provide CAO program services in the south county area.	Nothing to report at this time.	
3. Establish an ad-hoc committee to evaluate and plan for Shelter Home improvements.	Nothing to report at this time.	