

FAMILY SERVICE OF GREATER WATERBURY, INC.
ANNUAL LEADERSHIP GOALS - 2006

2/20/06

Introduction: These goals define the actions to be taken in 2006 to move the agency towards fulfillment of the Strategic Plan. The goals are therefore listed within the categories of the Strategic Plan.

- MASTER PLAN Champion: Sandy

The agency will formulate, by the end of 2006, a master plan outlining the agency's image and program offerings for 2010 and 2015, the agency's current and future constituents, present and future demographics of the client base, staffing and facility needs.

- AGENCY CULTURE Champion: Sandy

In managing the agency and making decisions, we will respect the strong agency culture of transparency, information sharing and management empowerment.

We will seek and promote diversity of all types in our board makeup, staff makeup, language and cultural needs of clients, printed and web information, publicity and our image in the community.

- SOCIAL ADVOCACY – 2006 Goals Champion: Cathy (with Shannon, Amy and Christina)

1. Form a legislative action task force (board and staff) to work through the issues of working as legislative advocates. These include whether to work singly or collaboratively, at what levels to work, how to understand what is going on in the legislature, and how to impact the legislature (e.g. bringing legislators to the agency.)
2. Create a catalog of other resources in the community that we can recommend to clients for help we cannot provide.
3. Monitor emerging needs of our client groups and funding developments which will affect our ability to meet those needs.
 - a. Act as a clearinghouse to capture this information by
 - i. Identifying sources which have the information
 - ii. Contacting those sources
 - iii. Creating a structured process for pooling information within the agency
 - iv. Doing a formal demographic study by the end of 2006 (Part of development of Master Plan & preparation for possible capital campaign.)

- b. By the end of 06, produce a report of what we have learned and the implications for what we can and should do.
- **QUALITY ASSURANCE – 2006 Goals** Champion: Laurie (with the Leadership Team).
 1. Review the data we gather, in terms of:
 - a. How to use the data to generate the reports we need to make decisions and provide information to others. (e.g. business reasons, quality decisions, grant support)
 - b. What additional data we should collect to make our analysis and use of the data easier and more useful.
 - c. Whether the data collected in different parts of the agency is consistent.
 2. Decide how to analyze and collate the data we collect so that it is easily accessible in the format we need.
 3. Automate the aggregation of quality data by June 30, 2006. Provide staff with the time and training they require to use the automated system.
 4. Cross-reference the data bases within the agency
 5. Re-activate the CQI Team (board-staff) which reviews the quality results and reports them to the board. While trying to re-activate, take some interim step to be sure CQI results are shared. (Sandy)
 6. Let staff know the positive news on quality through use of bulletin board, internal newsletter, forwarding of positive feedback to individuals, etc.
 7. Share results feedback with staff (see Quality Assurance #6)
 8. Make sure everyone is getting consistent quality numbers.
- **TECHNOLOGY** Champion: Dan
 1. Acquire and implement an MIS system to manage data and generate the data needed to:
 - a. Make decisions;
 - b. Manage quality
 - c. Operate more efficiently
 - d. Apply for grants
 - e. Support development
 2. Investigate linking all our data sites so that updates and information retrieval is simple (especially for development).
 3. Update computer equipment as funds become available.
 4. Create an automated agency calendar.
- **FINANCIAL PLANNING** Champion: Dan
 1. Develop a five year capital plan.

- a. Gather data needed from various departments
 - b. Put together five year capital plan
 - 2. Provide numbers still needed by program managers to manage financial performance.
 - 3. Laurie, Dan, and the program managers will meet regularly about budgets, until the system is stabilized.
- PROGRAM EVALUATION Champion: Laurie (with Management Team).
 - 1. Establish the criteria for reviewing each program's performance.
 - 2. Establish a mechanism for reviewing programs every six months. (Phil and Ashley)
 - 3. For those programs reviewed and deemed to be key revenue opportunities, establish system for deciding how to maximize the opportunity, perhaps increase payoff, and protect the program.
 - 4. For those programs reviewed and identified as chronically under-funded, (time frame?), establish a system for deciding what to do with the program.
 - 5. Establish a system for renegotiating fees for under-funded program with Child Services
 - 6. Pilot the renegotiating approach on the Visitation program.
 - a. Get all the data
 - b. Set up an initial meeting at Child Services to feel the situation out.
 - c. Laurie will head this project, with Ashley, Phil, and Sandy.
- DEVELOPMENT Champion: Paul
 - 1. Continue to recruit members of the Legacy society and increase its visibility and rewards for members. (More specific here? – what events, newsletters, etc.)
 - 2. Develop a board white paper that can support a capital campaign.
 - 3. Avoid erosion of the good will of existing contributors with too many/too frequent appeals for money.
 - 4. Avoid draining current funds with matching grants or expensive development projects.
 - 5. Actively search for quickly available funds/grants to alleviate the agency's shortfall by June 30, 06. This needs to be done without taking attention and effort away from long-term development goals.
 - 6. Create a written document of short and long-term financial goals by end of the first quarter.
 - 7. Create a "speaker's bureau" system to make outside groups aware that we can provide speakers and that we can serve as sources of information to journalists and others studying the agency's field.

8. Create a PowerPoint presentation for the use of those speaking on behalf of the agency. (Paul and Doreen)
 9. Set up system to monitor speaking opportunities and contact the organizations to offer speakers to them (e.g. Rotary, etc.).
- CAPITAL CAMPAIGN Champion: Paul
 1. Find funds for the research required to create a master plan for the agency.
 2. Make a decision about a capital campaign, its purpose, and its goal, by the end of 2006.
 - MARKETING Champion: Paul
 1. Identify all the constituencies which need to know about the agency.
 2. Make sure that those constituencies are reached through marketing materials, new website, e-newsletter, agency events, and other means to be identified.
 3. Create a written marketing plan by end of first quarter.
 4. Make staff aware of their roles as ambassadors to all constituencies, not just clients.
 5. See that each staff member has an “elevator speech” that they can use when asked about the agency in any setting.
 6. Increase quality of existing agency events.
 7. Find funding for rollout of new logo, identity and marketing materials.
 8. Create system for positive feedback to be collected in a central place (Paul) so that it can be maximized in marketing efforts.
 - GROWTH Champion: Laurie
 1. Improve facility utilization
 - a. Compile a report on current office utilization. (Laurie)
 - b. Establish a plan to improve the use of office space if possible.
 - EXPANSION OF SERVICES Champion: Laurie
 1. The agency will consistently apply the criteria from the Strategic Plan to evaluate new program possibilities.
 - a. A Program Proposal form will be designed that asks for a brief description of a new program possibility and lists on the form the criteria (from the Strategic Plan) for considering such possibilities.
 - b. Any new program idea or request (from any source) will be described in the Program Proposal form and forwarded to Laurie.

- c. Laurie will coordinate its consideration, using a consistent process centering on the established criteria.

- STAFF DEVELOPMENT Champion: Phil
 1. Establish a salary range structure for each position in the agency.
 2. Align the salary range structure with the professional evaluation system.
 3. Implement the newly designed performance evaluation tool
 - a. Develop a process for using the system
 - b. Decide on timing
 - c. Train managers in its use
 - d. Test the system
 - e. Revise as necessary
 4. Identify individual staff development needs in the annual evaluation and establish plan to meet the needs identified.
 5. Empower staff members by pushing authority down:
 - a. At the beginning of every staff meeting, management will ask if any decisions on the agenda can be pushed down to the next level.
 - b. See that staff members can differentiate between “informing” management and asking for a decision, using the “inform” mode whenever possible.
 - c. Ensure that every staff member is certain of what decisions he or she can make and which need to be sent up a level.
 - d. Managers will send decisions back down when they believe the next person in the chain of command can handle them.
 6. Ensure that all staff members know what to do in a crisis situation.
 7. Provide training and support to the staff as they increasingly deal with more serious evolving needs of our clients.
 8. Provide staff training for technology as new systems are installed.
 9. Review the staff orientation process and why it is not working as well as it could be.
 10. Ensure that all staff members have an up-to-date organization chart.
 11. When a group has worked collaboratively on a project, take the time at the end of review how worked well together and where could improve.

- COMMUNITY COLLABORATION Champion: Sandy
 1. Every six months, the management group will review the list of community or professional groups with which the staff is involved. This review will use the criteria established in the Strategic Plan.
 - a. Management will ask for each person’s affiliation every six months.

- **COLLABORATION WITH OTHER AGENCIES**

No specific Action required.