

**New River Community Action
Strategic Plan July 1, 2014 – June 30, 2018**

Progress Report July 2017

Goal 7: Identify one improvement for each program that would reduce stress (increase efficiency) in that program.

Oversight Committee(s): Program

| Objective | Action Steps | Responsible Person | Target Date | Outcome | Measurement |
|--|--|---------------------------|--|-------------------------|----------------------|
| CHIP CHIP staff will streamline paperwork by developing and implementing one Case Management form which will meet data collection requirements for all CHIP grants. Objective target date: February 28, 2015 <i>Revision objective target date: March 31, 2015</i> COMPLETE | CHIP Specialist will convene a meeting of all Family Case Mangers to review all case management forms and identify data collection duplications. | Angie Nichols | Sept. 30, 2014 | Completed Sept. 2014 | Staff meeting agenda |
| | CHIP staff (Carrie, Carol and Jolee) will develop a new blended case management form. | Angie Nichols | Dec. 31, 2014 <i>Revision: Feb. 28, 2015</i> | Completed March 2015 | Case management form |
| | CHIP staff (Angie and Jolee) will train Family Case Mangers on use of new form. | Angie Nichols | February 28, 2015 <i>Revision: March 31, 2015</i> | Completed March 2015 | Staff meeting agenda |

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| <p>EMERGENCY ASSISTANCE</p> <p>Emergency Assistance Program (EAP) staff will improve service delivery by coaching clients to utilize their own resources more efficiently and by developing and implementing a process for program continuous quality improvement.</p> <p>Objective target date: July 31, 2017</p> <p>COMPLETE</p> | EAP staff as a team will review each jurisdiction's current program policies and procedures (P&P) and share best practices. | Glenda Vest | March 31, 2015 <i>Revision: Dec. 31, 2015</i> <i>Revision: February 29, 2016</i> | Review completed April 2016 | Review notes |
| | EAP staff as a team will draft revised EAP P&P to include focus on clients using their own resources efficiently. | Glenda Vest | Oct. 31, 2015 <i>Revision: March 31, 2016</i> | Draft # 1 completed April 2016; draft #2 completed Oct. 20216 | Draft procedures |
| | Montgomery and Pulaski EAP staff will take draft revised EAP P&P to MCEAP and PCENTF Boards for review and approval. | Glenda Vest | Dec. 31, 2015 <i>Revision: April 30, 2016</i> | PCENTF Board approved Nov. 2016; MCEAP Board approved May 2017 | Approved procedures |
| | Director of Community Services Programs will take draft revised P&P to the Board's Program Committee for review and possible recommendation to the Board for approval. | Glenda Vest | Feb. 28, 2016 <i>Revision: April 30, 2016</i> | Board approved February 2017 | Approved procedures |
| | Following Board approval, Director of Community Services Programs will train EAP staff on new P &P. | Glenda Vest | April 30, 2016 <i>Revision: June 30, 2016</i> | Staff trained March & April 2017 | New procedures |

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| | Director of Community Services Programs will begin schedule of team quarterly review of EAP P & P for best practices and need for improvement. | Glenda Vest | July 31, 2017 and quarterly thereafter | Ongoing | |
| | Director of Community Services Programs will develop and implement with team a process for annual EAP continuous quality improvement planning and follow up. | Glenda Vest | July 31, 2017 and annually thereafter | Ongoing | |

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| FINANCE DEPARTMENT Finance Department staff will implement electronic timesheets and travel reimbursements. Objective target date: January 31, 2016 Revision objective target date: January 31, 2017 <i>Jan. 2017 note: This project currently on hold due to payroll department staff turnover and possible budget constraints as a result of the Floyd bridge damage.</i> July 2017 update: Staff researched options extensively and found no tool that meets NRCA's needs at an affordable price. However, staff will continue to explore tools through ongoing awareness of new payroll software products. COMPLETE | Finance staff will visit benchmark site(s) to evaluate the process and estimate cost and impact. | Finance Director | March 31, 2015 <i>Revision: March 31, 2016</i> | Discussions held with Clinch Valley & Rooftop CAAs; participated in webinar with potential vendor Aug. 2016 | Notes from meeting; webinar materials |
| | IT Department will determine compatibility of new system to current financial software. | IT Department | May 31, 2015 <i>Revision: May 31, 2016</i> | Determined compatible Aug. 2016 | |
| | Finance staff will determine implementation costs (IT resources, software license, etc.). | Finance Director | June 30, 2015 <i>Revision: June 30, 2016</i> | Some review with vendor complete – Aug. 2016 | Notes from review |
| | Finance staff will test new system/program. | Tabbi Greenhalgh (timesheets) Cristy Blair (travel) | October 31, 2015 <i>Revision: October 31, 2016</i> | | |
| | Finance staff will implement new system/program. | | January 31, 2016 <i>Revision: January 31, 2017</i> | | |

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| <p>FACILITIES AND TRANSPORTATION</p> <p>F & T staff will establish a HVAC preventive maintenance program to ensure all agency-owned systems are functioning at peak performance.</p> <p>Objective target date: Nov. 30, 2014</p> <p>Revision objective target date: April 30, 2015</p> <p>COMPLETE</p> | <p>F&T staff will explore and develop contract(s) with professional HVAC mechanics to inspect all agency-owned units twice each year, generally in spring and fall.</p> | <p>Rick Phillips</p> | <p>Nov. 30, 2014</p> <p><i>Revision: April 30, 2015</i></p> | <p>Completed May 2015</p> | <p>Contract document</p> |

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| HOMELESS AND HOUSING PROGRAMS HHP staff will create two NRCA program policies and procedures manuals, one for education and counseling services, one for prevention and rapid re-housing services. Staff will update manuals annually. Objective target date: Dec. 31, 2014 COMPLETE | HHP staff will write procedures for education and counseling services. | Lisa Yost | Dec. 31, 2014 | Completed Dec. 2014 | New procedures document |
| | HHP staff will write procedures for prevention and rapid re-housing services. | Lisa Yost | Dec. 31, 2014 | Completed Dec. 2014 | New procedures document |

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| HEAD START Head Start management staff will work with the Human Resources Manager and <i>Effective Case Management Team</i> to develop a training schedule that will effectively meet ongoing training and professional development requirements for NRCA Head Start, without disrupting Head Start services for families and children’s instructional time, and without placing a financial burden on the Head Start program. Objective target date: May 31, 2015 COMPLETE | Sheryl Helm, Sheila West, and Roni Fitch will identify trainings important for both Head Start and other NRCA programs. Identified trainings related to case management will be shared with the <i>Effective Case Management Team</i> . | Sheryl Helm | Dec. 31, 2014 | Completed Dec. 2014 | List of trainings |
| | Sheryl Helm, Sheila West and Roni Fitch will identify trainings important for each position within the Head Start Program. Identified trainings related to case management will be shared with the <i>Effective Case Management Team</i> . <i>Revision: Effective Case Management Team no longer meeting – work completed.</i> | Sheryl Helm | Dec. 31, 2014 <i>Revision: February 28, 2015</i> | Completed June 2015 | Head Start individual staff training plans |
| | Sheryl Helm, Sheila West and Roni Fitch will prioritize trainings for each Head Start position. | Sheryl Helm | April 30, 2015 | Completed June 2015 | Head Start individual staff training plans |
| | Sheryl Helm, Sheila West and Roni Fitch will review the Head Start Planning Calendar and schedule trainings with focus on minimal disruption to services and classroom schedules, and minimal cost. | Sheryl Helm | May 31, 2015 | Completed July 2015 | Head Start calendar |

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| HUMAN RESOURCES Human Resources (HR) Manager/Executive Assistant will coordinate with the Executive Director to explore revising the job duties of the HR Manager/Executive Assistant and Main Office Program Support Technician (PST), and review implementation of Executive Assistant position, to enhance effectiveness and efficiency of these departments. Objective target date: April 30, 2015 <i>Revision: The above objective will be achieved through the administrative restructuring process.</i> Revision objective target date: January 31, 2016 COMPLETE | The HR Manager/Executive Assistant and Executive Director will review the HR Manager/Exe Asst and PST job descriptions, duties and performance plans and analyze “what’s going well” and “what’s not going well.” | Sheila West | Nov. 15, 2014 <i>Revision: Jan. 31, 2016</i> | Completed Dec. 2015 | Administrative restructure plan |
| | The HR Manager/ Executive Assistant and Executive Director will review the Executive Assistant job description drafted several years ago as part of general exploration of ways to enhance department effectiveness and efficiency. | Sheila West | Nov. 30, 2014 <i>Revision: Jan. 31, 2016</i> | Complete Dec. 2015 | Administrative restructure plan |
| | Pending outcome of exploration, the HR Manager/Executive Assistant and Executive Director might develop revisions to job descriptions and/or proposed new job position and explore feasibility with Finance staff. | Sheila West | February 28, 2015 <i>Revision: Jan. 31, 2016</i> | Completed Dec. 2015 | Administrative restructure plan |
| | Pending outcome of exploration, HR Manager/Executive Assistant and Executive Director might take job description revisions and/or proposed new job position to Board of Directors for review and possible approval. | Sheila West | April 30, 2015 <i>Revision: Jan. 31, 2016</i> | Completed Dec. 2015 | Administrative restructure plan |

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| <p>PLANNING 7A. Planning Director will work with appropriate program staff leaders to develop an Octopia data entry handbook with directions for each NRCA program specific to their services. Objective target date: July 15, 2015 Revision target date: June 30, 2016 Revision target date: June 30, 2018</p> <p>July 2017 Update: <i>Objective not accomplished as originally proposed (via screenshot software), but training manual with visuals is complete and in use. Staff members are trained in groups (updates) and individually (new staff).</i></p> | Planning Director will purchase and learn to use <i>screenshot</i> software, a tool for developing training manual. | Ann Angert | January 31, 2015 | Software purchased Dec. 2014 | Software |
| | Planning Director will meet with each program staff leader to verify that Octopia properly captures and reports identified program outcomes. | Ann Angert | March 31, 2015 <i>Revision: Sept. 30, 2015</i> | Complete June 2015 | Outcomes included in 2015-16 CSBG Work Plan |
| | Planning Director will refine Octopia system to effectively capture identified program outcomes. | Ann Angert | April 30, 2015 <i>Revision: Sept. 30, 2015</i> | System revised and on-line July 2015 | Software revision |
| | Planning Director will draft training manual in <i>screenshot</i> software and forward to program staff leaders for review. | Ann Angert | May 15, 2015 <i>Revision: Dec. 31, 2015</i> <i>Revision: Dec. 31, 2017</i> | | |
| | Program staff leaders will provide comments to Planning Director on training manuals. | Ann Angert | May 31, 2015 <i>Revision: Feb. 28, 2016</i> <i>Revision: March 31, 2018</i> | | |
| | Planning Director will develop final <i>screenshot</i> training manual. | Ann Angert | June 30, 2015 <i>Revision: May 31, 2016</i> <i>Revision: April 30, 2018</i> | | |
| | Planning Director will train each program department on manual. Planning Director will also develop schedule for training new staff. | Ann Angert | July 15, 2015 <i>Revision: June 30, 2018</i> | | |
| COMPLETE | | | | | |

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| 7B. Planning Director will train appropriate program staff leaders on access to Octopia data entry and support so that program leaders can assist their staff when Planning Director is unavailable. Objective target date: Nov. 31, 2015 Revision objective target date: Nov. 30, 2016 Revision objective target date: Nov. 30, 2018 | Planning Director will develop a training manual for program staff leaders. | Ann Angert | Sept. 30, 2015 <i>Revision: Sept. 30, 2018</i> | | |
| | Planning Director will train program staff leaders. Also, training task will be placed on all Training Plans of appropriate program leaders to ensure training of new managers. | Ann Angert | Nov. 30, 2015 <i>Revision: Nov. 30, 2018</i> | | |

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| TO OUR HOUSE TOH staff will develop and implement a new procedure to ensure all volunteers are trained on TOH policies. Objective target date: March 15, 2015 COMPLETE | Staff will develop a document that lists all TOH policies critical for volunteers. | Carol Johnson | Nov. 1, 2014 | Document developed Nov. 2014 | List of policies critical for volunteers |
| | Staff will distribute document to all TOH volunteers along with a signing sheet for volunteers to complete acknowledging their understanding of the policies. | Carol Johnson | March 15, 2015 | Completed Nov. 2014 | Document and signing sheet |

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| VA CARES Staff will improve service and communication to clients through revisions to staff operations schedule, voice mail messaging and written orientation materials. Objective target date: Dec. 31, 2014 Revision objective target date: Sept. 30, 2015 COMPLETE | Staff will research other rural VA CARES programs covering large numbers of square miles to find models for effective staff scheduling practices. | Darrell Lucas | Nov. 30, 2014 | Analysis complete Nov. 2014 | Research notes |
| | Staff will develop an improved weekly set schedule for client orientation, service delivery and record keeping. | Darrell Lucas | Dec. 15, 2014 | New schedule proposed Dec. 2014 | Schedule |
| | Staff will revise all program voice mail messages and written client orientation materials to inform clients of the weekly schedule. Staff will also revise voice mail messages to encourage clients to leave clear messages, including client name and phone number. <i>Revision: Smart phones will be assigned to staff to promote faster communication with clients and real-time scheduling of appointments.</i> | Darrell Lucas <i>Revision: Shannon Lowery</i> | Dec. 31, 2014 <i>Revision: February 28, 2015</i> <i>Revision: Sept. 30, 2015</i> | Complete Dec. 2015 | Phones |

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| <p>VOLUNTEER INCOME TAX ASSISTANCE (VITA)</p> <p>Staff will improve outreach to low-income families before the beginning of tax season.</p> <p>Objective target date: Dec. 31, 2015</p> <p>COMPLETE</p> | <p>Staff will use the agency data base to send a mailing to all NRCA clients informing them of the VITA program, its benefits and how to access the service.</p> | <p>Glenda Vest</p> <p><i>Revision: Heather Lucas</i></p> | <p>Dec. 31, 2015</p> | <p>Completed March 2015; will continue in future years with mailing earlier in tax season.</p> | <p>Document mailed</p> |

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| <p>RSVP</p> <p>RSVP staff will develop a new NRCA RSVP Policies & Procedures (P&P) manual to cover roles, responsibilities and duties for staff, volunteers and Advisory Councils. Staff will use the manual to develop a new NRCA Volunteer Handbook and a new Advisory Council Orientation Packet.</p> <p>Objective target date: June 30, 2016</p> <p>PROGRAM ENDED MARCH 2015</p> | Staff and both Advisory Councils will review the current P&P and RSVP Volunteer Handbook and propose revisions. | Valerie Mills | January 31, 2015 | | |
| | Staff will review P&P manuals from at least two other RSVP projects for ideas that might assist in the development of the NRCA manual. | Valerie Mills | March 31, 2015 | | |
| | Staff will develop a new draft manual. | Valerie Mills | July 31, 2015 | | |
| | Staff will share the draft with the Executive Director, Finance Director and Human Resources Manager for compliance with NRCA Policies & Procedures. Staff will share draft with both Advisory Councils for review and comment. Staff will revise draft as needed. | Valerie Mills | October 31, 2015 | | |
| | Executive Director will approve final P&P manual. | Terry Smusz | Nov. 30, 2015 | | |
| | Staff will draft the new NRCA RSVP Volunteer Handbook and new Advisory Council Orientation Packet, taken from the new P&P manual. | Valerie Mills | February 28, 2016 | | |
| | Staff will share the draft Volunteer Handbook and Advisory Council Orientation Packet with Executive Director and both RSVP Advisory Councils and revise as needed. | Valerie Mills | April 30, 2016 | | |
| | Staff will distribute new NRCA RSVP Volunteer Handbook to all current RSVP volunteers and to new volunteers. Staff will distribute the new NRCA RSVP Advisory Council Orientation Packet to current Advisory Council members and new members. | Valerie Mills | June 30, 2016 | | |

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| AmeriCorps AmeriCorps Coordinator will train and oversee agency clerical staff to assist with members' enrollment and exit data entry. Objective target date: February 29, 2015 <i>Revision objective target date:</i> Sept. 30, 2015 <i>Revision objective target date:</i> March 31, 2016 COMPLETE | Coordinator will identify and train clerical staff in use of eGrants, member enrollment and exit requirements. | Nina Hollins | Dec. 31, 2014 | Staff identified and trained Dec. 2014 | Training instructions |
| | Coordinator will establish and implement a schedule and process for random checks of enrollment and exit procedures and related data entry to ensure timeliness and accuracy. | Nina Hollins | February 29, 2015 <i>Revision:</i> Sept. 30, 2015 <i>Revision:</i> March 31, 2016 | Schedule and process completed March 2016 | Written procedures |