

Audubon Area Community Services, Inc.
2007 Strategic Plan

Agency-level Strategic Improvement Initiatives

*Helping
People*



*Changing
Lives*



*Building
Communities*



Year Three

of the agency's

Re-Imagine 2005+ Initiatives

and

Vision 2010

*Approved by the Board of Directors
December 19, 2006*

***Developing resources...
Investing in human potential***

Re-Imagine 2005+

Audubon's Mission:

Developing resources...

Investing in human potential

Vision2010:

Helping People. Audubon Area Community Services is people-centered in its purpose, passionate and caring in its response to people in their need, and provides high stakeholder satisfaction with character, honesty, integrity through a wide array of valuable programs that represent a significant value-add to its constituents.

Changing Lives. Audubon Area Community Services reaches out and improves peoples' lives with flexible, adaptable, synergistic, high-impact services; it exercises high stewardship to provide taxpayers and grantors a significant positive return on their investment in the agency; Audubon Area Community Services makes a positive difference in a strong and powerful way in each of aspect of society.

Building Communities. Both independently and through partnerships, Audubon Area Community Services meets the human service needs of its served communities; through its scope and scale as a regional agency, Audubon Area Community Services, Inc. exemplifies a high level of performance excellence and positive results and significant outcomes.

Core Values

- Fiscal Accountability and Stewardship
- Individual and Organizational Integrity
- Across-the-Board Pursuit of Excellence

Core Purpose

To foster hope in individuals, family, and community

To nurture — preserve, protect, promote — individual dignity

End Goals

High Purpose
High Satisfaction
High Results
High Recognition

Year-Three (2007) "Wildly Important Goals"

Broad Goals and Objectives and Planned Activities

Goal One — Enhancing the Agency Infrastructure

Goal 1a. Augmenting and Accelerating LOGOS.NET. The agency's financial automated *Logos.NET* v4.2 accounting/human resources/asset management systems will continue to be significantly enhanced through continuing the software implementation and continuing to develop and implement effective staff training processes. Implement *Logos' e-Suite* module for enhanced benefits management; provide management and staff online self-managed access and capabilities. Implement and utilize Logos' e-mail notification and approval-management facilities — supported by an upgrade to GroupWise 7.1, which also interfaces seamlessly with Microsoft Outlook for those users who prefer that mail client. **Specific Activities:**

- Through education and overviews familiarize the agency's senior leadership with all available *Logos* modules purchased by

the agency and the options, benefits and challenges required with each option – *Fully perform and complete in January 2007. Assignees: CFO, involving all senior staff as appropriate.*

- With top management support evaluate the agency’s purchased *Logos* modules and commit to implement agency-wide such purchased *Logos* modules around which an inter-departmental consensus as to their general/overall value emerges; then each AACS program/department, based on its evaluation of the value-add to its departmental operations, select and implement additional *Logos* modules it deems appropriate and commit to implement those – *Fully perform and complete in February 2007. Assignees: Executive Director, CFO, Human Resources Director and senior staff, as appropriate.*
- Develop an implementation plan and training calendar to then prepare to implement those *Logos* modules according to agency leadership consensus and departmental needs; prepare twin plans and calendars, one for a Fiscal Track, the other for a Human Resources track; all Fiscal Track modules being now available, that track will proceed first; the Human Resources Track’s *e-Suite* (online self-managed employee benefits) will proceed after mid-year – *Begin Fiscal Track plan and calendar development in March 2007. Assignees: CFO, Human Resources Director and other senior staff, as appropriate.*
- Provide process-specific *Logos.NET* training for each *Logos* fiscal module, with scheduled trainings as needed and print and online training references for self-paced learning – *Implement Fiscal Track training by May 2007, continue as long as needed. Assignees: CFO & other senior staff, as appropriate.*
- Begin to implement the *e-Suite* self-managed module and services, inform and train staff in its use ... (and if it becomes available as scheduled late in 2007, begin the review, familiarization, and training processes for implementing electronic timesheets in the subsequent Work Plan Year) – *Human Resources Track training to begin by August 2007 — ongoing through the balance of 2007. Assignees: Human Resources Director and other senior staff, as appropriate.*
- Along the same lines as the earlier module education and selection process driving those module-specific trainings determine agency-wide and program/department specific needs and train departmental and line management on *Logos* inquiry, reporting tools, and other functionality; as approved and embraced; likewise, determine line managers who need the functionality and required training to implement and utilize *Logos*’ e-mail notification and approval-management facilities – *Implement upon completion of fundamental Fiscal Track training; ongoing throughout the balance of 2007. Assignees: CFO, HR Director, and line management staff, as appropriate.*

Goal 1b. Enriching Our Information Systems. Create and implement a relevant vision and concerted operations for the agency’s “IT” (Information Technologies) infrastructure, including enhanced support for the *Logos* accounting/human resources management systems and the many and varied information systems tools within the agency’s other support and service departments. Implement and manage a coordinated vision- and support-driven “IT” department within the agency; preserve the security and integrity of agency data resources and tools; implement and maintain functional spam-blocked but authenticated-user-reliable e-mail, stable and reliable networking services, and effective Web services; and develop and maintain secure and effective data backup and restoration services. Develop and implement effective staff “IT” training processes. Generally broaden the agency’s Web-based informational, inquiry and reporting tools. ***Specific Activities:***

- Develop and implement a logical and supported “IT” short-range vision, January-June 2007 plan and the agency’s immediate support service needs and its IT department’s planned response; develop and implement a logical and supported multi-year long-range “IT” vision and plan – *By January 31, 2007 Assignees: IT Director, Executive Director, CFO and other senior staff, as appropriate. The plans shall, at a minimum, cover:*
 - ❖ Providing all needed and assured specific services, support and training for each “IT” service in that agreed-upon plan; train departmental and line management on software hardware usage and on agency policies, procedures and requirements relating to the use of both.
 - ❖ Providing reliable and assured “IT” services according to agency management requirements in support of agency information services needs, including *Logos*, IP telephone system support, and all requisite data security and restoration services; provide ongoing “HelpDesk” support (including monitoring departmental responsiveness and impact), project-specific data management software, e-mail, networking services, Web services; and data backup and restoration services.
 - ❖ Work with AACS project management and support services staff to develop and implement data-management resources and tools; assist departmental and line management with data- inquiry and data reporting tools, supported with staff training.
- Explore options within the agency’s current Information Systems infrastructure and capability to assimilate data from AACS’ disparate programmatic databases and parse out unduplicated client and service counts, and report results in agency annual reports – *By October 15, 2007 (for the 2007 Annual Report). Assignees: IT Director, IT Staff, and other senior staff, as appropriate.*
- Assure agency access to vital government-specific Web sites such as e-grants; assure that agency managers use of these and other Web-based resources are unimpeded, resolving all agency-side connection and firewall issues – *By June 15, 2007. Assignees: IT Director, IT Staff, and other senior staff, as appropriate.*

Goal Two — Enhancing the Agency Culture

Goal 2. Living the Vision. Create, implement and manage a culture where employees fully understand the *Mission* — “Developing resources... Investing in human potential” — and the *Vision* of “Helping People. Changing Lives. Building Communities.” Uniformly hold all staff accountable to perform productively, execute tasks and roles efficiently, and collectively produce superior personal, departmental and agency-wide outcomes and results; create greater trust and inter-dependence among all staff — who, in turn, feel appreciated/valued, demonstrate loyalty, enjoy their AACS work experience. **Specific Activities:**

- Implement and maintain effective and repetitive communications with staff to inculcate the agency’s end goals, core purpose, and core values; explore viable and effective means for distributing information to staff and utilize all appropriate person-to-person means, including senior stall/line management communications; fully utilize print media, postal mail, e-mail (establishing e-mail accounts for all AACS staff and policy makers), fax, and Web-based communications means –
 - ❖ **End Goals:** High Purpose, High Satisfaction, High Results, High Recognition
 - ❖ **Core Purpose:** To foster hope in individuals, family, and community;
To nurture — preserve, protect, promote — individual dignity
 - ❖ **Core Values:** Fiscal Accountability & Stewardship; Individual and Organizational Integrity;
and Across-the-Board Pursuit of Excellence

Fall 2007; begin planning no later than January 2007. Assignees: Human Resources Director and other agency staff, as appropriate.

- Maintain and improve the *Executive Director’s Celebrating Excellence Award* employee recognition program; assure that the recognitions are meaningful and conspicuous – *Fall 2007; begin publicizing and receiving nominations no later than May 2007. Assignees: Executive Director and Human Resources Director, and other senior staff, as appropriate.*

- Summarize and disseminate 2006 employee survey results, identified strengths and weaknesses, and agency responses to validated needs for change; seek ways to increase survey participation, including both online and hardcopy survey options and incentives for completion and submission of the surveys; perform 5-part 2007 employee satisfaction surveys; assess 2007 survey results and compare against 2005-2006 results/benchmarks; assess progress, retrogression, trends, and apparent or presumed implications and develop appropriate “utilization” of results – *Establish Fall 2006 initial “benchmark” survey results; re-survey January-to-June 2007; Fall 2007: assess, compare and analyze; recycle beginning in January 2008. Assignees: Human Resources Director, primary; other agency staff, as appropriate.*

- ❖ Assess and report overall/summary findings; develop a Plan of Action based on identified strengths and weaknesses.
- ❖ Recycle survey process; assess and report findings, update Plan of Action.

- Continue agency development of the incomplete activity from the 2005 and 2006 work plans with respect to restructuring agency position descriptions and performance appraisal instruments into a more performance-, outcomes-, and results-based format – *Ongoing throughout 2007. Assignees: Human Resources Director and Head Start Professional Development Committee & other agency staff, as appropriate.*

- Develop succession plans for all AACS senior management; review and upgrade all senior management staff position descriptions; carefully consider and focus succession planning around the theme of “supporting the culture” of the organization; obtain appropriate succession planning training; and develop relevant, precise, effective succession plans:

- ❖ “Emergency” (*Roughed Out*) Succession Plan – *Completion no later than June 30, 2007*
- ❖ “Permanent” (*Full-blown*) Succession Plan – *Completion by year’s end 2007*

Assignees: Executive Director, senior staff, and Board of Directors.

- Plan and conduct a 2007 agency-wide event — picnic, annual meeting, other — for all employees and policy makers – *Fall 2007; begin planning no later than January 2007. Assignees: Human Resources Director and other agency staff, as appropriate.*

Goal Three — Enhancing the Agency’s Impact and Viability

Goal 3. Rebuilding the Momentum. Explore means and options, both strictly internal and supported by outside partners, to initiate aggressive new grant-seeking initiatives within the agency. Explore alternative non-grant means to enhance the agency’s growth and capacity; aggressively pursue all means to “grow” the agency, enhance its financial viability, and expand its service capacity. Explore any and all new and creative ways to restore AACS’ growth trend, including management services to other nonprofits, “incubator” grants, and fee-based training services. **Specific Activities:**

- Aggressively explore growth potential through expansion, redirection, and/or replacement of current funding streams; seek new and non-traditional funding sources and/or new clientele with unmet needs and public support – May “piggy-back” with existing AACS services; agency may work with other nonprofits in an “incubator” relationship where AACS “fronts” grant writing costs in order to secure a subsequent fee-generating “fiscal sponsorship” role with the nonprofit(s). *Ongoing*

throughout 2007. **Assignees: Research and Planning Coordinator, Executive Director, new “Grants Review Committee” and other senior management as appropriate.**

- Research and explore income generating opportunities, even for-profit funding/business opportunities (in-state and out-of-state), through entrepreneurial approaches – *Ongoing throughout 2006.*

- ❖ *Create and seek new, innovative, non-traditional funding/entrepreneurial opportunities IDEAS:*

- Housing development — partnering with a for-profit developer — and property management services’ “fee for service” start-up
- GRITS vehicle-, route-management and motor pool services to AACS departments and area entities — multi-agency sharing and support/service
- Counseling Services’ “fee for service” start-up
- Energy audit services — plumbing/heating energy conservation— *for-profit start-up?*
- Other innovative partnership arrangements and services

- ❖ *Explore services AACS might provide on a fee basis — fiscal and payroll services, personnel services, and/or grant-writing services to other non-profits*

(Supported by *Logos.NET*’s “multiple payrolls/multiple companies” facilities segregate non-AACS entities from AACS operations)

- ❖ *Promote AACS “fiscal sponsorship” arrangements with other nonprofits*

(Promote AACS benefits as a “lure” to attract other fee-paying non-profits as “associated” entities)

- ❖ *Explore the potential for profit-making subsidiaries, perhaps in the area of Adult Day Care.*

Assignees: Research and Planning Coordinator, Executive Director, others as appropriate.

- Explore and offer various options for donor fund development; create an AACS Endowment

Fund — *possible fund development approaches to be explored:*

- Major Gifts
- Planned Giving
- Annuities and Bequests...

Ongoing throughout 2007. Assignees: Executive Director, Investment/Oversight Committee, Board Attorney, Board committee.

- Explore the feasibility of conducting an annual Fundraising Dinner and/or fund-drive campaign – *Ongoing throughout 2007.*

Assignees: Executive Director and other senior management.

Goal Four — Partnering in Community Responses to Emergencies

Goal 4. Building the Incident Management System. Follow through on the Board’s commitment for the agency to fully participate in the national-to-local “incident management system.” Develop well-defined internal agency responses for mobilize in emergencies according to established norms — developed according to NIMS-compliant incident management system requirements. Integrate AACS into local and area Emergency Management Systems (EMS) according to the requirements of the National Incident Management System and local EMS needs. **Specific Activities:**

- Develop and implement “institutionalized processes” to ensure organizational policies, procedures and defined management/command structures and “modular and scalable” responses to agency and/or public emergencies as encompassed under the purview of the National Incident Management System (NIMS) – *By June 2007. Assignees: Executive Director, senior management & the Board as appropriate.*

- ❖ Train and certify AACS management and other key staff through NIMS’ Independent Study Courses.

- ❖ Marshal an agency task force to push forward AACS’ NIMS compliance; designate a lead person to exercise stewardship for the progressive development of NIMS and hold task force members accountable to the NIMS development process.

- ❖ Establish a work schedule that will advance the agency through the planning, determination and development of the requisite NIMS components and requisite models.

- ❖ Incrementally deploy NIMS components as developed and ready; periodically update the agency’s NIMS “capability assessment” online as step-by-step/reportable progress is made.

- Lay a conceptual foundation for the further development of the AACS NIMS-compliant incident response system, both internally and externally, which the agency has committed to have in place no later than June 30, 2009 – *December 2007 (beginning in mid-2007 but the final development largely to occur in 2008 and 2009).* **Assignees: Executive Director, senior management & the Board as appropriate.**

- Begin to integrate AACS into appropriate participation in the areas Emergency Management Systems (EMS); determine AACS emergency response resources and, as appropriate, make available in partnership with those EMS entities. *June 2007 forward. Assignees: Executive Director, senior management & the Board as appropriate.*

Re-Imagine 2005+ Goal: Preparation of 2008 Work Plan

Goal: *Continuing the Strategic Initiative.* Consistent with the overarching Five-Year Plan's "menu" of options for achieving the Mission and Vision as previously set forth and appreciable continuity with the progression of the previous year's strategic initiatives, select the guiding elements and activities needed to additionally fulfill the Mission and Vision; fully consider immediate challenges which must be met, stakeholder/associate readiness, acceptability, and commitment in the design of the 2008 Year-Four Plan.

Objective: Develop a 2008 Plan of Activity that complements the 2005, 2006 and 2007 work plans, furthers the 2005-2010 overall *strategic directions*, moves the agency toward fulfillment of "Vision 2010," and yet responds dynamically to changing agency and operational "environmentals."

Specific Activities:

- No later than July 1, 2007, begin staff/Board work on the development of the 2008 Work Plan.
- No later than the December 2007 Board meeting, present 2008 Work Plan for Board approval.