

Discover Goodwill of Southern & Western Colorado
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Performance Management Report 2018

“Don't wish it was easier, wish you were better. Don't wish for less problems, wish for more skills. Don't wish for less challenges, wish for more wisdom.”

- Jim Rohn

To Our Stakeholders:

As was anticipated, 2018 brought new challenges as we continue to advance programming for all we serve. Foresighted planning carried on and helped all in clarifying and translating our vision into program strategies, objectives and metrics. We had continued success in addressing minimum wage increases while emphasizing process improvements. Staff looked for ways to further mission integration within our client and employee workforce through available support systems and by developing new relationships with community providers. Careful evaluation of our programs was accomplished to ensure sustainability. Ultimately, 2018 saw an emphasis on ensuring near and long-term mission impact through operational excellence. This statement, along with our response to the challenges and opportunities experienced, informed our 2018 Operating Plan.

As in the past, Goodwill utilized the balanced scorecard, a planning and management system, to outline the four strategic categories:

1. **Financial:** Expand revenue and margin to support mission and increase financial stability.
2. **Team:** Increase employee satisfaction, retention and performance.
3. **Customers:** Attract new customers and build loyalty across all stakeholder groups.
4. **Performance:** Drive operational excellence using data and continuous improvement to support growth of the mission.

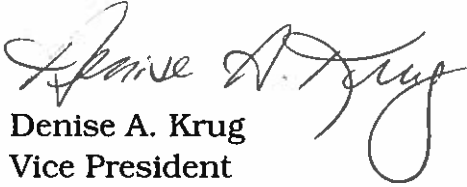
2018 Major Initiatives:

- Continue to ensure the sustainability of programs and the desired impact on individual lives.
- Create a long-term plan for mission integration.
- Leverage retail competencies to selectively expand brick and mortar opportunities.
- Continue to monitor and adjust to mitigate the effect of minimum wage and compression.
- Focus on innovation to ensure business diversification, quality revenue and financial stability.
- Develop and launch a sustainable plan for our new cultural values.
- Accelerate decision making through data initiatives and continuous improvement.

Sharing this information helps Goodwill ensure a seamless experience for all served. The more we share; the more value is added to program and operations.

We believe in accountability; this report provides data to our community in general and makes us the better for it. Please review our 2018 Performance Management Report and know that will continue to serve all stakeholders in a thoughtful, progressive manner.

Respectfully submitted,

A handwritten signature in black ink, appearing to read "Denise A. Krug". The signature is fluid and cursive, with a large, looping initial "D".

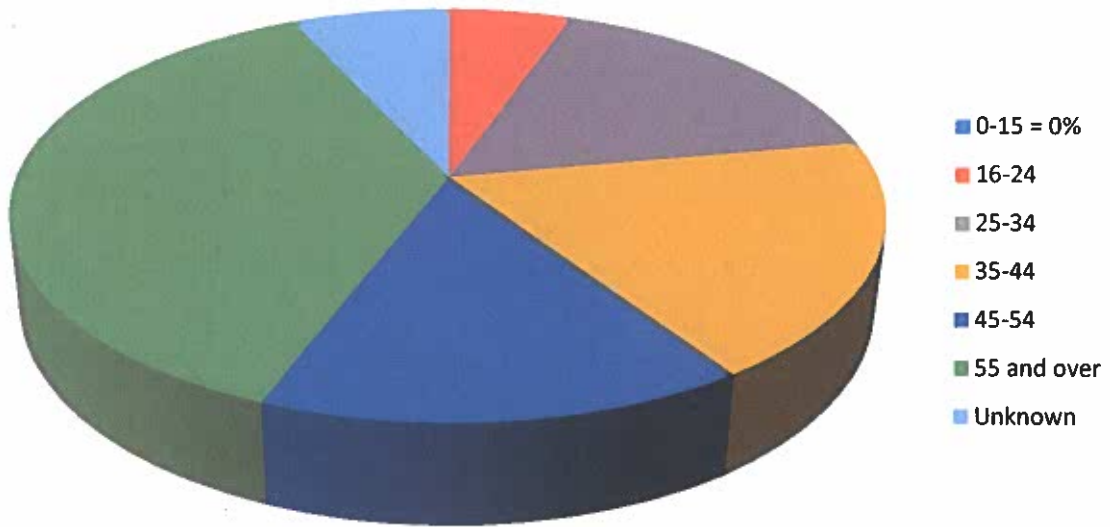
Denise A. Krug
Vice President

Workforce Development, Community Programs and Contracts

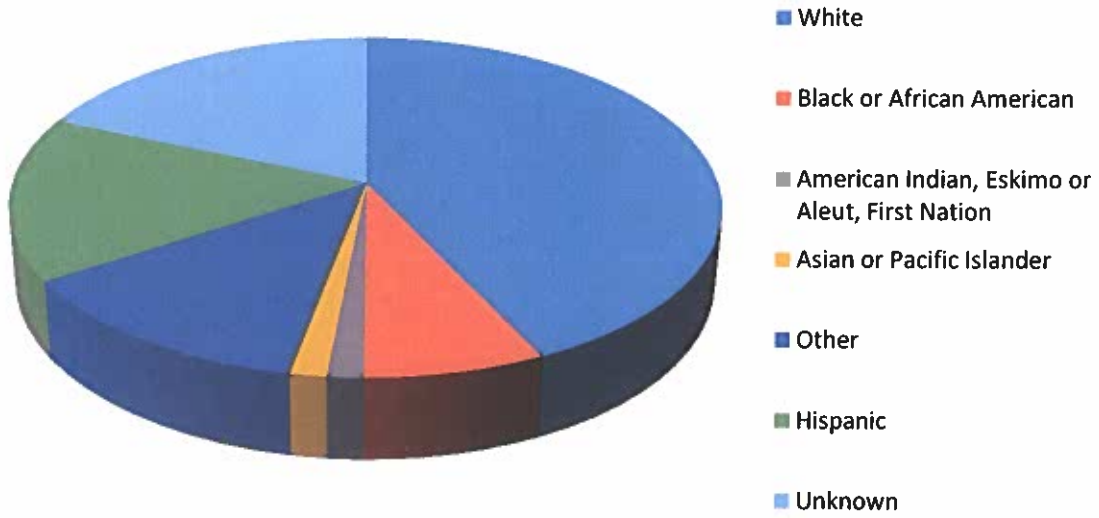
2018 People Served by Gender



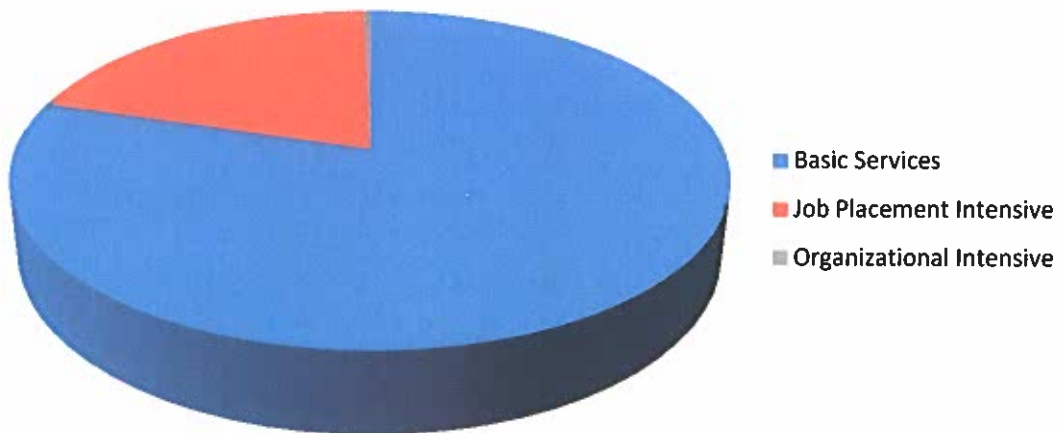
2018 People Served by Age Group



2018 People served by Race/Ethnicity



2018 Persons Served by Service



2018 Barriers Experienced by Persons Served



■ Developmental Disability

■ Other Physical Disability

■ Psychiatric and/or Emotional Disability

■ Neurological Disability

■ Other Disabling Condition

■ Blindness/Other Visional Impairment

■ Deafness/Other Hearing Impairment

■ Learning Disability

■ Unemployed/Dislocated Worker

■ Offenders/Ex-Offenders

■ Homeless

■ Working Poor/Incumbent/Underemployed

Performance Management Indicators Recommendations and Objectives Report

Key Performance Indicators for 2018

- Focus on innovation to ensure business diversification, quality revenue and financial stability.
- Spot our mission impact.
- Diversify fundraising to enhance mission impact.
- Demonstrate and highlight the mission embedded in our entire organization.
- Cultivate existing partners to expand opportunities for new relationships.
- Improve growth in E-commerce and the donated good retail market.

2018 Major Initiatives

- Create a long-term plan for mission integration that supports and empowers those of our employees facing significant work/life obstacles.
- Continue to monitor and adjust our plan to mitigate the effect of minimum wage and compression.
- Focus on innovation to ensure business diversification, quality revenue and financial stability.
- Develop and launch a sustainable plan for our new cultural values.
- Execute a comprehensive marketing/communication plan too reach all customers and stakeholders.
- Accelerate decision making through data initiatives and continuous improvement.

Strategic Objectives for 2018

Financial:

- Achieve operational profitability in Skilled Care. Not Accomplished
- Maintain a net operating margin before fundraising of \$2.5M. Accomplished
- Mitigate the effect of minimum wage and compression. Accomplished.
- Provide contract transportation services. Accomplished.

Team:

- Investigate opportunities and create a long-term business plan for mission integration. Accomplished.
- Complete the Leadership Cohort. Accomplished.

Customers:

- Embed within our organization a customer delight approach to all customers. Accomplished

Performance:

- Achieve Contract E/R of 89.8%. Accomplished.
- Reinforce safety as a key component of continuous improvement and our cultural values. Accomplished.
- Meet all outlined outcomes for RFP Contracts. Accomplished.
- Maintain WD/CP overall E/R of 93.4%. Not Accomplished.

Individual Unit Outcomes

Possibilities:

- The FISH (Functional Independence Skills Handbook) testing saw an increase of 50.5% over baseline in the 12 Functional skills: cognitive, adaptive, affective, sensorimotor, social, speech/language and vocational areas.
- 6 new community partnerships were developed in 2018 (Deerfield Community Center volunteer program, Denver Nature and Science museum, Expanding Minds Museum, Shorin Center Martial Arts-TaiChi, YMCA Memorial/Cottonwood Water Park & White Rabbit Beading Group).
- Monthly mayor/city council meetings were held meeting goal expectations.
- Exceeded goal to implement participant suggested community, curricular and programmatic choices.
- 94.3% of respondents of Annual Survey would recommend the program to their friends and family.

Recommendation(s):

1. **Effectiveness** – Continue with Functional Skills Independence Handbook (FISH), as an integral part of the curriculum, emphasizing one specific skill each month across all centers for continued reinforcement, combining with community integration experiences. To apply person centered thinking and individual participant goals within this framework as part of each center curriculum and as a part of the daily routine.
2. **Service Access** – Increase the number of community integration experiences offered each month to participants and continue with the development of new long-term community partnerships that will encourage community relationships and natural supports of the participants. Utilize Smart Board technology to provide information, across all learning modalities, about these outings and integration experiences and allow for participants to sign up for their choices. It is recommended to increase the number of Community Liaisons/buses available for community integration experiences.
3. **Efficiency** – Continue to track participant utilization and schedule make-up days for participant absences and for scheduled holidays as part of a Case Management-Administration Assistant team effort. Emphasize excellent customer service and train staff to ensure positive and helpful communication with all stakeholders. Continue personalized service and program excellence to increase participant retention. Continue to plan and publicize programmatic events and activities both internally via flyers and via the Constant Contact “Possibilities Snap Shot” weekly email to all stakeholders.

4. Stakeholder Input – Continue conducting yearly Possibilities survey and follow up with any issues noted by the respondents. Continue monthly City Council meetings and participant Focus Groups for programmatic input.

Transition Services:

- The number of students who achieved their ISP goals averaged 79%.
- 32 referrals were received during the programming year.
- The utilization of service goal decreased from the baseline to 78%.
- Overall survey ratings were 4.86 for 2018.
- For the fifth year in a row, all survey respondents would refer the program to friends and family.

Recommendation(s):

1. Effectiveness: In order for TS participants to maximize their ISP goals, the Case Manager will continue to meet/work with each participant on their curriculum retention.
2. Service Access: Case Manager will continue to meet with each team to discuss different funding options in order to maximize services. She will continue to track the number of referrals, number of intakes, and the number of inappropriate for services.
3. Efficiency: The Case Manager will continue to have face-to-face interactions with the participants to encourage student attendance and assure that the participant is engaging in program. Case Manager will also track utilization of days and encourage all participants to fully utilize all approved days.
4. Stakeholder Input:
 - Stakeholders will be administered an Annual Satisfaction Survey to capture feedback.
 - Systems Improvement Specialist will conduct open ended questions to increase participant's satisfaction through providing opportunities to share/discuss feedback from the participants directly.

Journeys:

- The maximization of achievement of day program goals was 71% missing the target goal of 75%.
- The number of participants attending a community integration was 70% missing the target goal of 80%.
- Utilization was at 90% missing the goal of 95%.
- All survey attributes increased from 2017 to 2018 and 100% of respondents would recommend the program to family and friends.

Recommendation(s):

1. Effectiveness: Staff members will continue to encourage, prompt and assist participants as needed with achieving their objectives. Continue to offer the objective block weekly. Quarterly, Program Manager will review curriculum with Activity Director to ensure there are plenty of opportunities for participants to meet their goals.

2. Service Access: Community Integration will continue to be offered 4 times/week. The Program Manager will meet with Community Liaison quarterly to look at the participants that have gone on outings and the places they were able to visit. The Community Liaison will continue to research possible new places for participants to go on their outings.
3. Efficiency: Administrative Assistant will continue to keep track of clients that are absent and work with the providers to have the participant make up time by either extending their daily hours or the number of days they attend weekly, if applicable. Administrative Assistant will also send out fun events to providers to maximize attendance on those days, as well as weekly generally updates about Journeys.
4. Stakeholder Input: Activity Direct will continue to have monthly Award Assemblies to gather activities/integration feedback from the participants/stakeholders. The feedback is implemented into the Activity Calendars for person centered planning. The Activity Director will also send pictures of each participant engaged in activities to the provider/guardian quarterly. After a new participant starts, the Case Manager will contact the participant's provider after the participant's first day, first two weeks and first 3 months to give an update on how the participant is doing at Journeys. Continue to administer annual satisfaction survey.

Supported Employment

- 99% of all in program retained their employment.
- The goal of meeting with employer once per month (12) was met.
- Utilization goal was 92% missing the target goal of 95%.
- 100% of survey respondents said they'd recommend the program to friends and family.

Recommendation(s):

1. Effectiveness: Continue goal of monthly employee contact to sustain community employment.
2. Service Access: Continue to address any employer complaints immediately. Decrease complaints by being readily available to all employers.
3. Efficiency: Program Coordinator will meet with Employment Consultant bi-monthly to discuss schedule for weekly client visits.
4. Stakeholder Input: Continue annual client survey to give additional opportunities for client feedback.

Individual Unit Customer Satisfaction

Discover Goodwill continuously seeks ways to gather stakeholder input and works diligently to talk directly with those receiving our services. This provides strategic information that is used in creating overall annual objectives/program refinements. Participants are involved in focus groups during their classroom scheduled time and are represented by members of Possibilities' City Council where town operations are conducted. Monthly assemblies are held with a designated time when activity suggestions are solicited. Client choice is a daily opportunity where individuals are allowed to vote on what activities they want to participate in for the next hour.

Other methods for stakeholder input include: luncheons for referral sources, open houses, invitations to parents/guardians/host home providers to join in on special programming days, monthly parent calls, calls to other stakeholders seeking programming feedback, and individual unit's surveys are conducted.

Stakeholder feedback is outlined in this management report which is then published on Goodwill's web site for easy access to all who might have an interest. Additionally, feedback is discussed in unit staff meetings and is always a topic in strategic planning where measurable "Customer" objectives are developed and outlined in Goodwill's Strategic Plan.

Journeys:

- The Program: All attributes except for "**level of care the participant received**" increased or remained the same from 2017.
- The Staff: When comparing this year's results to 2017, all attributes rated higher in 2018.
- Overall Service: The ratings increased for all attributes from 2017.

Supported Employment:

- Work Skills: Work Skills increased in 2018 from 2017 with results closer to those in 2016.
- The Program: There was a slight increase for both "**safe environment**" and "**staff genuinely cares**" from 2017.
- The Staff: Respondents' rating increased for all attributes from 2017 and were closer to those received from 2016.
- Overall Service: Respondents' excellence rating of overall service increased slightly for "**professionalism**", "**courteousness**" and "**attentiveness**" and decreased slightly from 2017 for "**helpfulness**" and "**quality of service**".

Transition Services:

- Work Skills: There was a significant increase for all attributes for 2018. The largest improvement was for "**The participant was coached appropriately to reach program/employment goals**".
- The Program: Respondent's rating decreased slightly from 2017 for both "**safe environment**" and "**staff genuinely cares**".
- The Staff: Respondent's rating increased for all attributes except for "**keeps me informed of progress and activities**".
- Overall Service: Respondents' excellence rating of overall service decreased insignificantly from 2017. Only one respondent pushed the mean down from 5.0 to 4.86 on all attributes.

Possibilities:

- The Program: Respondents' rating decreased slightly for "**safe environment**" and "**staff genuinely cares**".
- The Staff: Respondents' rating increased in all attributes from 2017 and was higher than most of the past years.

- **Overall Service:** Respondents' excellence rating of overall service showed an increase in all attributes for 2018 and was mid-range when compared against all past years recorded.

Looking Ahead

2019 Global Strategic Objectives:

Financial:

- Increase company revenue to \$66M.
- Increase net operating margin.
- Achieve stabilization in WDCP revenue.

Team:

- Analyze the mission integration program and its effect on employee development, engagement and retention, work/life support and personal empowerment.
- Launch the new cultural value of Integrity, Customer Delight, People Matter, Stewardship, Continuous Improvement and Excellence.
- Develop Administration Team talent through engagement in major, cross-functional initiatives to support the business continuity plan.

Customers:

- Execute Phase I of a comprehensive marketing/communication plan that connects Goodwill with our stakeholders to drive community participation.
- Launch Phase II of the Customer Delight initiative.
- Continue to advance State Person Centered Planning.

Performance:

- Expand continuous improvement efforts with an organization-wide focus on purchasing and CI projects.
- Secure IHSS services of 12 individuals.
- Achieve budgeted E/R/.

Program Highlights

Possibilities:

1. Functional Independent Skills Handbook (FISH) Improvements in 2018:
 - 50.51% increase over baseline in the 12 Functional Skills from the cognitive, adaptive, affective, sensorimotor, social, speech/language and vocational areas.
2. 6 new community partnerships for 2018 providing meaningful community inclusion
 - Monthly average of 217 participants integrated into the community
 - 29 average monthly outings
3. YTD 2018 utilization average of 81%.
4. There were 141 special programmatic events suggested by participants which were implemented and overseen by the Possibilities City Council.

5. Population census increased by 41 new participants in 2018, 21 of those being Tier Level 3 and above for funding.

Supported Employment:

1. Maintained 99% employment.
2. Overall unit utilization was 89%.
3. Provided services to 12 participants.
4. Achieved an ER of 83%.

Transition Services:

1. Overall unit utilization was 78%.
2. 79% of students achieved their ISP goals.
3. 10 students became dual funded, meaning they are qualified for long-term programming.
4. We are serving 5 school districts.

Journeys:

1. Positive reviews on Annual Survey:
 - 4.88/5 rating for Professionalism, 4.81/5 for Courteousness, 4.63/5 for both Attentiveness and Quality of Service.
 - 100% of respondents would recommend Journeys to their family and friends.
2. Overall utilization was 89.7%.
3. Achieved an ER of 77%.
4. Journeys served 79 participants total throughout 2018. The daily average census was 45 participants.
5. 70% of the participants chose to go on community integrations throughout the year.
6. Journeys enrolled 8 new clients in 2018.

In Closing:

We are looking forward to a successful 2019 with everyone contributing to the meeting of very ambitious goals. All employees must live their commitment, keep track of their progress, ask for assistance when necessary, be willing to revisit and revise, get focused on the important, and, above all, be consistent with those we serve. Discover Goodwill must:

- Deploy the right strategies
- Navigate around the hurdles/mitigate the distractions
- Be patient
- Connect with and involve the community
- Be diligent in the provision of service
- Learn from failure
- Seek and welcome feedback from any and all stakeholders.

As always, Discover Goodwill is excited about the future of programming. We look forward to another successful year and in assisting as many individuals as possible.