



Strategic Planning 2017 Update - State of the Agency EXECUTIVE SUMMARY

Strategic plans provide a road map for long-range business destinations. Effective strategic planning requires that guiding members of the business come together and gain an understanding of the current situation impacting the business including feedback from key stakeholders and an examination of future challenges. From this, members envision the organization's future and collaboratively develop the necessary tasks, timelines, procedures and operations to achieve the desired future. The end result is a plan that everyone is committed to accomplishing.

As of August 2017, OCO is 3½ years into its current 5-year strategic plan. This summary provides an update on accomplishments to date and on critical information gathered over the past few months, to assist with informing the completion of the remaining 19 months of the current strategic plan cycle. This data also will assist with OCO's transition into the next planning cycle for a 3-year plan encompassing 2019 - 2021.

A. OCO'S CURRENT SITUATION

1. Significant Accomplishments

Accomplishments for OCO over the last 3 ½ years have been documented in the OCO Strategic Management Plan as follows:

a) OCO Led and/or Participated in a Variety of Community Collaborations, including:

- COACH – the County's Continuum of Care for Homelessness
- Oswego County Nutrition Coalition
- Rural Health Network
- Literacy Coalition
- LIFT Oswego – Empire State Poverty Reduction Initiative
- Health & Nutrition Advisory Committee
- Transportation Coalition
- Oswego County Poverty Task Force
- Workforce Development
- CNY Care Collaborative
- CSB Integrated Sub-committee meetings, and
- County Partnership meetings

b) OCO Assured People had Access to Resources to meet Basic Needs:

i. Services that expanded:

- Meals provided increased across OCO and the free Summer Meals for Youth program exhibited growth each year since it began in 2013
- Housing – the number of nights of emergency shelter increased, housing options for respite increased, a group home for homeless youth opened in early 2016
- Parent Education increased for participants

- Increased the number of emergency shelter beds for youth in 2016
 - Continued implementation of Universal Delivery & Intake system and data management system
 - ii. Services that decreased:**
 - Job Training and Employment services dwindled due to reduced funding
 - Transportation trips have decreased due to regionalized coordination of Medicaid transport
- c) **Low-Income People have a Voice in Services and in the Community:**
The following Participants have an active and ongoing voice in services and on community committees:
- Head Start parents
 - WIC participants
 - Youth
 - Senior citizens
 - People experiencing homelessness
 - Low-income participants on OCO's Board of Directors
 - General public, through OCO's toll-free number, website feedback form, and email
- d) **OCO has a Comprehensive Strategy and System for Communicating Critical Information:**
- The OCO Newsletter spotlights agency programs monthly
 - Program sections and news pages on OCO website
 - The number of media spots produced annually has increased, with over 80% of publicity taking place on electronic media
 - As of 2017, all OCO staff receive an active email account upon starting work
 - Starting in 2015, social media posts and internal TV screens are used to regularly communicate to employees and the public
 - Starting in 2016, PR Committee issues monthly email blasts about upcoming events & activities
 - Human Resources communicates value of employee benefits and educates staff
 - A speakers bureau has been created in 2017
- e) **OCO will Retain Well-Qualified and Experienced Employees by Providing Professional Development, Flexible Benefits and Living Wages:**
- A new wage & salary scale was implemented in 2015 with step increases after 1, 4 and 7 years
 - A 3-year wage plan is being implemented in 2018 to accommodate step increases in minimum wage and maintain balance between OCO's job levels for exempt and non-exempt employees
 - Executive leadership team succession plans are in place
 - Wellness activities are held and wellness incentives developed in response to periodic surveys to identify staff needs and interests
 - Continued exploration of longevity incentives for employees, including a 10-year step increase
- f) **OCO will have an Active Fund Development and Cash Management Plan in Place:**
- Fund development strategic plan implemented
 - Development coordinator hired in 2015, and funds raised exceeded \$112,000 by year-end 2016
 - OCO promoted cost-saving culture by spotlighting employees in the OCO newsletter who achieved cost savings
 - In November 2016, OCO invested \$1 million to open a long-term investment fund

2. Significant Challenges

OCO routinely faces challenges related to finances, technology, human resources, facilities and program operations. The agency has a knowledgeable, dedicated workforce that successfully addresses these “normal” operational challenges with minimal impact to delivery of services. However, the agency has been faced with some continuing challenges that fall outside the norm and which require a concerted, comprehensive, multi-faceted approach for resolving:

- **Homeless services**
- **Transportation**
- **Youth services**

a) **Homeless Services:**

Funding necessary to provide services to the homeless and nearly homeless has not kept pace with the need, even with OCO’s efforts to combine services from different departments for a comprehensive approach. In addition, needs assessment data continues to show that adults and families living in poverty do not earn enough to afford the median rent in Oswego County. Individuals and families often move from place to place, staying as long as they can with one relative or friend then moving on to another. This creates barriers to holding a job, opening a bank account, and doing well in school. Forty-one percent of Oswego city residents living below the poverty line moved in the past year alone.

b) **Transportation:**

Since coordination of Medicaid transportation in Oswego County was moved from OCO to a regional model in 2013, OCO Transportation Services have suffered significant financial losses due to its inability to coordinate services in the most cost-efficient manner by grouping trips and keeping rates lower. As one member amongst a pool of Medicaid transport providers, OCO has had to utilize an established county rate that, at times, increases costs. Reduced revenues have forced OCO to reduce resources that used to sustain a higher desired number of public transit routes in outlying areas of the county which serve low numbers, posing hardships for residents without access to other affordable transportation.

d) **Services to Youth:**

Funding for youth programs has fluctuated, making sustainability of successful programs for at-risk youth difficult. Staff have diligently sought other funding streams and applied for new programs in the past 3 ½ years, successfully bringing the Fulton Community Schools program in 2014, the After School Programs, and most recently the Clubhouse Program starting in October 2017. These help fill a gap in the community by providing resources and supports to at-risk youth and their families.

e) **Transition to Managed Care Services:**

A new Managed Care system is being implemented statewide, which is reshaping the ways in which OCO provides residential services to the mentally ill and developmentally disabled. In the first phase, to comply with a “conflict free” care management model requirement, the state is looking to create regional Care Coordination Organizations (CCOs) and move care coordinators (currently Medicaid Service Coordinators) from providers like OCO to the CCOs. The 2nd phase of the Managed Care approach is for the behavioral health and developmental disabilities services to move from fee for service model to a value based performance (VBP) model. At this time the implementation time line is to be determined. OCO already provides approximately 40 supportive living apartments for these populations and expects that need to grow as New York State’s plan moves forward for agencies to deliver services that assure the highest levels of independence.

3. Updates to Identified Needs:

In April - June 2013 OCO conducted focus groups and administered surveys to consumers, employees, board members and community partners to solicit feedback about strengths and weakness of OCO, needs of individuals and families and the community. The qualitative data gathered through focus groups and surveys was analyzed and categorized to align with the common themes listed below. Updates are in this 2017 updated Executive Summary are based on data collected from the following sources:

- OCO Consumer Satisfaction Surveys completed in 2015 and 2016
- County and Statewide data from NYS Community Action Association's 2017 Community Needs Assessment tool
- County and City of Oswego data from the 2017 LIFT Oswego - Empire State Poverty Reduction Initiative Report

a) Top Identified Needs for Individuals, Families and the Community

BASIC NEEDS

- Additional services / resources are needed to meet people's basic needs: food, shelter, health care
- 2017 poverty estimates show a total of 19,996 persons living below the poverty rate. At 17.4% , Oswego County's poverty rate is above the NY average of 15.5% (p. 12, Oswego County Community Needs Assessment, 2017)

HOUSING

- Increased affordable, quality housing is needed at the service level and in the county.
- All housing levels in Oswego County require a higher hourly wage than the average renter hourly wage (p. 87, Oswego County Community Needs Assessment, 2017)

EMPLOYMENT

- Additional employment opportunities and skill development is needed
- Unemployment continues to be above the state average. In May 2017, the county average unemployment rate was 5.8%, compared to a statewide rate of 4.3%. In January 2017 county's the unemployment rate was 7.2%. The LIFT report notes that Oswego County has the 10th lowest labor force participation in the state.
- The county average wage is \$782.41 compared to \$1,292.44 statewide (p.67, Oswego County Community Needs Assessment 2017)

TRANSPORTATION

- Additional transportation options are needed to enable people to get to work and appointments
- 91% of people drive to work. Less than 1% use some form of public transportation. (p.72, Oswego County Community Needs Assessment, 2017). The 2017 LIFT Oswego report (pp.23 – 29) states that 16% of households in the City of Oswego do not have a vehicle, but only 1% of City residents rely on public transportation to get to work, due in part to lack of service to job locations beyond the Fulton-Oswego corridor and to the limited schedules and lengthy commute times to jobs in neighboring Onondaga County.

b) Top Identified Needs for OCO to Continue to build Capacity and Excellence:

INSUFFICIENT AND UNSTABLE FINANCIAL RESOURCES

- OCO made great strides in 2015-16, ending 2016 with a surplus of \$1.4 million that allowed for a \$1 million long-term investment to provide for future needs.
- Continued efficiencies, efforts to maintain neutral or minimal increases to indirect costs, and centralized purchasing of supplies and services are needed to offset potential interruptions to program funding.
- Budget reductions and program eliminations at both the state and federal level continue to be a threat to OCO program operations.
- The transition to a managed care system for the developmentally disabled, mentally ill and other vulnerable populations stands to significantly impact funding, housing and other resources for those served by OCO.

AWARENESS & ACCESSIBILITY OF SERVICES

- OCO has over 80 locations, utilizes a website and internet media, and has increased publicity spots to exceed 2,200 annually through a greatly increased presence on social media. Stakeholder feedback informs us that there is a continued need to provide more awareness of services.
 - *“Continue to give out business cards and post information, because others may need it who don’t know about OCO”*
 - *“I have recommended to friends already and will continue to, there are others that need OCO!”*
 - *“I’m surprised that more people don’t know about the program, I know lots of people that would benefit, I am telling them.”*
- OCO Universal Service Delivery system provides for a universal system of access to all OCO services; the standards and policies/procedures have been implemented, but the data base tool is not completely implemented for all services. Initial Contact & Intake screening and data entry has been implemented agency wide as of September 2017

EMPLOYEE BENEFITS & COMPENSATION

- Must keep pace with the current job market to ensure that quality staff are retained
- Must continue to improve toward assuring living wage for full-time staff:
 - In 2013, 66% of OCO employees earned less than \$30,000; as of July 2017, that percentage has decreased to 55%.
 - In 2013, 16% earned less than \$20,000 annually; as of July 2017 that percentage has decreased to 7.7%.

OPERATIONAL EXCELLENCE

- Must be maintained across the agency, particularly in the areas of service eligibility and building skills for self-reliance
- Universal Service Delivery methods have been implemented, usage of universal data collection and reporting system faces ongoing challenges due to proliferation of funder- and service-specific data systems that result in data entry into multiple and diverse systems. This places a strain on staff time and resources
- OCO has aligned its annual work plan and performance measures with Community Action Standards of Excellence

B. FUTURE CHALLENGES

An important aspect in developing strategic plans is projecting future trends that may potentially impact future business. This “prediction” is predicated on what is known today that may grow, change and impact future activities. Some critical future trends to consider are:

- 1. State /federal budget deficits:** As of this writing, the 2013 NYS budget deficit is \$1.3 billion. The federal deficit for 2013 is \$973 billion. One of the proposed places to cut significant costs is in the area of social service programs. We have already experienced this impact as described previously. Agency strategies must consider how we will continue to weather potential future cuts in funding.
- 2. Economic climate:** We have seen increases in fuel/utility and health care costs which have resulted in an increase in hungry and housing vulnerable families with fewer resources available to assist them. In addition to the impact on families, increasing costs affect the agency. High fuel costs, increasing costs for providing health care and increasing utility costs may mean there is less revenue for enhancing program services or even increasing staff salary and benefits.

- 3. Work Force Recruitment & Retention:** With the increased cost of living, OCO must be assure its employees are earning a living wage and to assure it attracts and maintains a talent pool that perpetuates quality services.

As new generations enter the workforce, they each are looking for something different to motivate them and keep them from “moving on”. Variety, the ability to influence decisions, and a benefits structure that is flexible and meets the growing life changes of employees are often cited as critical workplace needs. The state’s increase for minimum wage workers in fast food / restaurant jobs created a new source of competition for entry level positions at OCO, placing additional drain on staffing resources and increasing employee turnover. OCO has responded by complying with the state’s annual increases since 2013, and is also implementing its own 3-year plan 2019-2021.

In the 2011 Employee Survey, only 48.3% of employees indicated that they were satisfied with OCO Benefits, Compensation and Recognition and only 54.98% indicated they were satisfied with their work environment. On the positive side, 82.2% indicated they were satisfied with benefits for full time employees and 81.1% felt that they had meaningful work. The next Employee Survey is scheduled for early 2018.

In a report on Employee Turnover from Jan – June 2017, of the 50 employees who ended employment with OCO during this period, 6% left to seek further education, 4% relocated, 33% resigned to take another job and 34% resigned for personal or unspecified reasons.

- 4. Jobs in the community:** The DataUSA website shows the top three occupations for the Oswego region as of 2015 to be Administrative (12.9%), Food & Serving (10.8%) and Education, Training & library (9.1%) New York State Department of Labor’s Occupational Employment Statistics survey (2012) provides a detailed look at the distribution of occupations in the county. The most common jobs held by residents are Administrative, Food & Serving, and Sales. Healthcare & Social Assistance, Accommodation & Food Service, and Educational Services are the three largest employment sectors. Colleges, hospitals and several high-tech manufacturers are some of the major employers. The high concentration of professional and technical occupations in the region suggests there will be a strong demand for these workers. When paired with the identified growing need to replace workers who retire, we see a clear picture of the employment opportunities in the county.

The Oswego County Workforce Development System’s Local Plan (2013-14) reports the current and projected employment opportunities in Oswego County and Central New York as: Advanced Manufacturing, Health Care, Ambulatory Health Care, Skilled Labor, Professional, Scientific and Technical Services, Clean energy and Environmental Systems, Financial Services, Insurance, Agribusiness and Food Processing, Administrative and Supportive Services, Social Assistance Programs, Food and Beverage, Biomedical and Bio Sciences, Personal/Home Construction trades, Computer Network, Data and Communication Systems and Hospitality/Tourism.

- 5. Technology:** The need to keep pace with the advancement of technology is an increasing challenge. What we see is that staff and consumers are using technology more and more as a way to communicate and learn. Below are the top reasons why it is important for community organizations to keep up with technology:
- a. Technology allows learning anywhere, anytime, which increases our ability to reach people.
 - b. Technology allows people to learn and assimilate information at their own pace.
 - c. Technology allows the efficient collection and analysis information.
 - d. Technology allows new ways to collaborate with others. It allows us to be efficient by holding fewer meetings and traveling less.
 - e. Technology allows us to produce and store information at a lower cost than books and paper.

OCO has a strong internet media presence with web, email and social media. The agency will continue to be challenged to keep up with the ever-changing world of technology.

- 6. Leadership Development and Succession Planning:** As of July 2017, OCO employed 40 employees at a high leadership level in the agency. This number includes directors and coordinators. Conceivably, OCO could lose over 50% of these leaders over the next 7-10 years to retirement. What is the organization doing to assure that new leaders are being developed and that agency history and knowledge is being passed on to those who will be its future leaders?

C. OPPORTUNITIES FOR GROWTH

Opportunities continue to be abundant for OCO, its consumers and the community. Based on the original feedback from focus groups and surveys in 2013, as well as the updated Oswego County community needs assessment data, the LIFT Oswego poverty report, and OCO customer satisfaction survey results, the following opportunities have been reinforced for OCO to carry out during the remainder of its 2014-2018 strategic plan:

a) OCO Needs to Continue to Plan for High Impact Services:

- Assisting consumers to attain and maintain access to quality, affordable food
- Meeting Consumer's basic needs of food, clothing, shelter, healthcare
- Providing Job training and developing skills for self-sufficiency, specifically in supporting programs for math / literacy skills and soft skills
- Increasing transportation options & developing additional transportation opportunities and methods and aligning public transit schedules and routes with shift times at job sites
- Increasing housing opportunities, specifically providing more stable housing options and supporting creation of clusters of supportive and mixed-occupancy housing units in communities throughout the county
- Increasing quality, affordable child care options

b) OCO needs to Continue to Plan to Build Capacity in the areas of:

- Further stabilization of financial resources through increased efficiencies and elimination of duplication of services provided among partner agencies
- Increasing awareness & accessibility of services
- Augmenting employee benefits & compensation, specifically for employee retention
- Leadership development and succession planning, through implementing curriculum written by Training Coordinator
- Fund development, through implementing a donor management system and database
- Pay, longevity, flexible benefits & incentives

c) OCO needs to Continue to Plan to Build Excellence in the areas of:

- Further development and expansion of technology
- Implementing and maintaining standards for operational excellence

d) OCO needs to Continue to Plan to Build Strategic Partnerships in the area of:

- Affordable, decent housing for all
- Living wage and job creation, especially in areas where residents can utilize public transportation to and from work
- Accessing quality, affordable food for consumers
- Expansion and education for county transportation services as well as additional funding supports for county transportation services
- Legislative advocacy for community action and our constituents

Sources:

- LIFT Oswego: Needs Assessment, Poverty in the City of Oswego, April 2017. Assessment was compiled by CRG, Inc. of Rochester, using various data sources, many of which were at the countywide level vs the city level – making the information more applicable to OCO’s community needs assessment.
- NYS Community Action Association, Oswego County Community Needs Assessment, 2017
- OCO Employee Turnover Report, Jan- June 2017; OCO Employee wage report, August 2017
- OCO Consumer Feedback Surveys, 2015-2016
- DataUSA, <https://datausa.io/> , Oswego, NY