

FAMILY OUTREACH, INC. FY2018 GOALS AND OBJECTIVES Quarterly reports to the board.

1	GOAL: CREATE AN OPERATIONS PLAN THAT WILL STABILIZE AND PROMOTE PROGRAM GROWTH				
	Objective	Action	Timeline	Responsible PM	Updates
1.1	RFP	I. Respond to the RFP for Part C/FES Services	I. Based on the timeline determined by the DPHHS when they reissue the RFP.	Mgt Team	Mike will monitor on a daily basis until the RFP is let again.
1.2	PR	I. Explore low-cost methods for promoting agency programs and awareness of services	I. Completed by September 30 th , 2017	Tyler Stephanie	Stephanie will provide Mike with weekly updates as needed.
1.3	TCM	I. Complete the enrollment to be a TCM provider	I. Completed by September 5 th , 2017	Fran Jackie	Fran will brief Mike on a weekly basis on the status of FO's enrollment.
1.4	Part C	I. All offices will over serve targeted contracted numbers (216)	I. Completed by November 13 th , 2017	Teri Marcy Fran Jackie	These program numbers will be reviewed at the monthly Mgt.Team meetings and presented to the Board each month as well.
1.5	0208	I. We will develop a formula to determine percentage of cost plan spent that equals all agency expenses which includes, but is not	I. Draft of Formula by February 1 st , 2018	Mgt Team HRS Kevin Sandy Stephanie	A status report will be given by Tyler/Kevin at the monthly Mgt.Team meetings.

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		limited to; staff time, admin costs and indirect costs		David ILSs	
1.6	Customized Employment	I. Training for job specialist staff via Voc Rehab	I. Strive to complete entire training program by June 30 th , 2018	Tyler David Kelsey	David B. will monitor on a weekly basis and Tyler will provide updates at the monthly Mgt.Team meetings and the Board meeting.
1.7	Applied Behavior Analysis	I. Continue transition from waiver to insurance services	I. Monthly updates to Management Team	Jackie	Jackie will provide updates as needed at the monthly Mgt.Team meetings.
2	GOAL: DEVELOP STRATEGIES AND COMMUNICATE STATE AND FEDERAL CHANGES TO STAFF AND CLIENTS				
	Objective	Action	Timeline	Responsible PM	Actions
2.1	Timely Communication Regarding Audits	I. Identify and develop a centralized plan which will be put in place to monitor and complete program audits by funding source/remediation plans and contracts	I. Part C Audit – September 1, 2017 II. FES – September 1, 2017 III. 0208 – December 1, 2017 V. Tricare – Fall 2017 V. Insurance contracts – Spring 2018	Stephanie Mgt Team	Stephanie will provide Mike with weekly updates and will give updates at the Monthly Mgt.Team meetings.
2.2	Child and Family Intern Legislative	I. Attend quarterly hearings	I. Give quarterly updates to Mgt Team	Mike Jackie	Mike and Jackie will attend planning sessions on an as

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	Committee				needed basis and will attend the quarterly committee meetings. They will give updates quarterly at Mgt. Team meetings and Board meetings.
2.3	FSSAC	I. Attend quarterly meetings and request that a Part C parent from Region 4 attend these quarterly meetings.	I. Teri/Marcy and Fran will monitor these quarterly meetings quarterly meetings and at least one of them will attend the meetings.	Teri Fran Marcy	Quarterly updates will be given at Mgt. Team meetings and Mike will update the Board on a quarterly basis.
2.4	Provider Calls/Case Management Calls	I. Participate in monthly provider and case management calls sponsored by DPHHS II. Formulate questions to submit to DPHHS	I. Update staff on a monthly basis II. The program manager assigned to the monthly call is responsible for gathering questions from the Mgt.Team each month to submit for the call/	Stephanie will update the schedule for the fiscal year so that the Mgt Team can monitor the call on a rotating basis.	The PM responsible for the call will send out minutes to the remainder of the Mgt. Team so they can review these calls with their respective staff at the monthly staff meetings. Office staff meetings. Mike will update the Board on an as needed basis.

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3	GOAL: PROMOTE A CULTURE OF EXCELLENCE IN PROGRAMMING, PROFESSIONAL DEVELOPMENT AND STAFF WELLNESS				
	Objective	Action	Timeline	Responsible PM	Actions
3.1	Program Data	I. Collection and dissemination of program data as needed for verification of successful programming.	I. PM's will review their respective data on weekly basis and Tyler will review overall program data weekly as well. SSS's will assist the PM's in collecting and reviewing data as well as implementing appropriate adjustments to the staff case on an as needed basis.	The respective PM for each office will review their respective data. Tyler and David B. will work together on the Adult services program data.	This information will be reviewed at the monthly Mgt.Team meetings and Tyler will present program numbers at the monthly Board meetings.
3.2	Develop a Staff Wellness Program	I. Provide annual staff screenings and Wellness newsletter for all staff. II. Each office will strive to create and offer fun and creative team building activities that encourage mental wellness and positive attitudes.	I. The respective PM's will develop a draft of a plan for their respective offices by January 1, 2017. II. Mike and Kevin will work with Sarah from Payne West regarding BC/BS assisting in the staff wellness program.	Mike Kevin Tyler PM's	The development of a staff wellness program will be discussed at the monthly Mgt.Team meetings. Mike will provide the Board with updates on an ongoing basis.
3.3	Discuss and	I. BCBS will provide us with an	I. The goal is for the Mgt.Team to have a wellness	Mike	Progress reports will

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	promote the benefits of a wellness program with the staff.	overview of the benefits associated with having a staff wellness program II. This information will be disseminated to staff on a routine basis	program in place by June 30 th , 2018	Kevin Tyler	be discussed at the monthly Mgt.Team meetings and Mike will update the Board on an as needed basis.
3.4	Insurance Policy	I. Strive to improve the transition time of the annual renewal of the staff health insurance policy.	I Mike and Kevin will initiate discussions with Sarah in January of 2018, explore options and initiate the bidding process on potential bidders/options regarding our health insurance for the next fiscal year. They will also explore the feasibility of transitioning our insurance coverage from a fiscal year plan to a calendar year plan.	Mike Kevin	As information and updates on meetings with Sarah become available this information will be brought Mgt.Team meetings and Mike will update the Board on an as needed basis.
3.5	Professional Development	I. Ensure staff maintains their licensing/certification status by attending required training programs.	I. Training requests and mandated training hours for certification will be reviewed on a monthly basis by the appropriate Program Manager to ensure that no staff allows their certifications to lapse.	Mgt Team	This will be reviewed on a quarterly basis at the Mgt.Team meetings with information from each of the respective offices.
3.6	Relias Updates	I. It is imperative that we maintain our staff handbooks/orientation manuals regarding new employee	I. Sandy will review the Relias record keeping system with Stephanie and ensure that she learns the program well enough to track staff training and make sure these records are	Tyler Sandy Stephanie	This data will be reviewed on a monthly basis and Stephanie will do a status report at the

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		<p>orientation as well as our annual training programs. These training records are maintained in the Relias software.</p> <p>II. Transition of Forms and Job Descriptions are also contained in the Relias system and must be monitored and updated on a monthly basis.</p>	<p>accurate and up to date.</p>		<p>Mgt.Team meeting on an as needed basis. But at least quarterly.</p> <p>II.Stephanie will provide Mike with weekly updates on proposed changes to Job Descriptions and Transition forms.</p>
4	GOAL: SUPPORT AUTOMATED BUSINESS PRACTICES THAT ENHANCE ECONOMIC STABILITY AND FISCAL ACCOUNTABILITY OF OPERATIONS				
	Objective	Action	Time line	Responsible PM	Actions
4.1	Accounts Receivable System	I. Phase out of Office Ally software and replace with a system that is compatible with SAGE.	I. The Fiscal Systems team will work with Kevin, Sandy, Tyler, Jason and Stephanie to have a new software system in place by January 1, 2018	Kevin Sandy Henry Jason Stephanie	The Fiscal Systems Team will meet monthly and explore options to develop a plan to phase out the Office Ally program and replace it with a more appropriate software package.
4.2	Fiscal	I. Fiscal Systems Team will	I. Sandy will provide monthly updates on issues being	Fiscal Team	These updates will

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	Systems Team	identify areas of concern and develop action plans to address these challenges.	addressed by the FST to the Mgt. Team.	Sandy Laura Stephanie	include that status of the work being done by Sandy and Stephanie in their new assignments.
4.3	Fiscal Systems Team	I. Create Monthly Profit & Loss statements.(Per program and Funding Source)	I. The target date for the first Profit and loss statement by program and funding source is January 1, 2018	Fiscal Team	Kevin will provide monthly updates at the Mgt.Team meeting and Board meetings.
4.4	0208 Budget Monitoring/A amendments and Waitlist	I. Transition responsibility to the 0208 manager	I. Fran will work with Marcy and the Butte office staff to complete the transition of the 0208 Budget monitoring process with a target completion date of November 1, 2017	Fran Marcy	Fran and Marcy will provide monthly updates at the Mgt.Team meetings.
4.5	Business Office Staffing	I. Reassess Staffing Needs in Business Office	I. Mike, Kevin and Tyler will meet weekly to discuss operations and will review the status of the new assignments given to Sandy and Stephanie. A determination of the status of these assignments will be made no later than February 1, 2018	Mike Kevin Tyler	The status of the Business office will be discussed at the monthly Mgt.Team meetings.
4.6	Increase Annual Profit margin for all of operations.	I. The Mgt.Team has set a goal of \$250K for this fiscal year. So by the end of this fiscal year our current bank balance should show an increase of \$250K.	I. The Mgt.Team will conduct Quarterly reviews of our profit and loss statements to determine if we are on track to meet our goal. II. The cut off is date is June 30 th , 2018	Family Outreach Staff	The information gathered by the Business office will be reviewed at least quarterly at the Mgt.Team meetings and Kevin will provide regular updates to the Board.

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