Since 1965, Chautauqua Opportunities, Inc. (COI) has lead the fight against poverty by creating a pathway for low-income or at-risk families in Chautauqua County to work toward greater self-sufficiency and a better quality of life.

COI works to reduce and alleviate the impact of poverty through:
► promoting personal academic success & self-sufficiency
► empowering people toward greater self-sufficiency
► promoting asset development for individuals and the community
► promoting & developing proactive health habits
► promoting responsible usage of energy resources

COI, in conjunction with its many partners, builds a foundation for empowerment and opportunities, through its four divisions: Health Services, Children and Family Services, Housing and Community Development, and the Chautauqua Child Care Council.
Mission Statements

Chautauqua Opportunities, Inc.
“Helping People ... Changing Lives.”

“COI ... leading the fight against poverty by mobilizing resources and creating partnerships to promote empowerment, economic independence and opportunities.”

Chautauqua Opportunities for Development, Inc.
“Helping Businesses... Creating Opportunities.”

“CODI ... leading the fight against poverty by mobilizing resources and creating partnerships to promote and create economic independence through business development and opportunities.”
Agency Overview

Chautauqua Opportunities, Inc. (COI) is a not-for-profit Community Action Agency that has been serving the low-income population of Chautauqua County, NY since 1965. COI is fighting the war against poverty by empowering low and moderate income individuals and stabilizing the vulnerable among us. COI strives to create economic opportunities that afford each individual a ladder out of poverty and improve the overall well-being of the entire community. It is our commitment to restore each individual’s dignity and assist, through supportive services, each one to attain short and long-term goals that move them toward economic stability.

In November of 2017, the Board of Directors at Chautauqua Opportunities, Inc. announced Mr. Franklin Monjarrez as the agency’s new Executive Director. Monjarrez replaced Roberta Keller, who retired in January 2018 after leading the community action agency for over two decades. Mr. Monjarrez has 20 years of progressive social services senior management experience: including program development, accreditation and peer review, fiscal management knowledge and practice, community leadership and collaborations, as well as a strong commitment to serving low income, in-crisis populations, all of which complement the agency vision and mission.

COI serves over 6,000 households each year with an annual budget of about $16,600,000. All services within the organization are integrated and focus on asset development from a cognitive behavioral model. Services are grouped into the divisions of Housing and Community Development (Weatherization, housing rehabilitation, rental assistance, homebuyer education, foreclosure prevention, homeless prevention and rehousing, veterans supportive services, runaway and homeless youth shelter), Health Services (licensed Home Care, Alzheimer’s Caregiver Assistance, Navigator assistance for health insurance enrollment, Mobile Crisis), and Children and Family Services (Head Start, Early Head Start, Chautauqua Child Care Council, Fatherhood program, Kinship Caregiver Program). COI has status as a registered charity in NYS, a NYS Rural Preservation Company, a licensed day care provider, a licensed Home Care provider, and a HUD Housing Counseling Agency. COI’s affiliate corporation, Chautauqua Opportunities for Development, Inc. (CODI), is a certified Community Development Financial Institution (CDFI) that provides technical assistance and access to loan capital for small businesses and micro-entrepreneurs.

All customers enter through a centralized intake/navigation system. Through an educationally-based interview session, the customer is engaged using a strength-based approach and encouraged to develop a life plan including short and long-term goals related to their areas of risk and aligned with the continuum. Customers enroll in services that align with these identified goals. The agency has developed a copyrighted Self-Sufficiency Continuum© supported by Family, Youth, and Child Matrices© that evaluate and measure the status of customers in 26 life domains that include: Housing, Employment, Money Management, Family Relationships, Parenting and other Life Skills. These tools have been certified as evidence-based by the State University of NY at Buffalo’s School of Social Work Program Evaluation Center. The Continuums include indicators that measure a family or individual’s progress from “In-Crisis” to “Thriving”. Customers are evaluated against the Continuum© and linked with appropriate services designed to achieve short and long-range goals. Customers are re-assessed every 6 months or at point of major life change (if that occurs sooner than 6 mos.).
Chautauqua County Demographics

- Total population of 131,748.
- The percentage of individuals in poverty in Chautauqua County increased from 13.8% in 2000 to 19.4% in 2016.
- 5.4% of the population are children under 5.
- 54.9% of the population are single women with children under 5 living in poverty.
- 18% of the population are persons 65 years of age and older.
- 92.8% of the population are white persons.
- 2.6% of the population are African American.
- 7% of the population is of Hispanic or Latino origin.
- 42.8% of all occupied housing units in the county were built prior to 1940.
- 80.9% of occupied houses were built prior to 1979 before the use of lead-based paint was banned.

*2012-2016 American Community Survey 5 year estimate

COI & CODI

- Intake approximately 15,494 individuals in over 6,267 households each year
- Offer comprehensive service access through three divisions; Housing & Community Development, Health Services, and Children and Family Services
- Have a combined annual budget of about $16,800,000.00
- Have 304 staff; 202 full-time staff, 97 part-time staff, and 5 as needed staff

COI is a:

- Community Development Corporation
- Registered charity in NY State
- NYS designated Rural Preservation Company
- Licensed day care provider
- Licensed Home Care Agency
- HUD certified Housing Counseling Agency
- Licensed Runaway and Homeless Youth Shelter Provider
- Community Housing Development Organization
- US Department of Justice Budget & Credit Counseling Agency and Provider of Debtor Education

CODI is a:

- Community Development Financial Institution (CDFI)
- Community Development Entity (CDE)
Initiatives & Highlights 2016-2017

► NY State Homes and Community Renewal, Tenant Based-Rental Assistance (TBRA) - $400,000. Rental assistance program.

► NYS Department of Health, Medicaid Redesign Team Financial Assistance for People Living with HIV/AIDS - $200,000/year for 4 years. Rental assistance program

► NYS Empire State Development Corporation, CDFI Assistance - $60,000. Small business training and lending capital

► Lakeshore Savings Bank - $500. CPR Training Equipment

► Chautauqua Region Community Foundation - $1,000. CPR Training Equipment

► Sheldon Foundation - $1,700. Safe House furnishings

► NeighborWorks America, Project Reinvest Financial Capability- $18,360. Housing Counseling services

► City of Olean Housing Counseling – per unit cost. Housing Counseling Services

The Continuous Quality Improvement Report can be seen as part of a larger, ongoing management system of self-assessment, gaps analysis, community feedback, community assessment, and strategic planning that drives COI’s & CODI’s program development and management. All of COI’s & CODI’s services are designed to respond to identified needs in the community, and this CQI process is an integral part of the ongoing planning and assessment process.
Chautauqua Opportunities, Inc. and Chautauqua Opportunities for Development, Inc. are committed to bringing the highest possible level of service to their customers. To ensure quality across programs, a Continuous Quality Improvement (CQI) system is in place consisting of 360 degree feedback from both internal and external sources. The agency strives for an 85% satisfaction rating in all identified areas on each survey. When results yield a rating that falls below 85%, a plan is developed with specific action steps to address issues. These areas are monitored, board approved and made public to ensure the action plan is being carried out as intended. A brief description and time line follow.

**Internal**

- **Employee Surveys:** There is a standard employee survey which is distributed agency wide and completed in the fall of each year. Staff is asked to evaluate agency systems, processes, facilities, and organizational structure. Electronic surveys were distributed in 2017 using Survey Monkey, allowing for anonymity and ease of completion. Staff found the electronic survey easy to complete and once again shared very positive comments regarding the ability to complete the survey online. Because not every COI/CODI staff person has e-mail, hard copies were also printed and staff was given the opportunity to complete at a staff meeting (as was done in years past). These hard copy surveys were gathered and returned to the Operations Director for manual entry into Survey Monkey. Survey results were summarized into division reports and finally into an agency-wide report. These reports were then reviewed by the Management Team and a plan (with specific action steps) was developed to address issues that resulted in a satisfaction rating below the mandated 85%. A separate survey was distributed to Home Care Aides again in 2017, addressing areas specific to this service. A separate survey was distributed to staff in central services and core administration with specific questions designed to address process, systems, and organizational structure in those areas. A **Management Survey**, focusing on management roles & functions, is also distributed annually. As with the other surveys, results are reviewed by the full Management Team and an action plan is developed where necessary.

- **Focus Group Meetings:** The Executive Director, along with Division Directors meet with all staff using a focus group format every winter as part of the Continuous Quality Improvement process. The purpose of these meetings is to report on the results of the fall employee survey and to gather additional feedback from all levels of staff concerning customer issues, customer flow, and staff concerns. Information is compiled into a report addressing any agency-wide themes; resulting in recommendations, action steps, and follow-up.
► **Board of Director Surveys:** In 2017, Board members received electronic surveys through Survey Monkey. Again, this provided members with an easy means to reply to the survey questions. Surveys were compiled into a summary report. The Executive Director reviewed the results and responded to the surveys with an action plan, if necessary, for areas that were rated below 85%. Both Chautauqua Opportunities, Inc. Board members and Chautauqua Opportunities for Development, Inc. Board members were surveyed.

**External**

► **Community Surveys:** Both Funders and Community Partners are sent surveys annually on a rotating basis, allowing for both quantitative and narrative feedback regarding specific services, contracts, and the agency as a whole. Results are summarized and management develops an action plan with specific action steps for areas falling below the 85% rating. In 2017, Funders were surveyed via an electronic survey (SurveyMonkey) allowing respondents to easily access, complete, and return the survey with minimal time spent. Despite these efforts, the return rate was extremely low and, therefore the validity of the results could not be verified.

► **Customer Surveys:** Customer surveys are collected on an ongoing basis. Each customer is asked to fill out a survey after accessing services. This information is compiled and reviewed by each Division quarterly. An agency-wide summary is developed annually and a management response plan with specific action steps is developed for any area rating below an 85% satisfaction rate.

The final report is compiled and submitted to the Board for final approval. The approved Continuous Quality Improvement Plan is then made available both internally and externally to all stakeholders. Senior Managers review progress on the action plans quarterly.
Chautauqua Opportunities, Inc. and Chautauqua Opportunities for Development, Inc. first instituted a Continuous Quality Improvement Plan in 2000. In this first year, customer surveys and staff surveys were standardized, information was collected on both the departmental and agency wide level, and focus groups were held in each building. In response, the following systems were developed and implemented:

- Communication System: Communication Books and staff communication protocols were developed and implemented at each work site.
- The quarterly review of employee performance goals was implemented.
- Standardized customer survey was developed.
- All main COI work sites were assigned a building manager.
- Agency disaster plan was developed and drill protocols developed and implemented.

In subsequent years, a number of positive program (service) changes have been implemented as a direct result of the feedback received from staff, customers, Board members, funders, and community partners. The CQI process itself has also undergone changes that reflect feedback and recommendations aimed at making the process more inclusive.

**2001-2002**

- A more formalized reporting system was instituted; action plans were developed with time frames and identification of person responsible.
- A Memorandum of Agreement (MOA) system was put into place for all existing partnerships. This system assured a systemic review, measured outcomes, and ensured routine monitoring.
- “Coffee with Roberta” monthly meetings were formalized and improved, giving all staff opportunity to meet regularly with the Executive Director.
- Programs hours were expanded to include non-traditional appointments in the evening and on weekends.

**2002-2003**

- Data collection through a centralized human resources database was implemented so that the employee appraisal system can be evaluated and utilized better for employee skill development.
- Central Intake – In direct response to customer and front line staff feedback, a centralized customer intake system was initiated.
Executive Summary...continued

- Board of Directors involvement – Individual program overviews are presented at monthly meetings on a rotating basis to help keep the board members informed of new service activity.

**2004-2005**
- Continued standardization and integration of services resulting in more effective and cost efficient service delivery.
- Outcome based reporting – Expanded outcome based reporting agency wide and utilization of outcome tracking.
- System Integration – Enhanced connectivity of agency plans, initiatives, and projects through education and participation.

**2005-2006**
- Greater consistency of staff meetings across divisions to twice per month with agenda items for “staff feedback.”
- Implemented annual review of current job description at performance review with sign-off by employee.
- Implemented teleconferencing capabilities.

**2006-2007**
- Agency increased monitoring of management systems to ensure consistency across the agency.
- Relocated two south county offices to newly renovated building; many facility issues addressed (windows, heating & cooling systems) at various facilities.
- Implemented Navigator & Educator roles across the agency to enhance customer service, access to services, and customer flow.
- Added staff feedback section to staff meeting agenda to ensure a mechanism for staff to provide ideas & suggestions. Concerns & items are carried over to the next meeting and remain on the agenda until issues or concerns are addressed.

**2007-2008**
- Addressed facility issues at both Connections North and Connections South.
- Implemented regular review of staff meeting minutes to ensure consistent “message” of organizational language.
- Developed a separate survey for Core & Central Services staff that better assessed staff relationships with “internal” customers.
- Instituted a monthly Managers Coffee Talk to offer on-going growth and development opportunities for managers and coordinators.
- Added two questions on employee survey to assess employee awareness and satisfaction with COI benefit package (based on recommendation from self-assessment process).
Increased awareness of budget process for front-line staff; offering opportunities at staff meetings to review expenses and have input into purchase of equipment & materials.

Addressed concerns over shared waiting area at Connections North: recommendation made to Connections Board for redesign of waiting area in 2010.

Developed mechanism for staff meeting agendas to be developed and made available in advance giving all staff ability to add items and provide suggestions.

Staff meeting times & locations were rotated to allow for participation by all staff (to the greatest extent possible).

Coordinators were included in monthly Management Team sessions which focused heavily on supervision, ultimately strengthening the role of Coordinators throughout the agency.

Standardized staff meeting agenda revised to include brainstorming portion allowing for staff to offer any idea that relates to customer flow or improving services, thus creating an environment which promotes the sharing of ideas.

Service Directory developed and placed on Public Folders to give staff an accessible reference tool making them more familiar with agency services overall.

Staff meeting minutes will be placed in communication books within 72 hours of meeting.

Division & Service Area budgets will be reviewed at staff meetings; staff will be given opportunities to provide input.

Staff will be provided more opportunities to choose workshop selections at staff development days. All new hires will receive a complete Service Area Orientation within 2 weeks of hire.

Supervisors of staff holding blended positions are required to meet on a regular basis to ensure consistent flow of information to staff.
2011-2012
- Employee page added to agency website for easy access to agency information, processes & forms; employee blog added to employee page to provide a mechanism for staff to post questions or make suggestions.
- Focus on service integration & cross training to promote customer progress along the continuum.
- Increased focus on, and regular review of, customer data to address service gaps; strategies are then developed to respond to identified gaps; Integration Group formed to take the lead in this analysis.

2013-2014
- Employee Surveys and Focus Groups moved to Fall and Winter to shorten the time between survey and feedback, and align with existing agency systems.
- Due to the change in time of year, this report encompasses 18 months of data.

2014-2015
- Comprehensive Health Screenings are completed for all Head Start and Early Head Start families, included in these assessments are the creation of goals and objectives.
- A customer survey specific to individuals who receive services in their home was developed for use by divisions.

2015-2016
- Home Care customers have a navigation guide, an Individual/Family Development Plan and an Action Plan created upon entry into services, putting an emphasis on setting and accomplishing goals.
- Management developed patterns for staff meetings including routine staff meetings rotating times and locations as needed, and standardized agendas, including budget strategies and controls, as well as funnel and navigation data.
- New Manager/Coordinator training is being scheduled on a regular basis with shorter intervals between sessions.

2016-2017
- Children and Family Services implemented the use of visual aids (such as pie charts) in the Children and Family Services division meeting in order to enhance the understanding of where resources are divisionally.
- The Customer Satisfaction Survey was updated and includes both an English and Spanish version.
- Supervisors capitalized on structured, scheduled moments with their staff, such as staff meetings. These interactions proved to be engaging and comfortable, and promoted a supportive and strong working relationship.
- Funnel and navigation review began to occur at Integration meetings by division.
- Management developed patterns for staff meetings including standardized agendas, budget strategies and controls. In addition, the location and time of meeting are held on a rotating basis to allow for more in-person access.
Surveys

Customer
Board of Directors
Employee
Home Care Employee
Manager/Coordinator
What service did you participate in today? ___________________________ Today's Date: __________________

Is this your first time at COI? □ Yes □ No

If no, how long have you been receiving services? □ Less than 6 months □ 6-12 months □ More than 1 year

What County were your services in? ___________________________

Please mark the location where you were seen:

□ Connections North
10825 Bennett Rd. Dunkirk

□ Children's Center
Mayville Family Court

□ Holy Family School
1135 Main St. Jamestown

□ School: __________________

□ Other: __________________

Please give us your feedback on the following (Only complete the block that pertains to you):

<table>
<thead>
<tr>
<th>Services Received at one of COI’s Service Buildings:</th>
<th>Excellent</th>
<th>Good</th>
<th>Needs Improvement</th>
<th>Poor</th>
<th>Does not Apply</th>
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<tbody>
<tr>
<td>Intake Process</td>
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<td>Waiting time in waiting room</td>
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<td>Receptionist was helpful and courteous</td>
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<td>Helpfulness/responsiveness of staff</td>
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<td>Bilingual staff were available (if needed)</td>
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<td>Overall experience in this service</td>
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<td>Overall experience with COI</td>
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<td>I understand everything about my service</td>
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<td>Is this service accessible to you?</td>
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<td>Have you set goals while in this service?</td>
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<td>If yes, have you achieved one or more goals?</td>
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<td>Were you responded to in a timely manner?</td>
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<td>Do you think you were treated fairly?</td>
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How did this service meet your needs? __________________

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<tr>
<th>Services Received Off-Site (Home, Community, but not at a COI Service Building):</th>
<th>Excellent</th>
<th>Good</th>
<th>Needs Improvement</th>
<th>Poor</th>
<th>Does not Apply</th>
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<tbody>
<tr>
<td>Intake Process</td>
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<td>Service time and location met my needs</td>
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<td>My Privacy was respected and maintained</td>
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<td>I was informed and encouraged to complete a COI</td>
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<td>full intake to explore additional services</td>
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<td>Helpfulness/responsiveness of staff</td>
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<td>Bilingual staff were available (if needed)</td>
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<tr>
<td>I understand everything about my service</td>
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<tr>
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How did this service meet your needs? __________________
2017 COI Customer Survey Summary

Customers are encouraged to complete a survey after each visit to a service. (Surveys are available in both English & Spanish.) These surveys are then compiled into a quarterly report by service area and division. Each division then reviews the results and prepares a response (action plan) for any area scoring below the 85% or in response to any concerns noted in the comment section. The results (and action plan if indicated) are then shared with staff in that service area and division and monitored for improvement with improved customer service as the goal. The results are summarized agency wide annually and reviewed by the Executive Director, the Senior Management Team and the Board.

Strengths

All but two areas on the 2017 Customer Survey scored above an 99% satisfaction rating agency-wide.

99% of customers reported:

► their overall experience at COI/CODI was excellent or good
► their overall experience with the service was excellent or good
► COI Staff were helpful and responsive
► Receptionist was helpful and courteous
► the intake process was good or excellent
► Bilingual staff were available (if needed)
► they understood everything about services received
► they were treated fairly
► they set goals while in a service

98% of customers reported:

► wait time (with a scheduled appointment) or service time and location was excellent or good
► they achieved more than one goal

Areas For Improvement

No areas fell below 98%

Surveys Distributed: 3054
Surveys Returned: 2119
Return Rate: 69%
1. Number of years on the board: □ less than one □ 1 to 5 □ 6 to 10 □ over ten

2. Board reports keep me adequately informed regarding agency services & fiscal activity.
   □ Strongly Agree □ Agree □ Disagree □ Strongly Disagree
   Comments: _____________________________________________________________________________

3. The format of Board reports is adequate.
   □ Strongly Agree □ Agree □ Disagree □ Strongly Disagree
   Comments: _____________________________________________________________________________

4. The information I receive through reports, educational materials, etc. provides me with the necessary information to clearly understand the mission and impact the agency is making in the community.
   □ Strongly Agree □ Agree □ Disagree □ Strongly Disagree

5. I feel that the time commitment asked of Board Members is:
   ___ Too Much ___ Adequate ___ Not Enough

6. The current structure of the Board Committees is:
   ___ Effective–working well ___ Adequate–but could use improvement ___ Ineffective

7. Adequate opportunities are provided for training and information sharing each year.
   □ Strongly Agree □ Agree □ Disagree □ Strongly Disagree

8. There are adequate opportunities (as a Board member) to provide feedback that is meaningful to the organization.
   □ Strongly Agree □ Agree □ Disagree □ Strongly Disagree

9. I feel the Board is most effective in/with: ___________________________________________________

10. The Board could strengthen its role through: _______________________________________________

11. Other suggestions/comments: ___________________________________________________________
Surveys were distributed electronically to members of the Board of Directors for Chautauqua Opportunities, Inc. & Chautauqua Opportunities for Development, Inc. through Survey Monkey. Survey results were automatically collected and then tabulated. The Operations Director then reviewed and shared the results with the Executive Director and Senior Management Team.

**Strengths**

► 100% of those responding believe that Board reports keep them adequately informed regarding agency services & fiscal activity.
► 100% of respondents agree that the format of Board reports is adequate.
► 100% of those responding believe that the information received through reports, educational materials, provide the necessary information to clearly understand the mission and impact the agency is making in the community.
► 100% of respondents report feeling the time commitment asked of Board members is adequate.
► 93% of respondents report that the structure of the Board Committees is working well; 7% feel it is adequate but could use improvement.
► 100% of those responding believe that adequate opportunities are provided for training & information sharing each year.
► 100% of those responding to the question feel they are given adequate opportunities to provide feedback that is meaningful for the organization.

**Areas for Improvement (as noted in comment section of the survey)**

► Devote time to learning about the expertise as well as professional and personal interests of each board member; allow input from the board based upon this information.
► More interaction from staff and at all levels throughout the agency, not just management.
► Better attendance at board meetings. COI is a complex organization and it is very difficult to know what is going on unless you are at the board and committee meetings. When members do not attend meetings, it outs more of the burden on those who are there to do the work.
► Improve our overall understanding of all operations of the agency.
► More board presence at program functions.
1. Please indicate which generation you consider yourself a part of:
2. Length of time employed by COI: _____ Less than 1 year _____ 1-5 years _____ 6-10 years _____ 10+ years
3. If employed for less than one year please respond to: The Orientation/training I received when I was hired was:
   Human Resources: Excellent Good Unsatisfactory Poor
   Service Area Orientation: Excellent Good Unsatisfactory Poor
4. If employed for less than one year please respond to: Service Area Orientation was timely (provided to me within 14 days of hire) ___Yes ___No
5. Please indicate division you work in: _______________________________________
6. What my division or service area does best is:
7. What my division or service area could improve on is:

8. Please rate the following on a scale from: Strongly Agree Agree Disagree Strongly Disagree

   Funnel data is routinely analyzed at service area/divisional staff meetings.

   Review of navigation data is part of funnel analysis.

   I am familiar with and utilize the continuum’s within my service area as I serve customers.

   I understand how the budget process works.

   I am aware of divisional budget strategies and controls (reducing expenses, inventory controls, etc.)

   I know clearly how to carry out my job duties and responsibilities.

   Service area staff meetings provide opportunities to make suggestions and provide input regarding customer related issues and service flow.

   Opportunities for professional growth & skill development offered through trainings and workshops assist me in developing skills that help me to better perform my job.

   My immediate supervisor and I have a good working relationship

   My immediate supervisor provides me with the supervision and feedback needed to carry out my job responsibilities

   COI provides a supportive culture that honors diversity of all employees

   I am aware of the other services that COI/CODI offer to the community

9. Please rate your experience with Human Resources in the following areas:

   Excellent Good Unsatisfactory Poor

   HR staff treats me with courtesy and respect

   HR staff treats requests and/or concerns with appropriate level of confidentiality

   HR staff responds promptly to my questions and/or concerns

   HR staff is available to meet personally with me

   I understand my benefit options

   Overall, I am satisfied with the quality of service provided by HR
2017 COI Employee Survey Summary

Employee surveys were distributed electronically via Survey Monkey to all staff with an agency e-mail. Hard copy surveys were distributed to any staff without an agency e-mail at a staff meeting. Hard copy surveys were completed and placed in an envelope and then delivered to the Operations Director who then entered the survey results into the electronic data base manually. The senior management team reviewed the overall agency survey results and began developing strategies to address areas falling below an 85% satisfaction rating, as well as employee concerns. 59% of staff reported being employed with COI/CODI five years or less.

**Strengths**

- 96.55% of new employees (less than one year) report satisfaction with Human Resources Orientation  
- 95.77% of employees are familiar with and utilize the continuums as they serve customers  
- 93.03% of employees report having an excellent/good relationship with their immediate supervisor.  
- 91.10% of employees report understanding the budget process.  
- 94.19% of employees feel that the agency honors diversity of all employees.  
- 88.98% of employees report funnel data is routinely analyzed at service area/divisional staff meeting  
- 89.83% of employees report that the review of navigation data is part of the funnel analysis.  
- 97.08% of employees report that they understand their benefit options.  
- 97.10% of employees report that they are aware of the other services that COI/CODI offer to the community.  
- 95.89% of employees report clearly knowing how to carry out job duties and responsibilities.

**Areas for Improvement**

- 16.67% of new employees in the Housing division report that Human Resources and Service Area Orientation was either unsatisfactory or poor.  
- 21.% of Core staff do not feel that opportunities for professional growth and skill development offered through trainings, committees, and workshops assist them in developing skills to better perform thier job.  
- 16.67% of employees from the Housing division disagree that thier supervisor provides them with the supervision and feedback needed to carry out thier job responsibilities.

**Response/Action Plan**

- The agency will provide staff with unique opportunities to orient themselves on the various supports and services Chautauqua Opportunities, Inc. has available to the community.  
- The agency will review and adjust the current management meeting schedule in an effort to give time back to Supervisors so they can be available on-site to staff.  
- The employee survey currently in use will be evaluated and revised based upon feedback from staff that certain questions are antiquated and left open for interpretation based upon the respondent.
Please rate the following on a scale from 1 – 4 (as indicated in each question)
1-Poor(P)  2-Unsatisfactory(US)  3-Good(G)  4-Excellent(E)
or
1-Strongly Disagree(SD)  2-Disagree(D)  3-Agree(A)  4-Strongly Agree(SA)

1. How would you rate your working relationship with your immediate supervisor?
   1_____Poor  2_____Unsatisfactory  3_____Good  4_____Excellent
   Explain: ______________________________________________________________________________________

2. Patient care plans are clearly explained to me and I am informed of changes.
   1_____Strongly Disagree  2_____Disagree  3_____Agree  4_____Strongly Agree
   Explain: ______________________________________________________________________________________

3. I know the procedure to follow if a patient/customer requests services that are not listed on the current care plan.
   1_____Strongly Disagree  2_____Disagree  3_____Agree  4_____Strongly Agree
   Explain: ______________________________________________________________________________________

4. Personal protective equipment (gloves, masks, etc) is available & accessible as needed.
   1_____Strongly Disagree  2_____Disagree  3_____Agree  4_____Strongly Agree
   Explain: ______________________________________________________________________________________

5. I know clearly how to carry out my job duties and responsibilities.
   1_____Strongly Disagree  2_____Disagree  3_____Agree  4_____Strongly Agree
   Explain: ______________________________________________________________________________________

6. Home Care procedures were explained to me and any changes are communicated to staff
   1_____Strongly Disagree  2_____Disagree  3_____Agree  4_____Strongly Agree
   Explain: ______________________________________________________________________________________

7. I am aware of the on-call procedure and I am able to reach staff 24/7 if needed.
   1_____Strongly Disagree  2_____Disagree  3_____Agree  4_____Strongly Agree
   Explain: ______________________________________________________________________________________

8. My opinions and suggestions are valued by the staff.
   1_____Strongly Disagree  2_____Disagree  3_____Agree  4_____Strongly Agree
   Explain: ______________________________________________________________________________________

9. In-service educations and training is helpful to me in performing my job duties.
   1_____Strongly Disagree  2_____Disagree  3_____Agree  4_____Strongly Agree
   Explain: ______________________________________________________________________________________

10. In service trainings are offered at different times and locations so that I can easily attend.
    1_____Strongly Disagree  2_____Disagree  3_____Agree  4_____Strongly Agree
    Explain: ______________________________________________________________________________________

What Home Care Services does best is:
_____________________________________________________________________________________________

What Home Care Services could do better is:
_____________________________________________________________________________________________

11. I feel I am part of the COI team.
    1_____Strongly Disagree  2_____Disagree  3_____Agree  4_____Strongly Agree
    Explain: ______________________________________________________________________________________

12. A Home Care Procedure Manual was reviewed with me when I was hired and is reviewed with me annually.
    Please circle one - YES NO
    Name: (optional) _______________________________________________________________________________________

Feel free to use the back for any additional comments, suggestions, concerns, etc.
Surveys were given to staff to complete when paychecks were being picked up or were mailed out in paychecks with a stamped return envelope. Completed surveys were then collected by the Home Care staff. The results were tallied by the Operations Director and then results were reviewed by the Executive Director and Senior Management Team. As in the last four years, all areas were rated above the 85% satisfaction rating benchmark.

### Strengths

- 100% of those responding would rate their working relationship with their supervisor as good or excellent (consistent with 2016).
- 100% of respondents feel that care plans are clearly explained to them and the customer on a consistent basis (up 8%).
- 100% of those responding report that they know the procedure to follow if a patient requests services not on current care plan. (consistent with 2016).
- 100% of respondents agree or strongly agree that personal protective equipment is available and accessible as needed (consistent with 2016).
- 100% of those responding report that they clearly know how to carry out their job duties and responsibilities (consistent with 2016).
- 100% of respondents report that home care policies & procedures are clearly explained and feel they are informed of changes in home care procedures in a timely fashion (consistent with 2016).
- 100% of respondents feel staff is available 24/7 if changes need to be reported (up 3%).
- 100% of those responding reported that they felt their opinions/suggestions were valued by staff (consistent with 2016).
- 100% of respondents reported that in-service education and training was helpful to them in performing their job duties (consistent with 2016).
- 99% of those responding reported in-service trainings were offered at different times and locations that they could easily attend (up 3%).
- 100% responding feel that they are part of the COI team (up 3%).
- 100% of respondents report that a Home Care Procedure manual was reviewed with them upon hire and reviewed annually (up 9%).

### Areas for Improvement

None

### Response/Action Plan

No action plan needed
2017 COI Manager/Coordinator Survey

Chautauqua Opportunities Inc.
Chautauqua Opportunities for Development, Inc.

Annual Manager/Coordinator Survey 2017

The length of time I have been employed with COI/CODI as a Manager/Coordinator:
___Two years or less  ___2-5 years  ___6-10 years  ___Over 10 years

If you have been a manager or coordinator at COI for 2 years or less:
What areas were most difficult to learn/navigate/implement? _____________________________________________
What areas were the clearest and easiest to implement/navigate? ________________________________________

1. My Supervisor spends an adequate amount of time with me, providing both
   the supervision and feedback needed for me to carry out job responsibilities.
   Strongly Agree_____    Agree_____    Disagree_____     Strongly Disagree__

2. COI provides a supportive culture that honors diversity of all employees
   Strongly Agree___    Agree___    Disagree___    Strongly Disagree___

3. Rate your working relationship with your immediate supervisor.
   Excellant______    Good_____    Unsatisfactory______    Poor_____

4. I am developing, managing and monitoring my budget for my service area.
   Strongly Agree___    Agree___    Disagree___     Strongly Disagree___

5. I am actively moving my service area/division in a positive direction that expands services.
   Strongly Agree____    Agree____    Disagree____    Strongly Disagree____

6. My service area/division is aware of and responds to the changing needs of customers.
   Strongly Agree____    Agree____    Disagree____    Strongly Disagree____

7. I am a part of community building through coalitions and strategic partnerships.
   Strongly Agree____    Agree____    Disagree____    Strongly Disagree____

8. I play an active role in planning and setting of goals in the agency (division).
   Strongly Agree____    Agree____    Disagree____    Strongly Disagree____

9. Opportunities for professional growth & development (i.e. Manager’s Coffee Talk, Staff Development
   Day, etc) are useful and assist me in managing staff and agency systems.
   Strongly Agree____    Agree____    Disagree____    Strongly Disagree____

10. My division/service area regularly uses ‘funnel data’ to analyze service flow and to strategize and plan
    for service adjustments or change.
    Strongly Agree____    Agree____    Disagree____    Strongly Disagree____

11. I feel a part of and supported by the larger agency management team.
   Strongly Agree____    Agree____    Disagree____    Strongly Disagree____

12. Please provide suggestions for how the monthly management team meetings/coffee talks could
    be improved upon.

13. What is your role in the integration of services and its impact on customers and the agency overall?

Other comments or suggestions: ________________________________________________________________
_________________________________________________________________________________________
_________________________________________________________________________________________
2017 Manager/Coordinator Survey Summary

The full Management Team, which is comprised of Middle and Senior Managers, as well as Service Area Coordinators, has an opportunity each year to share their opinions and suggestions through the CQI employee survey process. Management surveys were distributed electronically via Survey Monkey to all Managers/Coordinators. Survey results were automatically collected and then tabulated. The Operations Director then reviewed the results and shared a summary with the Senior Management team. An action plan for any areas falling below the 85% satisfaction rating benchmark was developed at a focus group which included all Managers/Coordinators. (46.4% of managers/coordinators report being employed in a manager/coordinator role at COI for 5 year or less.)

Strengths

► 96% of managers/coordinators rate their working relationship with their supervisor as good or excellent. (consistent with 2016).
► 100% of managers/coordinators feel they are involved in the development, management and monitoring of the budget in their service area (up 4%).
► 100% of managers/coordinators indicated that they are actively moving their service area/division in a positive direction that expands services (consistent with 2016).
► 96% of managers/coordinators report that their service area/division is aware of and responds to the changing needs of customers (consistent with 2016).
► 100% of managers/coordinators report that they are part of community building through coalitions and strategic partnerships (up 19%).
► 96% of managers/coordinators indicated that they play an active role in the planning & setting of goals (consistent with 2016).
► 92% of managers/coordinators agree/strongly agree that opportunities for professional growth and development are useful and assist them in managing staff and agency systems (down 8%).
► 92% of managers/coordinators report that they feel a part of and supported by the larger agency management team (down 8%).

Areas for Improvement

All areas scored above the 85% satisfaction threshold

Response/Action Plan

No action plan needed
Employee Focus Group Summary

Two staff focus groups were held February 5, 2018 and February 26, 2018. Various times and locations offered flexibility for staff in order to maximize access for employees. The following is a summary of the combined themes that resulted from all focus groups along with an overview of the process.

Overview

A brief introduction and overview of the Continuous Quality Improvement process was shared with staff at the start of each scheduled focus group in order to give new staff the needed framework of the process and to remind veteran staff of the intent and purpose of the focus group meetings.

► The Director of Systems Compliance/Risk management shared with staff the importance of the gathering of information (from both within the organization and from external sources), that will assess, evaluate, and refine internal systems.

► The Executive Director addressed the importance of the CQI process and explained that the results of the employee survey would now be reviewed during the focus group resulting in an action plan based on feedback received by both staff and management. He asked staff to take ownership of the results and provide necessary feedback to move the agency forward.

► Survey results by division (and agency-wide) were shared with staff at each session. The agency Division Directors and Co-Directors shared in the presentation of the results to staff. Feedback was strongly encouraged, as was open discussion and dialogue from the management team and the attendees was realized. Through this process, action steps were developed collaboratively with all staff.

Staff Feedback

Included in this report is a summary of issues/concerns identified and discussed as a result. A section is reserved for follow-up action/recommendations.

The results of each question on the employee survey were discussed with staff. Staff comments and recommendations were compiled and then integrated into the following Action Plan. Comments specific to service area, division, or building concerns or issues were noted and discussed.
### Employee Focus Group Action Plan

<table>
<thead>
<tr>
<th>IDENTIFIED ISSUE</th>
<th>ACTION TO BE TAKEN</th>
</tr>
</thead>
</table>
| Staff at Chautauqua Opportunities, Inc. would like to become versed in the supports and services the agency has available to the community.                                                                           | 1.) The agency will provide staff with unique opportunities to orient themselves on the various supports and services Chautauqua Opportunities, Inc. has available to the community.  
2.) The agency will make a service directory available to staff.  
3.) Divisions will invite employees from other service areas into staff meetings for a brief presentation and Q&A                                                                                           |
| Staff at Chautauqua Opportunities, Inc. would like to have their Supervisor more accessible to them.                                                                                                           | 1.) The agency will review and adjust the current management meeting schedule in an effort to give time back to Supervisors so they can be available on-site to staff.  
2.) Management who supervise staff in multiple locations will evaluate their schedules to ensure they are spending an adequate amount of time in each location. Management will be developing patterns |
| The employee survey tool is open to interpretation based on the respondent and their role in the agency.                                                                                                           | 1.) The employee survey will be evaluated by the management team to ensure the agency is soliciting responses to questions that will direct the agency towards positive change.  
2.) The employee survey will be revised based on the above evaluation and with an emphasis on consistent, concrete language.                                                                                 |
## Trended Employee Survey Data 2012-2017

<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td><strong>Years of Service:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less than 1 year</td>
<td>14%</td>
<td>25.4%</td>
<td>27.1%</td>
<td>24.4%</td>
<td>16.38%</td>
</tr>
<tr>
<td>1-5 years</td>
<td>45%</td>
<td>37.0%</td>
<td>34.3%</td>
<td>38.1%</td>
<td>42.38%</td>
</tr>
<tr>
<td>6-10 years</td>
<td>16%</td>
<td>16.8%</td>
<td>15.7%</td>
<td>15.9%</td>
<td>15.25%</td>
</tr>
<tr>
<td>over 10 years</td>
<td>22%</td>
<td>20.8%</td>
<td>22.9%</td>
<td>21.6%</td>
<td>25.99%</td>
</tr>
<tr>
<td><strong>The orientation/training I received when I was hired was excellent/good:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HR Orientation</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>97.55%</td>
</tr>
<tr>
<td>Service Area Orientation</td>
<td>100%</td>
<td>100%</td>
<td>93%</td>
<td>95.3%</td>
<td>89.65%</td>
</tr>
<tr>
<td><strong>The level of supervision/feedback I receive from my immediate supervisor that helps me to carry out my job duties is excellent/good:</strong></td>
<td>86%</td>
<td>77.8%</td>
<td>89.5%</td>
<td>88.8%</td>
<td>86.63%</td>
</tr>
<tr>
<td><strong>I am aware of how the overall budget process works and provide some level of input into proposed budget and/or am able to discuss budget at staff meetings: (Strongly Agree/Agree)</strong></td>
<td>1) 89%</td>
<td>1) 82.7%</td>
<td>1) 84.4%</td>
<td>1) 91.6%</td>
<td>1) 91%</td>
</tr>
<tr>
<td>2) 89% *</td>
<td>2) 76.6%</td>
<td>2) 82%</td>
<td>2) 90.9%</td>
<td>2) 87%</td>
<td></td>
</tr>
<tr>
<td><strong>I know clearly how to carry out my job duties &amp; responsibilities: (Strongly Agree/Agree)</strong></td>
<td>97%</td>
<td>96%</td>
<td>95%</td>
<td>96.5%</td>
<td>95.89%</td>
</tr>
<tr>
<td><strong>Service Area staff meetings provide opportunities to make suggestions &amp; provide input regarding customer related questions and service flow: (Strongly Agree/Agree)</strong></td>
<td>92%</td>
<td>89%</td>
<td>86.9%</td>
<td>93.6%</td>
<td>93.71%</td>
</tr>
<tr>
<td><strong>COI provides a supportive culture that honors diversity of all employees</strong></td>
<td></td>
<td></td>
<td></td>
<td>95.88%</td>
<td>94.19%</td>
</tr>
<tr>
<td><strong>Opportunities for professional growth &amp; skill development offered through trainings, committees, workshops, etc. are: Excellent/Good</strong></td>
<td>77%</td>
<td>94%</td>
<td>91.3%</td>
<td>90.2%</td>
<td>90.29%</td>
</tr>
<tr>
<td><strong>I receive adequate information about my benefits that enables me to make good decision for my family. (Strongly Agree/Agree)</strong></td>
<td>91%</td>
<td>94%</td>
<td>94.6%***</td>
<td>97.02%</td>
<td>97.08%</td>
</tr>
<tr>
<td><strong>I am aware of the other services that COI/ CODI offer to the community. (Strongly Agree/Agree)</strong></td>
<td>95%</td>
<td>89%</td>
<td>96.9%</td>
<td>97.83%</td>
<td>97.10%</td>
</tr>
<tr>
<td><strong>I am familiar with and utilize the continuums within my service area as I serve customers. (Strongly Agree/Agree)</strong></td>
<td>94%</td>
<td>96%</td>
<td>95.4%</td>
<td>95.5%</td>
<td>95.77%</td>
</tr>
<tr>
<td><strong>My division utilizes data at staff meetings to review and analyze service impact. (Strongly Agree/Agree)</strong></td>
<td>NA</td>
<td>1) 79.5%</td>
<td>1) 91%</td>
<td>1) 88.3%</td>
<td>89.98%</td>
</tr>
<tr>
<td>2) 75.6% **</td>
<td>2) 86.4%</td>
<td>2) 88.3%</td>
<td>2) 88.3%</td>
<td>89.83%</td>
<td></td>
</tr>
</tbody>
</table>

- * 2012- This question was split and revised
- ** 2013-2014 - This question was revised and split. 1) funnel data, 2) navigation data
- ***2015 - This question was revised to focus on information received about benefits instead of awareness of benefits website
- ****2016 - New question
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Target Sector

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Public Sector

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Target Sector

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