Performance Management, Advocacy and Continuous Improvement at UPO

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Ayana Bias, Advocacy Manager

(Workshop: Presented at Community Action Partnership’s 2018 Annual Convention)
(August 30, 2018 - Denver, CO)
Overview

- About the United Planning Organization (UPO)

- Strategic Planning as UPO’s Organizing Principle for the Journey to Excellence

- Two Practice Areas Highlighted in the Award for Excellence Notice
  - Performance Management System
    - Documentation and Data Tracking
    - Performance Measurement and Reporting
    - Continuous Improvement Operationalized
    - Agency-Wide Scorecard
  - Advocacy
    - Advocacy Division
    - Community Leadership Academy

- Lessons Learned and Next Steps

- Questions and Discussion
ABOUT UPO: THE UNITED PLANNING ORGANIZATION
About UPO: We are poverty-fighters.

- Private nonprofit human service corporation
- Established on December 10, 1962
- Established via gifts from both Ford and Meyer Foundation grants
- Become the designated community action agency for Washington, DC in 1964
About UPO: The inspiration that keeps us moving forward.

Our Vision
A city of thriving communities and self-sufficient residents.
UPO’s Washington, DC

Our Mission
Uniting People with Opportunities

Our Promise
Community Action changes people’s lives, embodies the spirit of hope, improves communities, and makes America a better place to live. We care about the entire community, and we are dedicated to helping people help themselves and each other.
About UPO: Location and Theory of Change

• Located in Washington, DC.
• Theory of Change involves:
  • Uniting Clients (residents of Washington DC with low-incomes) with the Opportunity to Become Self-Sufficient through human capacity development, stronger community support and access to
  • Uniting Staff and Volunteers with the Opportunity to Fully Utilize Their Skills in Making a Difference.
  • Uniting Funders with the Opportunity to Invest in Transforming the Lives of Clients.
  • Uniting Partners with the Opportunity to Extend the Efficiency and Effectiveness of Services Delivered.
  • Uniting DC Residents with the Opportunity to help their Fellow Residents in Need. [Maximum Feasible Participation]
About UPO: Governance and Funding

Governed by a 21-member tripartite board of directors

- 1/3 Representatives of low-income individuals and families
- 1/3 DC Mayoral Appointees
- 1/3 Representatives of industry leaders in business, law enforcement and education

- CSBG and Head Start funding account for over 70% of all funding
- Operating budget in FY 2017 ~ $31M
Programmatic and Administrative Divisions

- Executive Office
- Human Resources
- Office of Early Learning
- Performance Management
- Office of Business Mgmt
- Board of Directors
- Workforce Institute
- Information Technology
- Advocacy & Volunteers
- Foster Grandparents
- Community Reinvestment
- Parent Coordination
- Community Health
- CSBG Service Providers
- Development (Fundraising)
- CSBG Service Providers
- General Counsel
- UPO Inspire
- UPO CDC
- Finance
- Strategic Positioning
- Communications & Community Relations
- Parent Coordination
- CSBG Service Providers
- Information Technology
About UPO: The Numbers

- Customers Served in FY 2017 ~ 52,152
- Staff ~ 350
- Program Locations ~ 19
- CSBG Funded Service Providers ~ 10
- Headstart Centers ~ 12
- Headstart Funded Service Providers ~ 8
- Volunteers Engaged ~ 1,003
- Partnerships ~ 662
- Certified ROMA Professionals ~ 2
- CCAP Professionals ~ 3
STRATEGIC PLANNING: GUIDING PRINCIPLE FOR UPO’S JOURNEY TO EXCELLENCE
Strategic Planning: Getting Started

- **Top - Down**
  - Kick Off by Board of Directors
  - Kick Off by Executive Director
    - With Two Self-Study Work Groups
      - BOSS & POP
  - Commissioned to Begin with the Needs Assessment
  - Jump Started with Two Lists of Powerful Questions

- **Bottom - Up**
  - Rigorous Goal Development Approach
  - SWOT Analysis
  - Cross functional teams working independently:
    - POP: The Product Opportunity and Performance Working Group
    - BOSS: The Business Opportunities Support Systems Working Group
  - Multiple Surveys
  - Multiple Input Sessions
GOAL # 1. Continue to develop and implement a marketing and branding campaign
   a. Updated Material and Web Presence
   b. Social Marketing Approaches
   c. Host Voices Forums
   d. Friend Raising Sessions

GOAL # 2. Increase Non Government resources by $5,000,000 by September 30, 2018
   a. Foundation Appeal
   b. Fee Based Services
   c. Private Sector Contracting Related Business
   d. Income Approaches

GOAL # 3. Restructure Service Delivery System to focus on Economic Security with programming directed at family development through asset enhancement opportunities
   Strategy A. Employment Programming
   Strategy B. Expanded Adult Education and Training Division
   Strategy C. Early Learning Network
   Strategy D. Youth Division Continuum – ages 6 to 24
   Strategy E. Create a Community Re-Investment Division
   Strategy F. Expanded Green Technology Division
   Strategy G. Community Health and Wellness Division

GOAL # 4. Create and Grow Social Enterprise Opportunities
   a. Green Capital
   b. Facilities Management
   c. Child Care
   d. Substance Abuse Treatment
   e. Transportation

GOAL # 5. Expand to become a Washington Metropolitan Regional Provider

GOAL # 6. Modify business policies and practices to increase efficiencies and productivity
## Development of Tactical Plans

<table>
<thead>
<tr>
<th>Programmatic Divisions</th>
<th>Administrative Offices</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Task</strong></td>
<td><strong>Task</strong></td>
</tr>
<tr>
<td>- Review</td>
<td>- Review</td>
</tr>
<tr>
<td>- Division Mission</td>
<td>- Office Mission</td>
</tr>
<tr>
<td>- Division Goal</td>
<td>- Office Goal</td>
</tr>
<tr>
<td>- Division Objectives</td>
<td>- Office Objectives</td>
</tr>
<tr>
<td>- Develop Tactical Steps to be undertaken to achieve applicable agency-level strategic goal</td>
<td>- Develop Tactical Steps to be undertaken to achieve applicable agency-level strategic goal</td>
</tr>
<tr>
<td>- Identify</td>
<td>- Identify</td>
</tr>
<tr>
<td>- Staff person(s) responsible for each tactical activity</td>
<td>- Staff person(s) responsible for each tactical activity</td>
</tr>
<tr>
<td>- Timeframe</td>
<td>- Timeframe</td>
</tr>
<tr>
<td>- Outcome Indicators /Measurement Tool</td>
<td>- Outcome Indicators /Measurement Tool</td>
</tr>
</tbody>
</table>
Preparation and Review of Tactical Plans

- **Input Solicitation**
  - from Primary and Secondary Customers / Staff

- **One-on-One Reviews with Executive Team**
  - By Division and Office Directors
  - Of Draft Tactical Plans Developed
  - Feedback and Improvement Suggestions

- **Recommendations for Improvements by Executive Team**
  - Taking the long-term perspective
  - Thinking outside the box encouraged
  - Planning for resource development and assessment
  - Ensuring tactical plans span all 5 years of strategic plan period
Preparation and Review of Tactical Plans

- Presentation of Refined Tactical Plans to the Board
  - By Division Director and Executive Team
  - Board Input for revisions provided and incorporated.

- Adoption of Tactical Plans

- Development of a Strategic Plan Progress Monitoring System – Final Product of COMPASS DC Consulting Project
Operationalizing Performance Management

- **Modification of Existing Performance Measurement Reporting**
- **COO Reports Renamed: Performance Measurement Reports**
  - Enhancements Included:
    - Tracking Human Resource Allocation, Availability and Use
    - Tracking Budget to Actual Spending Relative to Program Performance
    - Tracking Resource Leveraging
    - Tracking of Performance on Tactical Plans
- **Necessity for About A Robust Agency-Wide Scorecard**
  - Need to Aggregate Programmatic, Administrative and Operational Performance
  - Need to Aggregate Performance on Tactical Plans and Strategic Plan
  - Results of Pathways Self-Study Pointed to the Need for a Scorecard.
Operationalizing Performance Management

• Creation of an Office of Performance Management by UPO’s Executive Team by re-organizing existing reporting, evaluation and monitoring functions.
  • Guiding Principle:
    – To optimize UPO’s effectiveness, efficiency and impact by serving as a catalyst for continuous improvement
  • Staffing:
    – Monitoring and Evaluation Analysts & Performance Data Analyst

• Journey to Excellence: Kick off and monthly check-in meetings between Executive Director and Senior Management team,
UPO’S PERFORMANCE MANAGEMENT SYSTEM
UPO’s Performance Management System

• **Distributed Approach**
  - Occurs at all levels of the organization
    - every program
    - every administrative office

• **OPM Role Includes**
  - Monitoring and Quality Assurance
  - Facilitating performance management
  - Facilitating continuous improvement
    - across administrative offices and programmatic divisions

• **Findings of OPM Provide Guidance**
  - For Supervision
  - For the Execution of Continuous Improvement
    - Programmatic and Administrative
  - For Executive Team Intervention
  - For Systematic Urgent Action
## Components of the System

- **Service Delivery and Data Collection**
  - Policies and Standard Operating Procedures

- **Customer File Management**

- **Programmatic Monitoring**
  - Site Visits/ Desk Audits (Quality/Compliance/Performance)

- **Administrative Monitoring**
  - Site Visits/ Surveys (Quality/Compliance/Performance)

- **Monthly Reporting and Analyses**

- **Monthly Issue Log Reviews with Executive Staff**

- **Performance Management Report Presentations**

- **Follow-up**
  - Verification of Required Corrective Actions that have been Completed
  - Customer Satisfaction Assessment
Service Delivery and Data Collection

- **Client Intake Standard Operating Procedure**
  - Client’s proof of identity;
  - Client’s proof of residency;
  - Client’s proof of income or certification of zero income;
  - Data System (CASA) Client Intake Form
  - Economic Security Assessment; and
  - CSBG Customer Child Support Information Sheet

- **Data Collection Standard Operating Procedure**
  - Completeness of Clients’ Files;
  - Frequency of Data entry in Data System (CASA);
  - Conditions for Late Reporting of Outcomes and Services
Client File Management

• Applicable Policies and Standard Operating Procedures Include:
  • Acceptable Verification Documents
  • Client Picture Use
  • Client Data Retention
  • Conditional Enrollment
  • Client/Constituent Feedback
  • Program Participant Termination
  • Responding to Unusual Program Related Questions
  • Updating Returning Customer Information

• Additional Client File Policies Regulate:
  • Physical Security
  • Controlled/Limited Access by Staff
  • Completeness
Programmatic Monitoring

• Internal Programs Monitored Quarterly
  – Sampling of data entered by front-line staff
  – Reviews of
    • actual performance relative to planned performance
    • operations relative to funder agreements, laws and regulations
  – Findings Documented in Formal Reports Shared with Program Staff and Executive Team
  – Critical Findings Trigger a requirement for a Corrective Action Plan from the program reviewed
  – Annual Customer Surveying and Analysis
  – Quarterly Customer Input Box Content Analysis
  – Quarterly Staff Input Box Content Analysis

• External Programs (CSBG Service Providers) Monitored Monthly
  – Program Outcome Earnings System
  – Key program outcomes priced-out
    • Full program budgets must be earned (not cost reimbursed)
  – Monitoring verifies customer eligibility and customer outcomes documented/reported.
## Programmatic Monitoring: Division of Labor

<table>
<thead>
<tr>
<th>DIVISION</th>
<th>LARGE / MEDIUM / SMALL</th>
<th>GROUP / INDIVIDUAL</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Monthly</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sub Recipients</td>
<td>Large</td>
<td>Split</td>
</tr>
<tr>
<td><strong>Quarterly</strong></td>
<td></td>
<td></td>
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<tr>
<td>Workforce Institute</td>
<td>Large</td>
<td>Split</td>
</tr>
<tr>
<td>Early Learning</td>
<td>Large</td>
<td>Shared</td>
</tr>
<tr>
<td>Youth Services</td>
<td>Medium</td>
<td>Individual Analyst</td>
</tr>
<tr>
<td>Community Health</td>
<td>Medium</td>
<td>Individual Analyst</td>
</tr>
<tr>
<td>Community Reinvestment</td>
<td>Medium</td>
<td>Individual Analyst</td>
</tr>
<tr>
<td>Advocacy</td>
<td>Small</td>
<td>Individual Analyst</td>
</tr>
<tr>
<td>Foster Grandparents</td>
<td>Small</td>
<td>Individual Analyst</td>
</tr>
<tr>
<td>Parent Coordination</td>
<td>Small</td>
<td>Individual Analyst</td>
</tr>
</tbody>
</table>
## Administrative Monitoring: Division of Labor

<table>
<thead>
<tr>
<th>OFFICE</th>
<th>LARGE / MEDIUM / SMALL</th>
<th>GROUP / INDIVIDUAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Semi Annually</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Strategic Positioning</td>
<td>Small</td>
<td>Individual Analyst</td>
</tr>
<tr>
<td>General Counsel</td>
<td>Small</td>
<td>Individual Analyst</td>
</tr>
<tr>
<td>Human Resources</td>
<td>Large</td>
<td>Individual Analyst</td>
</tr>
<tr>
<td>Business Management</td>
<td>Large</td>
<td>Individual Analyst</td>
</tr>
<tr>
<td>Information Technology</td>
<td>Large</td>
<td>Individual Analyst</td>
</tr>
<tr>
<td>Finance</td>
<td>Medium</td>
<td>Individual Analyst</td>
</tr>
<tr>
<td>Resource Development</td>
<td>Medium</td>
<td>Individual Analyst</td>
</tr>
<tr>
<td>Communications</td>
<td>Medium</td>
<td>Individual Analyst</td>
</tr>
</tbody>
</table>
Monthly Reporting and Analyses by Programs

• Frontline Staff
  • Required to Ensure All Outcomes and Services Are Recorded in the Data System

• Program Managers
  • Required to
    – Spot Check Data Entry
    – Analyze Trends
    – Extract and Transcribe Key Performance Data to Performance Measurement Reports
    – Review Staff Sufficiency
    – Review Financial Spending Relative to Budget
    – Review Programmatic or Administrative Key Performance Indicators
    – Review Dollars Leveraged
    – Update and Review Progress on Strategic Plan
Performance Management Report Presentations

• Quarterly Presentations of Performance Measurement Reports (PMRs)
  – Monthly Managers’ Meeting Focused Wholly on PMRs Once Each Quarter
    • Outcomes Outside of Performance Targets Required Explanation
    • Peer-to-Peer Input provided by fellow Managers
    • Executive Team Input Provided
  – Quarterly Presentations by Program Managers to Program Operations Committee
    • Board Member Input on Programs Provided
    • Influence on Board Actions
    • Program Operations Committee of BOD Presents Major Themes and Findings to Full Board
    • Subsequent Board Agendas Shaped by PMR Content
Monthly Issue Log Reviews

- Monthly One-on-One Meeting
  - Between Executive Director and the Director of Office of Performance Management
- Issues Reviewed:
  - All Findings from Monitoring Reviews
  - All Outstanding Corrective Actions
  - Aggregated Key Performance Indicators
  - Trends Observed
    - Staff Handicap or Deficiencies
    - Client Needs / Demographics
    - Recurring Problems / Concerns
  - Recommended Actions and follow up with Programmatic/Administrative Directors
Corrective Action and Follow Up

- Executed by Staff and Managers
- Vetted by Managers/Directors
- Verified by OPM Prior to Quarterly Monitoring
- Training & Technical Assistance Support provided or coordinated by OPM
  - to address outstanding issues
- Updates provided to Executive Team by OPM when corrections are made or not made.

OPM also provides Support or coordinates the preparation of responses to Programmatic or Administrative findings assessed by funders.
Continuous Improvement Through Staff Training

• Periodic Special Emphasis Training for Staff Offered by Personnel of the Office of Performance Management
  • Intake
  • Economic Security Assessment
  • Basic Data Entry
  • Case Management Training
  • Review and Analysis of Programmatic Reports

• ROMA Training
  • Offered at All New Hire Orientation Sessions
  • Full Day ROMA Training Facilitated Quarterly
    – Up to 25 Staff Trained Quarterly
    – Staff encouraged to receive full-day training at least once every three years

• Strengths-Based Family Worker Training
  • Offered Semi-Annually.

• Strengths-Based Leadership Training
  • Offered Annually.

• Special Emphasis Training for Carefully Selected Cohorts of UPO’s Staff and Management.
  • Offered by Bowie State University Graduate School to UPO Semi-Annually

• Other training offered as determined necessary.
# UPO’s Agency-Wide Score Card: Dimensions and Weighting

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Weight</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organizational Standards</td>
<td>5%</td>
</tr>
<tr>
<td>- Percentage Organizational Standards Met or Not Met</td>
<td></td>
</tr>
<tr>
<td>Agency Strategic Plan Progress</td>
<td>5%</td>
</tr>
<tr>
<td>- Percentage of Tactical Steps Completed</td>
<td></td>
</tr>
<tr>
<td>Financial Strength</td>
<td>5%</td>
</tr>
<tr>
<td>- Percentage of Financial Oversight Review by Board of Directors and Managers Completed</td>
<td></td>
</tr>
<tr>
<td>- Completion of Audit</td>
<td></td>
</tr>
<tr>
<td>- Filing of 990</td>
<td></td>
</tr>
<tr>
<td>Customer / Staff Input</td>
<td>5%</td>
</tr>
<tr>
<td>- Percentage of Scheduled Surveys Completed &amp; Analyzed (Customers; Staff; Funders; Board Members; Volunteers)</td>
<td></td>
</tr>
</tbody>
</table>
## UPO’s Agency-Wide Score Card: Dimensions and Weighting

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Weight</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capacity Building / Maintenance</td>
<td>5%</td>
</tr>
<tr>
<td>-Percentage of Scheduled Quarterly ROMA Training Facilitated</td>
<td></td>
</tr>
<tr>
<td>-Percentage of Scheduled Board Meetings and Board Committee Meetings Conducted</td>
<td></td>
</tr>
<tr>
<td>-Percentage of Scheduled Performance Review Meetings Conducted at Management Level</td>
<td></td>
</tr>
<tr>
<td>-Percentage of Scheduled Performance Review Meetings Conducted at Board Level</td>
<td></td>
</tr>
<tr>
<td>-Percentage of Scheduled Central Client Data Tracking and Case Management Training Facilitated</td>
<td></td>
</tr>
<tr>
<td>Program and Administrative Monitoring</td>
<td>5%</td>
</tr>
<tr>
<td>-Percentage of Scheduled Quarterly Programmatic Monitoring Reviews Conducted</td>
<td></td>
</tr>
<tr>
<td>-Percentage of Scheduled Semi-Annual Administrative Office Reviews Conducted</td>
<td></td>
</tr>
<tr>
<td>ROMA / Programmatic Outcomes / Customer Self-Sufficiency</td>
<td>70%</td>
</tr>
<tr>
<td>-Actual Performance as a Percentage of Projected Performance Levels</td>
<td></td>
</tr>
<tr>
<td>-Emphasis is on the impact that services have on customer progress to self-sufficiency.</td>
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</table>
UPO’S ADVOCACY DIVISION
We Advocate for:

- Programs
- Customers
- Funding
- New Programs & Program Expansions
- Partnerships
We:

• Educate
• Train
• Create Awareness
• Testify
• Mobilize
• Empower
As members of the Body of Community Action - We are Advocates!

That’s what we do 😊
Do you have an Advocacy Division or a person designated to oversee your organizations Advocacy Efforts?
UPO Advocacy Division

Created to organize, and coordinate advocacy efforts based on the organization's strategic plan, which is driven by the Community Needs Assessment.

Other focuses include but not limited to partnership development, volunteerism, resident leadership development, board recruitment, resident input and engagement, public policy, and geo-targeting for funding recommendations based on issues in specific areas.
Agency of Excellence Advocacy Standards

• 1.5 Maximum Feasible Low-Income Community Involvement

• 1.6 Community Advocacy

• 7.5 Advocacy Results
We ensure access and a seat at the table to allow the voice of the low-income to be heard, respected, and impactful.

- UPO Board
- UPO Advisory Councils
- Participation in Task Forces, Groups, Partnerships, and Collaborations
UPO Advisory Councils

Purpose: (1) Broaden the base for community input into UPO programs; (2) strengthen relations between UPO and the community, (3) coordinate and share information with other service agencies or advocate groups about specific program interests, (4) create an Environment of interaction between board members, staff, client populations and interested community based entities relevant to program impact; and (5) to advise the board and staff on program options and the needs of the community.

- Program Advisory Councils
- Parent Policy Council
- Workforce Investment Council
- Washington Highlands Community Advancement Network (WHCAN)
- Inspire Foundation
The UPO board voted to create the WHCAN to specifically address concerns in a small geographic area identified in the Community Needs Assessment as high in crime, poverty, unemployment and in need of special consideration.

Members of this group along with UPO low-income Board members and staff identified neighborhood safety, high unemployment, lack of affordable housing, youth recreation and lack of services for returning citizens as issues they need addressed in the community.
WHCAN Highlights

- Opened an Early Learning Center
- Onsite Programming
- Adopted Hendley Elementary School
  - Foster Grandparents
  - Project Create
  - Establishing a PTO/PTA
- Monthly WHCAN Meetings
- Program & partnership Expansion
  - Domestic Violence Workshops, Coping with Gun Violence, Mental Health, Health Vendors, Mentoring, referrals.
- Annual Vote Your Block Beautification Initiative.
- Student/Parent/School led Safe Summer Peace Walk and Rally.
Community Leadership Academy (CLA)

This program was designed to assist communities with building their local leadership capacity and equip local leaders with skills to manage and direct positive change. We want to create Community LEADERS and ADVOCATES!

CLA was approved by the board in 2012.

Focus Areas:
- Advocacy
- Communication
- Community Empowerment
- Community Organizing
- Leadership Development
Elements of the Curriculum

- Offers a unique opportunity for community-wide input on issues and concerns, how to develop a shared vision, and a Community Action Plan.
- Provides an opportunity to develop skills through self-selected community project planning.
- Incorporates real-life hands-on exercises and other activities to assist in project development and implementation.
Community Leadership Highlights

- Charted a Toastmasters Club (2013).
  - UPO Community Leaders Toastmasters Club
- Resident led Voter Registration Drives, Events/Activities.
- Trained 25 trainers (2018)
- Helped established a Civic Association (2014)
- Participants testify, rally, and are more engaged in community meetings, events, activities.
<table>
<thead>
<tr>
<th>Issue</th>
<th>Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lack of Services for a Growing Returning Citizen Population.</td>
<td>2016, 2017</td>
</tr>
<tr>
<td>* Safety, Education, Opportunities &amp; Resources, Unifying the community (WHCAN)</td>
<td>2018</td>
</tr>
</tbody>
</table>
## Community Advocacy (1.6)

### Key Community Advocacy Issues Addressed

<table>
<thead>
<tr>
<th>Gap</th>
<th>Identified By</th>
<th>Formal Adoption</th>
<th>Supports Mission</th>
<th>Proactive Advocacy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inadequate Childcare for 0-3 population in DC and Neighboring jurisdictions</td>
<td>Residents, Staff, CNA, Advisory Groups, OSSE Report</td>
<td>Board Directed &amp; Approved, PPC 2013-8 Strategic Plan</td>
<td>Self-sufficiency Advocacy</td>
<td>Stakeholder input, Parent Policy Council Approved, Board Commissioned Study, Board Review and Approval of Funding Shifts, Proposal Development &amp; funding, Regional Expansion, Partnership with UCAP, Licenses and permits for work in Maryland and Virginia. Bainum Foundation Funding Foundation to fund slots in PG County.</td>
</tr>
<tr>
<td>Lack of marketable skills for income production though employment and business development in DC and region.</td>
<td>CNA/Direct Service Staff External Advisory Groups</td>
<td>Approval Regional Expansion Approval 2013-2018 Strategic Plan</td>
<td>Self- Sufficiency</td>
<td>Stakeholder Input Board Review and Consent, Funding Search &amp; Receipt AFL-CIO Partnership Expanded Skills Training &amp; Credentialing Programs Merging of Employment &amp; Training Division (2017) DOES Funding Received Partnered w. PG County College.</td>
</tr>
</tbody>
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Advocacy Results (7.5)

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<tbody>
<tr>
<td>Self-Sufficiency</td>
<td>Progress</td>
</tr>
<tr>
<td>Employment/Entrepreneurship Opportunities &amp; Skills Training In High Wage Career Paths</td>
<td>A strategic goal achieved was to transition the Workforce Training Program into a Workforce Training Institute that was accomplished in 2017 on schedule. UPO’s Workforce Institute is approved by the Maryland and District’s Boards of Higher Education and the Workforce Investment Councils of the District of Columbia and Prince Georges County, Maryland. All training provided is offered through evidence based practices and UPO is a licensed provider of nationally &amp; internationally certification programs. Our programs are aligned with private sector standards. As a result persons can complete our programs and apply their course work to their Union Apprenticeship requirements. All training aligns with the WIC’s High Demand Occupations Survey. Vocational Training Programs (selected from a list of high demand jobs) include certification/licensing in 9 areas: Building Maintenance Professional, Commercial Driver License Training, Culinary Arts, Electrical Installation Professional, Electrical Technician, Emergency Medical Technician, Hospitality Industry Hotel and Tourism Industry Service Worker, IT Helpdesk and Application Support Specialist &amp; Plumbing Technician. All construction programs meet NCCER Standards as determined by 125 construction CEO’s, association leaders and academic professionals. Since 2014, 1,151 customers have completed skills training. 3 of these customers actually opened their own businesses using assistance and match funds from the UPO IDA Program. This program was funded by DHS with matching funds from Capital Area Asset Builders ($64,000). Through this program 11 business plans by customers were completed in 2016 making them eligible for the maximum $4,500 match. A total of 27 businesses were approved for launch and/or expansion. 100% of the matching funds provided were earned and utilized by customers. Businesses included a cake lounge, 2 lawn care operations, and a dry wall company. 2 Building and Career Academy students used IDA funds to seek higher education and 2 clients purchased homes. Employment placements totaled 3,153 during the period most in high wage industries.</td>
</tr>
</tbody>
</table>
Advocacy Results Continued

- Affordable Housing, Homeownership Opportunities Displacement
- Quality, Accessible Childcare
- Lack of Services for Returning Citizens
<table>
<thead>
<tr>
<th>Community Building, Empowerment</th>
<th>Impact</th>
</tr>
</thead>
</table>
| Neighborhood Health and Safety, High Crime Drug Sales in Low income Areas<br>Issues Addressed: Areas with high poverty Inadequate affordable housing Open Drug Markets Crime, and Gang concerns | WHCAN was organized in 2014 to mobilize the community. UPO in partnership the ANC, community groups and resident leaders organized the community and completed activities intended to gain trust and assess need in this community.  
UPO Low-income Board representatives, senior leaders and staff organized a neighborhood walk, held meetings and discussions with MPD and other proactive activities.  
Door to door canvassing was done to get people to meetings. UPO provided funding and intense staff support and resident requested activities were implemented.  
Property managers, churches, service providers, schools and the ANC worked with residents to plan and implement positive activities, advocated with city government.  
9 of 11 crime categories in Police Service Area 706 decreased from November of 2016 to the same period of 2017.  
2 open air drug markets have been closed. Total crime is down 21%.  
Through a partnership with WINN Management, space was provided and renovated ($210,000 – In Kind) to operate an Infant and Toddler Center, allowing parents to enter training or the job market.  
In partnership with the local Elementary School, Hendley. UPO operates an after school program focused on math and science skills.  
UPO opened an Infant and Toddler program to support teen parents. The effort has improved student attendance and graduation rates. UPO recruits weekly in this community for enrollment in its job training program. |
LESSONS LEARNED AND NEXT STEPS
Lessons Learned

• Identify a staff person, team, or Division to oversee organizational Advocacy effort.
• Train and Educate internal staff on their role in Advocacy.
• Develop a process for engagement (including residents, staff, board members, and the Executive Team).
• Make sure Advocacy efforts are aligned with organization's mission.
• Make sure Advocacy efforts are formally adopted by leadership, and included in the strategic/tactical plans.
• Create a Hub/Depositary for collecting/tracking advocacy efforts.
• Be sure to tell your story.
• Take time to celebrate your victories!
Lessons Learned

- **Absolute necessities:**
  - Visionary leadership
  - Frequent examinations of progress
  - Collective effort

- **Immediate course correction**

- **Not all staff will be on board with necessary changes**

- **What is not documented does not improve**

- **Written policies and SOPs are useful for standardizing practices across the organization**

- **Our approach to stakeholder/client/constituent feedback collection and analysis needs additional work**