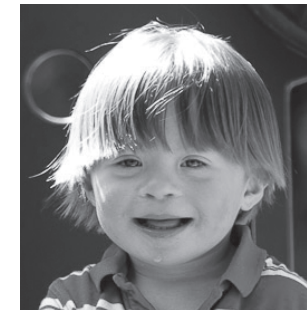
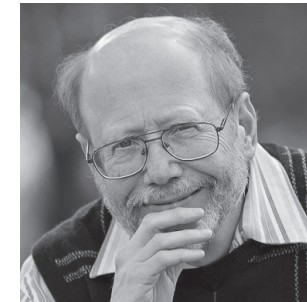




Tri-Counties Regional Center

SAN LUIS OBISPO • SANTA BARBARA • VENTURA

Strategic Performance Plan 2013-2015



Mid Year Report
2015



Strategic Focus Areas

- Family Support
- Autism
- Information/Communication

Operational Focus Areas

- Performance Contract Measures
- Fiscal Compliance
- Organizational Development

Strategic Focus Area 1 - Family Support

Defined As:

TCRC consistently provides information and support to help families adapt to the impact of disability particularly at the time of diagnosis and during age related life transitions.

Strategic Issues:

- Families with children diagnosed with a developmental disability often need support in processing the significant emotional impact.

- There is a legislative emphasis on transition, in particular the transfer of services and supports and case management from Early Start to Regional Center services and from Children’s services to Adult services.
- There is an ongoing need for individuals approaching adulthood for resources around employment, housing, day programs, transportation.

Desired Outcome: What does TCRC want to achieve?

- Families have information and are supported to make decisions at the time of diagnosis and during age related life transitions.



| How will we know we are making progress? | | | | | | |
|---|--|--------------------------------------|-------------------------|--------------------|------------------------|------------|
| Outcome Measures | Baseline (EOY 2012) | 2015 Desired Outcome | 2015 Mid Year | 2015 State Average | 2015 Desired Direction | Target Met |
| a. Families receive information and resources at the time of diagnosis, upon transition from Early Start services, and upon transition from school to adult services. | Brochures (Early Start, Turning Age Three, Transition to Adult Services) in development. | Evaluate plan and make improvements. | Evaluation in progress. | N/A | N/A | On track |
| Intake | | Yes/No | Yes | N/A | N/A | On track |
| Early Start | | Yes/No | Yes | N/A | N/A | On track |
| Adulthood | | Yes/No | Yes | N/A | N/A | On track |
| b. Children Residing with Families (DDS Performance Contract Measure) | 99.04 % (5,927) | 98.00% - 100.00% | 99.30% (6,515) | 99.11% | ▲ | On track |

Note: Outcome measures in **bold** denote alignment with implementation of Trailer Bill Language. (P) = DDS Performance Contract Measure. Goal for (P) measure is met when current TCRC # 1) meets or exceeds state average; 2) is better than TCRC baseline; 3) meets DDS Standard. ▲ indicates that a higher value is better and ▼ indicates a lower value is better.



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Strategic Actions:

| Topic | Description | Current Progress |
|--------------------------------|--|--|
| 1. Assess resources | Map out existing internal capacity and processes, and external resources. | Resources assessed in 2013. Updated provided in 2013 End of Year Report. |
| 2. What is working/not working | Gather input about what is currently Working/Not Working regarding support, from families, partners and staff. | <ul style="list-style-type: none"> ■ Input from surveys and focus group was used to outline a plan to enhance transition resources and support. ■ Plans were created and implementation has proceeded. ■ Feedback on effectiveness of plans is being gathered from families, partners and staff via surveys after trainings at FRCs and will be reviewed in the fall. Feedback will be gathered from Transition Service Coordinators at Transition Day in mid-August and reviewed in the fall. |
| 3. Plan template | Create template for plan for each age related area. | <p>Intake and Transition to Children's Services workgroup created implementation plan and timeline; progress:</p> <ul style="list-style-type: none"> ■ New materials have been created and are currently being shared with families at intake and transition from Early Start. ■ Referral process for clinical support to families around eligibility has been established. ■ Internal clinical resources have been created to inform community regarding Early Start eligibility and are being distributed. <p>Transition to Adult Services workgroup created implementation plan and timeline; progress:</p> <ul style="list-style-type: none"> ■ Transition checklist was created and presented to Service Coordinators at 2014 Transition Training Day. ■ List of core responsibilities for Transition Service Coordinators has been updated in all three counties. ■ Training content for Transition Service Coordinators and potential trainers has been identified. ■ Transition to Adult Services brochure, including an enhanced checklist, has been distributed to all offices in English and Spanish. ■ Collaboration continues with FRCs to provide countywide trainings on various transition topics. ■ Transition Days in collaboration with Local Education Agencies have taken place across all counties. |
| 4. Evaluation | Develop and implement evaluative input. | <p>Feedback from families and FRCs gathered in surveys after trainings has been very positive around the resources that have been developed and training provided.</p> <p>Formal collection of feedback from Service Coordinators, families/people served, and FRCs is in progress and will be reviewed in the fall.</p> |



Strategic Focus Area 2 - Autism

Defined As:

TCRC develops meaningful services for young persons with autism as they transition to adult life. TCRC also assists families and individuals with autism to access insurance benefits for behavioral health treatment as described in Statute SB 946.

Strategic Issues:

- There is a need for individualized employment opportunities, individual choice day services and other resources for teenagers and young adults who have autism.
- As resources shrink, it becomes increasingly important to collaborate and create partnerships to enhance services for people with autism.

- Statute SB 946 requires utilization of benefits through private pay insurance companies for Applied Behavioral Analysis (ABA) services.
- Families and service providers need assistance in understanding and navigating insurance benefits and generic resources.

Desired Outcome: What does TCRC want to achieve?

- TCRC is responsive to the emerging need to expand services for a growing number of young adults with autism. Individuals served will have access to information about insurance benefits for behavioral health services.



How will we know we are making progress?

Outcome Measures

| Outcome Measures | Baseline (EOY 2012) | 2015 Desired Outcome | 2015 Mid Year | 2015 State Average | 2015 Desired Direction | Target Met |
|---|--|--|---|--------------------|------------------------|------------|
| a. Implement plan to respond to needs for vocational, residential and day services for transition age young adults with autism. | Anecdotal information about changing needs. | Create services for day and residential needs according to needs assessment. | Project Search implemented. Get Safe established. | N/A | N/A | On track |
| b. Expand network of support for post secondary education and vocational opportunities. | No centralized information about current informal relationships. | Evaluate efforts and further enhance opportunities. | Introduced new models. Continued collaboration with AB 86 consortia in each county. | N/A | N/A | On track |
| c. Training is offered to Persons/Families to provide initial information and ongoing updates about methods to access insurance, including a module around behavioral services. | Two training events for families in each TCRC location in 2012. | Continue to implement according to 2014 assessment. | Twenty-seven (27) BSO sessions held. | N/A | N/A | On track |

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Strategic Actions:

| Topic | Description | Current Progress |
|--------------------------------------|--|--|
| 1. Survey Needs | Enhance the Autism Survey to be administered spring 2013 with questions that relate to needs for vocational, residential and day services as well as accessing other sources of input as well. | Autism Survey was completed and results were shared with stakeholders in all counties. Training provided for first responders on evidence based practices, wandering, and emergency preparedness for persons with autism based on survey and provider feedback. |
| 2. Create Request for Proposal (RFP) | Administer RFP, review submissions and Program Designs and award contracts. | Project Search, an innovative employment internship program, was implemented in Ventura County. Get Safe (Healthy Relationships) was established. |
| 3. Define goals and objectives | Define goals and objectives for desired post secondary programming. | All AB 86 consortia members submitted final plans in March 2015. No consortia meetings planned until state releases the Draft Guidance in July 2015. Ventura Co. Adult Education Consortium was funded \$401,754 for planning purposes only and is waiting for guidance on implementation from the state. Allan Hancock Community College Consortium submitted a survey to the thirty (30) large employers in North Santa Barbara Co. about entry level positions and vocational certificates. SLO Co. Adult Education Consortium is not meeting at this time and is waiting for guidance. Santa Barbara City College does not have an adult education component and is likely not to be fully funded for plans from the state, but has ideas on the local level. A training program at St. Johns Hospital in Ventura Co. is operational and is a direct outgrowth of AB 86 planning. Autism Coordinator and Clinical Director are on contact lists for all consortia and are awaiting notification of the next round of meetings. |
| 4. Create a Plan | Develop summary of currently existing post secondary programming available to young adults with autism and create a plan for relationship building and opportunity development (with the post secondary institutions.) Dedicate a team of TCRC leadership to conduct outreach. | AB 86 partnerships established in each county, provided data and input for each area. Employment collaboratives meeting in each county. WorkLink: A New Day for Day Services presentation hosted in partnership with SCDD-Central Coast Chapter. |



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| Topic | Description | Current Progress |
|--|--|--|
| 5. Create communications around training | Develop structure to communicate with families of individuals and adults with autism receiving behavioral services to ensure awareness of training and create feedback about ongoing training. | <p>Twenty-seven (27) Behavioral Services Orientation sessions (including insurance access information) were provided to 251 individual families; 54 were Spanish speaking. Parent Training provided via online, face to face/group or individually to 107 families who completed BSO this period. Training provided for TCRC staff and families on revised deductible payment procedures, updated insurance information, and Evidence Based Practices for treatment of autism.</p> <p>Information provided at Orientations revised to reflect recent TBL and income limits updates, additional information provided in Spanish, and expansion of Spanish presenters in each office underway.</p> <p>Updates on MediCal transition to ABA coverage provided to staff and included at BSO. TriLine and website contain links and information about such trainings.</p> |
| 6. Evaluate Training | Revise training module based on feedback. | New home based time limited interventions that include in-home parent training developed to reach families unable to access group training are now available as a result of staff and family feedback. |



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Strategic Focus Area 3 - Information and Communication

Defined As:

TCRC communications about regional center services and supports and generic resources are enhanced to be more easily accessible and understood by persons served, families and community partners.

Strategic Issues:

- Technology and mobility is maximized to actively connect people to accessing and understanding information and resources.

- Stakeholder input suggests an interest in receiving information and communication beyond the existing website and town hall methods.
- Communication and training plans must balance the impact and effectiveness of electronic and face to face communications.

Desired Outcome: What does TCRC want to achieve?

- TCRC provides understandable, useful and needed information in a variety of ways to persons served, families and community partners.



How will we know we are making progress?

Outcome Measures

| Outcome Measures | Baseline (EOY 2012) | 2015 Desired Outcome | 2015 Mid Year | 2015 State Average | 2015 Desired Direction | Target Met |
|---------------------------------------|--|--------------------------------|---|--------------------|------------------------|------------|
| a. Enhance information dissemination. | Have extensive collection of relevant content. | Evaluate standards and refine. | Two (2) focus groups scheduled for August and September to review and refine content. | N/A | N/A | On track |

Note: Outcome measures in **bold** denote alignment with implementation of Trailer Bill Language. (P) = DDS Performance Contract Measure. Goal for (P) measure is met when current TCRC # 1) meets or exceeds state average; 2) is better than TCRC baseline; 3) meets DDS Standard. ▲ indicates that a higher value is better and ▼ indicates a lower value is better.



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Strategic Actions:

| Topic | Description | Current Progress |
|---------------------------------|---|--|
| 1. Create Analysis (Year 1) | Determine audience segmentation criteria. Gauge comprehension of various audience segments by grade level, readability and engagement. | Update provided in 2013 End of Year Report. |
| 2. Review results (Year 2) | Review a current print piece or message for enhanced content and distribution. | Update provided in 2014 End of Year Report. |
| 3. Conduct Focus Group (Year 3) | Conduct a focus group to enhance content creation and dissemination procedures that affect internal communications and external, face-to-face communications. | <p>Two (2) one-hour webinars scheduled for August and September 2015: "Content Overview Webinar" and "Autism Content Webinar." Invitations will be sent to all staff and FRCs, posted on the website, and emailed to the TriLine newsletter list.</p> <p>The first webinar provides an overview of TCRC brochures, distribution channels, and the content development process. Up to one hundred (100) attendees will be able to provide feedback during the webinar about:</p> <ul style="list-style-type: none"> ■ Topics for future content development. ■ Ways to enhance distribution. ■ Suggestions on what we can do better. <p>The second webinar explores whether TCRC should develop a piece for people with Autism and their families. Panelists include Dr. Steven Graff, Director of Clinical Services, and Autism Coordinator Colleen Duncan. The panelists will discuss the type of information often requested. Up to one hundred (100) attendees will provide feedback on:</p> <ul style="list-style-type: none"> ■ The need for a piece related to Autism. ■ The type of piece that may be most useful. ■ Critical topics. ■ Additional comments or ideas. <p>A link to the recordings will be sent to those who register after both events. Viewers will have one week to view the recording and provide feedback.</p> |



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Operational Focus Area 1 - Performance Contract Measures

Defined As:

Measures that demonstrate TCRC's performance around quality of life issues compared with the state average:

Strategic Issues:

- Number and % of total population in Developmental Centers
- Adults Residing in Home Settings
- Children Residing in Facilities with Seven or More Beds

- Adults Residing in Facilities with Seven or More Beds
- Duration in Intake Status for Individuals Ages 3 and Over

Desired Outcomes:

- Meets or exceeds statewide average, better than baseline or meets DDS standard.



How will we know we are making progress?

Outcome Measures

| Outcome Measures | Baseline (EOY 2012) | 2015 Desired Outcome | 2015 Mid Year | 2015 State Average | 2015 Desired Direction | Target Met |
|---|--|----------------------------------|---------------------------|--------------------------|------------------------|------------|
| a. Number and % of total population in Developmental Centers | 0.35% (41) | .x % 38 | 0.21% (27) | 0.38% | ▼ | On track |
| b. Adults Residing in Home Settings | 77.85% (4,347) | 80.00% (x) | 79.44% (4,873) | 77.69% | ▲ | On track |
| c. Children Residing in Facilities with Seven or More Beds | 0.12% (7) | .x % (< or =12) | 0.02% (1) | 0.06% | ▼ | On track |
| d. Adults Residing in Facilities with Seven or More Beds | 4.60% (257) | 4.0% (x) | 4.09% (251) | 2.85% | ▼ | On track |
| e. Duration in Intake Status for Individuals Ages 3 and Over Intake Status (P) | <142 days 143-240 days over 240 days | 98.00% - 100.00% (x%) (x%) | 100.00% 0.00% 0.00% | 97.99% 1.70% 0.31% | ▲ ▼ ▼ | On track |

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Strategic Actions:

| Topic | Description | Current Progress |
|--|--|--|
| 1. Individuals moving from Developmental Centers | Implementation of the CPP Plan for the current fiscal year. | Three (3) people moved from Developmental Centers this fiscal year, two (2) of them since January 2015. |
| 2. Adults live in home like settings | Residential settings are developed within the capacity of the Purchase of Services allocation and response to Request for Proposals. | Four (4) residential settings vended in Santa Maria, Santa Barbara, and Oxnard. They include Residential Care Facilities for the Elderly and one (1) Adult Residential Facility. |
| 3. Children are not living in large facilities | Residential settings are developed within the capacity of the Purchase of Services allocation and response to Request for Proposals. | Specialized Residential Facilities for children are currently in development. One (1) home will be developed in each county. |
| 4. Adults are not living in large facilities | TCRC continues to support downsizing of large congregate residential settings in the TCRC catchment area. | Please see Strategic Actions 1 and 2. |
| 5. Intake Process | Each intake is monitored for a timely eligibility decision. | Continued to follow intake protocol and improve timelines as needed to stay on track. |



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Operational Focus Area 2 - Fiscal Compliance (Performance Contract) Measures

Defined as:

Audits, Budget, Client Development Evaluation Report (CDER)/Early Start Report (ESR) and Intake.

Desired Outcomes:

Compliance with outcomes expected from DDS.

| How will we know we are making progress? Outcome Measures | Baseline (EOY 2012) | 2015 Desired Outcome | 2015 Mid Year | 2015 State Average | 2015 Desired Direction | Target Met |
|---|---------------------------------|---------------------------------|------------------|--------------------|------------------------|------------|
| a. Internal compliance audit of implementation of TBL | Yes | Yes | Yes | N/A | N/A | On track |
| b. Unqualified independent audit with no material findings(s) (P) | Yes | Yes | Yes | N/A | N/A | On track |
| c. Substantial compliance with DDS fiscal audit (conducted within the prior 12 months) (P) | Yes (FY 09/10) (FY 10/11) | Yes (FY 11/12) (FY 12/13) | Yes | N/A | N/A | On track |
| d. Accuracy of POS fiscal projections (P) | Yes | Yes | Yes | N/A | N/A | On track |
| e. Operates within OPS budget (P) | Yes | Yes | Yes | N/A | N/A | On track |
| f. Certified to participate in the Medicaid Home and Community-Based Services (HCBS) Waiver | Yes | Yes | Yes | N/A | N/A | On track |
| g. Compliance with Vendor Audit Requirements per contract, Article III, Section 10 (within prior 12 months) (P) | Yes | Yes | Yes | N/A | N/A | On track |
| h. Client Development Evaluation Report (CDER)/Early Start Report (ESR) currency | Yes | Yes | On track | N/A | N/A | On track |
| i. Individual Program Plan (IPP) Development | 98.13%* April 2012 | Not applicable** | 99.13% (2014) | N/A | N/A | On track |
| j. Individualized Family Services Plan (IFSP) Development | 92.00% June 2010 | 95.00%** | 96.81% (2014) | N/A | N/A | On track |

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Strategic Actions:

| Topic | Description | Current Progress |
|--|---|--|
| 1. Implementation of Trailer Bill Language (TBL) | Internal compliance review of implementation of TBL. | The TBL Infrastructure Committee met in early 2015 to discuss compliance with recent TBL. POS service data report was completed by 12/31/14 and presented at three (3) main meetings in March 2015 and three (3) community meetings Mar-May; narrative sent to DDS. Discussion/planning for Employment First, Workforce I.O. Act, and Medi-Cal services for children with Autism. Review of TBL for FY15/16 will be completed July 2015. |
| 2. CPA Audit Corrective Action Plan | Develop corrective action plan from prior CPA audit and implement. | CPA audit findings from prior year reviewed in preparation for FY 13/14 CPA audit conducted September 2014. Audit narratives updated. TCADD Audit Committee meeting January 2015. Presentation to Board at February 2015 meeting. |
| 3. Review CPA and DDS Audit Findings | Review CPA and DDS audit findings from past 5 years and ensure recommendations are being followed. | Review of CPA audit findings from prior years completed. Preparations completed for DDS fiscal audit of FYs 11/12 and 12/13 in March 2014. Draft DDS audit report has not been received as of June 30, 2015. |
| 4. POS Projections | Submit monthly POS projections to DDS in accordance with instructions and current data. | Monthly POS projection submitted on time to DDS and in accordance with DDS instructions. No discrepancies noted. |
| 5. Monitoring of OPS | Monthly monitoring. Continue cost savings measures. Contribute to PERS at year end to maintain employer rate and consider contribution to post-retirement health trust. | The OPS budget is monitored closely each month. Savings in FY 14/15 primarily in salary savings, health insurance, workers compensation, and legal plus additional ICF/SPA funds allowed for \$1.1 million contribution towards PERS unfunded liability. |
| 6. Audit Plan for current fiscal year | Establish and implement audit plan for current fiscal year. Periodic meetings with auditors to monitor performance against plan and adjust as needed. | FY 15/16 vendor audit plan drafted. Met FY 14/15 vendor audit requirements. Completed three (3) billing audits, three (3) staffing ratio, three (3) cost verification and one (1) audit of an Early Start program, as required. Audit Team meets every two (2) months or sooner, if needed. |



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| Topic | Description | Current Progress |
|--|---|--|
| 7. Monitoring CDER/ESR reports | Federal Programs team sends reports of coming due CDER/ESR to the Service Coordinators (SCs). SCs complete these as IPP or IFSP meetings are held. Managers monitor compliance. | Mid year CDER Currency for TCRC was 98.91%. |
| 8. Monitoring Intake Timelines | A tracking system is used in each office to “cue” SCs and clinicians regarding intake timelines. | Continue to implement intake protocol and improve timelines as needed to stay on track. |
| 9. Individual Program Plan (IPP) Development | Agency-wide tracking system for IPPs is implemented by support staff and monitored by managers for PCT practices and timeliness. | A sample of IPPs of each team is reviewed by an internal review team for timeliness and person centeredness. |
| 10. Individualized Family Services Plan (IFSP) Development | Agency-wide tracking system for IFSPs implemented by support staff and monitored by ES managers for PCT practices and timeliness. | DDS Early Start Report (ESR) methodology was updated. Result from 2014 audit was 96.81%, an improvement over prior audit period. |



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Operational Focus Area 3 - Organizational Development

Defined as:

TCRC achieves consistency in the implementation of person centered performance management practices.

Operational Issues:

- There is an interest in creating greater employee alignment with the strategic plan.
- TCRC must be able to respond effectively in a time of rapid change.
- Person centered practices are implemented in different ways throughout the agency.

- It's important to utilize consistent practices across all regions in which services are provided.

Desired Outcome:

- TCRC develops a performance management model that reflects consistent application of person centered practices.

| How will we know we are making progress? Outcome Measures | Baseline (EOY 2012) | 2015 Desired Outcome | 2015 Mid Year | 2015 State Average | 2015 Desired Direction | Target Met |
|--|---|---|--|--------------------|------------------------|------------|
| a. Develop and implement a person centered Performance Management Model. | Performance Management Model currently based on Behavioral Event Interviews (BEI) and Competency Model. | Evaluate progress and create revisions as needed. | Evaluation completed. Training enhancements in progress. | N/A | N/A | On track |

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Strategic Actions:

| Topic | Description | Current Progress |
|--|---|---|
| 1. Input regarding Performance Review Process | Compile input from management and staff to identify what's working/not working about the existing Performance Review Process and clarify the indicators of an effective, efficient, person centered Performance Review Process. | Revised Performance Review form and process were successfully rolled out to all staff in January 2015, using Box and DocuSign. Feedback was received through Strategic Plan Staff Survey. |
| 2. Proposal of Revisions for Performance Review Process | Propose revisions to the Performance Review Process. | OD Team continues to support managers and staff through the Mid Year Review cycle. |
| 3. Revise Materials | Revise existing materials and platform for implementation of revised Performance Review Process. | Based on staff input, the Employee and Manager Guides to Performance Review are being updated with suggestions to enhance the interactions between manager and employee during the review process. |
| 4. Training | Develop training to support managers and staff to implement revised Performance Review Process. | A guide for using Box and DocuSign was developed. Work will continue to revise the Employee and Manager Guides. |
| 5. Implement changes | Implement Performance Review Process, solicit feedback and modify according to results. | Additional feedback will be collected after Mid Year Review and updates made as needed. |
| 6. Consider additional elements of the TCRC Performance Management Model | Define additional elements of a person centered Performance Management Model and begin to modify. | A TCRC Performance Management Model has been drafted and the next element to be explored with relation to person centered practices is proposed to focus on learning and development and its role in succession planning. |