

SG/PRC Strategic Plan Implementation Update
Quarterly Report from the Executive Director
Reporting Period: Q3 2025 (Jan 2025-March 2025)

Overview

The last quarter of 2025 focused on leadership alignment and discovery meetings to inform the development of departmental strategies and Key Performance Indicators (KPIs).

Through in-depth discussions with key leaders, SG/PRC is moving toward a more structured, accountable, and measurable implementation of its Strategic Plan. This report summarizes the current status of strategy and KPI development across the plan's four goals, the expected next steps, and the deliverables schedule for the remainder of the year.

Leadership Alignment & Strategy Development

All leadership alignment meetings were completed in March 2025. Instead of broad workshops, discovery sessions were held with department heads to develop actionable strategies tied to each strategic goal. Strategies and draft KPIs will be finalized by May 31, 2025.

Phase 1 Progress (February – May 2025): Leadership Alignment & Strategy Development

Status: On Track | Completion Date: May 31, 2025

- Leadership alignment meetings were completed in March.
- Discovery meetings were conducted with key department leads across Clinical Services, Client Services, HR/Training, Community Engagement, and Operations.
- Common themes emerged:
 - Strong departmental initiatives exist, but often need for more formal KPIs or explicit alignment to strategic goals.
 - There is a need for greater cross-functional accountability and a centralized tracking system.
- Revised strategies and draft KPIs at the strategy level are being finalized.

Phase 2 Preview (June – July 2025): Platform Setup & Training

Planned Activities:

- Monday.com will be configured with finalized strategies and KPIs.
- Strategic plan content and milestone tracking will be uploaded.
- Round 1 of staff training will begin for leadership and key users.
- This phase positions SG/PRC for live strategy tracking in Q3.

Strategic Plan Deliverables Timeline

Phase	Key Activities	Deliverable	Target Completion
Phase 1: Leadership Alignment & Strategy Development	Finalize strategies; review with team leads; submit final doc	Final Strategy & KPI Document	May 31, 2025
Phase 2: Platform Setup & Early Training	Configure Monday.com; upload content; conduct training	Monday.com Configuration & Training Complete	July 31, 2025
Phase 3: Execution, Monitoring & Mid-Year Review	Launch implementation; evaluate KPIs; gather feedback	Mid-Year Progress Report & Feedback Summary	September 30, 2025
Phase 4: Optimization & Sustainability	Optimize workflows; build sustainability model; submit final report	Final Report & 2026 Recommendations	December 31, 2025

Early Wins and Alignment Opportunities

The following highlights showcase the strong progress already underway across the organization. These examples reflect alignment with SG/PRC's strategic priorities, even in the absence of formalized strategies and KPIs. They represent high-impact early wins where formal strategy documentation is now catching up to successful execution.

Advancing Service Delivery (Goal 1)

- SG/PRC teams are actively improving service response times through the deployment of on-duty teams, targeted outreach campaigns, and a call log/ticket tracking system.
- To sustain this momentum, baseline KPIs will be established, and service performance metrics will be integrated into monthly leadership reviews.

Evidence of Progress in Equity and Access Initiatives (Goal 1 & 2)

- Reduction in "No POS" (purchase of service) for children ages 3–21 decreased from 37% to 20% in two years—a nearly 10% improvement, far exceeding the internal benchmark of 2% annual improvement.
- Per capita spending increased across all ethnic groups, with African American/Black youth seeing a 205% increase, demonstrating improved equity in service access.
- Direct outreach to Native American families addressed a -59% disparity in per capita spending. Personalized check-ins and culturally relevant resources were sent, forming the basis of a formal bridging strategy.

Data-Driven Engagement Tracking (Goal 2)

- Event attendance soared: Over 200 people registered for one event within 24 hours, and another exceeded its 450-person capacity in one week.
- Metrics like sign-ins, community touchpoints, and marketing response rates (email/text) are already being captured and can be integrated into KPIs.
- Community Information Forums were rebranded from “Critical Issues” to be more welcoming and now include post-event recording access.

Strategic Use of State-Level Data (Goal 1 & Goal 4)

- Utilizing state-issued POS data and National Core Indicator surveys to validate disparities and improvements, aligning accountability with internal goals.
- These metrics directly inform targeted strategies for underserved communities and are proposed to feed into the Monday.com KPI dashboard for live tracking.

Rapid Expansion of Self-Determination Program (Goal 1)

- Self-determination participation grew from 96 to 262 in under 2 years, more than doubling the impact compared to the prior five-year period.
- A new strategy was implemented: community-driven marketing, empowerment conferences, and decentralized information-sharing.

Community Trust-Building as a Strategy (Goal 2 & 4)

- Strategic shift in tone when working with service coordinators to improve internal collaboration and reduce friction.
- Introduction of soft-scripting in follow-up communications led to increased response rates and strengthened trust with internal teams.
- Community partners and equity advocates now proactively coordinate with SG/PRC, signaling trust and co-ownership of service equity work.

Clear Ownership Gaps Identified (Operational Insight)

- Staff are carrying out high-impact work, but an opportunity to assign clear ownership of specific goals or objectives has been assigned.
- This insight prompted the creation of a new process (in progress) to designate goal owners and strategy trackers for alignment and reporting.
- Once finalized, this will support the Executive Director and the board in receiving structured, data-informed quarterly updates.

Strengthening Community Engagement & Advocacy (Goal 2)

- A website relaunch is underway alongside newly expanded event strategies designed to deepen stakeholder connection. Team structures supporting these efforts are nearly finalized.
 - The next priority is to define and finalize digital and event engagement metrics to support ongoing tracking and reporting.
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Enhancing HR and Talent Development (Goal 3)

- SG/PRC has seen a reduction in staff turnover - and has launched onboarding improvements and leadership development initiatives.
- Implementation of Paylocity modules is planned next, which will streamline HR processes and support the finalization of a comprehensive KPI set for training and retention.

Improving Operational Efficiency & Technology (Goal 4)

- Major system upgrades are in motion, including the Atlas platform rollout, cloud migration, and enhanced cybersecurity infrastructure.
- The next step is to designate departmental leads responsible for tracking strategic progress and ensuring timely updates in the monitoring system.