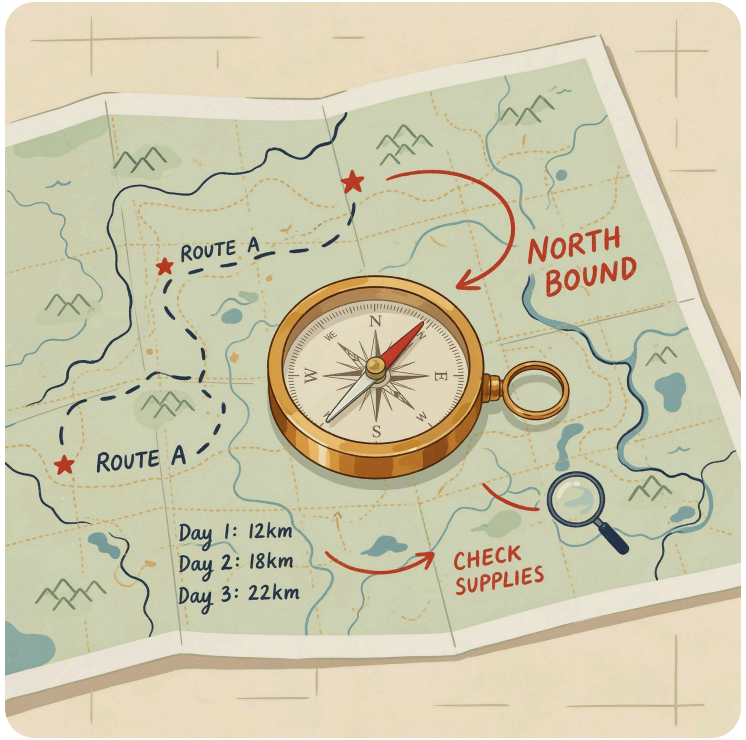
SG/PRC Strategic Plan Implementation Report

Q4 Update | April–June 2026

ALL FOUR GOALS IN PROGRESS



Q4 Overview



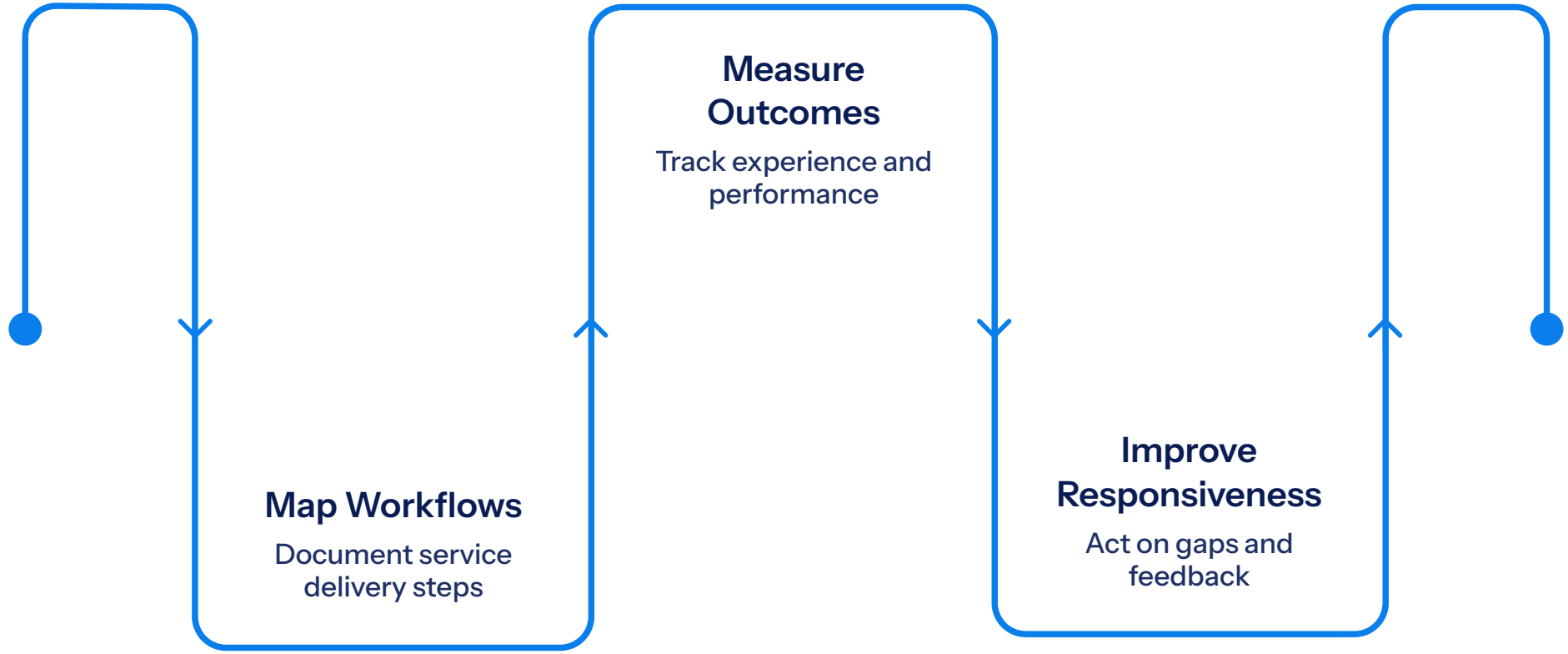
During Q4, SG/PRC continued implementation across all four strategic goals, with the **strongest new measurable results in service access and utilization.**

As strategies move into ongoing operations, SG/PRC is increasingly focused on **measuring outcomes** and using data to guide the next phase.

The Spring 2026 stakeholder survey identified persistent concerns around communication, Service Coordinator capacity, Self-Determination, and unmet service needs. A targeted follow-up survey is underway.

GOAL 1

Service Excellence

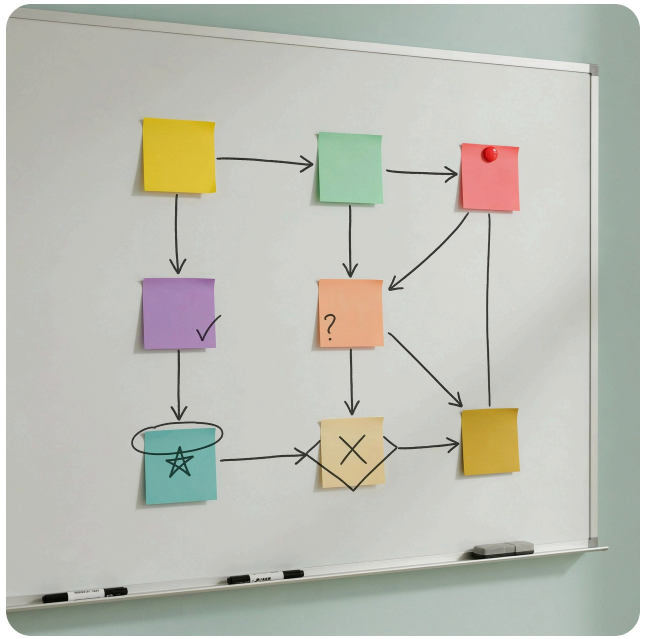


Goal 1 focused on strengthening service-delivery practices, addressing gaps, and building stronger measures of the experience of individuals served and their families.

GOAL 1 · IMPROVING RESPONSE TIMES

Workflow Mapping Completed

SG/PRC reviewed how work moves through four major service areas to identify where delays occur and where processes can be improved.



Adult / Residential

Family / Transition

Early Intervention / Preschool

Intake / Clinical

Quarterly analysis of ticketing-system data will further support SG/PRC in assessing response performance and identifying recurring delays.

GOAL 1 · SERVICE OFFERINGS

Expanding Services & Improving Access



Residential & Housing

Day programs, affordable housing, and specialized residential options identified as priority development areas.



Mental Health & Supports

Mental health services, technology supports, and specialized dental services flagged for expansion.



Training & Employment

Training, employment, and social/recreational services identified through community needs survey work.



Early Intervention

Early intervention services remain a priority area for new resource development.

The 2026–2027 Community Resources Needs Survey is underway to hear from individuals served, families, staff, providers, and advocates.

GOAL 1 · SELF-DETERMINATION

Self-Determination Program: Closer Attention



Client Services leaders and the training team are working more closely together — reviewing budgets, spending plans, and addressing repeated errors and inconsistent practices.

⚠ Training alone may not solve every problem. SG/PRC will measure whether families experience fewer errors, smoother processes, fewer complaints, and more consistent support.



GOAL 1 · INFORMATION ACCESS

Improving Access to Information

Subcommittee Feedback

Individuals Served and Families Subcommittee now reviews forms and serves as an ongoing feedback group for several departments.

Form Reviews Completed

Admission Agreements, consent forms, Medicaid Waiver documents, and eligibility information reviewed in Q4.

AI Chat Pilot Launched

SG/PRC is the **first Regional Center in California** to pilot an AI website chat and text tool — supporting ~120 languages and connecting families to staff when needed.

GOAL 1 · Q4 SNAPSHOT

Goal 1 KPI Summary

KPI / Measure	Q4 Status / Result
Workflow mapping	Completed across all four major service areas
Priority-form review	Planned Q4 reviews completed
Stakeholder feedback	Individuals Served and Families Subcommittee is now an ongoing feedback group
Outcome measurement	Measures for response time, satisfaction, access, and case management are being improved

Goal 1 is moving toward stronger outcome measurement — using workflow, ticketing, stakeholder, and service data to assess real improvements in responsiveness and family experience.



GOAL 2

Community Engagement & Advocacy

In Q4, SG/PRC shifted focus from counting events and attendance to measuring whether outreach and education are helping more people **understand, request, and use services.**

GOAL 2 · SERVICE ACCESS

Dramatic Gains in Service Access (Ages 3–21)

1,540

More Individuals Served

Population grew from 7,201 to 8,741

9.4pp

No-POS Rate Drop

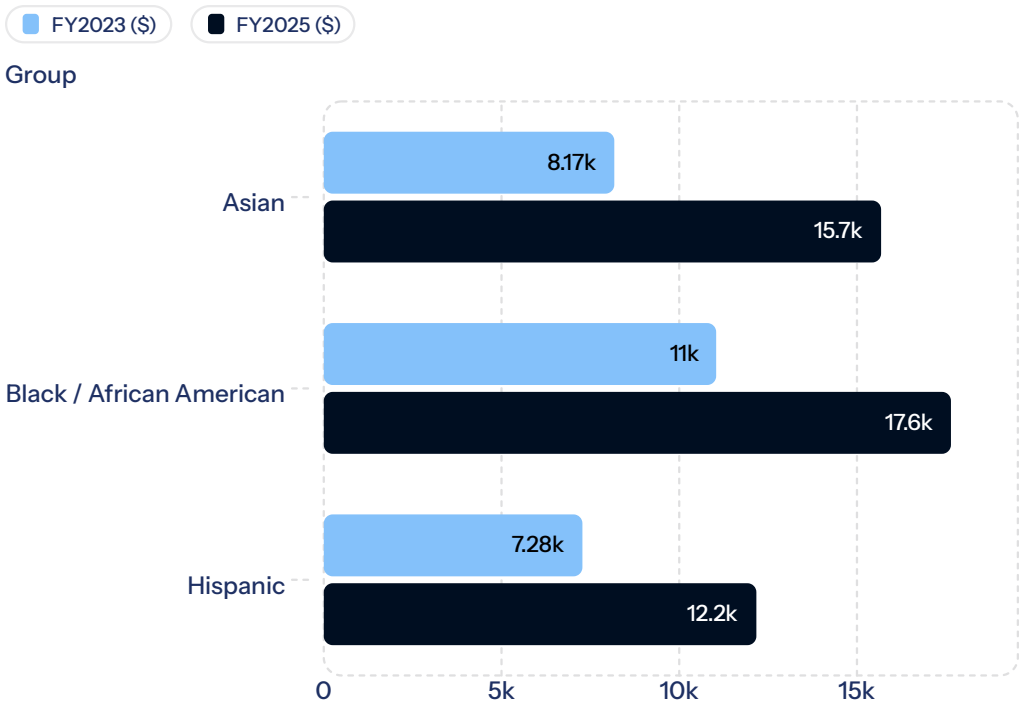
Decreased from 34.0% to 24.6%

No-POS Rate Improvements by Ethnicity

- **Hispanic:** 35.5% → 26.2%
- **Black / African American:** 31.8% → 26.5%
- **Chinese:** 23.9% → 15.9%
- **Korean:** 28.3% → 18.5%
- **Vietnamese:** 44.4% → 21.8%
- **All other ethnicities:** 33.8% → 23.2%

GOAL 2 · SERVICE UTILIZATION

Per-Capita Service Spending Rising (FY2023–FY2025)



Per-capita service expenditures for individuals ages 3–21 living at home increased significantly across all three reported groups — confirming that **more individuals are receiving funded services.**

Together with lower no-POS rates, these numbers demonstrate meaningful progress in equity of service access.

GOAL 2 · Q4 SNAPSHOT

Goal 2 KPI Summary

KPI / Measure	Q4 Status / Result
Individuals ages 3–21 served	Increased from 7,201 to 8,741
Overall no-POS rate	Decreased from 34.0% to 24.6%
Equity in access	Low/no-POS decreased in every demographic group analyzed
Service utilization	Average spending per person increased for Asian, Black/African American, and Hispanic groups
Engagement outcomes	Surveys updated to track learning, service requests, and resource use

Next step: better connect SG/PRC's outreach and education to what families do afterward — requesting services, using resources, or advocating for themselves.

GOAL 3

Talent Development & Leadership

Q4 reflects **limited new measurable implementation** under Goal 3. Established workforce practices continued while SG/PRC advanced selected workforce and leadership-development priorities.



GOAL 3 · WORKFORCE & LEADERSHIP

Building Workforce & Leadership Capacity

1

Diverse New-Hire Retention

On track toward the **80% retention target** through December 2026.

2

Employee Competency Matrix

Draft framework developed to match training and development to the skills each role requires.

3

Foundational Leadership Skills

Strengthening the leadership pipeline and building a continuous performance and development culture.

4

Meaningful Recognition

Building a culture of employee recognition as a priority for the next phase.

GOAL 4

Operational Efficiency & Technology



Goal 4 had **limited new measurable activity** during Q4. Work is concentrated on technology rollout, system consolidation, and connecting stakeholder feedback to operational improvement.

Case-management rollout still underway; pilot-group feedback incorporated.

Microsoft Teams migration underway; duplicate systems being retired.

Department response plans, Monday.com tracking, and visual dashboards remain to be implemented.

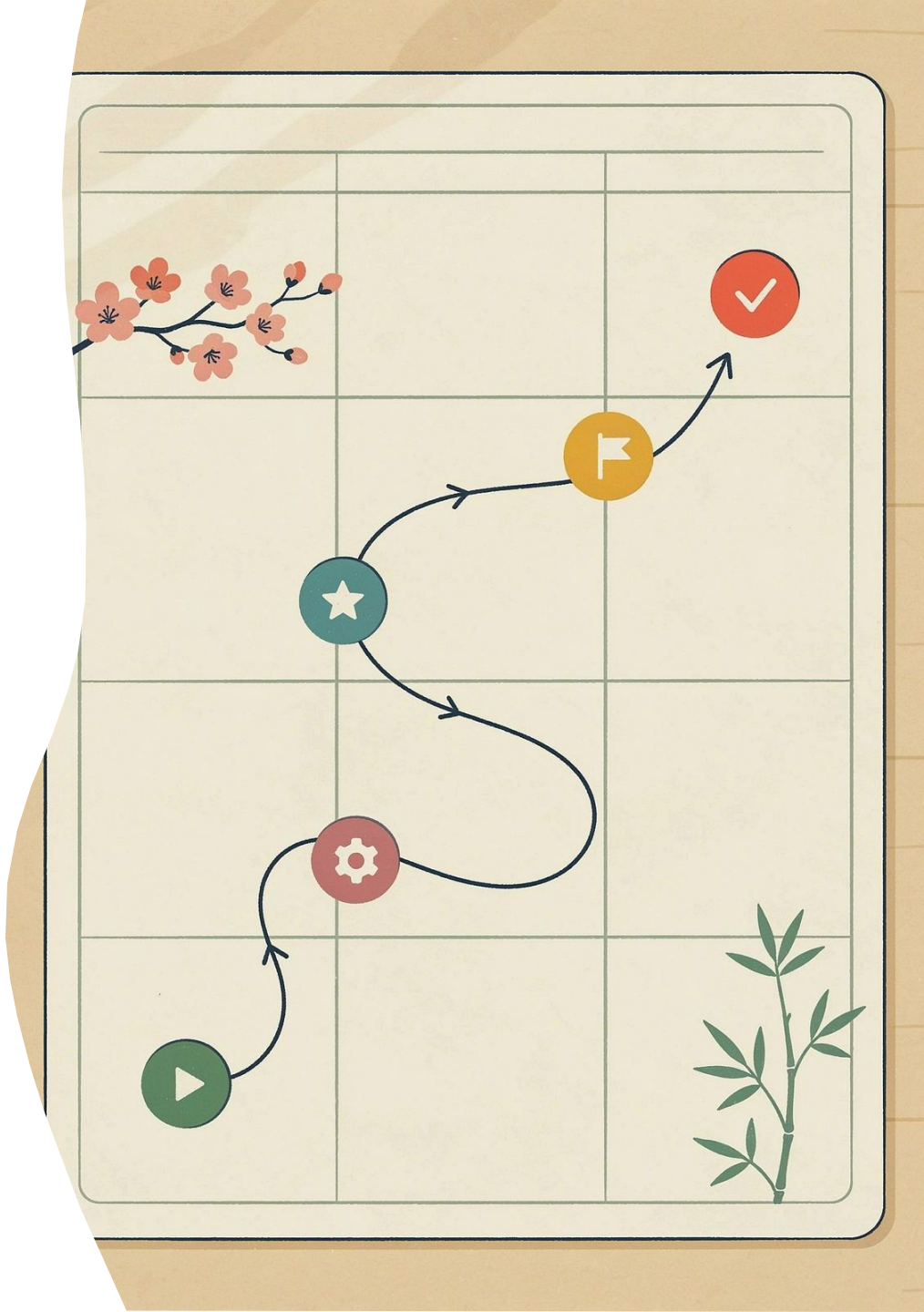
GOAL 4 · Q4 SNAPSHOT

Goal 4 KPI Summary

KPI / Measure	Q4 Status / Result
Case-management technology rollout	Still underway; pilot-group feedback has been used
Technology consolidation	Moving into Microsoft Teams and retiring duplicate systems is underway
Stakeholder improvement tracking	Department response planning, Monday.com tracking, and visual dashboards remain to be implemented
Operational outcomes	Future measures will focus on efficiency, system utilization, resolution times, and stakeholder-driven improvements

Mid-Point Strategic Plan Refinement

The mid-point review assesses whether selected strategies and KPIs continue to reflect the outcomes SG/PRC seeks to achieve. A targeted follow-up survey is underway to understand root causes behind persistent stakeholder concerns and identify improvements with the greatest impact.



Priorities for the Next 12–24 Months



Communication & Access

Multilingual guides, culturally responsive communication, response-time measurement, and AI-based tools.



Reduce Disparities

Continue improving service access equity while measuring whether engagement leads to greater knowledge and utilization.



Leadership Capacity

Leadership development, continuous performance feedback, employee development, and meaningful recognition.



Operational Efficiency

Technology consolidation and streamlined systems to reduce inefficiencies.

New Leadership: Chief Services & Engagement Officer



Talesha Payne — Beginning August 31

SG/PRC has created a new **Chief Services and Engagement Officer** position to provide executive-level oversight of:

- Service delivery and community engagement
- Stakeholder feedback and data-driven improvement
- Technology adoption and KPI development

This role will strengthen alignment and accountability across several areas of the strategic plan.

Looking Ahead

After the follow-up survey is analyzed and strategic plan leads complete their review, leadership and the Board will receive recommendations for focused updates to selected strategies and measures.

Same Four Goals

The intent is not to rewrite the plan — but to sharpen focus where it matters most.

Outcome-Centered KPIs

Future measures will increasingly reflect the experience and outcomes of individuals and families served.

Greatest Impact

Remaining implementation efforts will concentrate where they can make the most difference.

