

STATE OF MONTANA ROMA LOGIC MODEL

Community Services Block Grant Work Plan for the Year 2010-2011

Agency Name & Address	Phone Number
HRDC District IX, Inc. 32 South Tracy Avenue Bozeman, MT 59715	Contact Person Jeff Rupp Heather Grenier (406) 587-4486

WORKSHEET SUMMARY

National Goal	Projected Outcomes
<i>Identify the goal and briefly describe it</i>	<i>Results of intervention</i>
Goal #1: Low Income People Become More Self-Sufficient	
1.2.H/Obtained Safe and Affordable Housing	Obtained permanent rental housing of choice
1.1.A/Unemployed and Obtained a Job	Unemployed persons obtained employment
1.1.C/Employed and obtained an increase in employment income and/or benefits	Employed persons obtained better/new employment
1.2.A/Obtained skills/competencies required for employment	Eliminated/reduced barriers to employment
1.2.B/Completed ABE/GED and received certificate or diploma	Eliminated/reduced barriers to employment
1.2.K/Weatherize 260 homes	Households will have safe, energy efficient, warmer homes
1.3/Rehabilitate 20 homes	Homeowners realize an increase in assessed value of their home as a result of rehabilitation
1.3.B.3/Create and execute financial counseling curriculum	low-income households achieve an increase in financial assets and/or financial skills
Goal #2: The conditions in which low-income people live are improved	
2.1.D/Rehabilitate 20 homes	Safe and affordable housing units in the community preserved or improved through rehabilitation
2.1.C/Construct 10 affordable apartments for seniors in Meagher County	Community realized an increase in the number of adequate and affordable rental units for low-income seniors
2.1.D/Teach home maintenance skills to homeowners	Safe and affordable housing units in the community preserved or improved through rehabilitation
2.1.H/Streamline Transportation acquires bus barn for storage and maintenance of 24 vehicles	Accessible fare free public transportation saved from reduction
2.1.F/Evaluate opportunities to partner with local employers to increase child care services available	Essential service systems are created/increased
2.1.I/Pilot Life Skills Program	Essential service systems are created/increased
2.1.H/Expand Streamline Transpiration Routes/Days of Service	Essential service systems are increased
2.2.C/Establish and implement emergency disaster relief mass feeding and spontaneous food donation management capacity	Increase in the availability of community services to improve public health and safety
2.1.A/Retain 10 jobs in the Property Management field	Preservation of 10 employment positions

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*Identify the goal and briefly describe it**Results of intervention*

2.1.C/Increase affordable housing available within outlying communities	Increase in the number of safe and affordable housing units in Park and Gallatin Counties
2.1.F/Create child care co-ops in low income housing communities	Increase in the number of accessible, safe, and affordable child care placement opportunities for low income children
2.1.D/Operate Property Management Division providing affordable housing opportunities for more than 300 families	Safe and affordable housing units in the community preserved
2.1.E/Assist local employers in providing on-site child care services	Increase in the number of accessible, safe, and affordable child care placement opportunities for low income children
2.2.A/Decrease barriers to homeownership for low income families	Credit and financial services available to limited income households
2.1.E/Provide public health nursing services to low income residents in Meagher County	Increase in/Preservation of accessible and affordable health care services for low-income people
2.2.C/Increase transitional housing opportunities in the community	Increase in the availability of community services to improve public health and safety
Goal #3: Low-income people own a stake in their community	
3.1/RSVP will partner with no less than 100 non-profit, government, and health care organizations in Gallatin and Park counties	Community realizes an increase in volunteer hours donated to community action organizations serving low income persons
3.2.C/RTH Program services (education, counseling, down payment assistance and/or set aside assistance) will enable client to purchase a home, mobile home, or condo	Low and moderate income households achieve homeownership
3.2.C/RTH will provide financial assistance when necessary to ensure that bank loans are available to low and moderate income households	Low and moderate income households achieve homeownership
3.2.C/RTH will increase homeownership opportunities from the previous period	Additional numbers of low and moderate income households achieve homeownership
Goal #4: Partnerships among supporters and providers of service to low-income people are achieved	
4.1/Participation by Streamline staff and HRDC Board in operation of a Regional Transportation Partnership	Expand resources and opportunities in order to achieve family and community outcomes

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4.1/Support and participate in the community movement to address homelessness at all levels	Expand resources and opportunities in order to achieve family and community outcomes
4.1/HRDC Programs and Staff partner with the community	Expand resources and opportunities in order to achieve family and community outcomes
Goal #5: Agencies increase their capacity to achieve results	
5.5.B/Head Start will be fully enrolled with 168 children throughout the school year	Agency obtains a level of excellence in organizational quality in the form of operational management
5.1.H/Head Start will successfully solicit required in-kind match for federal granting requirements	Increase agency capacity to achieve family and community outcomes
5.5.E/Human Resource Department will implement an on-line application process	Agency obtains a level of excellence in organizational quality in the form of human resources
5.5.E/Human Resource Department will update the Affirmative Action Plan	Agency obtains a level of excellence in organizational quality in the form of human resources
5.5.E/Human Resource Department will implement an open door policy	Agency obtains a level of excellence in organizational quality in the form of human resources
5.5.E/Human Resource Department will coordinate and implement Drug and Alcohol and Sexual Harassment training for all program managers	Agency obtains a level of excellence in organizational quality in the form of human resources
5.5.E/Human Resource Department will implement a new employee review process focused more on performance appraisal	Agency obtains a level of excellence in organizational quality in the form of human resources
5.5.E/Fiscal Department will improve staff retention	Agency obtains a level of excellence in organizational quality in the form of Finance and Budget
5.6.I/Fiscal Department will offer and fund training for department staff	Agency staff obtain credentials that improve their capacity to achieve results
5.5.E/Fiscal Department staff will be cross-trained in critical fiscal functions	Agency obtains a level of excellence in organizational quality in the form of Finance and Budget
5.5.E/Fiscal Department will improve program support for program managers in the form of timeliness, visibility, and accessibility	Agency obtains a level of excellence in organizational quality in the form of Finance and Budget
5.5.C/Increase awareness in the social service and business community	Agency obtains a level of excellence in organizational quality in the form of Marketing

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5.5.A/Actively maintain Board member representation in accordance with HRDC bylaws	Agency obtains a level of excellence in organizational quality in the form of Board and Governance
5.3.A/Utilize ROMA trainer to facilitate ROMA training at the Board level	Agency has provided Results-Oriented Management and Accountability Training
5.5.C/Strengthen awareness of HRDC programs and outcomes	Agency obtained a level of excellence in organizational quality in the form of Marketing and Community Education
5.6.I/Road to Home Program staff training	Agency staff obtain credentials that improve their capacity to achieve results
5.5.C/Implement 3rd year of the five year strategic plan	Agency obtained a level of excellence in organizational quality in the form of Planning and Community Investment
5.1.B-E/Continue training and technical assistance with national initiatives	Agency improves its ability to positively impact low to moderate income households ability to secure and retain affordable housing
5.1.A-E/Operate administrative functions within HRDC and provide programs with grant administration and program support	Agency improves its ability to mobilize resources and maintain level funding
5.1.B/Strengthen financial viability of property management division	Agency obtains a level of excellence in organizational quality in the form of operational management
5.2.B/Improve delivery of emergency service programs	Agency obtains a level of excellence in organizational quality in the form of operational management
5.2.E/Maximize effectiveness/efficiency of all HRDC Programs/Service Deliveries	Agency has capacity to compare cost of service with cost of the outcome, measuring both efficiency and effectiveness
5.5.B/Improve customer service	Agency obtains a level of excellence in organizational quality in the form of Service Delivery
Goal #6: Low-income people, especially vulnerable populations, achieve their potential by strengthening family and other support systems	
6.2.B/Provide emergency utility payments or heating systems through the LIEAP and Energy Share Program	households avoid utility termination or fuel crisis through agency payment; households improve home environmental safety through installation of new heating and/or air conditioning system
6.1.A/Through the Homemaker Program provide supportive services including homemaker, nurse case management, and medication management to 40 low-income seniors	Individuals remain independent in their own home and avoid institutionalization

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6.1.A/RSVP will provide no less than 650 individuals age 55 and older with meaningful volunteer opportunities	Individuals age 55 and older participate more fully in their community reducing isolation and inactivity
6.1.A/RSVP will provide volunteer hours to assist in congregate meal prep/service and Meals on Wheels deliveries	Seniors remain independent in their own home
6.3/Head Start will provide early childhood development and family services to 168 children and their families	Infants and children obtain age appropriate immunizations, medical, and dental care; infants and child health and physical development are improved as a result of adequate nutrition; Children participate in pre-school activities to develop school readiness skills; Children who participate in pre-school activities are developmentally ready to enter Kindergarten or 1st grade; <u>Parents and other adults learn and exhibit improved family functioning skills</u>
6.1.A-B/Galavan will provide transportation services to seniors, disabled, and low-income persons	vulnerable populations maintain an independent living situation
6.4.E/RTH provides financial literacy and/or homeownership education to vulnerable low to moderate income households	vulnerable low and moderate income households will complete steps toward first home purchase through RTH
6.2.A/Operate the Gallatin Valley Food Bank to improve food security throughout the service area	emergency food needs are ameliorated
6.1.A/Operate the senior grocery program by distributing supplemental foods to low income seniors in Park, Gallatin, and Madison counties	Seniors maintain an independent living situation
6.3.A.2/In collaboration with the State Office of Public Instruction, operate the Summer Lunch Program for children	Child health and physical development are improved as a result of adequate nutrition
6.3.A.2/Operate a Backpack Program to supply low-income children with nutritious food during school breaks	Child health and physical development are improved as a result of adequate nutrition
6.3.C.2/Provide transitional housing opportunities within the community	Parents and other adults learn and exhibit improved family functioning skills
6.2.C/Operate the Home To Stay Program to provide advice/assistance regarding resolving or preventing mortgage delinquency	Foreclosure prevention

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6.2.C/Operate the Home To Stay Program to provide advice/assistance regarding locating, securing, maintaining residence in rental housing	Homeless Prevention
6.2.C/Operate the Home To Stay Program to provide advice/assistance regarding shelter or services for the homeless	Homeless Placement
6.2.C/Take the lead in developing youth transitional housing program	Homeless prevention and placement for area youth

Explanation/Discussion (if necessary):

Six National Goals - written out for use on the Goals-Workplan Face Sheet!!!

- GOAL 1: LOW-INCOME PEOPLE BECOME MORE SELF-SUFFICIENT (FAMILY)
- GOAL 2: THE CONDITIONS IN WHICH LOW-INCOME PEOPLE LIVE ARE IMPROVED (COMMUNITY)
- GOAL 3: LOW-INCOME PEOPLE OWN A STAKE IN THEIR COMMUNITY (COMMUNITY)
- GOAL 4: PARTNERSHIPS AMONG SUPPORTERS AND PROVIDERS OF SERVICE TO LOW-INCOME PEOPLE ARE ACHIEVED (AGENCY)
- GOAL 5: AGENCIES INCREASE THEIR CAPACITY TO ACHIEVE RESULTS (AGENCY)
- GOAL 6: LOW-INCOME PEOPLE, ESPECIALLY VULNERABLE POPULATIONS, ACHIEVE THEIR POTENTIAL BY STRENGTHENING FAMILY AND OTHER SUPPORTIVE SYSTEMS (FAMILY)

Explanation/Discussion (if necessary):

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<i>Identify the activity and briefly describe how it will be accomplished. Be sure to provide the # of clients served or the units offered.</i>	<i>Primary National Goal</i>	<i>Result of intervention.</i>	<i># and % of clients/units to achieve each outcome.</i>	<i>National Performance Indicator</i>	<i>Describe how outcome will be measured (i.e., data source and/or collection procedures).</i>
A) 410 families use Section 8 vouchers to secure housing	1	Obtained permanent rental housing of choice	390 of 410 (95%) families obtained permanent rental housing of choice 20 of 410 (5%) are in the process of locating permanent rental housing of choice	1.2.H	MDOC Section 8 Database; Client Files
B) 40 At-risk youth ages 14-21 will enroll and be provided with assessment, employment skills, educational and support services, case management, academic support, work experience, leadership development, counseling, and follow up services		Unemployed persons obtained employment	10 of 40 (25%) Obtain part-time employment, less than 25 hours per week, at minimum wage or above without health insurance benefits	1.1.A	Payroll reports
			10 of 40 (25%) obtain part-time employment, equal to or greater than 25 hours per week, at minimum wage or above without health insurance benefits		
			8 of 40 (20%) Obtain full-time employment - number of hours as defined by employer; at minimum wage without benefits.		
			2 of 40 (5%) obtain full-time employment - above the minimum wage and could include benefits		
Employed persons obtained better/new employment			2 of 10 (20%) exiting youth increase hours of employment	1.1.C	Client files, MT Works
			2 of 10 (20%) exiting youth increase wage/salary rate		
			2 of 10 (20%) exiting youth acquire benefits		
Eliminated/Reduced barriers to employment			30 of 40 (75%) demonstrate a measurable increase in identified skills/competencies required for employment	1.2.A	Client files

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	1		30 of 40 (75%) complete the BEST program and receive certificate or diploma in order to acquire/maintain employment 8 of 10 (80%) receive High School Diploma or GED	1.2.A 1.2.B	Client files Client files; MT Works
C) Weatherize 260 homes	1	Households will have safe, energy efficient, warmer homes	Overall 10% reduction in fuel consumed for weatherized households	1.2.K	Northwestern Energy, Department of Energy, Health and Human Services, Energy Share of Montana
D) Rehabilitate 20 homes	1	Homeowners realize an increase in assessed value of their home as a result of rehabilitation	20 of 20 (100%) rehabilitated homes will realize an increase in assessed value as a result of rehabilitation	1.3	Pre and Post appraisals; lien on home to track sales
E) Create and execute a financial counseling and resource curriculum to be used in a 24 month pilot for 20 HRDC customers	1	low-income households achieve an increase in financial assets and/or financial skills	15 of 20 (75%) customers complete the financial counseling and resource curriculum 10 of 20 (50%) increased savings balance by 20% at the conclusion of the pilot	1.3.B.3	Program files; attendance records Savings account balances; program files

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A) Rehabilitate 20 homes	2	Safe and affordable housing units in the community preserved or improved through rehabilitation	20 of 20 (100%) rehabilitated homes meet HQS and IBC code/requirements	2.1.D	Home Inspections
B) Construct 10 affordable apartments for Seniors in Meagher County	2	Community realized an increase in the number of adequate and affordable rental units for low-income seniors	10 affordable units constructed for low-income seniors	2.1.C	Lease agreements
C) Teach home maintenance skills to homeowners	2	Safe and affordable housing units in the community preserved or improved through rehabilitation	10 of 20 (50%) homeowners receiving rehabilitation services learn home maintenance skills	2.1.D	Time sheets, report on self-help labor, documentation of maintenance performed
D) Streamline Transportation acquires Bus Barn for storage and maintenance of 24 vehicles	2	Accessible fare free public transportation saved from reduction	Partnership with City confirmed, land secured, predevelopment process complete, construction phase in process	2.1.H	Construction Contracts
E) Evaluate opportunities to partner with local employers to increase child care services available	2	Essential service systems are created/increased	2 businesses pilot on-site child care facilities with training and technical assistance from the Head Start Program	2.1.F	Child Care Connections database
F) Pilot Life Skills Program	2	Essential service systems are created/increased	Pilot 2 complete Life Skills Courses for further evaluation and adjustment	2.1.I	Community Service Database; Program evaluation
G) Expand Streamline Transportation Routes/Service Days	2	Essential service systems are increased	Expand route service to West end of valley, expand full weekday service into weekend services	2.1.H	route maps/schedules
H) Establish and implement emergency disaster relief mass feeding and spontaneous food donation management capacity	2	Increase in the availability of community services to improve public health and safety	100% response rate to requests for assistance issued through Gallatin County Voluntary Organizations Active in Disaster Response Team. 5 staff members and 10 volunteers trained, practiced, and performing in emergency capacity operations	2.2.C	Food Bank Inventory/Distribution records Staff/Volunteer training records; emergency response activity reports
I) Retain 10 jobs in the property management field	2	Preservation of 10 positions	8 of 10 jobs at entry level wage or above (\$8.64 per hour) 5 of 10 (50%) set and achieve basic or work skills goals	2.1.A	HR records
J) Increase affordable/low-income housing opportunities in outlying areas	2	Increase in the number of safe and affordable housing units in Park and Gallatin Counties	20 units of additional family low income housing units in the City of Livingston 4 units of additional family low income housing units in the City of Three Forks	2.1.C	Rental property listings

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K) Create child care co-ops in low income housing communities	2	Increase in the number of accessible, safe, and affordable child care placement opportunities for low income children	2 additional child care providers in lower income communities in Gallatin Valley	2.1.F	Child Care Connections database
L) Operate Property Management Division providing affordable housing opportunities for more than 300 families	2	Safe and affordable housing units in the community preserved	300 of 300 (100%) affordable housing units offered through RPM are preserved for low-income housing opportunities 3.5% of available funds will be set aside for property reserves	2.1.D	Yardi Property Management Software ORION accounting software
M) Assist local employers in providing on-site child care services	2	Increase in the number of accessible, safe, and affordable child care placement opportunities for low income children	Mentor 2 businesses annually to implement on-site child care facilities for employees	2.1.E	Child Care Connections database
N) Decrease barriers to homeownership for limited income households	2	Credit and financial services available to limited income households	Research feasibility of operating a Community Development Financial Institute	2.2.A	Research documents
O) Utilize CSBG dollars to provide public health nursing services for low income residents in Meagher County	2	Increase in/Preservation of accessible and affordable health care services for low-income people	91 hours of nursing services including child protection activities and senior companion activities	2.1.E	Contract billing
P) Increase transitional housing opportunities in the community	2	Increase in the availability of community services to improve public health and safety	4 additional transitional housing unit services created	2.2.C	contract/funding
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A) RSVP will partner with no less than 100 non-profit, government, and healthcare organizations in Gallatin and Park counties		3 Community realizes an increase in volunteer hours donated to community action organizations serving low income persons	260 of 650 (40%) of RSVP volunteers are low-income individuals contributing volunteer hours to organizations that provide services to low income individuals/families 56,000 of 80,000 (70%) volunteer hours contributed to organizations that provide services to low income individuals/families	3.1	Montana State Unit on Aging Demographic Data RSVP Partner Organization Timesheets
B) RTH program services (education, counseling, down payment assistance and/or set aside assistance) will enable clients to purchase a home, mobile home, or condo		3 Low and moderate income households achieve homeownership	45 of 284 (16%) RTH clients will purchase a home; 26 of 45 (57%) purchasing homes will utilize an RTH financing program	3.2.C	Client files
C) RTH will provide financial assistance when necessary to ensure that bank loans are available to low and moderate income households		3 Low and moderate income households achieve homeownership	45 of 284 (16%) RTH clients will purchase a home; 26 of 45 (57%) purchasing homes will utilize an RTH financing program	3.2.C	Client files
D) RTH will increase home ownership opportunities from the previous period		3 Additional numbers of low and moderate income households achieve homeownership	12.5% increase in homeownership within the community; 30% increase in clients utilizing a RTH program	3.2.C	Association of Realtors; RTH database

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A) Participation by Streamline staff and HRDC Board of Directors in operation of a Regional Transportation Partnership with ASMSU and others	4	Expand resources and opportunities in order to achieve family and community outcomes	1 Regional Transportation Partnership established among ASMSU, HRDC, City of Bozeman, City of Livingston, City of Belgrade, Gallatin County, Park County, MSU	4.1	Streamline Board minutes
B) Support and participate in the community movement to address homelessness at all levels	4	Expand resources and opportunities in order to achieve family and community outcomes	Active participation in local Continuum of Care (GGHAC); lead agency in annual Homeless Survey and Gaps Assessment	4.1	CoC minutes; Homeless Survey results; Gaps Assessment results
C) Strengthen statewide organization connections/partnerships	4	Strengthen partner agencies efforts to combat the effects of poverty; create a coordinated effort across the state for alleviating barriers to self-sufficiency	Utilize Community First Fund to provide mentorship and partnership opportunities with communities throughout Montana	4.1	Successful partnerships
			Ability to respond when requests are received from the Montana Board of Housing regarding technical assistance and project development	4.1	HRDC staff participation on MBOH Board of Directors
D) HRDC Programs and Staff partner and support the following agencies or programs	4	Expand resources and opportunities in order to achieve family and community outcomes	Partnerships with 10 non-profit organizations; 15 faith based organizations; 6 local government organizations; 6 State government organizations; 15 Federal government organizations; 30 for-profit business corporations; 2 Housing Consortiums, 7 School Districts, 1 Institution of Post-Secondary Education; 3 Health Service Institutions; 6 State wide associations	4.1	HRDC partnerships

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A) Head Start will be fully enrolled with 168 children throughout the school year, enrolling new children within 30 days after a child withdraws from the program	5	Agency obtains a level of excellence in organizational quality in the form of operational management	160 of 168 (95%) available Head Start slots will be filled with eligible children throughout the school year	5.5.B	Child Plus Reports
B) Head Start will successfully solicit required in-kind match for federal grant requirements	5	Increase agency capacity to achieve family and community outcomes	20% of federal grant award is secured via in-kind contributions	5.1.H	In-Kind tracking systems
C) The Human Resource Department will implement on-line application process	5	Agency obtains a level of excellence in organizational quality in the form of human resources	50% vacancies successfully filled within 45 days 30% reduction in copy/postage/supplies expenditures within the HR department	5.5.E	HR database HR fiscal reports
D) The Human Resource Department will update the Affirmative Action Plan	5	Agency obtains a level of excellence in organizational quality in the form of human resources	Hiring practices in line with organizational goals; Affirmative Action Plan adopted by Board of Directors	5.5.E	HRDC Organizational Policies/Procedures, Personnel Policies
E) The Human Resource Department will Implement an Open Door Policy	5	Agency obtains a level of excellence in organizational quality in the form of human resources	20% increase in line staff visits to HR Department; increased utilization of HR resources; 100% established office hours staffed	5.5.E	Annual Employee Survey; HR time tracking
F) The Human Resource Department will coordinate and implement Drug and Alcohol and Sexual Harassment training for all program managers	5	Agency obtains a level of excellence in organizational quality in the form of human resources	100% of supervisors trained in Sexual Harassment and Drug and Alcohol Abuse identification to increase awareness and reduce company liability	5.5.E	training attendance
G) The Human Resource Department will implement a new employee review process focused more on performance appraisal	5	Agency obtains a level of excellence in organizational quality in the form of human resources	100% managers trained in utilization of new employee evaluation process; 75% utilization rate among programs	5.5.E	Completed Performance Appraisals
H) The Fiscal Department will work to increase staff retention	5	Agency obtains a level of excellence in organizational quality in the form of Finance and Budget	4 of 5 (80%) existing staff retained for a period of one year	5.5.E	HR Records
I) The Fiscal Department will offer and fund training for departmental staff	5	Agency staff obtain credentials that improve their capacity to achieve results	4 of 5 (80%) fiscal staff obtain continuing education credits within the year	5.6.I	Certificates of completion
J) The Fiscal Department staff will be cross-trained in critical fiscal functions	5	Agency obtains a level of excellence in organizational quality in the form of Finance and Budget	4 of 5 (80%) fiscal staff will be cross-trained to complete critical fiscal functions including payroll and payables	5.5.E	Fiscal Records

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Service or Activity	Goal	Outcome	Indicator	NPI	Measurement
<i>Identify the activity and briefly describe how it will be accomplished. Be sure to provide the # of clients served or the units offered.</i>	<i>Primary National Goal</i>	<i>Result of intervention.</i>	<i># and % of clients/units to achieve each outcome.</i>	<i>National Performance Indicator</i>	<i>Describe how outcome will be measured (i.e., data source and/or collection procedures).</i>
K) The Fiscal Department will improve program support for program managers in the form of timeliness, visibility, and accessibility	5	Agency obtains a level of excellence in organizational quality in the form of Finance and Budget	14 of 18 (40%) programs budgets will be entered into ORION 9 of 18 (50%) budget to actual reports will be automated to export data from ORION into Excel	5.5.E	ORION software
L) Increase awareness in the Social Service and Business Community	5	Agency obtains a level of excellence in organizational quality in the form of Marketing	25 of 25 (100%) presentations regarding HRDC's programs and services conducted within the community Host 2nd Annual Commitment to Community Event Utilize new website as communication and public relations tool with community and social service partners Create updated power point presentation on HRDC history, mission, programs, and services	5.5.C	HRDC presentation calendar Event attendance web hits/feedback marketing and community education tool created
M) Actively maintain Board Member Representation in accordance with HRDC Bylaws	5	Agency obtains a level of excellence in organizational quality in the form of Board and Governance	13 of 15 (85%) Board slots are filled by the proper representatives of the low-income, public, and private sectors in compliance with the Community Services Block Grant Facilitate Board Development training for the newly created Streamline Advisory Board	5.5.A	Board Member Listing/Recruitment Documentation training conducted
N) Utilize ROMA trainer to facilitate ROMA training at the Board level	5	Agency has provided Results-Oriented Management and Accountability Training	10 of 15 (67%) Board members have completed Introduction to ROMA training	5.3.A	ROMA documentation
O) Strengthen community awareness of HRDC programs and outcomes	5	Agency obtained a level of excellence in organizational quality in the form of Marketing and Community Education	Produce 12 press releases per year; market the HRDC website	5.5.C	Printed press releases; web hits
P) RTH staff training	5	Agency staff obtain credentials that improve their capacity to achieve results	1 RTH staff person will receive continuing education certification and/or certification training	5.6.I	Certificates of completion
Q) Implement the third year of the agency five year plan. The plan will see the agency through 2012. Plan based on extensive community needs assessment.	5	Agency obtained a level of excellence in organizational quality in the form of Planning and Community Investment	Strategic Planning Committee Updates/Reports	5.5.C	Strategic Plan

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R) Continue training and technical assistance with national initiatives such as LISC, NCCED, NED, HAC.	5	Agency improves its ability to positively impact low to moderate income households ability to secure and retain affordable housing	HRDC leveraged funds on a 3:1 ration	5.1.B-E	ORION software
S) Operate administrative functions within HRDC and provide programs with grant administration and program support	5	Agency improves its ability to mobilize resources and maintain level funding	Total dollars mobilized each year by the agency as compared with CSBG dollars	5.1.A-E	ORION software
T) Strengthen financial viability of Property Management Division	5	Agency obtains a level of excellence in organizational quality in the form of operational management	Vacancy rates at 5% or less; Decrease in overhead costs	5.1.B	YARDI accounting software
U) Improve delivery of emergency service programs	5	Agency obtains a level of excellence in organizational quality in the form of operational management	Collaborative customer service outcomes generated among emergency service programs within HRDC; collaborative program delivery	5.2.B	Outcome scale and system developed among emergency service programs
V) Maximize effectiveness/efficiency of all HRDC programs/service deliveries	5	Agency has capacity to compare cost of service with cost of the outcome, measuring both efficiency and effectiveness	Conduct one in-depth program assessment and evaluation annually, culminating in recommendations for improvements being offered for consideration to the HRDC Board and Management Staff	5.2.E	Program Evaluation and Recommendations

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W) Improve Customer Service	5	Agency obtains a level of excellence in organizational quality in the form of Service Delivery	Speakers/Trainers present to all staff to promote a culture of strong customer service and prevent burn out Utilize opportunities for internship placements within HRDC programs	5.5.B	Trainings conducted Internship placements

Explanation/Discussion (if necessary):

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A) Provide emergency utility payments or heating systems through the LIEAP and Energy Share Program	6	households improve home environmental safety through installation of new heating and/or air conditioning system households avoid utility termination or fuel crisis through agency payment	300 households without heat or in danger of losing their heat will have repairs to their heating system or assistance with heating bills so their power is not disconnected	6.2.B	Follow up through subsequent applications for heating assistance and weatherization
B) Through the Homemaker Program provide supportive services including homemaker, nurse case management, medication management to 40 low-income seniors	6	Individuals remain independent in their own home and avoid institutionalization	40 of 40 (100%) receive Homemaker services 40 of 40 (100%) receive Nurse Case Management Services 12 of 40 (30%) receive Medication Management Assistance	6.1.A	weekly homemaker logs monthly nursing reports nursing notes
C) RSVP will provide no less than 650 individuals age 55 and older with meaningful volunteer opportunities.	6	Individuals age 55 and older participate more fully in their community reducing isolation and inactivity	572 of 650 (88%) volunteers report their experience as an RSVP volunteer adds additional purpose to their life 455 of 650 (70%) volunteers report RSVP provides opportunities to learn new things 520 of 650 (80%) volunteers report RSVP helps them look forward to each new day	6.1.A	RSVP volunteer evaluation; RSVP database
D) RSVP will provide volunteer hours to assist in congregate meal preparation/service and Meals on Wheels deliveries	6	Seniors remain independent in their own home	182 of 202 (90%) at-risk seniors remain independent in their own home as a result of Meals on Wheels Delivery and Congregate Meal Service	6.1.A	Congregate meal sign-in sheets; Meals on Wheels Delivery Rosters; RSVP timesheets

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E) Head Start will provide early childhood development and family services to 168 children and their families	6	Infants and children obtain age appropriate immunizations, medical, and dental care	151 of 168 (90%) enrolled children will receive their yearly physical and dental exams	6.3.A.1	CC ports/assessments completed 3 times per year
		Infants and child health and physical development are improved as a result of adequate nutrition	168 of 168 (100%) enrolled children will receive nutritionally balanced meals and snacks upon attendance	6.3.A.2	Child Plus Reports
		Children participate in pre-school activities to develop school readiness skills	168 of 168 (100%) enrolled children will show an improvement in their gross motor, social, emotional, and literacy skills	6.3.A.3	Child Plus Reports
		Children who participate in pre-school activities are developmentally ready to enter Kindergarten or 1st grade		6.3.A.4	
		Parents and other adults learn and exhibit improved family functioning skills	118 of 168 (100%) of families will accomplish a Family Partnership Agreement within the school year	6.3.C.2	Child Plus Reports
F) Galavan will provide transportation services to senior, disabled, and low income persons	6	vulnerable populations maintain an independent living situation	8,050 of 23,000 (35%) Galavan rides are for medical or dental appointments	6.1.A-B	Galavan database/CDC
			6,440 of 23,000 (28%) Galavan rides are for employment, including volunteer opportunities		
			5,060 of 23,000 (22%) Galavan rides are for congregate meal service or grocery shopping		
			3,450 of 23,000(15%) Galavan rides are for social or business obligations		
			56% of Galavan customers are seniors	6.1.A	
			44% of Galavan customers are disabled	6.1.B	
	36% of Galavan customers are low-income	6.1.A-B			

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G) RTH offers financial literacy and/or homeownership education to vulnerable low and moderate income households	6	vulnerable low and moderate income households will complete steps toward first home purchase through RTH	6 of 12 (50%) vulnerable population households will complete a RTH education program	6.4.E	Client files
H) Operate the Gallatin Valley Food Bank to improve food security throughout the service area	6	emergency food needs are ameliorated	13,000 of 13,000 (100%) emergency food requests are honored	6.2.A	Food Bank database
I) Operate the Senior Grocery Program by distributing food packages to low income seniors residing in Park, Gallatin, and Madison counties	6	Seniors maintain an independent living situation	250 of 250 (100%) state contract slots remain occupied at all times 30 of 30 (100%) seniors on waiting list are provided with supplemental services via state contract funds or grant monies	6.1.A	CSFP Records; Application Forms, State Approval and Contract
J) In collaboration with the State Office of Public Instruction, operate the Summer Lunch Program, providing nutritious lunches to area children	6	Child health and physical development are improved as a result of adequate nutrition	Establish and operate sites in the areas of Gallatin Gateway, Manhattan, and Three Forks Increase daily attendance by 10% over previous year's numbers at Bozeman area sites Increase daily attendance by 10% over previous year's numbers at Belgrade area sites	6.3.A.2	Daily site meal logs; SFSP site contracts
K) Operate a Backpack Program to supply low-income children with nutritious foods for weekends and holidays during the school year when school meals are not available	6	Child health and physical development are improved as a result of adequate nutrition	475 of 500 (95%) food packages are distributed to school children in 41 of 41 weeks	6.3.A.2	Food Bank Files
L) Provide transitional housing opportunities within the community	6	Parents and other adults learn and exhibit improved family functioning skills	2 of 2 existing units occupied continually 3 families receive temporary subsidized housing while working towards self-sufficiency 2 of 3 (67%) families will move to permanent housing	6.3.C.2	Carriage House files; individual family work plans
M) Operate the Home To Stay Program to provide advice/assistance regarding resolving or preventing mortgage delinquency or default	6	Foreclosure prevention	5 of 10 (50%) households provided with counseling and financial assistance, resulting in mortgage brought current 5 of 10 (50%) households provided with counseling, resulting in mortgage default	6.2.C	HMIS; CDS; HUD Counseling Forms; Client Files

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N) Operate the Home To Stay Program to provide advice/assistance regarding locating, securing, maintaining residence in rental housing	6	Homeless Prevention	68 of 170 (40%) households provided with counseling/assistance resulting in entering debt management plan 17 of 170 (10%) households provided with counseling/assistance resulting in locating alternative housing 140 of 170 (82%) households provided with counseling/assistance resulting in obtaining temporary rental assistance and remained in current housing	6.2.C	HMIS; CDS; HUD Counseling Forms; Client Files
O) Operate the Home To Stay Program to provide advice/assistance regarding shelter or services for the homeless	6	Homeless Placement	5 of 50 (10%) households provided with counseling resulting in emergency shelter placement 40 of 50 (80%) households provided with counseling/assistance resulting in securing permanent housing 4 of 50 (8%) households provided with counseling resulting in transitional housing placement 2 of 50 (4%) households provided with counseling resulting in the household remaining homeless	6.2.C	HMIS; CDS; HUD Counseling Forms; Client Files
P) Take the lead in developing youth transitional program	6	Homeless prevention and placement for area youth	4 of 40 (10%) homeless youth placed in transitional housing with case management services	6.2.C	Client files

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