

WACOSA

Strategic Initiatives

For the Five-Year Planning Cycle September 1, 2021 - September 1, 2026

To Be the Premier Organization of Choice!

| Dept./BOD Committee Assigned | Staff Leads | Priority High(H), Medium(M), Low(L) | Progress | Goals Under Specific Initiative | Tactics Used to Measure Accomplishments | Targeted Year of Completion | Progress in Achieving Goals and How Goals Were Accomplished for Jan 24 to Jan 25 |
|--|-------------------------------------|-------------------------------------|-------------------------|--|--|-----------------------------|---|
| 1.) Build Superior Brand Recognition/Community/Customer Connections | | | | | | | |
| Admin | Ann/Nancy | M | Initiative accomplished | 1. intentionally identify and broaden our strategic partnerships by the following: | a. Strengthen connection/partnerships with GSDC/other community business experts. | 2023 | We continue to be a participating member of GSDC, contributing to meetings and civic opportunities. We continue to work with Gail Cruikshank talent development. |
| Admin | All Admin & Senior Leadership staff | M | Initiative accomplished | | b. Admin Team members will each be involved in 1 state and/or local community groups, depending upon the nature of their duties at WACOSA. | 2023 | Our teams are active in various Chamber events, civic organizations, advisory groups, boards both at the community and state levels and continue to represent WACOSA and our clients' interest. |
| Admin | Ann/Rox/Jenny/Mary/Lynn | M | Making steady progress | | c. WACOSA will sponsor a minimum of 1 chamber event annually. | Complete Annually | WACOSA staff presented twice to a chamber group on the positive impacts of hiring people with disabilities in 2024. |
| Marketing | Ann/Lynn W/Mary | H | Making steady progress | 2. Expand staff skill sets to grow brand development through training in branding techniques | a. Create 1 additional opportunity throughout the year for training in various marketing/branding information sessions. | Complete Annually | Select staff are being trained on facebook marketing for ThriftWorks. |
| Marketing | Ann | M | Making steady progress | | b. Branding techniques will be implemented throughout WACOSA as appropriate. | Complete Annually | Ann worked with the development department to refine our fund raising event marketing materials. She also is mentoring our new Development Manager on WACOSA's branding. |

WACOSA

Strategic Initiatives

For the Five-Year Planning Cycle September 1, 2021 - September 1, 2026

To Be the Premier Organization of Choice!

| Dept./BOD Committee Assigned | Staff Leads | Priority High(H), Medium(M), Low(L) | Progress | Goals Under Specific Initiative | Tactics Used to Measure Accomplishments | Targeted Year of Completion | Progress in Achieving Goals and How Goals Were Accomplished for Jan 24 to Jan 25 |
|---|-----------------------|-------------------------------------|-------------------------|---|--|-----------------------------|--|
| 2.) Strengthen Staffing Stability/Organizational Culture | | | | | | | |
| HR/Prov | Lynn Wilori | M | Initiative accomplished | 1. Expand staff buy-in to the principles addressed by Top 20 and the WACOSA Way | a. 100% of new staff will be orientated on Top 20 and WACOSA Way principles. Additionally, all staff will receive refresher training in these concepts annually. | Complete Annually | WACOSA has integrated on-boarding training and annual trainings for all staff and completed this in 2023, and will continue going forward. - Has been continued all of 2024 |
| Admin | HR | H | Making steady progress | 2. Strengthen employee engagement initiatives | a. The administrative team will implement a minimum of 2-3 agreed upon techniques that result in increased staff communication, engagement, competence & initiative. These techniques will be incorporated into best practices for the organization. | 2024 | We worked with Bruce Miles to learn new leadership tools to implement across our agency, and we upgraded our email to Outlook 365, which offers more electronic communication across our organization. |
| HR | HR | H | Initiative accomplished | 3. Improve staff stability by reducing turnover | b. WACOSA's administration will implement a minimum of 2 technology initiatives that promote increased employee engagement. | Jul-22 | In 2024 we fully implemented our Relias training platform for all staff. - expected in 2024. |
| | HR | H | Making steady progress | | a. DSP staff turnover will decrease by 2% annually. | Complete Annually | Decreased DSP turnover by 3% in 2024. |
| | HR | H | Progress Stopped | | b. Total staff turnover will decrease by 2% annually. | Complete Annually | 2024's turnover rate was 19.75%, remaining static as compared to 2023. |
| Program | Nancy/Lynn/Mary/Steph | M | Initiative accomplished | 4. Expand the ways volunteers can be of value within WACOSA. | a. Grow volunteer involvement by maintaining Service Enterprise Initiative accreditation practices. | Complete Annually | Established and ongoing practices. |
| Program | Steph | M | Initiative accomplished | | b. Education and training of WACOSA staff annually in understanding the value-added opportunities volunteers can bring to the workplace. | Complete Annually | Established and ongoing practice. |
| Program | Steph | M | Initiative accomplished | 5. Develop and sustain a volunteer directory from which to draw | a. Increase the number of volunteers on WACOSA's Volunteer Roster annually by 5 individuals. | Complete Annually | Our volunteer program continues experience committed long term volunteers, especially in ThriftWorks, where they currently do not have the capacity to take on more people. We have increased our ongoing program volunteers by 3 in 2024, which we will continue to support. |
| Program | Steph | M | Slowly progressing | | b. Increase volunteer hours annually by 10%. | Complete Annually | Steph continues to match volunteer skills with needed tasks across WACOSA departments and while the volume has not increased by 10%, the quality output of work has increased in each department. This strategic recruitment practice is proving to be what we can support and we will continue. |
| Program | Steph | L | Making steady progress | 6. Make effective use of interns from academic programs | a. WACOSA will participate in 1 internship fairs/conference annually. | Complete Annually | Steph supported on intern in 2024. |

WACOSA

Strategic Initiatives

For the Five-Year Planning Cycle September 1, 2021 - September 1, 2026

To Be the Premier Organization of Choice!

| Dept./BOD Committee Assigned | Staff Leads | Priority High(H), Medium(M), Low(L) | Progress | Goals Under Specific Initiative | Tactics Used to Measure Accomplishments | Targeted Year of Completion | Progress in Achieving Goals and How Goals Were Accomplished for Jan 24 to Jan 25 |
|--|-------------|-------------------------------------|-------------------------|---|---|-----------------------------|---|
| 3.) Strengthen & Diversify Revenue/Business Opportunities in preparation for the elimination of 14C certificate | | | | | | | |
| Admin | Nancy | H | Progress Stopped | 1. Explore and implement a new business and/or product | a. By 2025 a new business entity/project or product will be completed and operating with a potential profit margin of at least 10%. | 2025 | We continue to research productive opportunities based on our clients' interests and skill sets, but no progress has been made |
| Admin | Ann | H | Slowly progressing | 2. Expand current/existing business successes. | a. Expand center-based work exploring greater MN/nationwide work opportunities within a 25 county area. b. Partner with prospective businesses to evaluate business expansion. | 2024 | Progress has increased since 2023 due to new paid work opportunities at the Annex, South and Sauk Centre locations. The strategy has been to seek ongoing, predictable jobs that our clients like, in order to be sustainable in the long term. |
| | Ann | H | Progress Stopped | | | Ongoing | With the increase in in-center work opportunities, we have stopped progress on this initiative. |
| | Ann/Lisa | M | Initiative accomplished | | c. Expand DocuShred by growing value added shred options and/or expanding into associated areas of destruction by 2024. | 2024 | In 2024 we have adjusted pricing for various paper waste, including pull tabs. We updated our pricing, pickup scheduling fees and conducted an audit of all our equipment on site at our customer sites to ensure accuracy in billing. |
| Dev | Nancy/Lori | H | Making steady progress | 3. Expand connections with foundations | a. Strengthen relationships with area foundations by responding to appropriate RFP's, collaborating on campaigns, utilizing foundation resources and developing partnerships. | ongoing | This goal is progressing as we have partnered with the Community Foundation and the Initiative Foundation for several art grants. |
| Dev | Dev Dept. | H | Initiative accomplished | 4. Diversify resource development strategies in fundraising - endowments. | a. A WACOSA endowment will be established by the close of 2021. | 2021 | Completed in 2020 - Central Mn Community Foundation. |
| | Dev Dept. | H | Initiative accomplished | | b. Engage consultant services to reach out to potential, endowment donors by June, 2021. | 2021 | Completed in 2020 - Ed Stracke hired as consultant and identified KPI's to complete. |
| Dev | Dev Dept. | M | Slowly progressing | 5. Diversify resource development strategies in fundraising. | a. One new strategy will be developed and implemented annually throughout the life of this strategic plan. | Complete Annually | 2024 this slowed due to new Development Staff joining our team. |
| Operations | Lisa/Dan | M | Making steady progress | 6. Improve efficiency of existing business models | a. Create efficiencies in DocuShred to improve shred revenue by 10% over the life of the strategic plan | 2026 | We continue to make changes, including price increases that resulted in 8% increase in revenue. |
| Program | Lisa | M | Slowly progressing | | b. Create efficiencies in ThriftWorks to improve revenue by 10% over the life of the strategic plan | 2024 | ThriftWorks revenue remained flat in 2024 |

WACOSA

Strategic Initiatives

For the Five-Year Planning Cycle September 1, 2021 - September 1, 2026

To Be the Premier Organization of Choice!

| Dept./BOD Committee Assigned | Staff Leads | Priority High(H), Medium(M), Low(L) | Progress | Goals Under Specific Initiative | Tactics Used to Measure Accomplishments | Targeted Year of Completion | Progress in Achieving Goals and How Goals Were Accomplished for Jan 24 to Jan 25 |
|--|--------------------|-------------------------------------|-------------------------|--|---|-----------------------------|---|
| 4.) Strengthen our Capacity to Continually Innovate | | | | | | | |
| Admin | Nancy | H | Making steady progress | 1. Strengthen our ability to adapt to changes and see new opportunities. | a. Explore unmet needs in our community. Techniques to expand WACOSA services might include collaborating with service partners and area funders. | 2025 | Worked with the leadership team to prepare the teams for systems changes, adapting to new service models/ideas, and implementing program delivery changes throughout 2024. |
| Admin | Nancy | M | Initiative accomplished | 2. Assemble Innovation Team | a. Conduct quarterly Innovation Team meetings. | 2023 | Restructured our org chart to help identify service pillars and match with staff talents. The Program Manager group is regularly meeting in 2024 and implementing the above mentioned strategies. |
| Admin | Nancy, Lynn W/Mary | M | Slowly progressing | | b. Create a work plan for actionable items identified in all meetings. | 2024 | The senior leadership team has been implementing changes across all WACOSA service sites according to an annual work plan... |

WACOSA

Strategic Initiatives

For the Five-Year Planning Cycle September 1, 2021 - September 1, 2026

To Be the Premier Organization of Choice!

| Dept./BOD Committee Assigned | Staff Leads | Priority High(H), Medium(M), Low(L) | Progress | Goals Under Specific Initiative | Tactics Used to Measure Accomplishments | Targeted Year of Completion | Progress in Achieving Goals and How Goals Were Accomplished for Jan 24 to Jan 25 |
|---|------------------------|-------------------------------------|-------------------------|--|---|-----------------------------|---|
| 5.) Respond to Current/Future Client Service Needs | | | | | | | |
| Program | Nancy/Lynn/Mary | M | Progress Stopped | 1. Expand senior services | a. Grow 1st Ave location to expand Senior Services by 5% within a 2-year period. b. Redesign 1st Ave programs/services to accomplish maximum service delivery. | 2024 | Staffing has prevented progress. |
| Program | Nancy/Lynn/Mary | H | Progress Stopped | 2. Develop additional/alternative service models to accommodate impending legislative Waiver changes. | a. Develop a client volunteer service model to be implemented across WACOSA by December, 2022. | 2023 | Staffing has prevented progress. |
| | Nancy/Lynn/Mary | H | Initiative accomplished | 3. Develop community connection service model/s | b. Develop innovative/effective service model centered around new employment services (i.e. EES, EDS, ESS) by July, 2022. | 2022 | Small cohorts of client volunteers are operating at our sites and include project based activities like food drives, making blankets for the animal shelter etc. |
| | Lynn/Mary/Rox/Jenny | H | Initiative accomplished | 4. Become independent owners of Sauk Centre service location. | a. Prepare for, promote and conduct a show/program using WACOSA clients, focusing on core areas around areas secured with art grants. The show/program might consist of acting in a play, conducting an art show etc. b. Scout location for property to incorporate all aspects of WACOSA's current services to include Shred, Thrift and Programs by July 2022. | 2022 | Program changes have been implemented and are operating. |
| Program/BOD | Nancy | H | Progress Stopped | 5. Expand focus of employment/placement narrative for clients moving from obtaining jobs to fostering career employment. | a. Commence capital campaign for Sauk Centre project by July 2023. b. 10% of program staff will be cross trained to provide the needed technical assistance to the media department at each site. | 2023 | We put on "Fill the Castle" self written, produced and performed at Tech High School in June 2022, funded by grants. We also presented a play at the Paramount in June 2024 |
| Admin | Lynn/Mary/Mike | M | Initiative accomplished | 6. Expand WACOSA's existing service model | a. Develop and implement staffing structure adaptable to changing service models as required legislatively (i.e. media, employment etc.) b. Develop 5 (remote, on-site, community based etc.) new curriculum classes that promote the nature of career opportunities. | 2023 | Program committee put on hold due to further financial constraints. |
| Admin/Programs | Christy/Shaina | M | Slowly progressing | | | 2022 | On hold due to financial constraints. |
| Program | Senior Leadership team | M | Initiative accomplished | | | 2023 | The team has implemented orientation at on-boarding for new staff and annual refresher training for all staff. Specialized equipment training is ongoing, due to staff turnover |
| | | | | | | 2022 | Legislative changes are moving slower than anticipated, thereby slowing this process, however recommend to move completion target to 2025. |
| | | | | | | 2023 | Completed 5 new training opportunities in 2022, and are continuing to develop others that align with client interests identified in client satisfaction surveys. Classes developed include remote business tours, in-person business talks, employment exploration classes with MDI, business site tours and ThriftWorks tours and application process. |