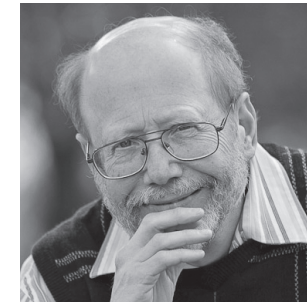




# Tri-Counties Regional Center

SAN LUIS OBISPO • SANTA BARBARA • VENTURA

## *Strategic Performance Plan 2013-2015*



*End of Year Report*  
2014



**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)	2014 Desired Outcome	2014 End of Year	2014 State Average	2014 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.	Continue to create materials, establish infrastructure, implement the plan.	Brochures developed.  Plan implementation has begun.	N/A	N/A	Met
Intake		Yes/No	Yes	N/A	N/A	Met
Early Start		Yes/No	Yes	N/A	N/A	Met
Adulthood		Yes/No	Yes	N/A	N/A	Met
b. Children Residing with Families (DDS Performance Contract Measure)	99.04 % (5927)	98.00% - 100.00%	99.28% (6367)	99.04%	▲	Met

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.



**Strategic Focus Areas**

Family Support

Autism

Information/  
Communication

**Operational Focus Areas**

Performance  
Contract Measures

Fiscal  
Compliance

Organizational  
Development

... continued

**Strategic Actions:**

Topic	Description	Current Progress
1. Assess resources	Map out existing internal capacity and processes, and external resources.	Resources assessed in 2013. Update 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.	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.
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"> <li>▪ New materials are in process of being created to be shared with families at time of intake.</li> <li>▪ Clinical team has outlined current resources and processes.</li> <li>▪ Recommendations are being reviewed for internal resources and a plan to pursue community and vendor resources.</li> <li>▪ New outreach materials have been created to inform community regarding Early Start eligibility and distributed.</li> </ul> <p>Transition to Adult Services workgroup created implementation plan and timeline; progress:</p> <ul style="list-style-type: none"> <li>▪ Transition checklist was created and presented to Service Coordinators at Transition Training day.</li> <li>▪ List of core responsibilities for Transition Service Coordinators has been updated in all three counties.</li> <li>▪ Training content for transition Service Coordinators and potential trainers have been identified.</li> <li>▪ Transition to Adult Services brochure, including an enhanced checklist, has been distributed to all offices in English and Spanish.</li> <li>▪ Collaboration with FRCs has started and training day for families is tentatively scheduled for late Spring.</li> </ul>
4. Evaluation	Develop and implement evaluative input.	Implementation has begun and evaluation will occur in 2015.



## 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)	2014 Desired Outcome	2014 End of Year	2014 State Average	2014 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.	Pursue Request for Proposals (RFP) according to results of needs assessment and prioritize within available Purchase of Services (POS) funding.	RFP completed.  New programs in development.	N/A	N/A	Met
b. Expand network of support for post secondary education and vocational opportunities.	No centralized information about current informal relationships.	*Research models and formalize relationships in each County. Implement at least one program in each county. <i>*Deferred from 2013</i>	TCRC participating in AB 86 Consortia in each county. Project Search Implemented.	N/A	N/A	Met
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.	Evaluate continuing training needs and modify as needed and appropriate.	Feedback gathered through BSO evaluations, modifications made. 87 BSO sessions held.	N/A	N/A	Met

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**Strategic Focus Areas**

Family Support

**Autism**

Information/  
Communication

**Operational Focus Areas**

Performance  
Contract Measures

Fiscal  
Compliance

Organizational  
Development

... continued

**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.	In 2013, autism survey results were analyzed and an action plan developed. Feedback was invited from TCADD, Autism Societies of Ventura, Santa Barbara and San Luis Obispo counties, as well as from the vendors participating in VAC.  Needs assessment results were shared with stakeholder groups including SB & VC Autism Societies.
2. Create Request for Proposal (RFP)	Administer RFP, review submissions and Program Designs and award contracts.	A Social Skills RFP to serve young people age 12-22 was closed in June, 2014. A Healthy Relationships RFP was closed in August, 2014.  Program proposals were received and reviewed for social skills and healthy relationships services; the contracting process is underway.
3. Define goals and objectives	Define goals and objectives for desired post secondary programming.	Regional center staff continue to participate in AB 86 stakeholder groups at Ventura CC, SBCC, Alan Hancock CC, and Cuesta CC to identify needs and opportunities for accessing post secondary education and vocational opportunities. Local program plans are being developed by each Community College Consortium.  Regional center staff is also in communication with California State University, Channel Islands regarding collaborating to identify the supports and funding needed for students with High Functioning Autism Spectrum Disorder to attend CSUCI.  In Ventura County TCRC contracted with Project SEARCH, an international program that provides internships in integrated settings.



Strategic Focus Areas

Family Support

**Autism**

Information/  
Communication

Operational Focus Areas

Performance  
Contract Measures

Fiscal  
Compliance

Organizational  
Development

... continued

Topic	Description	Current Progress
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.	TCRC liaisons in each county continue to serve on AB 86 Consortia to provide input on proposal development.
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.	Monthly Behavioral Services Orientations (BSO) provided for families include guidance for accessing insurance coverage. In the last half of 2014, sixty (60) BSO events were held with one hundred and ninety-two (192) families with Spanish translation provided for fifty-six (56) families. A total of eighty-seven (87) sessions were completed in 2014. Feedback is received from TCRC staff and parents.  Procedures and informational resources were revised to reflect process for assisting with insurance deductible. TCRC is preparing to make information available to FRCs.  Planning is underway with Gold Coast and CenCal to implement transition to Medi-Cal coverage of autism treatment.
6. Evaluate Training	Revise training module based on feedback.	As a result of feedback received from BSO participants: <ul style="list-style-type: none"> <li>▪ Autism Coordinator collaborated with SCs when needed to offer individual orientations to increase access for families.</li> <li>▪ Options are being explored for additional online resources.</li> </ul>



**Strategic Focus Areas**

- Family Support
- Autism
- Information/Communication**

**Operational Focus Areas**

- Performance Contract Measures
- Fiscal Compliance
- Organizational Development

## 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? <b>Outcome Measures</b>	Baseline (EOY 2012)	2014 Desired Outcome	2014 End of Year	2014 State Average	2014 Desired Direction	Target Met
a. Enhance information dissemination.	Have extensive collection of relevant content.	Evidence of application of standards.	Use of infographics has enhanced communications.  Dissemination enhanced by new platform for newsletter.  Article comparison shows increase in reading ease and decrease in grade level.	N/A	N/A	Met

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Strategic Focus Areas

Family Support

Autism

Information/  
Communication

Operational Focus Areas

Performance  
Contract Measures

Fiscal  
Compliance

Organizational  
Development

... continued

**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.	<p>Infographics are single page pieces characterized by plain, condensed language. With primarily graphic content, these pieces are an effective way to communicate concepts quickly. Aligned with our Communications Plan standard for comprehension, eight (8) infographics were developed in 2014 for staff. Five (5) infographics were developed for public use. A TCRC infographic conveying the changes in Early Start criteria was particularly effective. NLACRC requested to add their logo to this piece for use in LA County.</p> <p>Information dissemination was enhanced by adding a new platform for viewing the TriLine newsletter. Issues dating back to 2001 have been uploaded to issuu.com, a publishing platform with an easy flip page display of catalog-style publications. This feature works on iPads and smart phones. This website enhancement may be viewed by clicking “News”, then “TriLine Newsletter”. Once published, a link to new TriLine issues will be pushed out by email to those who have opted-in to the TriLine email list.</p> <p>Communications Plan standards include a decrease in reading grade level and increase in reading ease according to Flesch–Kincaid scales. Overall average reading grade level for featured articles in two (2) recent TriLine issues came down over one grade level to 11.5 and 11.2 as compared to a 2011 issue. Reading ease increased 10-15 points. These numbers demonstrate that our content is becoming easier to understand.</p>
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.	Updates will be provided in 2015.





**Strategic Focus Areas**

Family Support

Autism

Information/  
Communication

**Operational Focus Areas**

**Performance  
Contract Measures**

Fiscal  
Compliance

Organizational  
Development

**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?		Baseline (EOY 2012)	2014 Desired Outcome	2014 End of Year	2014 State Average	2014 Desired Direction	Target Met
Outcome Measures							
a.	<b>Number and % of total population in Developmental Centers</b>	0.35% (41)	.x % 39	0.22% (28)	0.42%	▼	Met
b.	<b>Adults Residing in Home Settings</b>	77.85% (4,347)	79.00% (x)	79.24% (4,795)	77.30%	▲	Met
c.	<b>Children Residing in Facilities with Seven or More Beds</b>	0.12% (7)	.x % ( < or =12)	0.08% (5)	0.07%	▼	* Met
d.	<b>Adults Residing in Facilities with Seven or More Beds</b>	4.60% (257)	4.3% (x)	4.13% (250)	2.96%	▼	Met
e.	<b>Duration in Intake Status for Individuals Ages 3 and Over</b>						
	Intake Status (P) <142 days	100.00%	98.00% - 100.00%	99.38%	96.97%	▲	Met
	143-240 days	0.00%	(x%)	(0.62%)	2.53%	▼	
	over 240 days	0.00%	(x%)	(0.0%)	0.50%	▼	

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Note: Children Residing with Families - see Strategic Focus Area 1 Family Support Outcome Measure b.

\*Outcome measure c is viewed as a local goal with a different outcome expected than what the state expectation is, due to a unique program serving medically fragile children.



**Strategic Focus Areas**

Family Support

Autism

Information/  
Communication

**Operational Focus Areas**

**Performance  
Contract Measures**

Fiscal  
Compliance

Organizational  
Development

... continued

**Strategic Actions:**

Topic	Description	Current Progress
1. Individuals moving from Developmental Centers	Implementation of the CPP Plan for the current fiscal year.	In 2014, two (2) individuals were moved from developmental centers to the community. Twenty-eight (28) people remain in DCs.
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.	<p><b>Resource Development (RD)</b> An Adult Residential Facility in Santa Barbara county was vendored in July.</p> <p><b>Community Placement Plan (CPP)</b> In partnership with Tri-Counties Community Housing Corporation (TCCHC), a residential care facility for the elderly (RCFE) is being developed in Nipomo. Six (6) additional projects are in development to serve adults with dual diagnoses, children with dual diagnoses, and transition age young adults with Autism.</p>
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.	<p>An RFP was administered in Winter 2014.</p> <p>One provider was selected to develop a home in each county for children with severe behavioral challenges and concurrent mental health issues. Provider is currently seeking properties to secure for development.</p>
4. Adults are not living in large facilities	TCRC continues to support downsizing of large congregate residential settings in the TCRC catchment area.	See update in Strategic Action 2.
5. Intake Process	Each intake is monitored for a timely eligibility decision.	Continue to follow intake protocol and improve timelines as needed to stay on track.



**Strategic Focus Areas**

Family Support

Autism

Information/  
Communication

**Operational Focus Areas**

Performance  
Contract Measures

**Fiscal  
Compliance**

Organizational  
Development

**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? <b>Outcome Measures</b>	Baseline (EOY 2012)	2014 Desired Outcome	2014 End of Year	2014 State Average	2014 Desired Direction	Target Met
a. Internal compliance audit of implementation of TBL	Yes	Yes	Yes	N/A	N/A	Met
b. Unqualified independent audit with no material findings(s) (P)	Yes	Yes	Yes	N/A	N/A	Met
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	Met
d. Accuracy of POS fiscal projections (P)	Yes	Yes	Yes	N/A	N/A	Met
e. Operates within OPS budget (P)	Yes	Yes	Yes	N/A	N/A	Met
f. Certified to participate in the Medicaid Home and Community-Based Services (HCBS) Waiver	Yes	Yes	Yes	N/A	N/A	Met
g. Compliance with Vendor Audit Requirements per contract, Article III, Section 10 (within prior 12 months) (P)	Yes	Yes	Yes	N/A	N/A	Met
h. Client Development Evaluation Report (CDER)/Early Start Report (ESR) currency	Yes	Yes	On Track	N/A	N/A	Met
i. Individual Program Plan (IPP) Development	100.00% April 2012	98.00% - 100%	On Track*	N/A	N/A	N/A
j. Individualized Family Services Plan (IFSP) Development	92.00% June 2010	94.00%**	On Track**	N/A	N/A	N/A

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**Strategic Focus Areas**

Family Support

Autism

Information/  
Communication

**Operational Focus Areas**

Performance  
Contract Measures

**Fiscal  
Compliance**

Organizational  
Development

... continued

**Strategic Actions:**

Topic	Description	Current Progress
1. Implementation of Trailer Bill Language (TBL)	Internal compliance review of implementation of TBL	The TBL Infrastructure Committee continued to meet in 2014 to discuss compliance. POS service data report was completed and reported on at the March 2014 Board meeting and subsequent Town Hall meetings; narrative completed and sent to DDS. SB 946 implemented. CPP requirements implemented and incorporated into ongoing processes. Planning occurred to implement new DDS contract language and various new bills effective in 2014. A review of TBL compliance was completed mid 2014.
2. CPA Audit Corrective Action Plan	Develop corrective action plan from prior CPA audit and implement.	CPA audit findings from prior year were reviewed in preparation for the FY 13/14 CPA audit conducted in 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 the DDS fiscal audit of FY 11/12 and 12/13 in March 2014. The draft DDS audit report was expected by the end of 2014 but has not yet been received.
4. POS Projections	Submit monthly POS projections to DDS in accordance with instructions and current data.	The monthly POS projection was submitted timely 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 13/14 primarily in staffing costs, health insurance and rent allowed for \$600K contribution towards the 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.	TCRC auditors completed nine (9) audits in FY 13/14 meeting DDS vendor audit requirements. Completed audits included five (5) billing, two (2) staffing, one (1) cost verification and one (1) personal and incidental. FY 14/15 vendor audit plan implemented. Audit Team meets at least every 2 months or sooner, if needed.



**Strategic Focus Areas**

Family Support

Autism

Information/  
Communication

**Operational Focus Areas**

Performance  
Contract Measures

**Fiscal  
Compliance**

Organizational  
Development

... continued

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.	End of year CDER Currency for TCRC was 99.81%. DDS is in process of revising methodology for ESR compliance.
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.	Last DDS ESR result from 2010 - DDS is revising the indicator for measure and will combine four elements of the ESR to arrive at an IFSP Development composite score for each regional center. New methodology not yet received.



**Strategic Focus Areas**

Family Support

Autism

Information/  
Communication

**Operational Focus Areas**

Performance  
Contract Measures

Fiscal  
Compliance

**Organizational  
Development**

## 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? <b>Outcome Measures</b>	Baseline (EOY 2012)	2014 Desired Outcome	2014 End of Year	2014 State Average	2014 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.	Implement the Model.	Revised Performance Review ready to Implement.	N/A	N/A	Met

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**Strategic Focus Areas**

Family Support

Autism

Information/  
Communication

**Operational Focus Areas**

Performance  
Contract Measures

Fiscal  
Compliance

**Organizational  
Development**

... continued

**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.	Focus groups were conducted in 2013 at every TCRC office location to gather input from staff. Suggestions were reviewed by the Focus Area Workgroup with input from Directors, Assistant Directors, Leadership Team and SEIU.
2. Proposal of Revisions for Performance Review Process	Propose revisions to the Performance Review Process.	A revised Performance Review document, reflective of staff input was reviewed and approved by Directors.
3. Revise Materials	Revise existing materials and platform for implementation of revised Performance Review Process.	In Q2 2014, a pilot test was performed using ADP as a platform for online administration of the performance review process. ADP did not meet the requirements for the project, therefore alternative methodologies were explored using existing technology and resources. Directors approved a process utilizing Box and DocuSign
4. Training	Develop training to support managers and staff to implement revised Performance Review Process.	A training guide will be developed when Box and DocuSign processes are finalized. HROD will be delivered in February 2015.
5. Implement changes	Implement Performance Review Process, solicit feedback and modify according to results.	All staff will be trained in February, 2015 to use the revised Performance Review beginning with the Planning Cycle for 2015. Feedback will be collected after the Planning Review and 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.