

CUSTOMER/STAKEHOLDER PERSPECTIVE							
	Engaging Communities						Target
Goal	Measurable objectives	Leader	2017 Actual	2018 Projected	2019	2020	2021
<b>Community Engagement:</b> Create meaningful impact in our community by listening to stakeholders, responding to needs, and building relationships.	<b>1. Increase the number of people we serve - total agency</b>	<b>Lance</b>	<b>16,693</b>	<b>16,868</b>			
	a. Number of people served thru Program Services (+5%)	Teri	14,491	14,491	15,216	15,976	16,775
	b. Number of people served outside Montgomery County (+10%)	Teri	4,468	6,020	6,622	7,284	8,013
	c. Number of veterans served. (+5%)	Teri	814	642	674	708	743
	d. Number served thru funding sources	Teri					
	OOD	Teri	676	484	track	track	track
	DD Waivers	Teri	361	334	track	track	track
	Clinical Behavioral Health Services (+5%)	Teri	398	473	497	521	548
	JFS Depts	Teri	4,650	1,603	track	track	track
	People relocated thru Home Choice - maintain caseload	Teri	241	205	205	205	205
	e. Number of youth 14 - 24 served	Teri			track		
	f. Number of Veterans placed/hired through Veterans Connection (cumulative)	Dave	1,670	1970	2170	2345	2495
	g. Case Management, Number of Veterans served (contact aside from placements)	Dave	79	250	300	300	300
	h. Number of individuals served in digital skills (level 2 - 5) or certification programs	Teri			track	track	track
	<b>2. Improve long-term impact of our services on peoples lives.</b>	<b>Teri</b>					
	a. Average score on Arizona Self-Sufficiency Matrix	Teri	3.5	3.4	track	track	track
	b. Number of people Placed	Teri	994	1,062	1,115	1,171	1,229
	Wage Per Hour (Average) - Program Services	Teri		10.49	track	track	track
	Hours Per Week (Average) - Program Services	Teri		27.67	track	track	track
	c. Average Retention Rate of Placements				track	track	track
	Program Services	Teri	56%	58%	60%	60%	60%
	d. Miami Valley Works						
	Number of people served	Rick	168	176	185	194	202
	Number of people placed (unduplicated)	Rick	87	92	92	97	101
	Wage Per Hour (Average)	Rick	\$10.97	\$11.26	track	track	track
	Annualized Earnings for Employed Members	Rick	\$4.6M	\$5.6M	track	track	track
	One - Year Retention - Continuous Employment	Rick	101	144	151	159	166
Members achieving Self-Sufficiency (>200% FPG)	Rick		65	68	72	75	
<b>3. Employ more people with disabilities agency-wide</b>	<b>Nicole</b>	<b>48%</b>	<b>51%</b>	<b>51%</b>	<b>51%</b>	<b>51%</b>	
a. Number/% employees in Bus Svcs who have a disability	Dave	154/82%	211/81.5%	218/80%	239/81%	262/82%	
b. Number/% employees in Retail who have a disability	Matt	286/49%	260/42.7%	285/45%	305/47%	323/49%	
c. Number/% employees in Program Svcs who have a disability	Teri	109/31%	102/30.6%	103/31.5%	107/31.5%	112/32%	
d. Number/% employees in Facilitator who have a disability	Leo	20/30%	19/28.6%	21/29.5%	22/30%	22/30.5%	
Total	Nicole	569	592	627	658	691	
<b>4. Increase customer satisfaction levels, across all groups</b>	<b>Steve N./Dawn</b>	<b>4.59</b>	<b>4.59</b>				
a. Retail customers highly satisfied	Matt	4.46	4.46	4.48	4.5	4.52	
b. Retail donors highly satisfied	Matt	4.91	4.91	4.93	4.95	4.97	
c. Vehicle donors highly satisfied	Matt	4.66	4.66	4.68	4.7	4.72	
d. Vehicle auction customers highly satisfied	Matt	3.87	3.87	3.89	4.01	4.03	
e. Volunteers 1-5 scale	Kathy	4.79	4.70	4.70	4.70	4.70	
f. Business Services customers: 1-5 scale	Dave	4.25	4.25	4.25	4.25	4.25	
g. Referral sources: 1-5 scale	Teri	4.61	4.61	4.65	4.65	4.65	
h. People served: 1-5 scale	Teri	4.82	4.82	4.80	4.80	4.80	
i. Families of people served: 1-5 scale	Teri	5.00	5.00	4.80	4.80	4.80	
j. Miami Valley Works - Employer Survey: 1-5 scale	Rick	4.79	4.79	0	0	0	
<b>5. Increase ratings from Secret Shopper/Donor Program</b>	<b>Matt</b>						
a. Retail experience	Matt	4.55	4.55	4.56	4.58	4.6	
b. Donation Ratings - Stores	Matt	4.55	4.42	4.5	4.52	4.56	
c. Donation Ratings - ADC's	Matt	4.60	4.35	4.4	4.45	4.5	
<b>6. Develop/conduct customer service training for all employees.</b>	<b>Nicole</b>			<b>Achieved</b>			
a. Include Customer Service messaging as part of bi-monthly Roadmap newsletter	Steve N.	6	6	6	6	6	
b. Include Customer Service messaging as part of weekly electronic communication	Steve N.	26	26	26	26	26	

<b>7. Increase number of used goods donors</b>	<b>Matt</b>	<b>727,448</b>	<b>727,448</b>	<b>749,271</b>	<b>771,750</b>	<b>794,902</b>	
				3%	3%	3%	
<b>8. Increase Auto Auction Donations</b>	<b>Steve N.</b>						
Lima market	Steve N.	35	30	32	35	40	
Miami Valley market	Steve N.	1,389	1,100	1,150	1,200	1,250	
<b>9. Increase computer donations (lbs)</b>	<b>Dave</b>	<b>2.2M lbs</b>	<b>723,000</b>	<b>730,000</b>	<b>750,000</b>	<b>775,000</b>	
<b>10. Increase media exposure</b>	<b>Steve N.</b>						
Total number of media impressions (millions)	Steve N.	15.6	16.4	16.8	17.2	17.6	
Number earned impressions (positive)	Steve N.	5.2	5.5	5.8	6.1	6.4	
Earned impressions value score ave (8 pt scale)	Steve N.	6	6.3	6.5	6.8	6.8	
Number unearned impressions (positive)	Steve N.	10.4	10.9	11.0	11.1	11.2	
Unearned impressions value score ave (8 pt scale)	Steve N.	2.6	3.0	2.2	1.9	1.6	
Mission-based stories	Steve N.	50	53	55	57	60	
<b>11. Link mission to our brand with targeted groups</b>	<b>Steve N.</b>						
a. Shoppers citing Mission Sevices (Disabilities, Employment, etc.)	Steve N.	49%	49%	51%	53%	55%	
b. Used goods donors citing Mission Services.	Steve N.	58%	58%	60%	62%	64%	
<b>12. Communicate Mission through increased use of GESMV's website and social media.</b>	<b>Steve N.</b>						
a. Increase use of all GESMV Websites	Steve N.						
Unique visitors to all websites YTD	Steve N.	82,765	85,000	87,500	90,000	92,000	
Total visits to all websites YTD	Steve N.	181,869	198,000	203,000	206,000	209,000	
b. Increase Shari's blog Page Views	Steve N.	5,232	5,600	5,800	6,000	6,200	
c. Increase Social Media presence	Steve N.						
Implement strategy developed by Marketing & Social Media consultant	Steve N.	N/A	N/A	develop metrics	Baseline	3% increase	
Facebook referrals to gesmv.org	Steve N.	2,770	3,144	3500	3875	4100	
<b>13. Increase GESMV mission awareness through community engagement</b>	<b>Kathy</b>						
Increase volunteer engagement - unduplicated count	Kathy	911	830	830	830	830	
Long-term recurring (cumulative)	Kathy	539	540	track	track	track	
Short-term engagements (cumulative)	Kathy	64	70	track	track	track	
One-time (cumulative)	Kathy	308	220	track	track	track	
Tours/visits with donors and prospects (Kathy/Caryl/Mandy)	Kathy	555	560	575	600	625	
Point of Entry or Re-entry events/attendees	Kathy	25 with 887	26 with 1097	25 with 850	26 with 1100	25 with 850	
Increase presentations to the community	Steve	188	150	155	160	165	
<b>14. Include mission messages in employee communication to educate staff and help them become more knowledgeable ambassadors for the agency</b>	<b>Steve N.</b>						
Include mission information in monthly Roadmap	Steve N.	6	6	6	6	6	
Include mission information in weekly electronic communication	Steve N.	26	26	26	26	26	
<b>15. Develop natural partnerships to increase fundraising efforts</b>							
Increase number of President's Council members (\$1000+/yr)	Kathy	177	182	182	183	183	
Percentage of trustees in PC	Kathy	78%	92%	92%	92%	92%	
Vendors in PC	Kathy	27	30	30	30	30	
Volunteers in PC	Kathy	36	40	40	40	40	
Total donors \$100+	Kathy	375	394	394	394	394	
Increase employees in Leadership Circle	Kathy	75	78	79	80	81	
Increase members in Edgar Society	Kathy	34	35	36	37	38	

FINANCIAL PERSPECTIVE							
		Financial Capacity				Target	
Goal	Measurable objectives	Leader	2017 Actual	2018 Projected	2019	2020	2021
<b>Financial Capabilities:</b> Enhance our mission through improving our financial position and strengthening our financial capacity.	<b>1. Increase agency borrowing capacity</b>	<b>Leo</b>	<b>\$20.1 M</b>	<b>\$22.1 M</b>	<b>0M</b>	<b>0M</b>	<b>0M</b>
	a. Improve agency-wide margin (E/R)	Lance	97%	98.50%	97%	96%	95%
	b. Improve retail margin (E/R)	Matt	74.06%	76.0%	75.5%	75.0%	74.5%
	c. Improve Business Services margin (E/R)	Dave	94%	99.0%	95%	94%	92%
	d. Improve Program Services margin as needed by agency	Teri	105.39%	103.00%	101%	100%	100%
	e. Administrative cost no higher than 15%	Leo	14%	14.30%	14%	14.0%	14%
	<b>2. Increase Program Services revenue</b>	<b>Teri</b>	<b>\$11,085,727</b>	<b>\$10,240,000</b>	<b>11,053,000</b>	<b>11,384,590</b>	<b>11,726,128</b>
	a. Employment Services	Teri	\$5,019,784	\$1,550,000	1,567,000	1,614,010	1,662,430
	b. Vocational Services	Teri		\$2,800,000	3,339,000	3,439,170	3,542,345
	c. Senior Services	Teri	\$2,477,602	\$2,000,000	2,060,000	2,121,800	2,185,454
	d. Children Services	Teri	\$327,071	\$190,000	130,000	133,900	137,917
	e. Behavioral Health Services	Teri	\$599,869	\$900,000	1,080,000	1,112,400	1,145,772
	f. Developmental Disability Services	Teri	\$2,644,814	\$2,800,000	2,877,000	2,963,310	3,052,209
	<b>3. Increase Business Services revenue</b>	<b>Dave</b>	<b>\$5,703,118</b>	<b>\$5,938,332</b>	<b>\$5,600,000</b>	<b>\$6,200,000</b>	<b>\$6,500,000</b>
	a. Increase E-Cycling Revenue	Dave	\$415,000	\$270,362	\$325,000	\$375,000	\$425,000
	<b>4. Increase Retail revenue</b>	<b>Matt</b>	<b>\$29,903,210</b>	<b>\$30,248,000</b>	<b>\$31,055,000</b>	<b>\$32,787,049</b>	<b>\$34,056,055</b>
	a. Increase same store sales	Matt	-3.80%	\$0	\$0	\$0	\$0
	b. Retail revenue per household	Matt	45.38	\$46	\$47	\$50	\$52
	c. Open new stores	Matt	2	\$0	\$4	\$2	\$2
	<b>5. Work with Board and Board Development Committee to increase total philanthropic contributions</b>	<b>Kathy</b>	<b>\$945,310</b>	<b>\$1,371,643</b>	<b>\$1,032,000</b>	<b>\$1,422,000</b>	<b>\$1,066,000</b>
	a. Donations from individuals	Kathy	\$466,241	\$460,020	\$420,500	\$430,000	\$449,000
	Board campaign	Kathy	\$22,250	\$20,000	\$22,500	\$15,000	\$25,000
	Employee campaign	Kathy	\$70,003	\$78,000	\$80,000	\$82,000	\$84,000
	UW designations (donor choice)	Kathy	\$10,893	\$12,000	\$12,000	\$13,000	\$14,000
	Gifts through Round-up/DGR	Kathy/Matt	\$74,458	\$140,000	\$150,000	\$160,000	\$170,000
	2020 Fundraising Event Individual Sponsors	Kathy	\$4,040	\$18,080	\$6,000	\$20,000	\$6,000
	Other annual gifts from Individuals	Kathy	\$192,726	\$120,000	\$130,000	\$140,000	\$150,000
Bequests	Kathy	\$91,871	\$71,940	\$20,000	track	track	
b. Donations from Organizations	Kathy	\$479,069	\$911,623	\$611,500	\$992,000	\$617,000	
UW allocations	Kathy	\$18,839	\$17,000	\$17,000	\$37,000	\$37,000	
Other Sponsorships or corporate gifts	Kathy	\$72,788	\$60,000	\$65,000	\$65,000	\$70,000	
Grants from Corporations and their foundations	Kathy	\$193,000	\$205,500	\$204,500	\$205,000	\$205,000	
Grants from Private Foundations	Kathy	\$160,482	\$556,623	\$280,000	\$610,000	\$260,000	
2020 Fundraising Event Corporate Sponsors	Kathy	\$33,960	\$72,500	\$45,000	\$75,000	\$45,000	
c. Donations to MVW	Kathy	\$132,500	\$500,550	\$200,000	\$500,000	\$200,000	
d. Increase unrestricted contributions	Kathy	\$314,898	\$240,000	\$250,000	\$260,000	\$270,000	
<b>6. Financing/Cost Improvement</b>							
a. Achieve Cost Savings via CRI/Other	Leo	\$560,000	\$167,891	\$200,000	\$250,000	\$275,000	

INTERNAL PROCESS PERSPECTIVE								
Operational Capacity		Target						
Goal	Measurable objectives	Leader	2017 Actual	2018 Projected	2019	2020	2021	
<b>Operational Capabilities: Build our operational capabilities through a commitment to continuous improvement.</b>	<b>1. Improve safety performance</b>	<b>Leo</b>						
	a. Decrease lost days per 100 workers	Leo	4.03	15.27	0.00	0.00	0.00	
	Retail	Matt	3.62	14.46	0.00	0.00	0.00	
	Program Services	Teri	0.00	15.68	0.00	0.00	0.00	
	Business Services	Dave	14.29	0.00	0.00	0.00	0.00	
	Facilitator	Leo	0.00	0.00	0.00	0.00	0.00	
	b. Decrease OSHA recordables per 100 workers	Leo	1.60	1.61	1.66	1.66	1.66	
	Retail	Matt	1.55	1.05	1.74	1.74	1.74	
	Program Services	Teri	1.41	1.04	1.47	1.47	1.47	
	Business Services	Dave	2.65	1.20	2.02	2.02	2.02	
	Facilitator	Leo	0.00	0.00	0.00	0.00	0.00	
	c. Decrease BWC claims per 100 workers	Leo	2.18	2.68	1.81	1.81	1.81	
	Retail	Matt	2.24	3.10	1.89	1.89	1.89	
	Program Services	Teri	1.97	3.41	2.03	2.03	2.03	
	Business Services	Dave	3.17	1.81	1.84	1.84	1.84	
	Facilitator	Leo	0.00	0.00	0.00	0.00	0.00	
		<b>2. Increase revenue and reduce cost from after-market retail goods</b>	<b>Matt</b>					
		a. Net revenue from after-market retail goods	Matt	\$2,334,065	\$2,450,000	\$2,523,500	\$2,599,205	\$2,677,181
		b. Pounds of trash (M lbs)	Matt	12	12.0	12.0	12.0	12.0
		<b>3. Maintain and expand qualitative initiatives</b>	<b>Dawn</b>			<b>Achieved</b>		
		a. Achieve ISO 9001-2008 - with no major non-conformances	Dawn	0	3 minor	0	0	0
		b. Achieve CIMS Certification - with no non-conformances	Dawn	0	0	0	0	0
		c. Achieve CARF Certification - with 3 or less recommendations	Dawn	N/A	N/A	3 or less recommendations	N/A	N/A
		<b>4. Expand continuous improvement efforts</b>						
	a. Data Analytics (DOMO)-Program Services-Cards	Matt	0	100	150	200	250	
	b. Data Analytics (DOMO)-Business Services-Cards	Matt	0	15	25	50	75	
	c. Data Analytics (DOMO)-Retail-Cards	Matt	0	200	300	350	400	
	d. Data Analytics (DOMO)-Lance-Cards	Matt	0	0	3	3	3	
	e. Data Analytics (DOMO)-Sage-Cards	Matt	0	0	10	20	30	
	f. Auto generated KPI boards	Matt	0	4	7	7	7	
	g. Back room production flow (w/new locations)	Matt	2	3	10	20	35	
	h. Identify social enterprise opportunities	Matt	0	1	2	2	2	

LEARNING & GROWTH PERSPECTIVE								
Goal	Measurable objectives	Leader	2017 Actual	2018 Projected	Target			
					2019	2020	2021	
Provide an environment of learning and growth by creating opportunities for people to become their best selves.	<b>1. Improve employee satisfaction (1-5 scale)</b>							
	a. Improve score on employee satisfaction survey (overall)	Nicole	N/A	3.66	3.8	4.0	4.0	
	Retail	Matt	N/A	3.66	3.8	4.0	4.0	
	Program Services	Teri	N/A	3.50	3.7	3.8	3.9	
	Business Services	Dave	N/A	3.78	4.0	4.0	4.0	
	Facilitator	Leo	N/A	3.73	3.9	4.0	4.0	
	b. Improve score on communications portion of employee survey (overall)	Steve N.	3.91	3.39	3.6	3.7	3.9	
	c. Improve score on internal customer service survey (overall)	Nicole	4.16	not done	4.19	4.22	4.25	
	Facilitator division	Leo	4.24	not done	4.25	4.26	4.27	
	Operating divisions							
	Retail	Matt	4.05	not done	4.1	4.15	4.2	
	Program Services	Teri	4.03	not done	4.1	4.15	4.2	
	Business Services	Dave	4.06	not done	4.1	4.15	4.2	
		<b>2. Increase support services for employees</b>	<b>Nicole</b>					
		Employees receiving any support service (undupl)	Nicole	278	402	370	388	400
		Retail	Nicole	100	324	295	303	308
		Program Services	Nicole	110	14	20	25	27
		Business Services	Nicole	45	45	45	47	49
		Facilitator	Nicole	23	8	10	13	16
		Employees receiving career development service (dupl)	Nicole	117	278	270	291	306
		Retail	Nicole	38	243	140	150	155
		Program Services	Nicole	45	6	60	62	65
		Business Services	Nicole	22	26	50	55	58
		Facilitator	Nicole	15	3	20	24	28
		Employees enrolled in career development activity	Nicole	76	2	145	240	368
		Certification-level training	Nicole	40	2	40	85	175
		Degree-level program	Nicole	16	0	5	5	5
		Employees completing career development activity	Nicole	58	0	101	168	257
		Certification-level training	Nicole	37	0	32	68	24
		Degree-level program	Nicole	8	0	4	5	8
		Skills to Succeed Academy	Nicole	n/a	n/a	100	150	188
	<b>3. Increase number of employees participating in wellness initiatives</b>	<b>Nicole</b>	<b>n/a</b>	<b>n/a</b>	150	225	250	
	By division							
	Retail	Nicole	n/a	n/a	57	75	86	
	Program Services	Nicole	n/a	n/a	48	75	82	
	Business Services	Nicole	n/a	n/a	20	40	42	
	Facilitator	Nicole	n/a	n/a	25	35	40	
	By activity (duplicated)		741	338				
	Smoking cessation	Nicole	75	2	5	5	5	
	Weight reduction	Nicole	165	80	82	85	88	
	Exercise program	Nicole	205	135	135	135	140	
	Other wellness	Nicole	297	116	120	125	130	
	<b>4. Increase employee development for high potential managers</b>	<b>Nicole</b>						
	a. Number of employees assessed during talent assessment	Nicole	N/A	36	40	45	50	
	b. Number of employees with targeted development plan	Nicole	N/A	11	13	15	17	
	c. Number of employees - satisfactorily progressing target DP	Nicole	N/A	11	10	11	13	