



# Continuous Quality Improvement Report (CQI) 2025 - 2026

CHAUTAUQUA OPPORTUNITIES, INC.

CHAUTAUQUA OPPORTUNITIES FOR DEVELOPMENT, INC.

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# MISSION STATEMENTS

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## Chautauqua Opportunities, Inc.

*“Helping People ... Changing Lives.”*

*“COI ... leading the fight against poverty by mobilizing resources and creating partnerships to promote empowerment, economic independence and opportunities.”*

## Chautauqua Opportunities for Development, Inc.

*“Helping Businesses ... Creating Opportunities.”*

*“CODI ... leading the fight against poverty by mobilizing resources and creating partnerships to promote and create economic independence through business development and opportunities.”*

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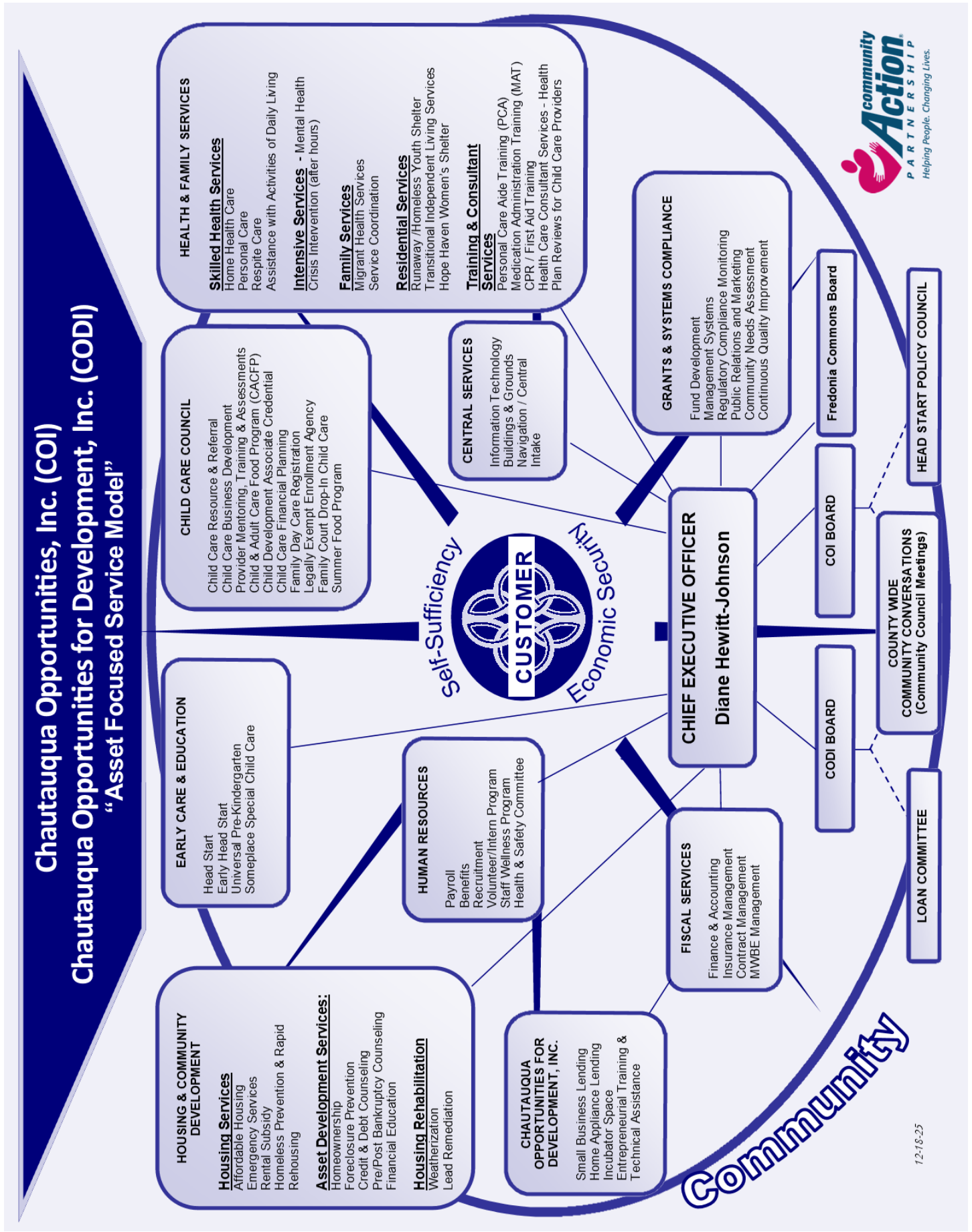
Chautauqua Opportunities, Inc. combats poverty in Chautauqua County by creating a pathway for low-income and at-risk families and individuals to work toward greater self-sufficiency and a better quality of life.

### **COI works to reduce and alleviate the impact of poverty through:**

- ▶ promoting personal success and financial stability
- ▶ empowering people toward greater self-sufficiency
- ▶ promoting asset development for individuals and the community
- ▶ promoting the development and expansion of small businesses
- ▶ promoting and developing proactive health habits
- ▶ fostering children’s school readiness and well-being
- ▶ promoting responsible usage of energy resources
- ▶ promoting access to affordable childcare
- ▶ promoting access to affordable housing



# ORGANIZATIONAL CHART



# AGENCY OVERVIEW

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Chautauqua Opportunities, Inc. (COI) is a not-for-profit multi-service organization that has been serving the low income population of Chautauqua County, NY since 1965. COI is one of a network of 47 Community Action Agencies across NY State, and over 1,000 across the country, who work to alleviate poverty for low and moderate income individuals.

COI's services are designed to create opportunities that improve the economic situation and well-being of Chautauqua County residents. COI's services are grouped into the following divisions: Early Care and Education, Health and Family Services, Housing and Community Development, and the Chautauqua Child Care Council. Chautauqua Opportunities for Development, Inc. (CODI) is the agency's economic development affiliate that provides technical assistance and loan capital for new or expanding businesses.

## COI & CODI

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- ▶ Intake approximately 3,000 households each year
- ▶ Offer comprehensive access to services
- ▶ Have a combined annual budget of about \$20,000,000
- ▶ Have 214 staff members; 164 full-time staff, 13 part-time staff, and 35 as needed staff

## COI is a:

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- ▶ Community Development Corporation
- ▶ Registered charity in NY State
- ▶ NYS designated Rural Preservation Company
- ▶ Licensed child care provider
- ▶ Licensed Home Care Agency
- ▶ Personal Care Aide Training Provider
- ▶ HUD certified Housing Counseling Agency
- ▶ Licensed Runaway and Homeless Youth Shelter Provider
- ▶ US Department of Justice Budget & Credit Counseling Agency and Provider of Debtor Education

## CODI is a:

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- ▶ Community Development Financial Institution (CDFI)
- ▶ Community Development Entity (CDE)

# EXECUTIVE SUMMARY

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Chautauqua Opportunities, Inc. (COI) first implemented a Continuous Quality Improvement process in the year 2000 to bring a unified system for soliciting feedback that involves all stakeholders. The Continuous Quality Improvement Report can be seen as part of a larger, ongoing management system of self-assessment, gaps analysis, community feedback, community assessment, and strategic planning that drives COI's and CODI's program development and management. All of COI's and CODI's services are designed to respond to identified needs in the community and this CQI process is an integral part of the on-going planning and assessment process. Several changes have been made over the years as a result of the CQI process that increase the efficiency of agency operations and improve customer satisfaction. The summaries below offer a snapshot of survey results and how the agency is responding to identified areas for improvement.

## 2025 - 2026

- ▶ At least 95.9% of customers rated each criterion on the survey as either “Excellent” or “Satisfactory”.
- ▶ 100% of Board members rated each area on the survey as either “Agree” or “Strongly Agree”.
- ▶ The percent of employees having confidence in COI's leadership team rose by 11 percentage points.
- ▶ The percent of employees who are very satisfied with COI's benefits package is 15 percentage points higher than the benchmark for similar agencies.
- ▶ Increased communication activities will include monthly virtual open discussion sessions with HR.
- ▶ Employees who are promoted or have lateral position changes within COI will be listed on the Employee Intranet along with new employees.
- ▶ Agency capacity to take on new initiatives will be more heavily weighted when new programs are being considered.
- ▶ Grant awards will be announced throughout the agency as they occur to keep all staff informed of programming throughout the agency.
- ▶ The CEO and Director of Early Care and Education will increase presence at ECE staff meetings and visits to Head Start sites.

## 2024 - 2025

- ▶ At least 95.9% of customers rated each criterion on the survey as either “Excellent” or “Satisfactory”. Comments were overwhelmingly positive, with most thanking COI for the service.
- ▶ 100% of Board members rated each area on the survey as either “Agree” or “Strongly Agree”.
- ▶ 90% of employees say that their job makes them feel a part of something meaningful.
- ▶ The positive rating for employees feeling “There is good interdepartmental cooperation at COI” increased by 8 percentage points over the previous year survey.
- ▶ The positive rating for employees feeling that “At COI we do things efficiently and well” increased by 7 percentage points over the previous year survey.
- ▶ The positive rating for employees feeling that “My supervisor cares about my concerns” increased by 5 percentage points over the previous year survey.
- ▶ The need for communication is a recurring theme. Managers should have a system of communicating information to the staff they supervise (e.g. regular emails, staff meetings, division newsletter, etc..).

# METHODOLOGY

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Chautauqua Opportunities, Inc. and Chautauqua Opportunities for Development, Inc. are committed to bringing the highest possible level of service to their customers. To ensure quality across programs, a Continuous Quality Improvement (CQI) system is in place consisting of 360 degree feedback from both internal and external sources. When results are below the threshold, a plan is developed with specific action steps to address issues. These areas are monitored, board approved and made public to ensure the action plan is being carried out as intended. A brief description of the process follows.

## Internal Surveys

- **Employee Surveys:** An employee survey is distributed agency-wide and completed in the fall of each year to assess staff satisfaction with working conditions. Beginning in 2022, COI replaced the previous in-house survey with an evidence-based survey from a company called Energage. A list of employees that includes the division, supervisor, management/ non-management, and the employee's email address is sent to Energage, and surveys are sent directly to each employee's email address by Energage to ensure confidentiality. The survey consists of 26 statements that are rated by each employee on a 7-point scale. Questions that allow the employee to comment are generated based on their ratings. Management and non-management employees take the same survey, although results can be separated by this criterion as well as by division.

Benchmarks are provided by Energage for each statement that can be used for comparison. These are the average positive responses (total of Slightly Agree, Agree, and Strongly Agree) given by 99 other mid-size Human and Social Service organizations. These benchmarks are shown in the survey results presented in this report, replacing the 85% satisfaction threshold previously used for the employee/management survey. Survey results and comments were reviewed by Senior Managers to identify focus areas for improvement. Action Plans are not finalized until additional feedback is obtained through the Focus Group process.

Based on the results of the employee surveys, COI was rated as a Top Work Place by the Buffalo News in 2023 and 2024, and again in 2026. The designation is awarded to about 20 companies in the Western NY region.



# Focus Groups and External Surveys Methodology

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- ▶ **Focus Group Meetings:** The Chief Executive Officer and division Directors met with all staff using a focus group format. Two Focus Group sessions were held virtually in December of 2025 and all staff were mandated to attend at least one session. The purpose of these meetings is to report on the results of the fall employee survey, gather additional feedback, and address areas of concern. Additional Focus Groups were then held by each division and by the management team. Information from the surveys and the Focus Groups is compiled into this report.
- ▶ **Board of Director Surveys:** Board members of both Chautauqua Opportunities, Inc. and Chautauqua Opportunities for Development, Inc. receive surveys through email. Survey results are then summarized and compiled into a summary report that is reviewed by the Chief Executive Officer. An action plan is developed for areas with less than an 85% satisfaction rating.
- ▶ **Customer Surveys:** Customer surveys are collected on an ongoing basis and are available in both English and Spanish. Each customer is encouraged to fill out a survey after accessing services. Surveys may be completed electronically or on paper. Each division reviews the results quarterly and prepares a response (action plan) for any area scoring below an 85% satisfaction rating, or in response to any concerns noted in the comment section. The results and action plans are then shared with staff in that service area and division and monitored with the goal of improved customer service. The results are summarized annually and reviewed by the Chief Executive Officer, Senior Management and the Board.
- ▶ **Funder and Partner Surveys:** Funders and community partners are sent surveys on alternating years, allowing for both quantitative and narrative feedback regarding specific services, contracts, and timelines of reporting. Results are summarized and management develops an action plan with specific action steps for areas falling below an 85% satisfaction rating. In 2025, partners were surveyed via an electronic survey (Survey Monkey) allowing respondents to easily access, complete, and return the survey with minimal time spent. A total of 39 surveys were sent, with 8 surveys completed. All areas relating to the COI representative's responsiveness and progress toward the goals of the partnership were rated as satisfactory or higher.

Comments received included the following:

Is your agency receiving additional benefits as a result of this partnership?

- ▶ Higher quality care for children.
- ▶ Better connections with other programs within COI.
- ▶ Helps us to serve community and as many families as possible.
- ▶ The benefit to us is the manpower and the community we are working with is also involved in the programs.

Please provide any additional suggestions for improvement or expansion of the partnership.

- ▶ Consider running emotional regulation groups for the children and staff.
- ▶ We value our relationship with the agency and the staff member is an invaluable resource!
- ▶ I would like to get each person who is involved in the program food handler certified.

This Continuous Quality Improvement report is compiled annually and submitted to the Board for review and final approval. The approved Continuous Quality Improvement Annual Report is then made available publicly on the agency website.

# CUSTOMER SURVEY



## CHAUTAUQUA OPPORTUNITIES, INC Customer Survey

What service did you participate in today? \_\_\_\_\_ Today's Date: \_\_\_\_\_

Please mark the location where you received services:

<input type="checkbox"/> Connections North 10825 Bennett Rd. Dunkirk	<input type="checkbox"/> Laughlin Community Action Center 402 Chandler St. Jamestown	<input type="checkbox"/> Medical Appointment/Facility
<input type="checkbox"/> Children's Center Mayville Family Court	<input type="checkbox"/> Early Childhood Community Center 1020 Central Ave. Dunkirk	<input type="checkbox"/> Clean Office, Cattaraugus County
<input type="checkbox"/> Holy Family Center 1135 Main St. Jamestown	<input type="checkbox"/> Transitional Independent Living Program Jamestown	<input type="checkbox"/> Home
<input type="checkbox"/> School	<input type="checkbox"/> Transitional Independent Living Program Dunkirk	<input type="checkbox"/> Event in the Community
<input type="checkbox"/> Other: _____	<input type="checkbox"/> The Safe House, Jamestown	<input type="checkbox"/> Virtual

Please rate your experience with the following:	Excellent	Satisfactory	Needs Improvement	Poor	Don't know/ Does not Apply
Waiting time to initial appointment.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bilingual staff were available (if needed).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Confidentiality of customer information.</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your overall experience with this service.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your overall experience with COI.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Please give us your feedback on the Following statements:	Strongly Agree	Agree	Disagree	Strongly Disagree	Don't know/ Does not Apply
The service has met (or will meet) my needs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I was treated fairly.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Services were explained clearly.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staff responded in a timely manner.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Do you have any suggestions for improvement?</b>					
<b>Do you need other services that are not currently available?</b>					



Scan the QR code to take the survey  
on your computer or phone

**Thank you for your feedback!**

# CUSTOMER SURVEY



**CHAUTAUQUA OPPORTUNITIES, INC**  
Encuesta al cliente

¿En cual servicio o programa participaste aquí hoy? \_\_\_\_\_ Fecha de hoy: \_\_\_\_\_

Marque la ubicación donde recibió los servicios:

<input type="checkbox"/> Connections North 10825 Bennett Rd. Dunkirk	<input type="checkbox"/> Laughlin Community Action Center 402 Chandler St. Jamestown	<input type="checkbox"/> Cita médica/local
<input type="checkbox"/> Children's Center Mayville Family Court	<input type="checkbox"/> Early Childhood Community Center 1020 Central Ave. Dunkirk	<input type="checkbox"/> Clean Office, Cattaraugus County
<input type="checkbox"/> Holy Family Center 1135 Main St. Jamestown	<input type="checkbox"/> Transitional Independent Living Program Jamestown	<input type="checkbox"/> Su Casa
<input type="checkbox"/> Escuela: _____	<input type="checkbox"/> Transitional Independent Living Program Dunkirk	<input type="checkbox"/> Evento en la comunidad
<input type="checkbox"/> Otra: _____	<input type="checkbox"/> The Safe House, Jamestown	<input type="checkbox"/> Virtual

Califique su experiencia con el siguiente:	Excelente	Satisfactorio	Necesita mejorar	Pobre	No sabe / No se aplica
Tiempo de espera para la cita inicial.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Había personal bilingüe disponible (si era necesario).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Confidencialidad de la información del cliente.</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Su experiencia general con este servicio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Su experiencia general con COI.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Envíenos sus comentarios sobre el Siguiendo instrucciones:	Totalment e de acuerdo	De acuerdo	No estoy de acuerdo	Muy en desacuerdo	No sabe / No se aplica
<b>El servicio ha satisfecho (o satisfará) mis necesidades.</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Me trataron con justicia.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Los servicios se explicaron claramente.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
El personal respondió de manera oportuna.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
¿Tiene alguna sugerencia de mejora?					
¿Necesita otros servicios que no están disponibles actualmente?					



Escanee el código QR para realizar la encuesta en su computadora o teléfono.

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Gracias por sus comentarios!

# CUSTOMER SURVEY SUMMARY

628 customer surveys were received for the period 12/1/2024 - 11/30/2025. The responses are summarized below:

	<b>Excellent</b>	<b>Satisfactory</b>	<b>Needs Improvement</b>	<b>Poor</b>	<b>*Don't know/NA</b>
Waiting time to initial appointment	85.96%	13.48%	.37%	.19%	14.97%
Bilingual staff available (if needed)	81.96%	15.65%	1.86%	.53%	39.97%
Confidentiality of customer information	85.79%	13.67%	.36%	.18%	11.46%
Overall experience with this service	86.28%	12.69%	.86%	.17%	7.17%
Overall experience with COI	85.27%	13.53%	1.03%	.17%	7.01%
	<b>Strongly Agree</b>	<b>Agree</b>	<b>Disagree</b>	<b>Strongly Disagree</b>	<b>*Don't know/NA</b>
The service has met (or will meet) my needs	80.78%	18.33%	.36%	.53%	2.09%
I was treated fairly.	86.61%	13.23%	.16%	0%	1.27%
Services were explained clearly.	86.06%	13.78%	0%	.16%	1.75%
Staff responded in a timely manner.	85.58%	13.94%	.32%	.16%	1.75%

*\*Responses of "Don't know/Not applicable" were not counted in the calculations of the other response columns.*

## Strengths

- ▶ At least 97.61% of customers rated each criterion as either "Excellent" or "Satisfactory".
- ▶ Comments were overwhelmingly positive, with most thanking COI for the service.

## Comments

- ▶ Several customers noted the need for more Personal Care Aides.
- ▶ Customers indicated the need for additional life coaching services, parenting classes and support groups, skills training, support for children with special needs, and financial assistance to prevent foreclosure.

## Response

- ▶ COI is continually actively recruiting PCAs. COI intends to begin providing a PCA Training course in 2026 to increase the home care workforce.
- ▶ COI will continue to search for funding to provide services that address the needs of the community.

# EMPLOYEE SURVEY SUMMARY

	Strongly Disagree	Disagree	Slightly Disagree	Neutral	Slightly Agree	Agree	Strongly Agree
Chautauqua Opportunities, Inc. operates by strong values.	2%	1%	3%	14%	16%	38%	26%
I believe Chautauqua Opportunities, Inc. is going in the right direction.	3%	1%	3%	23%	13%	40%	17%
There is good interdepartmental cooperation at COI.	3%	5%	6%	22%	13%	38%	13%
Overall, I am very satisfied with my job.	2%	2%	2%	18%	13%	37%	26%
COI encourages different points of view.	5%	3%	8%	20%	16%	36%	12%
New ideas are encouraged at COI.	1%	6%	8%	18%	15%	38%	14%
At COI, we do things efficiently and well.	3%	7%	8%	16%	18%	37%	11%
Senior Managers (Directors) understand what is really happening at COI.	6%	2%	8%	19%	14%	34%	1%
My job makes me feel like I am part of something meaningful.	1%	1%	3%	8%	9%	39%	39%
I feel included at COI.	2%	3%	4%	14%	16%	42%	19%
I feel genuinely appreciated at COI.	3%	4%	4%	14%	14%	38%	23%
I feel well-informed about important decisions at COI.	3%	7%	6%	20%	19%	32%	13%
My supervisor cares about my concerns	3%	1%	3%	8%	12%	32%	41%
My supervisor helps me learn and grow.	2%	1%	4%	10%	13%	29%	41%
COI enables me to work at my full potential.	1%	8%	3%	16%	12%	38%	22%
I have the flexibility I need to balance my work and personal life.	3%	3%	5%	6%	12%	38%	33%
I regularly receive helpful feedback about my performance.	4%	2%	6%	17%	8%	40%	23%
COI does a great job of prioritizing employee well-being.	5%	7%	11%	16%	12%	36%	13%
I am very satisfied with my benefits package.	2%	3%	3%	14%	16%	34%	28%
My pay is fair for the work I do.	10%	12%	10%	11%	15%	30%	12%
COI motivates me to give my very best at work.	3%	1%	3%	20%	11%	37%	25%
I would highly recommend working at COI to others.	4%	2%	1%	13%	20%	34%	26%
I rarely consider searching for a job at another location.	7%	8%	10%	20%	11%	22%	22%
I have confidence in the leadership team of COI.	3%	1%	3%	15%	16%	34%	28%
I have frequent opportunities to learn and grow at COI.	3%	3%	4%	17%	12%	41%	20%
My work stress is at a manageable level at COI.	5%	5%	9%	16%	10%	39%	16%

# EMPLOYEE SURVEY SUMMARY

Energage compared the agency’s survey results to benchmarks that are based on average survey results for 99 Human and Social Services organization of similar size. Comparisons are made using the “percent favorable”, which is the sum of all three “Agree” responses.

	2025 COI Percent Favorable	2024 COI Percent Favorable	Human & Social Services Benchmark
Chautauqua Opportunities, Inc. operates by strong values.	80%	82%	87%
I believe COI is going in the right direction.	70%	72%	79%
There is good interdepartmental cooperation at COI.	64%	65%	69%
Overall, I am very satisfied with my job.*	76%	-	82%
COI encourages different points of view.	64%	63%	77%
New ideas are encouraged at COI.	67%	63%	77%
At COI, we do things efficiently and well.	66%	65%	73%
Senior Managers (Directors) understand what is really happening at COI.	65%	59%	71%
My job makes me feel like I am part of something meaningful.	87%	90%	91%
I feel included at COI.	77%	78%	82%
I feel genuinely appreciated at COI.	75%	75%	82%
I feel well-informed about important decisions at COI.	64%	60%	69%
My supervisor cares about my concerns.	85%	81%	86%
My supervisor helps me learn and grow.	83%	79%	82%
COI enables me to work at my full potential.	72%	73%	78%
I have the flexibility I need to balance my work and personal life.	83%	75%	83%
I regularly receive helpful feedback about my performance.*	71%	-	75%
COI does a great job of prioritizing employee well-being.	61%	63%	76%
I am very satisfied with my benefits package.**	78%	55%	63%
My pay is fair for the work I do.	57%	54%	56%
COI motivates me to give my very best at work.	73%	78%	83%
I would highly recommend working at COI to others.	80%	72%	79%
I rarely consider searching for a job at another location. **	55%	49%	58%
I have confidence in the leadership team of COI.	78%	67%	79%
I have frequent opportunities to learn and grow at COI.	73%	71%	74%
My work stress is at a manageable level at COI.	65%	-	73%

\* New questions in 2025.

\*\*Questions revised in 2025 from “My benefits package is good compared to others in this industry” and “I have not considered searching for a better job in past month”.



# FOCUS GROUP DISCUSSIONS

Two virtual Focus Group sessions were held in December 2025 to present the survey results to employees and provide opportunities for discussion. Survey results were sent to employees prior to the meeting and were shared on the screen. All staff members were mandated to attend at least one session. Divisional Focus Groups were then held to discuss divisional survey results. A Leadership meeting was utilized to review survey responses from management. The following tables summarize the issues identified as needing improvement and the agency responses.

Agency Focus Areas		
Focus Area	Discussion	Response or Action Plan
I feel well-informed about important decisions at COI.	<p>Staff would like to have survey results sent to them prior to the Focus Groups.</p> <p>Staff appreciate hearing about customer success stories from all divisions and would like to see more of them.</p>	<p>Survey results will be sent to all staff prior to Agency and Divisional Focus Groups.</p> <p>Customer success stories are published in the quarterly community newsletter and on social media. Customer success stories may be sent to Systems Compliance for publication, and may also be shared in staff meetings and through emails to “everyone”.</p>
COI does a great job of prioritizing employee well-being.	Staff would like more support for dealing with stress, including on the topic of working with challenging clients.	<p>HR has shared information about Bree Health, COI’s Employee Assistance Program provider. This includes their monthly newsletter, and wellness information and resources. Information is also on the employee page of the agency website (Human Resources --&gt;&gt; EAP Information). Log in to Bree Health online at <a href="https://www.nexgeneap.com/loginv2">https://www.nexgeneap.com/loginv2</a></p> <p>Also, HR will begin holding monthly open discussion sessions to provide information and answer employee questions.</p>
My work stress is at a manageable level.	Agency capacity should be carefully considered before new initiatives are implemented.	Management will weigh the effects of implementing new initiatives on current staff more heavily during the initial stages of development.
I am very satisfied with my benefits package.	Some staff feel that the policy that new employees must wait 9 months for a merit raise eligibility is unfair. Since merit raises are only determined in July, someone hired in December would be employed for 21 months before being eligible for a merit raise.	<p>Merit raises are not guaranteed and are based on annual July performance evaluations. New employees become eligible only after completing at least nine months of employment, as this period is considered part of the learning phase. While some employees may wait longer depending on their hire date, the policy will remain unchanged. It aligns with guidance from Society for Human Resource Management and other recognized HR and employment law standards. All employees, regardless of hire date, receive annual cost-of-living adjustments in March, subject to Board approval and available funding.</p>

## Core

(Human Resources, Finance, Grants & Systems Compliance, It & Central Services, CODI)

Focus Area	Discussion	Response or Action Plan
<p>I feel genuinely appreciated at COI.</p>	<p>Employee job changes within the organization should be celebrated whether they are traditional promotions or not. Lateral moves are as important and worthy of celebrating and they demonstrate that COI is invested in seeing professional growth no matter what role someone moves into.</p> <p>Congratulations and “thank you for your service” notices should go out monthly to everyone.</p>	<p>HR currently provides a list of new employees to the Systems Compliance and Marketing Specialist following Orientation for posting on the Employee page of the agency website. Moving forward, the information provided by HR to Systems Compliance will include employees who have changed positions within the agency, either through a promotion or a lateral move.</p> <p>Paylocity has a great feature that encourages connection and recognition for employees. The HR Manager will send out a reminder about the Recognition and Rewards feature to all employees.</p>
<p>COI motivates me to give my very best at work.</p>	<p>Some employees feel that merit raises are not very motivating, since they are always the same regardless of whether you just do your job or go above and beyond.</p>	<p>Non-exempt employees completing their job requirements satisfactorily are rated a “2”, which translates to a 2% raise). If the overall performance rating is higher than 2, a higher merit raise is given. (e.g. an overall rating of 2.5 would yield a 2.5% merit raise. Those who feel their rating is unfair should provide specific reasons to their supervisor.</p>
<p>I feel well-informed about important decisions at COI.</p>	<p>New programs/grant awards should be celebrated by announcing them to everyone in the agency.</p> <p>The completion of large projects, agency or employee recertifications, staff accomplishments, customer success stories, etc...should be announced to the whole agency.</p>	<p>Managers receive this information at Leadership meetings and should be passing it on to their staff. However, grant awards will now be announced through an email to “everyone” by the Grants and Systems Compliance Director as they occur.</p> <p>Directors and Managers should be sending this information to Systems Compliance for social media and the quarterly community newsletter. Directors and Managers are also encouraged to send an email to “everyone” with information such as this that they wish to share.</p>
<p>At COI, we do things efficiently and well.</p>	<p>It is understood that some things are required to be kept as paper files but we should use electronic storage more.</p>	<p>Electronic storage is already being used for many documents (e.g. Google drive, CAPTAIN). Ideas for specific uses of electronic storage should be brought to your supervisor.</p>

## Early Care & Education

Focus Area	Discussion	Response or Action Plan
At COI, we do things efficiently and well.	<p>Staff members noted several process improvements to the CAPTAIN central intake system that are needed.</p> <p>They also noted that the division Google drive needs to be cleaned up, and that the “Next Placement” procedure and form should be revised.</p>	<p>The Family Services and ERSEA Managers will continue to work with the IT Department for improvements to the CAPTAIN system, including the issues raised during discussions.</p> <p>The division management team will work on cleaning up the division Google drive.</p> <p>The “Next Placement” procedure and form have been revised.</p>
I feel well-informed about important decisions at COI.	Staff would like more communication about happenings at COI.	A bulletin board will added near the sign-in book at Holy Family to display weekly emails from division management.
COI motivates me to give my very best at work.	Staff need help from others to feel appreciated and motivated.	Monthly tokens of appreciation will be provided to staff.
I feel genuinely appreciated at COI.	Some team members feel that a lack of presence and communication with the childcare staff by other Senior Managers and the CEO contribute to a feeling of not being appreciated.	<p>Memos will be distributed to everyone by email in addition to posting in the Communication Book. CEO and Senior Management will will attend ECE staff meetings at least annually. CEO will also attend to address agency-wide updates as they occur. CEO will welcome staff for ECE pre-service in-person when possible, or virtually if needed. She will also work with site leaders to schedule at least one visit to each main site annually.</p> <p>HR will be launching monthly virtual meetings to give staff opportunities to ask questions. Private meetings may be set up with HR or the CEO to discuss confidential issues by request.</p>
I feel included at COI.	Staff feel siloed. Increased communication across divisions will strengthen collaboration, morale, and shared mission alignment.	The ECE management team will focus on sharing information from other divisions regularly through staff meetings and memos, and short monthly “inter-division huddles”. Attendance at Community Conversations is encouraged.
COI does a great job of prioritizing employee well-being.	The team at ECCC would like to improve communication, trust, and team cohesion.	Daily team huddles will be implemented to check-in on well-being of all staff and ensure any issues that arose during the day were/are addressed and all team members are kept informed. Daily motivational prompts and a culture of safety reminders will be initiated.

## Child Care Council

Focus Area	Discussion	Response or Action Plan
I have frequent opportunities to learn and grow at COI.	<p>Staff are interested in clearer opportunities for growth, including a potential management or leadership track within the organization. Staff expressed interest in incentives or supports for obtaining degrees or furthering education.</p> <p>Staff expressed a need for greater clarity and consistency in the grading process and evaluation rubric, including how ratings are determined and communicated.</p>	<p>The Director will explore the development of a formal “management track” or career pathway model and identify key competencies and training opportunities needed for advancement. Existing opportunities will be communicated more clearly to staff. Options for tuition assistance, reimbursement programs, or incentive stipends tied to degree completion will be explored with Human Resources.</p> <p>The Director will recommend a review of the current evaluation tool and grading rubric to ensure clarity, consistency, and alignment with job expectations, and collaborate with HR to determine if updates or adjustments to the grading scale or criteria are needed. Supervisors will be provided with guidance and training to support consistent application of the rubric across staff. Transparency will be increased by clearly communicating how ratings are determined and how staff can improve or progress.</p>
I am very satisfied with my benefits package.	Staff shared concerns about the length of time required to reach higher levels of vacation accrual (e.g. the 8-year threshold to accrue 10.5 hours/month).	<p>The Director will review current vacation accrual policy with HR and leadership, including benchmarking against similar organizations.</p> <p>Explore options for more incremental increases in accrual over time rather than large gaps between tiers.</p>
I have the flexibility I need to balance my work and personal life.	Although a selection of alternative work schedules is available, staff would like the option of developing work schedules that are individualized to more closely fit into their personal life schedules.	The Director will discuss with agency management the feasibility of allowing individualized schedules based on role and program needs. Flexible scheduling within select positions or teams could be piloted to assess the impact on operations and service delivery. Clear guidelines would be developed to ensure consistency, accountability, and coverage while allowing flexibility.
My work stress is at a manageable level.	Staff shared concerns about workload balance and the potential for burnout. There is a need to better understand how work is distributed across the team and identify where imbalances may exist.	<p>Staff input will be gathered to identify the challenges that contribute most to workload stress. Workload distribution will be analyzed to identify inequities. Strategies will be developed to better balance workloads during high-demand periods (e.g., seasonal programs, reporting cycles).</p> <p>Opportunities to streamline administrative tasks or reduce duplication will be explored.</p>

## Housing and Community Development

Focus Area	Discussion	Response or Action Plan
I feel well-informed about important decisions at COI.	Staff members highlighted the recently improved communication within the division. Staff explained that honesty, transparency, and open communication makes them feel well informed.	Division management will continue to focus on honesty, transparency, and open communication.

## Health and Family Services

Focus Area	Discussion	Response or Action Plan
I feel genuinely appreciated at COI.	Staff would like more incentives to remind them that they are appreciated.	Health and Family Services will hold quarterly drawings for \$5 Amazon gift cards for employees of the division.
COI motivates me to give my very best at work.	Staff would like more training opportunities to help motivate them to give their best at work.	The division will provide staff with online trainings on topics such as de-escalation, managing stress, and empathy. In-person training will also be provided by the Intensive Services Coordinator on managing mental health.

## LEADERSHIP TEAM ONLY - Survey Summary

The following table illustrates the responses to the Energage survey from the Leadership Team only (Directors, Managers, and Coordinators). The Leadership Team reviewed and discussed these survey responses at their November 2025 meeting. A summary of the discussion appears on the next page.

	2025 Percent Favorable	2024 Percent Favorable	Human & Social Services Benchmark
Chautauqua Opportunities, Inc. operates by strong values.	89%	86%	87%
I believe Chautauqua Opportunities, Inc. is going in the right direction.	74%	83%	79%
There is good interdepartmental cooperation at COI.	63%	79%	69%
Overall, I am very satisfied with my job.*	81%	-	82%
COI encourages different points of view.	63%	66%	77%
New ideas are encouraged at COI.	67%	61%	77%
At COI, we do things efficiently and well.	63%	62%	73%
Senior Managers understand what is really happening at COI.	74%	72%	71%
My job makes me feel like I am part of something meaningful.	96%	96%	91%
I feel included at COI.	85%	89%	82%
I feel genuinely appreciated at COI.	78%	83%	82%
I feel well-informed about important decisions at COI.	81%	86%	69%
My supervisor cares about my concerns.	78%	83%	86%
My supervisor helps me learn and grow.	74%	76%	82%
COI enables me to work at my full potential.	70%	83%	78%
I have the flexibility I need to balance my work and personal life.	78%	79%	83%
I regularly receive helpful feedback about my performance. *	77%	-	75%
COI does a great job of prioritizing employee well-being.	59%	68%	76%
I am very satisfied with my benefits package. **	96%	72%	63%
My pay is fair for the work I do.	70%	71%	56%
COI motivates me to give my very best at work.	74%	79%	83%
I would highly recommend working at COI to others.	89%	82%	79%
I rarely consider searching for a job at another organization. **	59%	48%	58%
I have confidence in the leadership team of COI.	78%	82%	79%
I have frequent opportunities to learn and grow at COI.	81%	90%	74%
My work stress is at a manageable level at COI.*	56%	-	73%

\* New questions in 2025.

\*\*Questions revised in 2025 from “My benefits package is good compared to others in this industry” and “I have not considered searching for a better job in past month”.

## Leadership Team Focus Group

Focus Area	Discussion	Response or Action Plan
<p>My work stress is at a manageable level at COI.</p>	<p>Managers are feeling pressured from having to take on additional responsibilities when there is already a high workload. Some expressed that a 40 hour work week (vs.35) is needed to get their work done.</p>	<p>The agency recognizes the stress associated with management responsibilities, particularly when additional duties arise. Under the Fair Labor Standards Act (FLSA), exempt employees are paid a fixed weekly salary to fulfill their duties regardless of hours worked, and employers may set expectations such as a standard workweek without requiring overtime pay. While some organizations use a 40-hour benchmark for tracking and salary conversion, COI has established a 35-hour minimum workweek for exempt staff to align with its standard 35–37.5-hour schedule for non-exempt employees. This same range is used to calculate hourly equivalents. An increase to 40 hours would not change weekly salaries but would reduce the calculated hourly rate.</p> <p>To be considered an exempt employee, staff must meet both FLSA and strict NYS salary/duty tests &amp; regulations. If these tests are not met, the agency would be required to review each position and re-grade them using the agency’s grading system. This would then convert the position to an hourly position and rate consistent with the non-exempt hourly staff pay scales.</p>
<p>I feel well-informed about important decisions at COI.</p>	<p>Managers would like to be involved in discussions before the agency takes on new initiatives. They would like more attention given to high workloads and capacity. Risk assessments should be done for all new projects, not just for new grants.</p> <p>Also, some managers felt that they should have been told that the agency’s contribution to health insurance would be decreasing prior to open enrollment. Employees were told only that the rates would be increasing.</p>	<p>New initiatives are discussed at senior management and management meetings, where feasibility, capacity, and potential challenges are evaluated before deciding whether to proceed.</p> <p>Division Directors lead the development of divisional initiatives, assessing risks and consulting with their teams before making recommendations to the CEO. If an idea originates with the CEO, the Division Director researches and gathers divisional team input before providing a recommendation.</p> <p>Agency-wide initiatives are set by the CEO and Board of Directors, with input from senior management, and sometimes full management teams, though the CEO and/or Board may move forward regardless of consensus by management.</p> <p>Once decisions are made, information is communicated throughout the management chain. This process will be reviewed to identify and address any communication gaps.</p>

<p>I have frequent opportunities to learn and grow at COI.</p>	<p>Managers are concerned that earning educational degrees or additional training does not translate into higher wages. Some feel there is no real ladder to move up. They would like full reviews of the entire wage scale, as well as “preferred” vs. “required” education levels on job descriptions, and the scoring rubrics used for performance evaluations that determines merit wage increases.</p>	<p>Over the past year, all job descriptions were reviewed and updated for accuracy, with requirements based on regulations and funder guidelines. Positions are graded solely on job requirements, and compensation does not increase for skills or education beyond what is required, unless a funder mandates a premium for specific certifications.</p> <p>The agency maintains strong HR policies approved by the Board, with a 2023 external review by an HR consultant confirming alignment with the Society for Human Resource Management (SHRM), national standards, and Wipfli guidance. The review included payroll policies, grading process, pay scales, performance evaluations and related processes. Minor updates were made, and current policies remain in place.</p> <p>The agency strongly believes in promoting from within and often has opportunities for career growth if staff are interested in moving to another position that has more responsibilities and a higher pay grade. Growth in a specific position is limited to the needs of each division and position. Personal growth is the responsibility of the employee and shows initiative for potential career growth. The employee and supervisor can develop a plan/career path so that when a position becomes available the employee is ready for advancement.</p>
<p>At COI, we do things efficiently and well.</p>	<p>Initiatives are sometimes slow to be implemented or sometimes they flounder after staff time has been invested.</p>	<p>There are times when initiatives flounder due to many competing responsibilities occurring at the same time. We can definitely do things better! Specifically, the TIC/Resilient agency initiative has floundered, and we are dedicated to getting it back on track. The 6 Principles Groups met and made suggestions for change. Many of the suggestions have already been implemented but communication was stalled. The senior management team has focused on reviewing and responding to the suggestions made and these were reviewed with the full leadership team in March 2026, followed by sharing the document with all staff. The groups will then be free to continue to meet if needed or submit suggestions to the Great Ideas email (<a href="mailto:greatideas@chautopp.org">greatideas@chautopp.org</a>) for consideration.</p>

# COI/CODI Board of Directors Survey

CHAUTAUQUA OPPORTUNITIES for DEVELOPMENT, INC.  
BOARD OF DIRECTORS SURVEY  
2024

1. Number of years on the board:     less than one     1 to 5     6 to 10     over ten

2. Board reports keep me adequately informed regarding agency services & fiscal activity.

Strongly Disagree     Disagree     Agree     Strongly Agree

Comments: \_\_\_\_\_

3. The format of Board reports is adequate.

Strongly Disagree     Disagree     Agree     Strongly Agree

Comments: \_\_\_\_\_

4. The information I receive through reports, educational materials, etc. provides me with the necessary information to clearly understand the mission and impact the agency is making in the community.

Strongly Disagree     Disagree     Agree     Strongly Agree

5. I feel that the time commitment asked of Board Members is:

\_\_\_ Too Much    \_\_\_ Adequate    \_\_\_ Not Enough

6. The current structure of the Board Committees is:

\_\_\_ Effective-working well    \_\_\_ Adequate-but could use improvement    \_\_\_ Ineffective

7. Adequate opportunities are provided for training and information sharing each year.

Strongly Disagree     Disagree     Agree     Strongly Agree

8.


Strongly Disagree     Disagree     Agree     Strongly Agree

9. I feel the Board is most effective in/with: \_\_\_\_\_

10. The Board could strengthen its role through: \_\_\_\_\_

11. Other suggestions/comments: \_\_\_\_\_

# COI/CODI Board of Directors Survey Summary

	<1	1-5	6-10	11-20	>20
Number of years on the board.	33.3%	25.0%	16.7%	16.7%	8.3%
		Strongly Disagree	Dis-agree	Agree	Strongly Agree
Board reports keep me adequately informed regarding agency services and fiscal activity.		0%	0%	16.7%	83.3%
The format of Board reports is adequate.		0%	0%	16.7%	83.3%
The information I receive through reports, educational materials, etc... provides me with the necessary information to clearly understand the mission and impact the agency is making in the community.		0%	0%	25.0%	75.0%
I feel that the time commitment asked of members is:	100% Adequate				
	Strongly Disagree	Disagree	Agree	Strongly Agree	
Adequate opportunities are provided for training and information sharing each year.	0%	0%	50.0%	50.0%	
There are adequate opportunities as a Board member to provide feedback that is meaningful to the organization.	0%	0%	33.3%	66.7%	

## Strengths

- ▶ 100% of all members responding rated each area as either “Agree” or “Strongly Agree”.
- ▶ Three members commented that the Board is most effective with communication and general discussion during meetings.
- ▶ One member commented that COI appears to be very well managed.

## Areas for Improvement

- ▶ One member commented that the Board could strengthen its role through increased interactions and experience with COI staff.

## Response/Action Plan

- ▶ No Action Plan is needed, as all areas met the 85% satisfaction threshold.

## COI Board of Directors 2025-2026

Kevin O'Connell, Chairperson Target Sector	Rebecca Ruiz, Vice-Chairperson Target Sector	Robert Moore Treasurer Private Sector
Douglas Richmond, Secretary Private Sector	Robert Bankoski Public Sector	Michele Bautista Target Sector
Chad Bongiovanni Public Sector	Thomas Carle Public Sector	Marie Carrubba Public Sector
Brittany Cerrie-Allen Public Sector	Veronice Jones Target Sector	Kristen Kathman Private Sector
Janet Keefe Private Sector	Will Pekrul Public Sector	Melissa Potter Private Sector
Laura White Target Sector	Thomas Whitney Private Sector	

## CODI Board of Directors 2025-2026

David Thomas, Chairperson	Kristen Kathman, Vice-Chairperson	Jena Willebrandt, Treasurer
Kevin Muldowney, Secretary	Rebecca Brumagin Director	Magdalena Dye Director
Susan Parker Director	Melissssa Potter Director	Thomas Whitney Director