

1. Develop and maintain customer relationships through programming and technology.

a. Create cross-agency working group to identify and prepare to address emerging trends and needs in training and technical services. The working group would report to the IPS leadership team any discoveries and make recommendations for action items to enhance IPS programmatic services in the future.

- » **Q2 Actions:** The group met on April 28 to discuss current practices of each agency, where collaboration could occur, and any thoughts regarding emerging technologies.
- » **Q3 Actions:** The group reviewed reports at a meeting on July 12 and will take necessary steps for actions needed in areas discussed.
- » **Q3 Actions:** The group met on October 4 to continue discussions of emerging technologies and how to best apply for engaging IPS customers.
- » **Champions:** Jeff Stiles, Keith Groves, Nikki Ballentine, Brian Barnett, Jessica Harris, Misty DePriest, Jason Jones

b. Deliver world-class, relevant and helpful programs to IPS customers by benchmarking with programs of other universities and private companies and by recommending enhancements for current IPS programs.

- » **Q1 Actions:** The action item team first met on April 25 to ensure we had a consensus on what was needed to satisfy the language of the action item and how our item fits into the IPS strategic plan. We developed a benchmarking and evaluation research approach with the following objectives:
  - » Describe the program and service area themes for each IPS agency. This will establish a baseline for IPS programs and services.
  - » Identify three to five benchmark organizations for each agency.
  - » Analyze the services and program areas of the benchmarking organizations.
  - » Evaluate IPS services and programs against benchmark organizations to identify strengths and weaknesses.
  - » Develop final report with recommendations for improvement.
- » **Q3 Actions:** This quarter we focused on objectives 2 and 3. The team met on August 22 and developed a phone survey for the benchmarking study. The survey was approved by the IPS leadership. We worked the IPS leadership team to identify benchmarking partners for each agency and worked with CUPSO to develop a contact list of public service organizations within CUPSO that could be benchmarking partners.
- » **Q4 Actions:** The group focused on objectives 3 and 4. Benchmarking data were gathered and analyzed. They also evaluated service and program areas at IPS and developed an executive summary report highlighting findings and recommendations for improvement. The summary report was submitted to Jon Walden and Macel Ely for feedback. The executive summary was approved.
- » **Champions:** Chris Shults, Jeff Stiles, Jeff Lindsey, Jeremy Kourvelas, Norma Wilcox

## 2. Capture, manage and retain expert knowledge as well as customer and agency information.

### a. Identify and implement an institute-wide knowledge and customer management system to retain vital knowledge and expertise for IPS employees.

- » **Q1 Actions:** Held in-person meeting at Polk Avenue to discuss initial steps.
- » **Q3 Actions:** Working on survey to be sent out to agency executive directors for distribution of appropriate parties.
- » **Q4 Actions:** Survey was sent this quarter. We had poor response and reissued to run through beginning of January.
- » **Champions:** Abb Oglesby, Johanna Owenby, Audra Pinson, Jeff Lindsey, Chris Payne, Tanya Washington

### b. Provide training to all IPS employees on how to use the new system.

## 3. Integrate additional platforms for ongoing feedback from current and potential customers.

### a. Schedule recurring focus groups with customers to evaluate services.

- » **Q1 Actions:** Dates and locations have been secured for the month of August to host three locations of focus groups (Jackson, Nashville and Knoxville). Content is being finalized for program.
- » **Q2 Actions:** Agency directors identified customers and employees to participate. Questions for forum were selected.
- » **Q3 Actions:** Customer focus groups were conducted in all three grand divisions, and feedback was summarized. Results were provided to participants, IPS Leadership and all IPS employees through Intranet, the Catchup and IPS Annual Conference.
- » **Champions:** Macel Ely, Martha Kelley

### b. Facilitate an annual meeting for the IPS leadership team to engage members of the IPS advisory board on suggestions of known trends or identified needs on which IPS agencies might focus in the future.

- » **Q1 Actions:** Location, date and meeting space contract have been finalized.
- » **Q2 Actions:** IPS champions have been working with vendors and venue staff to coordinate logistics. Materials have been ordered for meeting.
- » **Q3 Actions:** Preparations were made for the first advisory board meeting.
- » **Q3 Actions:** The first IPS Advisory Board meeting was held in Nashville on October 3. Bylaws were approved, and positions were elected. Feedback was provided for each agency. Next steps were to confirm date in Spring 2024 for next meeting.
- » **Champions:** Valerie Dugan, Macel Ely, Angie McLemore, Karisma Williams