

# ROWELL FAMILY EMPOWERMENT CENTER OF NORTHERN CALIFORNIA, Inc.



## BOARD PLANNING RETREAT

October 2007  
Mt. Shasta Ranch



Rowell Family Empowerment of Northern California, Inc., is a multi-service agency serving a huge geographic region in Northern California. The mission of Rowell Family Empowerment Center of Northern California, Inc. (RFENC) is:

***To empower people with disabilities, and their families, to live as respected and valued members throughout their communities by providing support, education and advocacy services.***

RFENC's many contracts and grants from federal, State and County agencies weave a patchwork of services for people with disabilities and their families in the larger Northern California area. This diverse funding creates both a stable funding base and a complex system to allocate and track staff hours, salaries and other costs to the multiple funding sources.

While the agency's contracts and grants fund many different kinds of activities, RFENC periodically conducts an agency-wide strategic planning process. This proactive approach enables the agency to identify and address the changing needs of the communities served and ensures that they are not merely reacting to the priorities of outside funding entities.

The October 2007 planning process was conducted at the beautiful Mt. Shasta Ranch in Shasta County. The Board Retreat was held immediately following a three-day staff retreat. The Director and all members of the RFENC Board of Directors, except one who was serving as a volunteer with the Red Cross, attended and participated in the planning process. The planning portion of the retreat was facilitated by Kay Ryan. A modified version of the Empowerment Evaluation model was used as a structure for reviewing the agency's current activities and developing clear, measurable and achievable goals for the future.

Empowerment Evaluation is a tool developed by Dr. David Fetterman of Stanford University. The three simple steps consist of developing a mission, vision, or unifying purpose; taking stock to identify strengths and weaknesses of key activities, and developing a plan for the future. It is particularly useful for human services agencies such as RFENC whose success is not measured in terms of production numbers or profit margins.

## Step 1 - Defining the Mission

After introductions, a brief explanation of the Empowerment Evaluation model and confirmation of expectations for our time together, the group began by reviewing the current RFENC Mission Statement. Staff had also discussed the mission statement during their retreat and it was suggested that maybe a simpler statement such as, "all are included" would be easier to remember.

After talking about the purpose of a mission statement, and how it is used, people agreed that while RFENC's current mission statement may not be easy to memorize, it does a great job of describing the mission of RFENC in a way that is clear and easy to understand. And, although, "all are included," is a very appropriate phrase for this agency and does reflect the agency's philosophy, it might be more appropriate as a motto, or as part of RFENC's logo than as the agency's mission statement.

The one dissatisfaction expressed with the mission statement was that it could appear to limit the scope of RFENC's services to people with disabilities and their families, when in fact, people of many different abilities benefit from RFENC programs, services and supports. Thinking about future funding to support those program elements led to a minor but significant change as shown in the revised mission statement below:

***To empower people with diverse abilities, and their families, to live as respected and valued members throughout their communities by providing support, education and advocacy services.***

## Step 2 - Taking Stock

During the first step of Taking Stock, a list of activities critical to accomplishing the mission of RFENC was generated. Those activities included:

Educating individuals, families and communities; conducting workshops and seminars and providing information through literature libraries, training scholarships, newsletters, and a website discussion board; advocating for individual and family empowerment, attending IEPs, participating as a member of Family Voices, staffing an 800 number, participating in local, statewide and national forums; supporting individuals, families and communities through after-school programs, respite, interpreters, summer programs, play groups, "what makes me special" binders, sibling groups and disability awareness puppetry.

Activities were defined, refined, and redefined. Some were combined under general headings, such as Training, which we decided would include Consultation, and then split to differentiate between training for families and community training. The final list included these categories:

- Training and Consultation – for the Community and for Families
- Library/Information/Website Management
- Health Advocacy – including Parent Health Liaisons
- Education Advocacy
- Systems Change – including Committees and Boards
- Programs for Kids, Youth and Young Adults
- Staff and Organizational Development
- Family Support – including Parent Services and Binders.

An additional category was added because the group felt they wanted to discuss Staff and Organizational Development. The fairly broad nature of the categories suited our purpose. If we had been meeting specifically to evaluate RFENC’s performance, the bigger list of discrete activities would have generated more information about specific program elements. However, because we were using the information for purposes of planning and operating on a tight timeline, the more general categories worked well.

Prioritizing the activities to determine which merited evaluation at this time was accomplished through a low-tech exercise using dots as votes. It is interesting to note that the second activity identified as key to the functioning of the organization (Library, information, website management) did not receive a single vote, making it the lowest priority for discussion at this time. And, although we did not discuss this, so it is possible that there is another explanation, ranking high as a key activity and low as a priority for discussion is consistent with an activity that people believe is critical to the agency’s mission and working well enough that there is no need to discuss it at this time.

The priorities identified by the RFENC Board and Director for evaluation and further discussion were as follows:

Activity	Rating
Staff and Organizational Development	6
Health Advocacy – including Parent Health Liaisons Programs for Kids, Youth and Young Adults	6
Family Support, Parent Services	5
Training and Consultation for Families	4
for Community	2
Education Advocacy	4
Systems Change – including Committees and Boards	1
Library/Information/Website Management	0

It is interesting to note here that because we broke Training and Consultation into two separate categories, Families and Community, neither received a sufficient number of votes to be considered among the top priorities; however, had the category not been divided, and given the votes were the same, Training and Consultation would also have received the highest rating of six.

The second phase of Taking Stock involves rating the activities. Recognizing that we have only minimally defined the categories at this point, the Director and Board members were asked to rate how well they are doing concerning each activity on a 1 to 10 scale, with 10 as perfect and 1 as abysmal. The dialogue that ensued as part of this step provided additional clarification and more detailed information about each activity.

Participants rated each of the activities before posting them to the chart, which shows individual and average scores. The chart identifies perceived strengths and weaknesses as well as “high” and “low” scorers. The individual ratings provide a mechanism for dialogue about program elements

## Rating & Dialogue - Results

Have done a lot with resources. Still have a ways to go. Need to do more in-house (cross-training up and down as backup for all, including Kat

Reduced funding has reduced programs - integrated play groups not happening. Lots for kids with Autism

Doing very well given \$ and staff resources but would like to serve more kids with more programs

Kat has done great but needs support. She's wearing too many hats and needs another person.

Key Activities	Individual Ratings							Averages By Category	
	JB	CM	MW	KL	LC	MM	DS	Totals	
Health Advocacy	6	5	3	3	4	4	4	29	4.8
Programs for Kids	4	6	4	3	4	7	5	33	5.5
Staff/ Organizational Development	3	4	4	1	3	3	3	21	3.5
Parent Support/ Family Services	6	7	6	2	6	8	6	41	6.8
<b>Totals</b>	<b>19</b>	<b>22</b>	<b>17</b>	<b>9</b>	<b>17</b>	<b>22</b>	<b>18</b>		<b>5.1</b>

What we do is phenomenal but we need to diversify the services (parenting)

Not visible to newcomer

Need succession planning

The ratings provide a baseline for future discussion about each activity. The discussion of individual ratings and rationale for high and low scores provided important information about where we are and prepared us to answer the question, "Where do we want to go from here?"

### **Step 3 – Planning for the Future**

The highest scoring four activities were selected as the foundation of RFENC's plan for the future. Specific goals were developed for each activity. The group also generated strategies for accomplishing each goal and forms of evidence to monitor progress toward the goals and demonstrate when they have been achieved. Because this part of Empowerment Evaluation builds upon the previous steps, and because the RFENC Board and Director know what of they speak, this part of the process was completed in record time, and generated clear, measurable, and achievable goals that will serve the agency well over the next months and years.

Each of the four activities discussed is shown below in its final form, along with the strategies developed for achieving it, and the evidence that will enable them to measure progress and know when they have achieved the goal. RFENC's goals are clear and realistic statements of where the Board and Director want to be: their long-term dreams put into words.

#### **GOAL #1 STAFF/ORGANIZATIONAL DEVELOPMENT**

RFENC has the infrastructure that enables it to fulfill its mission.

##### Strategies:

- RFENC has staff/contractors who are trained in and capable of developing programs and securing resources to sustain them by 2/08.
- RFENC's Board will review the organization chart by 1/08 to ensure that it supports the structure necessary to fulfill its mission.
- RFENC will hold quarterly meetings, which are open to Board members and include an informational component and program updates.

##### Evidence:

- RFENC has a resource development person (or people) on board.
- RFENC's organizational chart is reviewed and revised as necessary.
- Quarterly meetings are held and documented.

## **GOAL #2 HEALTH ADVOCACY**

Families are able to navigate and negotiate the health care system, including mental health, to secure the services necessary for a healthy lifestyle.

### Strategies:

- RFENC will identify and secure funding for at least one FTE to serve as a health care advocate/liaison in six counties.
- RFENC will submit at least one funding proposal for the health care advocate/liaison position by 6/08.
- RFENC will have at least one FTE with the knowledge, language skills and ability to assist families in securing appropriate health care by 10/08.

### Evidence:

- Proposal is written by 6/08.
- Funding is secured by 10/08.
- Staff is on board by 10/08.

## **GOAL #3 PROGRAMS FOR KIDS, YOUTH AND YOUNG ADULTS**

RFENC has a variety of services and programs for children, youth and young adults with diverse abilities.

### Strategies:

- Conduct community needs assessments in at least two of six counties to identify current services, programs and needs by 6/08. (include the Northern Hispanic/Latino Coalition, youth and families in the assessment process.)
- Develop community collaborative partnerships with at least three entities to maximize services (Mentors, Big Brothers and Sisters, YMCA.)
- Identify and secure funding for at least two programs by 1/09.
- Develop at least two community-based programs for different age groups to promote skill building, positive social/emotional development and life skills by 6/09.

### Evidence:

- Needs assessment will be done.
- Partnerships will exist.
- New programs will exist.

## **GOAL #4 PARENT SUPPORT/FAMILY SERVICES**

RFENC has a variety of services and programs to support families with diverse abilities (Respite, Binders, etc.)

### Strategies:

- Identify, review and compile data that substantiates need for services and programs for families with diverse abilities by 9/08.
- Identify and secure funds to develop and implement at least one program for families by 3/09.

### Evidence:

- Need Assessment completed.
- Data analyzed.
- Funding proposal submitted.
- Program implemented.

## **In Conclusion**

The work done by Board members and the Director of RFENC at this retreat is commendable. The revised mission statement reflects the agency's intent to expand services to a population in need of services this agency provides within the communities they currently serve. That population was defined as youth and young adults with diverse abilities.

"All are Included" could easily serve as this agency's motto or slogan as it is consistent with the philosophy of and services offered by RFENC. The planning process, albeit condensed into a short timeframe, resulted in a development of a clear roadmap to guide future growth. The goals and strategies for achieving them are clear and consistent with the mission and purpose of the agency.

In addition to meeting a wide range of needs currently, RFENC knows where it wants to grow and has a measurable and achievable plan for getting there. The agency and its staff, especially the Director, are to be commended for their proactive approach to serving the many communities in Northern California.