

## **We Can Act - Case Study**

### **Family Ties - Planning for Sustainability**

#### **A. The Context**

Family Ties is a *maison de la famille* in New Carlisle, serving the English-speaking population in the Baie des Chaleurs area of the Gaspé. Founded in 1996, the non-profit organization has provided support and services to an increasingly marginalized segment of the area's population: low-income, unilingual Anglophone families. Initially responding to the needs of single-parent families and women trying to re-enter the workforce, the activities have expanded to include pre-school and other programs geared towards prevention and life and social skills development for children and parents, including after-school programs for pre-adolescent youth and evening and week-end activities for teenagers.

Having purchased its own building, Family Ties had become, without fully acknowledging the evolution, a social economy enterprise: founded by the community, owned and operated in the community, and providing programs and services for the community. Even still, while servicing nearly 50 families and over 100 individuals each year with minimal core (operational) funding, the organization continued to struggle to exist in a coherent manner. Going from one round of project funding to another, and taking whatever charitable contributions donors had to offer, the program was becoming driven by the resources that were at hand. In addition, its expanding role in the community as a program and service provider of first resort was putting stress on the staff and building facilities. The pressures of being responsive to community needs were beginning to place strain on the organization's capacity to deliver in an adequate and effective manner in a context of increasing expectations.

As a reflection of the circumstances that Family Ties found itself in, the Committee for Anglophone Social Action (CASA), an organization dedicated to the development of the English-speaking community in the Gaspé region, carried out a study (followed by a community forum) on the health needs of the English-speaking population in the Baie des Chaleurs: for six critical health determinants, the English-speaking population of the area

was assessed to be worse off than the majority Francophone population. This prompted the CSSS de la Baie-des-Chaleurs (CSSS-BDC) to undertake a partnership project with CASA through the *Fonds pour l'amélioration de l'accès aux services et aux soins de santé primaires aux personnes d'expression anglaise du Québec* (FASSPP) aimed at improving access to health and social services in the area through Family Ties – notably inspired by the model created at the Holland Centre, representatives of which had made a presentation at the community forum.

A key component within this project was the development of a five-year strategic plan that would be the basis of not only the future programs and services for Family Ties, but be the first step in defining the working relationship between the organization, as a service provider to the area's English-speaking community, and the regional health board and other partners. Other important components of the project were renovations to the Family Ties building to make it more adapted to program needs, and initiatives to improve transportation in the area, the lack of which is an impediment for some families to adequately access health and social services. The *We Can Act* project, a CHSSN initiative to support the development of English language social enterprise in the area of health and social service delivery, became, at this point, engaged with Family Ties to assist with the strategic planning process.

"The results of the research indicate that the English-speaking population of New Carlisle is in a very precarious socio-economic situation" - FASSPP grant application

## **B. The Process . . . strategic planning for sustainability**

### **1.0 The Questions**

Strategic planning is like motherhood and maple syrup – it is something all organizations should do at some point in time, but trying to create a plan without a *raison d'être* is like working in a vacuum. Thus, the first step in working with the Family Ties planning committee composed of board members and staff was to identify the “why” of the exercise, and the response was immediate and clear: sustainability.

Family Ties had built up a successful program by responding to English language health and social service needs in the New Carlisle community and, despite this accomplishment it was obvious that the organization could not continue to offer the same level of services and programs without a stronger financial and operational foundation. All the pieces were already in place: a human resource base of volunteers and staff, a facility and a program responsive to local needs; yet to maintain and build upon this community asset, the operations had to be made sustainable over the medium and long-term.

The second question is the “what” – what is Family Ties supposed to be doing and for whom. The CSSS-BDC initiative presented an opportunity for Family Ties to acquire a more formal mandate and engage additional resources from its working relationship with the regional health board - were its goals and objectives still appropriate to match the task at hand?

The answer to this exercise of reflection was, in large part, “Yes”, but with one subtle but important change. The mission of Family Ties included the term “special needs”, a catch-all phrase that generally referred to those who most needed help, whether that be adults without skills for the job market or kids who just can’t be at home in the evening because of some form of social dislocation within the family. The evolution of Family Ties had grown beyond just crisis intervention for families and individuals into the offering of preventative and educational programs, and the attribution of special needs had, in some respects, become a stigmatization – there was a perception in the community that you only went to Family Ties if you were in trouble. The removal of the term now allows Family Ties to work on behalf of all families in the New Carlisle area.

"Our vision for Family Ties is to support positive and enriched family lives  
creating the foundation for a healthy community."

## 2.0 The Plan

The planning activity was conducted over three one-day sessions, one each in January, February and March, 2007. Each session was followed by e-mail interaction where the results of the previous session were disseminated and refined before the next session began. This helped to maximize the available 'face' time by minimizing the need to re-visit and review the work at the beginning of each session.

The first session was devoted to 'sorting out' – Family Ties had a long list of activities already underway, and various but isolated planning documents such as an annual action plan. The end of the exercise revealed a vibrant organization with a dedicated staff and high level of volunteerism - doing a whole bunch of good things in the community. The 'good things' were an array of appropriate and effective activities responding to needs as they arose in the community, but the parts had never been brought together as a sum total in one piece.

"Wow - We do all that!" - Strategic planning participant

As a result, the planning group identified four main areas of program activity:

- Programs for pre-school children
- After-school programs for pre-adolescents
- Evening and week-end programs for teenagers
- Development programs to support strong family units

In addition, to work towards a greater state of sustainability, the group identified two areas where planned and concerted activity would have to be undertaken:

- Partnership development
- Organizational, professional and leadership development

The second session was devoted to the organizing phase – putting all the pieces of programs, services and activities into an organized framework that had some coherence. The organizing process didn't eliminate or add any new programs, it simply allowed all the activities to be identified and categorized, and then brought together in a framework

that can be used by directors, volunteers and staff, regardless of their role or point of engagement, in a consistent manner.

For each goal, the group developed a set of strategies linked to:

- Education
- Prevention
- Intervention
- Socialization and life skills

To each of these a set of actions was attached; these were either actions (programs, services, activities) that were currently underway, or were ones that should be undertaken in order to achieve the stated goal. In the third session, each strategy and action was linked to a result and a performance indicator so that the organization can measure and evaluate progress over the next five years.

In addition, the third session examined the essential questions related to operational sustainability – finances and partnerships. Sources of financing were categorized into five main types, and sorted by source (national, provincial, regional, local) and analyzed for their relative contribution to the organization:

- Grants – regional grants were quite strong
- Projects – only moderately strong at the national level
- Donations – very strong at the local level
- Foundations – moderately strong at the provincial level (but mostly non-monetary contributions)
- Services – weak at all levels

A SWOT analysis was also carried out to assess the situation with partnerships:

- Strengths – a variety of partners translating into diversified sources of funding
- Weaknesses – share of resources from partner relations have not always been equitable (for amount of service delivered)
- Opportunities – to become the “Anglo connection” with partners for delivering services
- Threats – short-term horizon of partner arrangements

## **C. The Results**

The outcome of the Family Ties strategic planning process, while only one part of a larger project to improve access in the New Carlisle area to English language health and social services, was to better position the organization to be able to respond to the needs in the community in two important ways.

The first was internally, within the organization itself. The planning exercise clarified the scope and type of activity being carried out, and provided a road map for operations over the next five years. It also allowed Family Ties to identify the areas of strength and weakness, particularly with regard to funding, and to set out the types of activities that need to be undertaken in order to continue to further develop the organization with regard to the programs and services that it will offer to the New Carlisle community.

The second was external, with relation to partners. The planning exercise spelled out the range of partners and the variety of resources that they provide to Family Ties, as well as the opportunities and challenges that extend from these partnerships. This partnership assessment now allows the organization to take a more targeted approach in planning and formalizing the working relationship with other institutions and organizations. In particular, the strategic plan provides a detailed working document which can be used with the regional health board to secure resources (funding, staff training, etc.) for specific program and service delivery and, over time, will be the basis for more formalized contractual arrangements regarding the provision of English language health and social services.

Lastly, the planning process has provided the organization with a tool with which to monitor progress and make adjustments accordingly. Previous action plans and other management documents mostly reflected the type and level of activity that was to be undertaken; the addition of results and performance indicators has now put in place a measurement mechanism to establish a knowledge base that will be useful not only to ensure that the programs and services offered are the most efficient and effective as possible but also to substantiate requests and applications for future and further funding and resources.

## Family Ties - Vision & Mission Statement

### **Vision**

Our vision for Family Ties is to support positive and enriched family lives creating the foundation for a healthy community.

### **Mission**

The mission of Family Ties is to ensure the overall well-being and development of the whole family through the provision of education, prevention, intervention and socializing activities, services and programs.

### **Goals & Objectives**

- Provide a stimulating learning experience to better prepare young children (0-4+ yrs) for school through their participation in a supportive and caring network of programs and services.
- Offer a safe and secure after-school environment for children (5-12 yrs) in which they can enhance their educational experience and further develop their social abilities through the provision of instructive and extra-curricular activities.
- Offer a safe and secure evening and week-end environment for teenagers (13-17 yrs) in which they can fully develop their social, leadership and creative strengths through the provision of instructive, extra-curricular and volunteer activities.
- Engage and involve all family members in the development of strong family units that support all children through their participation in a supportive and caring network of programs and services.
- Ensure the long-term sustainability of Family Ties, as well as the efficient and effective delivery programs and services, by: establishing partnerships with individuals, organizations and institutions that share the common vision of a healthy community; and providing organizational, professional and leadership development opportunities to enhance the capabilities and competencies of staff and volunteers.

## **D. The Lessons Learned**

Numerous lessons were learned (perhaps better phrased as reinforced) along the way and a few are described below:

### **✓ Leadership**

Leadership comes in different forms and from a variety of sources, but it is always the point of departure for such development exercises. Amongst many leadership roles employed in the process, Heather MacWhirter, the Executive Director of Family Ties, recognized that something had to be done to ensure the long-term viability of a community institution that had clearly demonstrated its local importance; Kim Harrison, the Executive Director of the Council for Anglophone Social Action, acted as champion to make sure following the forum on English language health and social service delivery for the Baie des Chaleurs that initiative was taken on behalf of Family Ties. Bernard Nadeau, the Director General of the CSSS Baie des Chaleurs, seized the opportunity provided by the forum and the presence of Family Ties to initiate and support the institutional response to the demonstrated needs in the English-speaking community.

### **✓ Partnership**

There are very few instances where individual organizations have been able to manage change in isolation from the players and community actors that make up the surrounding milieu (even foundations which have financial resources need community partners to carry out the delivery of their mandate.) Family Ties not only partnered with CASA and the CSSS Baie des Chaleurs, but also with the Community Health and Social Services Network (CHSSN) which brought the resources of four institutions to bear on the sustainable development of the organization and its program delivery.

### **✓ Preparing the groundwork**

The planning exercise undertaken by Family Ties was preceded not only by the project application that supported the planning activities but also by a study and community forum that both examined the needs of the English-speaking population of the area with regard to health and social services. These two preparation activities carried out by CASA and the CSSS-BDC set the stage for the project enabling Family Ties to carry out its development activities.

✓ **Inspiration**

It is common for organizations to stay within their comfort zone when dealing with change and not look too far beyond the immediate horizon for inspiration. The Family Ties planning process, from the beginning, brought in resources from outside the area to provide example and contribute expertise. Representatives from the Holland Centre, which had become in many ways a showcase for the successful adaptation of health and social service delivery to English-speaking communities, made presentations at the community forum and provided advice on various aspects of the process. And the CHSSN engaged with staff visits and the provision of a consultant for the strategic planning process within their *We Can Act* project.

For more information on the Family Ties Strategic Planning Process, you can contact Heather MacWhirter at 418-752-7265 or [familyties@globetrotter.net](mailto:familyties@globetrotter.net).

Acknowledgements:

Kim Harrison, CASA

Russ Kueber and Jennifer Johnson, CHSSN

Richard Walling, Holland Centre

Hugh Maynard, Qu'anglo Communications & Consulting