



Organizations in Transformation Series



Family Service Canada

June 2012

Preamble

The past five years have seen significant challenges for many organizations in the social sector, particularly those whose projects and activities address Pan-Canadian issues and who have been funded through programs of the Government of Canada.

The fourth issue of [Imagine Canada's Sector Monitor](#) (Vol. 2, No. 2) continues to report serious concern, with 29% of charities reporting high stress, 51% reporting increased demand for services, 49% reporting difficulty in fulfilling their mission, and 26% reporting that their very existence is at risk. In addition, 27% of charities report decreased revenues and 49% report increased expenditures, a trend which is increasing.

In recent conversations with [NACY members](#), many organizations described serious financial challenges - some have even had to close their doors. Many of those that remain have limited resources, with few staff, many reduced to part time and working at home or in shared offices.

Clearly there have been significant changes in the sector since the federal government began restructuring in 2008. But while resources are reduced and restrained, we were also impressed by the many stories of adaptation and transformation that we heard from our members and through the work we are doing on the ground via the [Taking Stock project](#).

This prompted us to try to capture and share some of these stories, which we found to be quite interesting and encouraging, in a series of articles that we are calling "*Organizations in Transformation*". Larry Gemmel, former Executive Director of NACY, who currently works as a consultant specializing in organizational development and transformation has kindly taken on authoring these articles for us.

We will be sending out articles over the next few months with a view of sharing interesting stories and encouraging others to share their own transformation experience and advice. At the same time, this research has suggested a number of ways in which NACY can help its members to work together to be more effective, both in terms of sharing resources, building capacity, and creating collective approaches to public policy in support of children and youth.

If you would like to share your *Organizations in Transformation* story, please don't hesitate to write to us at info@nacy.ca. You can view the other articles in the series in NACY's online [Resource Centre](#).

Organizations in Transformation:



Family Service Canada

As the Operations Manager of **Family Service Canada (FSC)**, **Heather Underhill** brings more than 20 years of experience as the Executive Director of a local family services organization operating in the West Island sector of Montréal, and first hand enthusiasm for the value of a national organization in supporting local staff.

"I had always benefitted from the support and knowledge of other Family Service members through the network, and so it was natural for me to want to 'give back' by joining the Board in 2007" as Family Service Canada was transitioning to a Board managed model following the loss of core funding grants, lay off of staff, and closing of the physical office. Even after stepping down from the Board in 2009 when she left her local position, Heather was interested in staying connected to other Family Service agencies and staff in Canada and so she accepted a three month contract to survey the members of FSC to help determine it's future role and services.

This survey work then led to further part-time consulting contracts starting in 2010 to help the Board implement new plans and strategies, including developing a new website, revising bylaws and membership criteria, and putting in place a new financial system to track memberships. This past December the Board recognized Heather's solid track record and experience with a new ongoing contract as Operations Manager based on a monthly retainer and a list of specific deliverables, including the planning and development of the annual Executive Leadership Summit, responsibility for website content, and membership development and tracking.

As the sole paid staff member throughout this period, Heather has played a critical role in helping the organization since 2009 to re-focus its mandate *"to better support the needs of individual community-based social service agencies across the country"* and build capacity through *"leadership development, networking, and opportunities for information exchange as well as providing a national perspective to key issues"*. Dedicated to making Family Service Canada a success, Heather is no stranger to transformational change: As Executive Director she led Amcal Family Services from being a single 8 bed residential crisis facility for kids with 6 staff and a budget of \$90,000 in 1990 to become a multi-service agency with more than 20 staff and a budget of over \$1 million when she stepped down in 2009!

History¹

Initially formed in 1977 by a task force of family service agency social workers who wanted to develop a national organization for the well-being of families and children, grants from the federal government enabled the organization to hire Trevor Williams as its first Executive Director, opening a one room office in the Canadian Council on Social Development's building in Ottawa. Family Service Canada was then incorporated in 1983 as an association of family service organizations to provide leadership and direction to its member agencies and advocacy for families in Canada.

The original vision of "*Strong Families in a Caring Society*" was pursued through its mission of "*promoting families as the primary source of nurture and development of individuals, promoting quality services which strengthen families and communities and advocating policies and legislation which advance family well-being in Canada.*" In addition to this promotion and advocacy role, a series of strong national programs were developed over the years to support local Family Service members including:

- Family Services Employee Assistance Program (1982)
- Canadian Certified Family Educator program (1990)
- Families and Schools program (1995)

Despite 30 years of success in the field, Family Service Canada faced a serious financial crisis in 2007 with a challenging funding environment for social services in general and the loss of HRSDC Community Partnership Program core funding in particular. As a result, the organization moved quickly to lay off the remaining staff and close its Ottawa office, moving to a virtual model with key management and program responsibilities taken over by Executive Board members operating from their own offices.

Inevitably, and despite the dedicated efforts of Board members to keep the organization alive, it was very difficult to sustain a presence without staffing and activity fell off from 2007 on. By 2009, active membership had fallen from 75 to around 35, with little perceived benefit by members, little communication, and the website out of date. When the new Board was elected in September of 2009 they realized that FSC either had to transform itself to address reality or face inevitable closure.

Transformation to a new Mission

In 2009 Teri Nicholas, CEO of Family Service Vancouver (one of the largest FS agencies in Canada), became Chair of the Board and initiated a detailed survey of members to find out which aspects and services of FSC were most important and most valuable. Heather Underhill was hired on a three month contract to conduct the survey and prepared a report for the Board's December 2009 meeting in

¹ Sources: *Encyclopaedia of Canadian Social Work*, Francis Joseph Turner, 2005 and *Interview with Heather Underhill*, 2011

Toronto. Based on this feedback from members, the Board created a new mission and vision and established a timeline to move quickly in a new direction.

FSC needed to move away from delivering direct services through a large number of older programs, and these were transferred to other organizations or wound up. Social Advocacy was no longer considered a priority. Instead, what was most valuable was the network, the sharing of knowledge and resources, professional development, and how to do the work at the local level. Most important was the ability to connect with other peers from across the country, and so a new focus on Executive Leadership became the flagship program for the organization, positioning Family Service Canada as a critical support for the many new Executive Directors entering the system as an older generation retired or moved on.

Armed with a new mission—*“Family Service Canada is a national not-for-profit organization that promotes learning and the exchange of expertise through the dynamic relationships between executive leaders of family serving organizations in Canada”*—the organization now intends *“to be a vibrant network of exceptional family serving organizations building capacity in communities across Canada”*.

New Strategic Direction

In establishing a new strategic direction — *Fostering Leadership Excellence in Family Serving Organizations* — it is worth noting that Family Service Canada has put some solid and focussed planning behind its transformation. Here are some of the specific strategic objectives that they have established for themselves:

Communication: The organization will reach out to potential members through a newly designed website; and will regularly communicate with new and established members through regular email communication, the “At Work” communications website for members, and through in person interactions at the Executive Leadership Summit.

Learning Opportunities: The organization will continue to use the Executive Leadership Summit as its main forum for connecting with the membership. Technology (such as webinars) will be utilized to provide learning opportunities throughout the year.

Membership: The organization will establish and begin implementing a plan to increase the membership base.

Governance/Management Structure: The organization will undergo a review and revision of its bylaws and policies to ensure these align with the organization’s new mandate and mission.

Financial Health: The organization will look to increase financial health through cost containment, membership fees, and exploring new revenue generating and granting opportunities.

Membership and Benefits Clearly Defined

An important component of the revitalization plan for Family Service Canada was to focus on membership development, and in particular to clearly define the value proposition of “benefits” for fee paying members who contribute 85% of annual operating revenue – 2010/11 membership fees totalled \$190,000.

There are currently 33 **Principal Members** from across Canada who comprise the legal voting membership of the association. With annual budgets ranging from \$500,000 to over \$22,000,000 these members pay dues ranging from a minimum of \$470 to a maximum of \$3,500. Principal Members enjoy participation in the following benefits²:

- Networking
- Nation-wide communication
- National perspective
- Support system
- Executive Leadership Summit
- Professional development opportunities
- Canadian compensation survey
- Governance experience
- Voting rights
- Job posting distribution
- Rights to use FSC logo
- Consideration to be an FSEAP provider
- Executive Leadership Coaching Program (new in 2011)
- Discounted online staff training program (new in 2011)

There is a category of **Supporting Members** for other organizations who support the goals of FSC and whose work helps to further the mission. These Members pay a nominal annual fee of \$50 but do not share in any of the member benefits other than some of the communications.

There is also a special class of **Honourary Members** to recognize both individuals and organizations that have made outstanding contributions to the field.

Executive Leadership Summit

The flagship program to support Family Service Canada’s new mission is the annual **Executive Leadership Summit** for Executive Directors of Principal Members. Now held in October to coincide with the AGM and to replace a more traditional annual conference, the summit utilizes an “open space” approach to create breakout discussion groups on the spot based on the top of mind topics and issues of the participants, and then drawing on the wisdom and experience of those in the room through facilitated small group discussions. This change was based on feedback that EDs needed more time to learn from their colleagues and explore specific issues, and that there was *“lots of knowledge in the room, but they needed more*

² These benefits are explained in more detail at www.familyservicecanada.org

time to interact rather than just listen to external speakers. People in the helping profession are tired of going to conferences where they are just being talked at".

Held this past fall at the Kingbridge Conference Centre in King City, north of Toronto, the summit was designed to be accessible and affordable for participants from across the country and will be hosted in different cities and regions each year (Kelowna BC is scheduled for October, 2012).

This year's summit revealed a strong interest in succession planning, and for the first time provided the opportunity for ED's to bring their senior associates ("ED's in waiting!") as well. 40% of Family Service EDs in Canada have been in their roles for less than 3 years. Discussion topics included:

- Succession Planning
- The Ideal CEO
- The role of the CEO/Senior Management in Culture Change
- Use of Social Media
- How does corporate culture inhibit or advance change and growth? How do we shape and reshape it?
- How to deal with unhappy Social Workers/Employees
- Family Service Employee Assistance Program Mentorship
- How do loyalties in the organization and with the board bring strength and/or weakness in the organization? What do we do about it?
- What advice do people have about leading "Creative Destruction"?
- Staff "History" – Dealing with Past Conflicts

Although the Summit was a little bit hard to promote given that the exact content was not predetermined, Heather Underhill reports that this year's event was a "real hit" in that the format was a good fit for this particular group of Executive Directors. A new series of webinars to support executive leadership year round has been launched, and they are considering a formal mentoring program as a possible next step.



Continuing in this vein of professional and leadership development, FSC has introduced an e-Learning program provided by Essential Learning with a 10% discount for members and a 10% "commission" paid to FSC.

Conclusions

While the transformation process is ongoing, there is no doubt that Family Service Canada has created a solid base of support for family service organizations across the country, providing valued services unique to the field that are important to the members and not readily available through other sources. Supported primarily by membership dues, the association is on stable financial ground, producing a modest surplus in each of the past two years, and is ably supported by a dedicated staff member who is maintaining this new momentum. Ultimately growth in the membership base and network engagement will prove success.

Challenges remain: The Operations Manager receives only modest part-time compensation and works alone from a home office, running the risk of isolation and lacking a travel budget to be able to interact in person with members and other stakeholders. Given that others are in a similar position, one interesting idea would be to explore ways in which NACY and other umbrella groups could help to provide virtual and shared supports for those working essentially on their own. Another option is to co-locate national organizations in local or regional offices to share meeting space and support services such as accounting.

In the meantime, it is very encouraging to see organizations such as Family Service Canada benefitting from this kind of innovation and transformation.

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*About the author: [Larry Gemmel](#) is a former Executive Director of the **National Alliance for Children and Youth** who currently works as a consultant specializing in organizational development and transformation. If you would like to share your **Organizational Resilience** story, write to info@nacy.ca.*