

TAKING STOCK

How Canadian Child and Youth Agencies are Responding to Economic Challenges

Case Study # 1: Boys and Girls Clubs Big Brothers Big Sisters of Edmonton and Area

Creating a Model for Collaboration

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Creating a Model for Collaboration

Boys and Girls Clubs Big Brothers Big Sisters of Edmonton and Area

Background of the organization

Big Sisters Society of Edmonton began with an office in the downtown Edmonton YWCA in 1972. Change has been a constant and in 1991 Big Sisters and Big Brothers merged and became a United Way agency, setting a paradigm of collaboration that would lead to the outreach organization it is today with more than 50 partners in the community and a budget that exceeds \$8 million.

In 1998, the BSBB's in-school mentoring program began.

- In 2000, the Arbutus Volunteer Foundation and Partners Program of Boys and Girls Club merged with BSBB's mentoring programs as demand for services grew. The seeds for future solidified partnering were set.
- By 2004, more than 1,700 children were matched in mentoring programs, a figure that more than doubled by 2010.
- Today, more than 100 staff support a volunteer workforce of more than 3,000 individuals who interact directly with over 5,000 clients; nearly 20% of them University and College students.
- In July 2011, BBBSE and Boys & Girls Clubs of Edmonton amalgamated to take advantage of shared resources and a mutual goal to improve the lives of children and their families locally.

The organization credits a culture of "caring with intentionality and sincerity" in the work they do, a dedicated and informed staff and board, true dedication to the organizational mission, and their large stakeholder group of volunteers, funders, families and other supporters who care deeply for the agency and demonstrate this in meaningful ways. Stable, consistent and dedicated leadership has established, maintained and grown the current environment over many years.

Issue or situation

The organization has not always had the resources or expertise to be able to pay sufficient attention to infrastructure areas like human resources, communications and business development, and this has created gaps for the organization. In 2003, recognizing that these areas would be fundamental to the organization's growth and ability to meet the needs of the community's children, the agency began exploring ways to create the positions they needed for the future.

In 2010, the Executive Committees of BBBS and Boys & Girls Clubs met to discuss their current partnership. The meeting focused on a deeper level of partnership driven by their shared desire to better serve children and families and the Boys & Girls Clubs' current financial struggle. The amalgamation of BBBSE with the Boys & Girls Club of Edmonton in 2011 was a move that built positively on the shared services model. While the two cultures shared a passion for delivering programs that

positively impact the lives of children and their families, they nevertheless came together with differing expectations and delivery styles. Determining whether a potential partner is a good fit is key, and getting the right people at the table was critical to the successful collaboration.

Challenges

The organization faces challenges common to other not-for-profits: a shifting economy, immigration of newcomers, and stakeholder direction. Meeting the needs of all stakeholders who could benefit from the support of the work they manage, and attracting and retaining excellent staff in Alberta's tough employment environment, are two key challenges. Demonstrating outcomes is not always easy to do. Research can be expensive and so sometimes the challenge is between delivering the service and following the path and impact of those who receive the service.

Challenges faced leading up to the amalgamation included issues such as the organization's name, brand and identity, accreditation, membership fees, and development of a communication strategy to other agencies. As members of national affiliations and accreditation, both organization names were mandatory in the new name. While the new name is long, it has been acknowledged that, ultimately, the community will provide their informal name. Developing a new board structure and transitioning directors to the new organization was vital as was communicating change effectively to staff, volunteers and families involved with the organizations.

Actions taken

BBBSE has a history of looking at things differently. They have successfully employed a progressive model of collaborating with like-minded community organizations that help them deliver services better and more efficiently.

Collaboration with organizations like Family Centre which began in 1993, have benefited families by cutting out paperwork and allowing for accurate, shared information across the appropriate organizations. The partner agencies work collaboratively with families to find the best mix of programs and services that are then delivered by the staff of the different organizations jointly. As a result, families don't have to go to separate facilities and provide the same information to a series of different organizations. Processes are streamlined and barriers are removed for families who need access to services.

An organizational review process began in 2002 which resulted in a significant restructuring of the organization. Its executive director was also asked to take part in an HR Cluster program, an initiative proposed and funded by the Muttart Foundation. This initiative brought together a cluster of community organizations to share an HR consultant who was an industry leader. Involvement in this initiative allowed the organization to build its capacity in the area of HR management and to look at how they offer their programs in the community. After the foundation's HR Cluster program ended, the

agencies continued to pay for the HR Consultant to support a new HR cluster and the organization continued as a member. These Cluster partners are able to take advantage of the HR consultant to help work through their unique challenges at a fraction of the cost of doing it alone.

At the same time, BBBSE staff took a hard look at how they were using their resources and they adopted LEAN strategies, a move that “changed their world.” LEAN made them realize that they had become complacent about some of their procedures and that they were spending too much time doing things that were not focused on their end goal. Through LEAN they discovered new ways to do things better and more efficiently.

When, in July 2011, BBBSE and Boys & Girls Clubs of Edmonton formally came together to become one organization, there were a number of challenges along with opportunity. The decision to amalgamate was one long in the making but there were a number of supports in place to provide expert help to assist the agency with its processes and planning. While the two organizations had partnered on programming in the past, this was a significant organizational restructuring for which there were no precedents. It therefore required a great deal of consultation, planning, community involvement and impeccable leadership.

From an operational perspective, nine joint teams were formed around the functional areas of the organizations: Services for Children, Youth, and Families; Cultural Diversity; Volunteer Management; Finance; HR; Communications; Fund Development; Grants; and IT. All nine teams recommended that the Study Committee support an integration of the organizations. Staff was kept informed during the process via a living FAQ document, anonymous question box, weekly email updates and regular all-staff meetings. Staff commented that the process itself had made each more aware and sensitive to the other, and concluded that a deeper working relationship would be maintained regardless of the outcome.

Early in the process, an external consultant conducted an organizational culture survey of the two organizations. Twenty-five members of the leadership teams were surveyed; the results were benchmarked against data from 1076 other organizations, and compared to each other. The two organizations responded similarly to questions of mission, values, ethical behaviour, employee engagement, staff capability development, leadership and integrity, indicating that the two could effectively merge. Liz O’Neill’s thirty-plus years of strong leadership at BBBSE provided continued stability throughout the process.

Volunteer management for BBBS is strictly standardized at the national level while local Boys & Girls Clubs are able to develop their own practices based on national guidelines. Because volunteers were involved in both organizations in governance roles and for special project and events, this was an area of significant change for some members, volunteers and staff. Following amalgamation, volunteer recruitment was combined and all volunteers were brought to BBBS standards through training, enhanced screening and orientation to the new organization.

To ensure continued support from funders, the leadership team met with funders early on in the process to gain their support for the restructuring. Consequently, funders consistently supported the

amalgamation, maintaining or even increasing funding in some cases. Opportunities to seek grants to support the restructuring due to efficiencies that would be realized were also gained.

Outcomes

A critical component of BBBSE's success has been its commitment to partnership models and collaborations, a model that has impacted their organizational processes and the way they offer services to the community. By adjusting certain roles within the agency and connecting with others in the community, BBBSE is managing expectations regarding outcomes while also gleaning both anecdotal and measured responses relating to the success of the work undertaken by the organization.

The shared HR resource model is working. The employment situation in Alberta remains a challenge but by pooling their resources with other organizations and sharing the cost of hiring skilled experts to guide them, they have been able to build capacity and they're now managing those functions successfully on their own.

BBBSE's long-standing tradition of listening to staff and including them in planning has resulted in high volunteer and staff retention, and the organization continues to benefit from the long-term involvement of staff and senior volunteers. Involving staff and volunteers throughout the process of amalgamation has meant fewer surprises than might have been expected, and has helped contribute to its success. Consequently, despite the challenges faced when "them" becomes "us", the amalgamation is showing tremendous promise.

The organization has developed greater diversity in revenue and, with one exception, funders have continued to provide financial support, in some cases increasing funding in support of the restructuring. Given the broader diversity of programs now offered, the organization is eligible for grants they could not have considered prior to amalgamation.

They are certain that their partnership has increased their ability to serve more kids and families than ever before, and that by working together and extending resources, they're putting money back where it needs to be. They believe that through efficiencies, shared best practices, collaboration and innovative organizational solutions, the restructured organization will be able to *"do more with the same."* Prior to amalgamation, it was not unusual for frontline staff to refer across organizations, but a revised intake process, access to service, and streamlining of client information has the potential to improve under the new model.

Successful collaborations do not come without struggles but when all involved share one goal—dedication to ensuring positive outcomes for kids in the case of BBBSE and Boys and Girls Clubs—a successful partnership is possible and beneficial to all concerned. BBBSE and Boys and Girls Clubs continue to work through the challenges and opportunities following amalgamation, with the understanding that together, they will achieve even more positive outcomes for kids than either

organization could do alone. With similar outcomes in mind, and true commitment to ensuring that the outcomes are the primary goal, they are succeeding.

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