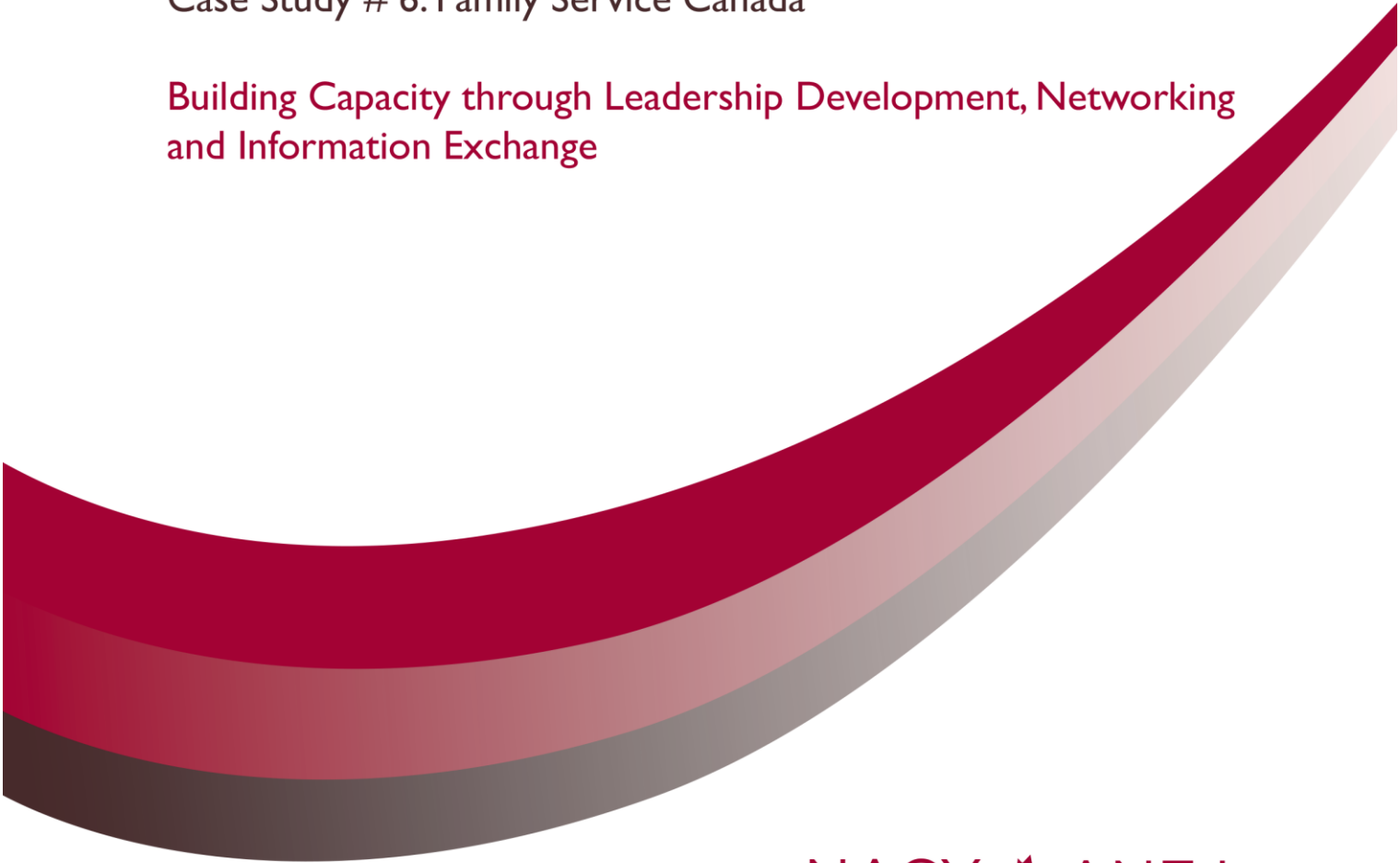


TAKING STOCK

How Canadian Child and Youth Agencies are Responding to Economic Challenges

Case Study # 6: Family Service Canada

Building Capacity through Leadership Development, Networking and Information Exchange



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The Taking Stock full report, all fourteen Case Studies and other supporting documents are available at www.nacy.ca/taking-stock.

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The Taking Stock project was funded by the Government of Canada's Social Development Partnership Program. The opinions and interpretations in this publication are those of the authors and do not necessarily reflect those of the Government of Canada.

Building capacity through Leadership Development, Networking and Information Exchange

Family Service Canada

Background of the organization

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)

Issue or situation

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.

Challenges

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.

In 2009 the Board hired Heather Underhill, a former Board Member who had been Executive Director of a local family services organization operating in the West Island sector of Montréal for more than 20 years, to survey the members of FSC to help determine its future role and services. This survey work then led to further part-time consulting contracts with Heather 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. As the sole paid

staff member throughout this period, Heather 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”*.

Actions taken

1. 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 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”*.

2. 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.

3. 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 benefits¹:

- 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.

¹ These benefits are explained in more detail at www.familyservicecanada.org

4. 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 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"*.

First held in October 2011 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 (The 2012 summit is planned for Kelowna BC).

The inaugural 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 the 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.

Outcomes

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 thriving and benefitting from this kind of innovation and transformation.

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