

SUSTAINING THE RESPITE COALITION WHEN LEADERSHIP CHANGES

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Overview

What happens when your coalition experiences a change of leadership?

How do you engage your Board and membership?

What do members want from the Coalition?

LEARNING OBJECTIVES

- Discuss leadership and organizational change as experienced by NCRCC
- Review strategic planning and the importance of creating a sustainability plan.
- Discuss purposes a Coalition may serve.
- Learn about potential barriers and challenges encountered during organizational change.

Case study: History of NCRCC

- Incorporated in 1997
- Housed and supported by ES/UCP
- Coalition had 3 regional chapters (east, central, west) that met quarterly
- Statewide conferences held in 2008 & 2010
- Application for recognition of exemption filed Fall 2012
- Coalition's Director changed employment and loss of ES/UCP staff support in Fall 2012
- IRS Determination Letter received February 2014

Impact of Leadership Change

- Create a sense of urgency
- Volunteer board members and local members needed to set up to hold meetings and communicate with members
- Diligence to acquire IRS determination letter
- Amended by-laws
- Revisited board member capacity
- Decided strategic planning was needed

Strategic Planning

Board retreat held after conducting a member webinar on respite vouchers grant opportunity

- Introduction to strategic planning process
- SWOT (Strengths, Weaknesses, Obstacles, Threats) analysis
- Revisit / revise mission, vision, and value statements
- Develop goals and objectives for the Coalition

SWOT Matrix

	STRENGTHS	WEAKNESSES
OPPORTUNITIES	S-O Strategies pursue opportunities that are a good fit to the organizations strengths	W-O Strategies overcome weaknesses to pursue opportunities
THREATS	S-T strategies identify ways that the organization can use its strengths to reduce its vulnerability to external threats	W-T strategies establish a defensive plan to prevent the organization's weaknesses from making it highly susceptible to external threats

Strengths (Internal)

- Historical
- Statewide representation
- Passion, desire to be successful
- Support of SUA/ state partners/ ARCH
- Local partners, host agencies
- Oversight of respite funds, gives us a reason for people to come to us
- Good stewards
- Volunteer guide
- Just One More
- Open minded, willing to be a learning community
- Networking opportunities, professional development

Weaknesses (Internal)

- Lack caregiver representation
- Full lifespan spectrum representation lacking
- Clear “elevator speech”
- What do people buy? What are benefits?
- Can’t articulate benefits
- No designated staff – all volunteers
- No administrative support (paid staff)
- No succession planning (leadership development, plan for terms, rotation, transitions)

Weaknesses – continued

- Lack of leadership / time
- Limited funds for sustaining
- Unclear mission/vision
- Low visibility; people don't know NCRCC
- Static website, no social media strategy
- Statewide target area can be hard to manage & get unity
- Are we unique enough?
- Not a 501c3

Opportunities (External)

- Increase in # of new General Assembly members (about 45%)
- Advocacy potential
- Trend/new growing need for community-based services
- Good role models in other coalitions (TN, SC, etc.)
- 501c3 allows NCRCC to raise \$
- Emergence of innovative respite opportunities

Opportunities - continued

- Tighter connection with Advisory Team
- MCO's – LME transition (Western Highlands)
- Show that respite saves \$ - public dollars
- Need we can meet:
- Policy maker/policy interpretation
- Information clearinghouse for respite policy/funding
- Sharing best practices, tap into ARCH
- What are the tools we can tap?

Threats (External)

- Organizational limbo
- External perception
- Uninformed public, even among peers
- Funding competition
- Getting lost in LTC supports
- Worsening economy
- Unclear communication
- Perception that NCRCC doesn't have long-term plan; lack of confidence
- Respite system/ provider funding
- Lifespan Reauthorization pending

SWOT Discussion: What do members and stakeholders actually want?

- Attendance at regional meetings dropped
- Meetings were being cancelled
- Local leadership was lacking
- Informal feedback regarding travel restrictions
- Loss of interest
- Confusion on identity
- Professional members & their organizations were experiencing “do more with less”

Mission & Vision Statements

Mission: The mission of the North Carolina Respite Care Coalition is to promote and support a statewide quality intergenerational respite care system.

Vision: Throughout North Carolina there is an established ~~seamless~~ **sustainable** network that meets the respite needs of families, caregivers, and individuals across the lifespan.

Value Statement

Respite care enhances the quality of life for the caregiver, their loved one and their community through timely, temporary care providing the balance to maintain a healthy approach to caregiving supports families across the lifespan. The NCRCC unites providers, caregivers and communities in growing quality lifespan respite care in North Carolina.

Goal 1

The Coalition will promote and support a statewide respite care network by sharing resources, best practices, and funding opportunities in an interactive format.

Goal 2

The Coalition will offer training and professional development opportunities to better equip our members to provide sustainable respite services in their communities.

Strategies

1. **Conduct member survey by August 31, 2013**

- Who are the member / stakeholders? What are their priorities, talents, content, communication method (webinar, in-person), time, and location(s).
- Professional development: topics, format, platform, frequency, tools, type of CEU's, etc. Suggested topics or content may include grant writing, fundraising, best practices, volunteer recruitment & management, leadership development, community building, sustainability, and advocacy training.

Strategies

- 2. Analyze survey results to create plan to guide the direction of the Coalition**
- 3. Seek support from the Lifespan Respite Grant to support the strategic planning project and survey**
- 4. Implement and evaluate plan**

Comprehensive Member Survey

- Member survey was supported by the Lifespan Respite Grant
- First beta-tested by members of the Statewide Lifespan Advisory Team (10 respondents)
- Released to the broader general membership and interested stakeholders (27 respondents)

Survey: Define NCRCC

- Information sharer – 89%
- Advocacy Organization - 76%
- Information Clearinghouse – 49%
- Policy Advisor – 46%
- Creator of ideas – 46%
- Other - Grant allocator, collaborative coalition, “pulse for respite care services” - 14%

Survey: Coalition Obligations

- Resource provider – 95%
- Advocacy – 86%
- Representation – 78%
- Train caregivers – 19%
- Other: knowledgeable about payment sources and eligibility for respite; advocating for private pay respite – 8%

Survey – Coalition Strengths

- Networking opportunities – 86%
- Statewide representation – 81%
- Passion – 73%
- Meet requirement for Lifespan Grant funding – 54%
- Support from state partners / ARCH - 51%
- Professional development – 35%
- Volunteer Guide – 22%
- Just One More – 11%
- Other – 3%

Survey: Coalition Weaknesses

- Limited funds – 65%
- Lack of recognition of what the NCRCC is - 62%
- Need a clear 30-second “elevator speech” - 59%
- Lack of articulated benefits for membership – 49%
- Need for paid staff or admin support – 43%
- Need succession planning for leadership – 35%
- Lack of caregiver representation - 24%
- Lack of representation from the full lifespan – 24%
- Lack of clear mission or vision – 19%
- Other: meetings were boring / not inspirational – 8%

Survey: Member Participation Expectation

- Networking – 54%
- Advocacy – 46%
- Clearinghouse for respite services – 43%
- Professional development – 30%
- Education – 27%
- Training – 24%
- All of the above – 65%

Survey: Meeting format

- Email – 38%
- Telephone conferences – 41%
- Webinars – 57%
- Face - to - face - 70%
- Other- 1%

Survey: Meeting Topics

- New ideas / best practices – 92%
- Partnership development – 73%
- Skills training / professional development – 70%
- Information from other coalitions – 68%
- Problem solving – 65%
- Brainstorming sessions – 51%
- Other: Funding resources – 3%

Survey: Sustainability funding

- Pursue grants – 81%
- Membership dues - 33%
- Fundraisers – 28%
- Other: Align with private/public entity to support NCRCC; Charge for meetings or trainings, sponsors, donors – 6%
- All of the above – 27%

Survey: Member involvement

- Grant writing – 9 respondents would help NCRCC
- Train others on grant writing – 6 respondents would be willing to train others
- Ideas for Fundraising – 1 responded with walk, ball, donation to NCRCC with purchase at a place of business
- Spearhead a fundraiser – 3
- Participate in a fundraiser – 74%
- Current member – 49%

Survey – Reasons for Membership

- Belief in the mission, vision and work of the Coalition
- Networking, learning about resources
- Interest
- Being part of a statewide organization and having the expertise and resources available
- Collaboration
- Need for respite
- Representation for caregivers and advocacy

Survey: Define membership

- Volunteer – 35%
- Dues paying – 6%
- Both – 59%



Survey: Membership Benefits

- Networking
- Training
- Clearinghouse for respite services and network of providers
- Policy announcements
- Partnership
- Education
- Sharing best practices

Membership Benefits - continued

- Advocacy to retain and grow respite
- Professional development
- Information about opportunities
- Priority to grant access
- Assistance in fostering new respite resources at the local level
- Mentorship

Survey: Dues or no Dues

Whether to remain a dues-based organization

- Yes - 56%
- No – 44%

Comments – dues keep low, benefits, dues are first things cut in budget cuts

Are dues a barrier?

- Yes - 54%
- No – 43%

Survey: Other questions

- Preferences for updates and frequency
- Attract more unpaid caregivers
- Website – have you visited
- Skills or talents willing to offer
- Serving as a Board member
- Demographics



Coalitions Next Steps

Define the Coalition:

- Members' key areas: networking, advocacy, resources
- Identify and enhance member benefits
- Communication: update website
- Continued development of respite database
- Branding – creation of new logo
- Create 30 second elevator speech
- Strengthen board leadership
- Create sustainability plan

Branding: Updated Website and Logo



www.northcarolinarespitecarecoalition.org

Our story in 30 seconds

The North Carolina Respite Care Coalition is a catalyst for improving the lives of family caregivers as well as their loved ones by joining together to provide collaboration, advocacy, and access to resources. We are a grassroots network of parents, family caregivers, providers, and representatives from organizations representing individuals with disabilities or chronic conditions, who have an investment in family support services. A collaboration of people and organizations working to find solutions for caregivers and to address the multitude of needs surrounding respite, our mission is to promote and support a statewide quality intergenerational respite care system. Our priority is to find ways to expand and enhance respite services available to families throughout the lifespan, and we maintain a database of respite providers across the state.

Future funding support

- NC Division of Aging and Adult Services included support for sustainability planning in new Lifespan Grant application



Our Current Challenges

- Funding
- Lack of paid staff to commit to delivery of directives
- Board members are volunteers working for other entities
- Resource database management
- Fiscal agent required by State of NC as NCRCC has not yet been vetted
- Accounting

Possible Funding Sources

- Grants from State agencies or foundations
- Fundraising
- Conferences and training
- Charitable contributions
- Membership dues – not supported by State agencies even though rate is low



Lessons Learned

- Have and follow clear and relevant by-laws
- Actively engage the Board in the directives of the organization
- Recruit Board members with ability to commit time and leadership
- Communicate frequently
- **Ask** for funding
- Plan, plan, plan
- Evaluate progress and revisit as necessary

Questions?

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