Wake County Community Collaborative for Children and Families

Strategic Planning Retreat
February 4, March 4 and April 1, 2014

Facilitators
Ginny Satterfield, Consultant
Lechelle Wardell, Consultant
Wake County Human Services
Office of Community Affairs
Introduction
The Wake County Community Collaborative for Children and Families (WCCCCF) began the process of developing a three year strategic plan on February 4, 2014, by holding the first of three strategic planning retreats. The remainder of the retreats occurred on March 25 and April 1, 2014. The goals of the retreats were to

1. Review and/or revise the mission statement
2. Develop a vision statement
3. Develop strategies to reach the visions
4. Develop a detailed action plan for the first year of the strategic plan

The retreats were facilitated by Ginny Satterfield and Lechelle Wardell, program consultants with the Wake County Human Services Office of Community Affairs.

Retreat Agenda
The agenda for retreats included the topics seen below. This report provides a summary of each agenda item with the committee’s related work.

- Developing a Journey Wall
- Reviewing/Revising the Mission Statement
- Creating a Shared Vision for Collaborative Work
- Developing Strategic Directions to Accomplish the Shared Visions
- Prioritizing Strategies
- Developing Action Steps to Accomplish Strategies

Below are notes from all three days of the WCCCCF Strategic Planning Retreats.

The Journey Wall

A Journey Wall provides an historical perspective of a group, helps identify trends and major changes, provides an opportunity for celebrating accomplishments and assists new members to quickly catch up to the history and background of a group.

Retreat participants were asked to consider the time frame from 2002, when WCCCCF was established to 2013. They were asked to identify the following types of events regarding the history of the WCCCCF:

- Accomplishments
- Major occurrences
- Additions
- Changes
Other events impacting the work of the organization

In looking at the history of the Wake County System of Care, participants were asked to identify:

- Community events
- Trends
- Leadership during the period
- Demographics
- Other changes

Having this history and information helps groups more effectively plan for the future of the organization by recognizing:

- Trends that may have impacted or may continue to impact the work of the organization
- Any barriers that might exist to moving forward, or
- Opportunities that might exist to aid in getting work done
## Wake County Collaborative

**Accomplishments**

- WCCC officially launched Nov. 6, 2001
- Collaborative membership grows
- Training/outreach
- CCC members attend state SOC conference
- Stable leadership

**Major Occurrences**

- WCCC officially launched Nov. 6, 2001
- Collaborative membership grows
- Training/outreach
- CCC members attend state SOC conference
- Stable leadership

**Additions**

- MHFC was meeting site until 2012
- A lot of attempts to involve legislators and political decision makers
- Training on child and family meetings
- Improvement in communication and visibility
- Second strategic planning process
- Diverse and welcoming
- Community data presentations to Collaborative
- Advocate for parents
- Cultural diversity presentations
- Community outreach promoting collaborative
- System of Care conferences
- Subcommittees formed and strengthened
- Change in LME
- Leadership change of Collaborative
- Increase in consistent and involved participation from a wide array of backgrounds
- New members, new chair and new vice chair
- New meeting location (moved to Alliance)
- Alliance hires SOC Coordinator
- Greta Gill left as SOC Coordinator
- Outreach presentations to parents on how to advocate for their children in school/Parent Advocacy workshops
- Change in focus

## Behavioral Health System

**Community Events**

- SOC focus
- The classification of Willie M dissolved
- More group home

**Trends**

- Community support services ©
- Mental Health “Reform”
- Area programs to LME’s
- Changes from LME to MCO
- School and day treatment collaboration
- Threats to stop supporting provisional

**Leadership**

- Community Care of North Carolina (CCNC)
- Main streaming special education (elementary)
- More awareness of mental health issues
- Value Options did Medicaid authorizations
- Dix Hospital closed

**Demographics**

- Food stamps changed to SNAP
- More push for medication
- Managed care model
- Higher qualified people providing support
- Wake County Divestiture of behavioral health
- Haven House starts assessments for adjudicated juveniles in Wake

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**Journey Wall**

2002 - 2013
<table>
<thead>
<tr>
<th>placements and wrap around services</th>
<th>Wake County did Medicaid authorizations</th>
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<tbody>
<tr>
<td>Wake County did Medicaid authorizations</td>
<td>Increased focus on quality (residential)</td>
</tr>
<tr>
<td>Once worker for all services to support families (ex I therapist for II H)</td>
<td>Local Managing Entity</td>
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<tr>
<td>Department of Juvenile Justice strong</td>
<td>Department of Youth Services</td>
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<tr>
<td>No self-contained classes (middle/high)</td>
<td>County</td>
</tr>
<tr>
<td>Trauma informed treatment</td>
<td>Opening additional youth psych beds (Strategic)</td>
</tr>
<tr>
<td>Intensive case management ended/changed</td>
<td>Wake LME merged with the Durham Center – Alliance Behavioral Health formed</td>
</tr>
<tr>
<td>Changes in state definitions in targeted youth population</td>
<td>Alliance does Medicaid authorizations</td>
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<tr>
<td>Push for more family centered</td>
<td>Increased alternatives to suspension</td>
</tr>
<tr>
<td>Community support services no more</td>
<td>More comprehensive crisis plan introduced</td>
</tr>
<tr>
<td>CABHA Certification</td>
<td>Project CATCH</td>
</tr>
<tr>
<td>Loss of school based mental health</td>
<td>Loss of case management</td>
</tr>
<tr>
<td>Push for licensure eliminated quality workers</td>
<td>Bill passes to directly enroll associates in Medicaid</td>
</tr>
<tr>
<td>Changes in state definitions in targeted youth population</td>
<td>Decrease in Level 3 in PRTF’s</td>
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<tr>
<td>Wake County’s divestiture of mental health services</td>
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</tbody>
</table>
Lessons Learned

- The Collaborative should speak up early to impact policy
- There is a need to prove effectiveness with outcomes and using evidence based models
- There is a need to inform/train families about behavioral health needs/system
- Cross training across disciplines is important
- Expand SOC database to be fully inclusive
- Strategic planning is key to be able to move forward

Mission Statement Review

A mission statement should be a guiding set of ideas that can be clearly articulated, understood and supported by the organization’s stakeholders, staff, volunteers, clients and partners. An organization’s mission statement should describe

- **What** an organization does
- **For whom** they do it, and
- **What** the benefit is.

As a part of the strategic planning process, the WCCCF worked to revise its existing mission statement based on services provided and the purpose of the collaborative. The revised mission statement is as follows:

**The mission of the Wake County Community Collaborative for Children and Families is to promote a system of care that strengthens children, families and the community by improving their access to local services and resources.**

Visioning Exercise

A vision is what you want your organization to be. In this exercise, participants began the process of envisioning what they want the Collaborative to be, become and/or be known for. Below is a listing of the categories that were used to develop vision statements for the Collaborative.

🌟 Community Empowerment

- Connecting
- Nurturing relationships between community and formal institutions
- To make things happen
- An organization that obtained more community involvement – parents and young people

🧬 Resource and Training

- An organization that provides information on how to navigate systems of services and resources
- Teaching
- A forum for sharing resources
- One stop resource for training families on the system of care
- To be a support network and educational resources for families
- One stop resource for mental health services, community services and activities
- One stop resource center for community services (ecology of the community)

❗ Advocacy

- Influencing policy makers
- Having an influence with decision makers
- Drive issues that the community wants
- A voice for individuals, children and families
An organization that is a facilitator of information between stakeholders (legal, education, MH, social welfare)
An organization that connects with the state collaborative
An organization that connects with local legislators and county commissioners

Provider relations
- Strengthen provider network
- Consistent
- Building communication amongst providers and working together to address the gaps that families face
- Ensuring no service or support gaps

Vision Statement
As a result of the visioning exercise, retreat participants developed a vision statement to describe what they want the Collaborative to be, become and/or be known for. The vision statement is as follows:

The vision of WCCCCF is to be recognized as a local leader in positively impacting children and families through advocacy, community empowerment, partnerships, training and connecting to resources.

Strategic Directions
After developing the shared vision, retreat participants developed strategies to reach the vision. This was accomplished through individual and team brainstorming sessions, which resulted in clear directions for the Collaborative and good ideas for action planning.
Priorities for Year One:

1. Develop a marketing plan
2. Gather and analyze data to target and align resources to maximize services and address gaps
3. Train parents, administrators, educators, and child-serving agencies
4. Build relationships with professional organizations (NAMI, NASW, LPCANC, NCAE)
5. Recruit influential members

Action Plans

After reviewing the work accomplished in day 2, participants began prioritizing strategies based on what should be addressed during years 1-3 of the strategic plan. Listed below are the action steps and completion dates for year 1. Assignments for action steps and detailed action plans for years 2 and 3 will be developed at a later date.
### Gather and Analyze Data

**Projected Accomplishments:** Address gaps and align resources to maximize services available in the community to influence policy.

**Completion Date:** January 6, 2015

**Action Steps**

<table>
<thead>
<tr>
<th>Action Steps</th>
<th>When</th>
<th>Who</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Establish a Data Committee</td>
<td>June 30, 2014</td>
<td>Collaborative Data Committee</td>
</tr>
<tr>
<td>2. Identify data needed – get from committees</td>
<td>June 30, 2014</td>
<td>Data Committee</td>
</tr>
<tr>
<td>3. Review Community Assessment data to determine needs/gaps (also Juvenile Court, WCPSS, Child Welfare)</td>
<td>Sept. 30, 2014</td>
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<tr>
<td>4. Review Alliance disaggregated data</td>
<td>Sept. 30, 2014</td>
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<tr>
<td>5. Compare data to id gaps</td>
<td>Sept. 30, 2014</td>
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<tr>
<td>6. ID resources to address gaps</td>
<td>Oct. 31, 2014</td>
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</tr>
<tr>
<td>7. Collaborate with Marketing Committee to create a map/resource guide</td>
<td>Nov. 30, 2014</td>
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**Resources Needed:** WCHS, Alliance, Statistical Analyst, Marketing Committee, Open Mind

### Recruit Influential Members

**Projected Accomplishments:** To ensure a diverse and influential membership using a deliberate process.

**Completion Date:** June 30, 2015 (ongoing)

**Action Steps**

<table>
<thead>
<tr>
<th>Action Steps</th>
<th>When</th>
<th>Who</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Review/Revise by-laws</td>
<td>September, 2014</td>
<td>By-laws Committee Membership Committee</td>
</tr>
<tr>
<td>2. Develop internal assessment tool/member profile (Get existing tool from Ginny Satterfield)</td>
<td>June 1, 2014</td>
<td></td>
</tr>
<tr>
<td>3. Conduct an internal assessment of current members – talents and affiliations</td>
<td>August 1, 2014</td>
<td></td>
</tr>
<tr>
<td>4. Establish a recruitment plan</td>
<td>January 1, 2015</td>
<td></td>
</tr>
<tr>
<td>5. Intentionally recruit membership to promote mission</td>
<td>June 1, 2015</td>
<td></td>
</tr>
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**Resources Needed:** People
## Train Parents, Administrators, Educators and Child Serving Agencies

**Projected Accomplishments:** Increase understanding of mental health issues.  
**Completion Date:** June 30, 2015

<table>
<thead>
<tr>
<th>Action Steps</th>
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<th>Who?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Review trend data Alliance has collected</td>
<td>July 2014</td>
<td>Community Involvement Education Committee (CIEC)</td>
</tr>
<tr>
<td>2. Identify target population for the first year</td>
<td>September 2014</td>
<td>Data Committee</td>
</tr>
<tr>
<td>3. Identify greatest training needs (surveys/other data collection)</td>
<td>December 2014</td>
<td>CIEC</td>
</tr>
<tr>
<td>4. Identify/develop training curriculum</td>
<td>March 2015</td>
<td></td>
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<tr>
<td>5. Identify persons/organizations to collaborate with for training</td>
<td>June 2015</td>
<td></td>
</tr>
<tr>
<td>6. Schedule trainings for the following year</td>
<td>June 2015</td>
<td></td>
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</tbody>
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**Resources Needed:** Data, survey tools, training curriculum, supplies, on-line communication

## Build Relationships with Professional Organizations

**Projected Accomplishments:** Increase influence, awareness and education  
**Completion Date:** December 2014

<table>
<thead>
<tr>
<th>Action Steps</th>
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<th>Who?</th>
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<tbody>
<tr>
<td>1. Identify current connections within Collaborative</td>
<td>June 30, 2014</td>
<td>Collaborative Committee</td>
</tr>
<tr>
<td>2. Identify chair(s) and committee</td>
<td>June 30, 2014</td>
<td></td>
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<tr>
<td>3. Prioritize identified organizations</td>
<td>August 31, 2014</td>
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<tr>
<td>4. Outreach to organizations (call, meet, attend meetings)</td>
<td>October 31, 2014</td>
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<tr>
<td>5. Foster strategic relationships (present to organizations, attendee from organizations)</td>
<td>December 31, 2014</td>
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**Resources Needed:** Work with Marketing Committee, documentation (minutes)
## Develop Marketing Plan

<table>
<thead>
<tr>
<th>Projected Accomplishments: Increased visibility throughout the county for efforts in advocacy, community empowerment, partnerships, training and resources.</th>
<th>Completion Date: June 30, 2015</th>
</tr>
</thead>
</table>

### Action Steps
1. Establish Marketing Committee
2. Continue to use System of Care database to educate stakeholders and expand awareness of mission
3. Conduct inventory of current members’ resources and affiliations
4. Members educate/reintroduce mission and vision of WCCCF to respective agencies and affiliates
5. Develop letter/brochure for members’ agencies to provide to families/communities with a focus on youth
6. Distribute letters to agencies
7. Identify and collaborate with existing organizations/groups serving the same populations

<table>
<thead>
<tr>
<th>When?</th>
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<tbody>
<tr>
<td>June 30, 2014</td>
<td>Collaborative Alliance</td>
</tr>
<tr>
<td>August 31, 2014</td>
<td>Marketing Committee Collaborative</td>
</tr>
<tr>
<td>September 30, 2014</td>
<td>Marketing Committee</td>
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<tr>
<td>October 31, 2014</td>
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<tr>
<td>December 15, 2014</td>
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<tr>
<td>January 31, 2015</td>
<td></td>
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<tr>
<td>March 31, 2015</td>
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</table>

### Resources Needed:
- Brochures
- Contacts
- Time of members
- Inventory/survey tool