



More than Purpose

Relying on more than social good to retain talent



Thank you for
joining me today!

About Me



- **Lived Experience with Facilities**
- **10+ Years Non-profit Experience**
 - Theatre/ Events
 - Community Based Organizations
- **Attended Case Western Reserve University**
 - Masters of Social Science Administration (Child and Youth Mental Health)
 - Masters of Non-profit Management
- **Intern at Safely Home 3+ Years**
 - Direct Care, Administrative, Organizational Review
- **Highly involved in CARF Accreditation / QRTP Certification**
- **Transitional CEO of Safely Home**



Safely Home, Inc.

Safely Home, Inc



- Opened in 1995
 - Located in Bedford, OH
 - Budget 2.5 Million
 - 1 Revenue Stream - Fee for Service
- 4 Programs (SH Residential, JEWELs Residential, Group Home, Charter School)
 - Can serve up to 30 Children
 - 30 - 40 Employees
- CEO is "Retiring" for 10+ Years - Little Success

What is a Transitional CEO



- **The goal of a Transitional CEO is to address the challenges which arise as one CEO leaves and the next Executive enters the organization**
 - Time Limited
 - Leads the organization through significant change
 - Ensures foundation is in place to allow next CEO to hit ground running
- **My Goal:** Help Safely Home move beyond the founder's vision into an organization capable and prepared to address the challenges of the next 25 years while addressing systemic issues currently present.



Step 1: Gather Information

- **Interviews**

- Goal of CEO
 - Transition out while ensuring organization returns to being an A+ Agency
- Goal of Executive Director
 - To provide more support to the workforce
 - To address organizational struggles (Regulation, Budget, Accreditation)
- Program Director
 - Redesign program to have more structure
 - Bring in more qualified candidates
 - Increase resources for programming
- Goals of Admin
 - More support when trying new things to assist agency
 - More communication

Step 1: Gather Information



- **Interviews**

- Goal of Direct Care Workers
 - To feel valued
 - To build back JEWELs Program
 - To have more support from leadership
- Goal of Therapists
 - To have more support from direct staff workers
 - To speak in a common language
 - More structure with paperwork/reporting
 -

Take-away: There is a lack of distrust in the organization and an understanding the organization feels poorly positioned to address future challenges.

Step 1: Gather Information - Policy/ Procedure



1. Review of all Existing/ Written/ Acceptable Policy and Procedures
2. Interviewed staff
 - a. Do you know and understand the policy and procedures
 - i. Multiple answers/ history of answers/ lack of clarity
 - b. Is the answer written in a clear place
 - i. Multiple answers/ history of answers/ lack of clarity
 - c. Does the answer work
 - i. No/ Sometimes/ When Followed

Take-away: Policy has been written to be reactive to state law and regulations rather than proactively addressing challenges and concerns of those in the organization.

Ex: Intercom

Step 1: Gather Information - Any Fires?



1. Newly QRTP
 - a. Newly Accredited - Provisional
 - i. Documents were not in
2. Significantly Over Budget
3. Lack of Staff needed to run optimally

Take - away: Fires minimal if we can get back on track

What is Organizational Effectiveness?



The ability of an organization to fulfill its mission through

- effective leadership and governance, sound management, and
- the alignment of measurable outcomes with strategies, services, resources, and partners.

Adapted from Grantmakers for Effective Organizations. (2016).

By this measure Safely Home, Inc. is not an effective organization.

How can it become one?

Step 2: Pick a Framework



Source: Huffington,
et al (1997)

Huffinton's Measures of a Healthy Organization

Purpose - A healthy organization is purposeful and goal directive. People have relatively explicit goals and directions towards which they are working. Creates focus, provides a framework, and provides criteria for resource allocation.

Structure - Power is widely dispersed and differentiated from (official) authority. The organizational chart, the ways in which work is organized, the location of decision points are defined by the work requirements not authority or power requirements.

Process - Decisions are made based on location of information, rather than roles in the hierarchy. Communication is open. Norms reward differences of opinion on ideas, solutions to problems, goals - regardless of the authority relationship of those who disagree. Conflict is managed and is viewed as an essential part of everyones job.

Huffinton's Measures of a Healthy Organization

Resources - There is a conscious effort to support each individual's identity, integrity, and freedom. The reward system(s) are related to work to be done.

Reality - There is an "action research" mode of behavior. The organization sees itself as always "in process" - needed mechanisms for collecting information on the state of things and consciously planning improvements. Feedback mechanisms are built in at all levels.

Relationship with the environment - The organization is seen as an open system, embedded in a complex environment, the parts of which are constantly making demands.

Purpose -



There is no one who works at Safely Home who does not have commitment to the purpose of the organization.

If employees are failing in this domain it is because:

1. The goals are not explicit
2. Other domains are not in place to support goal achievement

Structure -



- SH culture is largely "because I told you to"
 - Can be effective in short term but leads to long term confusion
 - Limits the ability for new leaders to emerge
- Decisions can happen unilaterally
 - Communication halted or actively hostile
 - Limited support of decisions from those not in positions of power
- Task - Forces implemented
 - Creates a structure for decisions
 - Creates decision points outside organizational hierarchy
 - Encourages communication and accountability
 - Meets needs of organization

Process -



- Decisions are made in Admin and distributed to team
 - Lack of written processes
 - Hiring process limited
 - Lack of transparency
- Go Forward - Written procedure book - approved by staff and team
 - Writes all procedures currently used
 - Establishes when review is necessary
 - Task Force's provide input
 - Clear understanding of how a procedure is reached and why
 - Supportive of a wide views of opinions without "authority" relied upon to settle disputes
 - Willingness to resolve disputes through communication

Resources -



- Rewarding staff for good work
 - Wage increase plan
 - Higher base rate
 - 4% COL Increase
 - 3% Merit Based Increase
 - Taskforce incentive
 - Peer recognition Bonus

• There is a conscious effort to support each individual's identity, integrity, and freedom. The reward system(s) are related to work to be done.

Reality -



- Few methods of Data Collection
 - Programming has limited income and outcome measurements
 - Measures present are not completed by staff
- New Programming input and output data collection
 - Measures understanding of concepts taught and learned
- Staff and Client Surveys
 - Strategic Task Force - Client Interview
 - Training Task Force- Staff
- Employee Growth and Accountability Task Force

Relationship with the Environment -



- SH Historically - Resisted Regulations
 - Limited engagement
- Limited itself to one revenue source
 - Limited donations/ no donor base
 - No grant funding
- Task-Force
 - Strategic Planning
- Increasing Board Development
- Annual reports and community engagement
 - Advocacy work

Step 2: Get on Same Page



- Revealed a plan to the organization
 - Wage Increase Plan
 - Huffington structure
 - Taskforce Groups
 - Budget
- Clarity around goals
 - Show employees they are valued

Step 3: Impliment Plan



- Hiring Task Force
 - Brought base pay up 1.90 cents
 - Panel Interview Process
 - Increased marketing materials
- Training Task Force
 - Implimenting new direct care training program
 - Increase engagement in training and application of training
- Programming Task Force
 - Creates rules and programming decisions

Step 3: Evaluate the Plan

- Pros
 - Provides structure for decision making
 - Allows decisions to be collaborative
 - Supports the value of resources
 - Sense of ownership in decisions
- Cons
 - Beginners mistakes - lack of structure, lack of clarity, overwhelming workload
 - Lack of faith in current leadership
 - Only as good as the solutions suggested
 - Items can be undermined through lack of participation



Step 4: Adjust the Plan



- INFORMATION WILL BE ADDED WITH NEW DATA

Safely Home, Inc - Before COVID

- **Competitive Advantage - Community Integration**
 - 85% of programming located off grounds
 - Library, YMCS, Conferences, Community Service
- **Integration between Client's Home and Treatment**
 - Weekend passes, passes on school breaks, high involvement of parents
- **High number of applicants for all positions**
 - Direct care workers plentiful
- **High retention rate**
 - Average length of stay (Direct Care) was was 5-7 years
 - People gained new positions for more money - not because they wanted to move into a new role
- **Conflict was boiling over**

Safely Home, Inc - During COVID

- **Complete lock down - Limited involvement with Community**
 - Parks and activities on grounds
- **Minimal movement of clients between home and facility**
 - Virtual visits
- **High number of applicants for all positions**
 - Applications virtually stopped
- **High retention rate**
 - Multiple long term employees left
 - Program Director, Therapist, School employees
- **Dropped Maximum Capacity of Program**
 - Closed room of 4 as "Quarantine Room"
- **Limited Admissions**
 - Fears of bringing COVID into facility + Slow-down of community referrals

Safely Home, Inc - During COVID

- **Employee Turnover Rate 2020 - 2021**
 - 2020 Turnover Rate
- **Commitment to Keep all Staff who wished to Stay**
 - Limited search for new staff - pipeline stalled
- **New Admin Staff**
 - New Program Director
 - New Leadership Team (under 1 yr)
 - Turn over in Therapists

Safely Home, Inc - Post COVID

- **New staff lacked experience**
 - Lacked comfort with clients in community
 - Increased passes home - more struggles with contraband
 - Virtual visits
- **Job Benefits no longer competitive**
 - Lacked online presence and infrastructure
 - Outbid with benefits and Wage / Job Hoppers
 - Increased wait times for background checks
- **Overburdened Long Term Staff**
 - COVID Stress + Increased Requests
- **Limits removed on Program admissions**
 - Not enough staff / Staff not prepared
 - Combined JEWELs & SH Residential
 - Closed Group Home