SUPER CRO

Our Mission is to aid consumers through education, advocacy, collaboration, feedback and equal representtaion

Section 1: **Why We are Here**

Section 2: **Environmental Trends and the Community We Serve**

Section 3: **Building New Capacity – Strengthening our Organization and Managing Change**

- **Strategic Plan Focus 2017- Eliminating Barriers to Participation**
  - Services
  - Programs
  - Community
  - Staff

Section 4: **Strategic Plan**

- **Definitions**
- **Mission Vision and Values**
- **Key Capacity Areas**
- **Governance and Leadership**
- **Program and Services**
- **Fund Development and Financing**
- **Internal Operations and Management**[1]
- **Strategic Relationships**

Section 5: **Implementation and Monitoring**

Section 6: **Appendices: Supporting Documents**

a. **Quick Guide to Standing Committees and Task Teams**
b. **Monitoring Form**
c. **Budget Projections**
d. **Board Members**
e. **Staff Leadership Team**

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[1] *Resource: Funders Guide to Capacity Building; Amherst Wilder Foundation*

Section 1: Why We Are Here

SUPER CRO is a consumer organization serving the geographical area of Australia and dedicated to improving the lives of people with psychiatric disabilities. The organization is entirely made up of people who self-identify as current or former consumers of mental health services. People are involved for various reasons:

- *Interested in the idea, and do not want to be reliant on federal funding.*
- *What are the lessons that we can learn from our Peers in Kansas?*
- *I want to be involved in the initial stages*
- *Interested in Consumer Run Organizations (CROs). We are going through a Mental Health Reform and are being asked to do this. Peer Run Services – Want to Move this through!*
- *I want to understand what is being proposed*
- *Waiting a long time. We need to fill in the gaps of services. Vision to the achievement for Australia. Start small, and expand to the other states. We want a place where people can feel safe.*
- *1992 episode. Type of service in the USA was discontinued in NSW. "Drop-in Center" models have become "too clinical". Hope to have a mirror image of Project Independence in Wichita, Kansas. Within the Clubhouse models, clinicians have come in and said "not well". Urban Partnership.*
- *It will allow us to have a "piece of the pie"*

Section 2: Environmental Trends and the Community We Serve

Important to our work is incorporating community or consumer voice into our planning and implementation process. We know that there can be barriers, and Project Independence has identified several Key Barriers:

- **Social Attitude**
  - Consumers can't do it"
  - Do things in steps to demonstrate it as an education process (an EBP – Evidence Based Practice)
- **Lack of Money**
  - Consumers who want to run the CRO
  - Demonstrate the need
  - Need to identify who handles the money.
- **Ignorance**
  - *Educate, Educate, Educate!*
- **Who can support us and do the work?**
  - *Need to be patient!*
- **Get the Group to understand who the supporters are.**
  - *Presentations.*

Facts and figures about the economy, the available budget, and statistics about consumer services are important. However, the session was designed to collect a first-hand read from members and staff about the **services, staff, programs, and community environment** Identifying those dimensions that provide a backdrop to setting our priorities and focusing our work are critical for success.

- **Services**
    - *Recovery Support Groups*
    - *Self-Run Groups*
    - *NDIS*
    - *Social Isolation/Physical Activities*
    - *Respite*
    - *Warm-line*
- **Staff**
    - *Classification and/or definition of Peer Workers*
    - *Colleges – Create Trainings*
    - *Having the right skill set*
    - *Board of Directors (voluntary)*
    - *Approximately six (6) paid staff*
- **Programs**
    - *Evaluate – Where we have been, and where we are going*
    - *Wellness Recovery Action Plans (WRAP)*
    - *Pathways to Recovery*
    - *Advocacy/Education around Actions 8.1.1*
- **Community Environment**
    - *Members must self-identify as having a mental illness*
    - *"What do you want?"*
    - *Local media coverage (positive)*
    - *Mentorship 0ne-on-one*
    - *Location (can be a factor)*
    - *In house "store"*

Section 3: Building Capacity –

One of the primary challenges for any non-profit organization is ensuring there is capacity to perform their mission and achieve their goals. *Project Independence* will undertake this process to identify strengths, areas for improvement and set priorities for building the strength needed to sustain and stabilize this organization once it is established. The planning process shall be guided by their strategic framework in which all organization programming and services falls into these arenas: *services, programs, community, staff, and collaboration with community partners.* This strategic focus should be reflected in the mission statement.

- **Identified Community Partners**
    - *NGOs*
    - *Email List*
    - *Social Media*
    - *Mental Health Recovery Network*
    - *Connections*
    - *Consumer Groups*
    - *City Busses*
    - *Urban Partnerships*
    - *Taxi Service*
    - *Gift Cards/Fast Food*
    - *Parking Arrangements*

- *Service Clubs (Rotary, Lions, etc.)*
- *First Responders*
- *Second Hand Stores*
- *Carers*

In order to build capacity, funding must be secured. SUPER CRO has identified a list of funding issues, as well as resources that may be available.

- **Funding Issues**
  - *Public Meeting*
  - *Building*
  - *Registered as a non-profit organization*
  - *Insurance*
  - *Furniture (fridge, Table, chairs, computer, printer, group supplies)*
  - *Storage containers*
  - *Inventory*
  - *Office Supplies*
  - *Secure Lock up Space*
  - *Parking Space/*Vehicle
- **Resources**
  - *Charities*
  - *Philanthropic Trusts*
  - *Banks*
  - *Home services*
  - *City of Sydney*
  - *Grants*
  - *Knowledge Exchange*
  - *Sponsorships*
  - *NSW Mental Health Commission*
  - *Central Eastern Sydney Primary Health Network*
  - *Partners in Recovery*

The strategic plan that follows is a candid assessment of what the organization must address in order to maintain stability and begin to grow certain aspects of the organization. The plan addresses urgent priorities along with a process to track progress and build in support as needed to address other mid-range and longer ranges priorities. Not only was the plan structured to address urgent issues it was designed as an aid in educating the board and staff about the necessity and the process for ongoing strategic planning. In addition to addressing priorities it provides a tool for developing confidence in the planning process. This plan is meant to be a working tool and used as guidance for task team and staff work.

Section 4: Strategic Plan

This plan provides the framework for a 3-5 year strategic effort by the organization as reflected in the *structure* of the plan. The *content* will be reviewed and modified at regular intervals as goals are achieved and new goals identified based on the priorities in each capacity area.

Mission

Our Draft Mission is to aid consumers through education, advocacy, collaboration, feedback and equal representation

Vision

Our Draft Vision is that all New South Wales have hope and expect mental health recovery and wellness as an essential part of overall health. All people can use their life experience or trauma background as assests to build diginity, self direction for a life of their choice in the community

Key Capacity Areas

The following areas provide strategic focus and set a frame for the ongoing work of the organization. These areas represent not only key strategic priority areas but also areas of capacity of a non-profit organization. They can easily be used as a guide for the organization for their work and assessment of their ongoing sustainability.

The plan was based on a "critical issues approach" to strategic planning. Essentially, identifying all of those items that must be addressed to either sustain and strengthen current efforts and or eliminate barriers to achieving program and organization goals.

Implementation is a key to successful planning and as such, we intend to use a task team approach to assigning tasks and tracking information. Following is the framework for our planning and implementation process.

- **Governance and Leadership**--addresses the formal and informal roles and responsibilities of board members, including legal roles and responsibilities.
- **Program Services**-- addresses the focus of the services provided within the context of the role of the organization and outlines the strategies necessary to accomplish the work of the organization.
- **Resource and Fund Development –**represents the budgeting, financing and activities to raise funds for the organization.
- **Operations and Management –**focuses on the policies, procedures, and activities necessary to manage administer and direct day to day work of the organization.
- **Strategic Partnerships –**addresses the alliances and collaborative activities necessary to ensure sustainability and support for the organization.

Critical issues[2] : Critical issues are fundamental policy or program concerns that define the most important situations and choices this organization faces now and in the future. Defining critical issues is at the core of setting strategic direction and was developed through a consensus building process with board and staff. These became the fundamental goals in the plan.

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[2] Critical issues identified by the board can reflect:

- Long standing problems in the system, people served or recent events, which are anticipated to have a significant impact on the organization and/or people, served.
- Impediments that must be overcome in order for the organization to meet is goals e.g. problems to be solved; or
- Watersheds/major shifts in thinking that can change the direction of the organization or the nature of its environment and challenge business as usual.

Task Teams: Task teams are time limited and designed as work teams to set goals, identify tasks, and develop implementation strategies for the critical issues that were identified in the strategic planning session. A task team may perform the same type of function as a standing committee **but is not intended to duplicate or take the place of the standing committee**. Its short-term nature dictates that as soon as the identified tasks are completed they are discharged as a team or they refer outstanding issues to another task team or standing committee.

Goals: Outcomes that **Project Independence** wants to achieve as a result of addressing critical issues. Each goal is ranked as **immediate** (within 6 months the primary activity is completed or is significantly under way); **mid-range** (begun during this 6 month period with a plan to carry it past 6 months to 9 months; **long range** (should be reviewed during the plan period and included in a long range or multi-year plan)

Strategies: For the purposes of this plan strategies provide the guidance and direction for developing the steps necessary to achieve identified goals. Strategies listed below are by way of example only. Task teams and committees will confirm and develop appropriate strategies as part of their charge.

Strategic Plan: Capacity Areas and Priorities

Governance and Leadership- addresses the formal and informal roles and responsibilities of board members, including legal roles and responsibilities.			
Critical Issue(s): Board operations and member capacity do not reach a level that enables the organization to remain stable	**Assigned to:**	**Level of Priority and Timing**	**Strategic Area**
Goal #1 : The board will effectively operate and manage and UNDERSTAND their roles and responsibilities. Strategies: • Develop a comprehensive board training and development plan and implement as soon as possible. Goal #2: The organization will created and approve by-laws that will allow daily operation of Project Independence. • Create bylaws, code of conducts, and other documents, in which the organization will agree to operate under. Goal #3: The organization will expand the support and involvement in the organization through board recruitment Strategies: • Develop a board recruitment, orientation and leadership training process for current and		Immediate Immediate Immediate	Organization Capacity Building

prospective board members • Establish a task team or standing committee that will be responsible for ensuring progress by monitoring and managing these efforts on a continuous basis.			
Resource and Fund Development - represents the budgeting, financing and activities to raise funds for the organization.			
Critical Issue: An immediate assessment of funding and how to expand the funding base to support current programming is needed.	**Assigned to:**	**Level of Priority and Timing**	**Strategic Area**
Goal #1**:** Complete an analysis identifying the level of funding needed for current program and operations and *project* needed funding over the next 1-2 years Strategies: • Conduct a financial analysis on funding streams; develop benchmarks for when additional funding and support will be needed. Produce a cash flow analysis and closely monitor. Goal #2: Produce a fund development plan and align it with the programming and organization development needs. • Establish a task team or identify a standing committee • Identify and/or engage a fund development manager to review current funding and ask for recommendations about increasing the funding base of the organization		**Immediate**	Funding stability

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• Consider identifying underwriters who provide ongoing support to the organization			
Program Delivery and Implementation - addresses the focus of the services provided within the context of the role of the organization and outlines the strategies necessary to accomplish the work of the organization.			
Critical Issue(s): Programming reflects a sound focus on Services, Programs, Staff, and Community**.**	**Assigned to:**	**Level of Priority and Timing**	**Strategic Area**
Goal #1 Program quality and content will be maintained while looking for opportunities that emerge from the work that the organization should consider. Eliminate barriers to sustainable funding. Strategies: • Staff should ensure there is a process in place for regular review and accountability of current programming • Regular reports as required should be distributed to funders, board of directors		Mid to Long Range	**Education, Advocacy, Collaboration**
Strategic Partnerships - addresses the alliances and collaborative activities necessary to ensure sustainability, support, and success for the organization			
Critical issue(s): The organization has identified partners they believe are essential to the success of its work. A review of those partners and assessment who to "connect with and how" needs to be done	**Assigned to:**	**Level of Priority and Timing**	**Strategic Area**
Goal: The organization will have identified 4-5 key partnerships in which they will vote time and effort in order to strengthen their capacity and achieve goals. Strategies: Designate a time limited task team to identify partners and organizations and have them make recommendations about how to strengthen and expand relationships		Mid Range to Long Range	**Partnerships**

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Operations and Management - focuses on the policies, procedures, and activities necessary to manage administer and direct day to day work of the organization.			
Critical Issue: There is a need to secure a place for Project Independence.	**Assigned to:**	**Level of Priority:**	**Strategic Area**
Goal: The organization will seek out a location that fits the needs of its programs and members.. Strategies**:** Establish a facilities management task team Confirm any move and when Develop a timeline and strategic task plan for transition		Immediate to Mid-range	**Operations**

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Section 6: Implementation and Monitoring

Monitoring the progress of this plan is the lynchpin to success. It is one thing to develop the road map but taking the trip requires good oversight. As such the monitoring consists of tracking the activities of each task team and standing committee. The Executive Committee and the Executive Director will review progress of the various task teams during their scheduled Executive Committee meetings and will then present that progress to the board. Forms for tracking and reporting are included in the appendices.

Next Steps: *(to be created once By-laws, Mission, etc are created and are fulfilled.)*

- **Draft Mission Statement created 12/06/17**
- **Draft Vision Statement created 12/06/17**
- **Identify Key Task People/Make Assignments/Set Priorities**
- **Standing Committees and Task Teams**
- **Monitoring Form**
- **Budget Projections**
- **Board Members**
- **Staff Leadership**
- **Supporting Documents (Bylaws, Code of Conduct, Rules of Operation)**