COCOONHOUSE

Breaking The Cycle Of Homelessness

Sustainability Through Change:
Navigating Significant Organizational Changes

Presented By:

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Framing the Workshop

Discussion Purpose:

How Cocoon House navigated a CEO transition in the middle of a capital campaign, construction, and relocation of agency headquarters

- Importance of organizational climate and culture setting

- Introduction to Cocoon House and our organization's experience and lessons learned over the last 5 years

- Establishing culture, strategic/succession planning, communication and Community engagement

- Key observations

- Q/A

What we Know:

- Organizations consist of core technologies & systems embedded in Social Contexts (Cultures and Climates)

- Social Contexts often determine whether technologies, systems, new approaches, or change efforts fail or succeed

- Social Context significantly impacts:
  - Quality of services to clients and client functioning
  - Staff outcomes (effectiveness, engagement, turnover)
  - Organizational change capacity & sustainability

What is Organizational Social Context? (Culture & Climate)

Organizational Culture (Norms and Expectations)

- *Proficiency*
- *Rigidity*
- *Resistance*

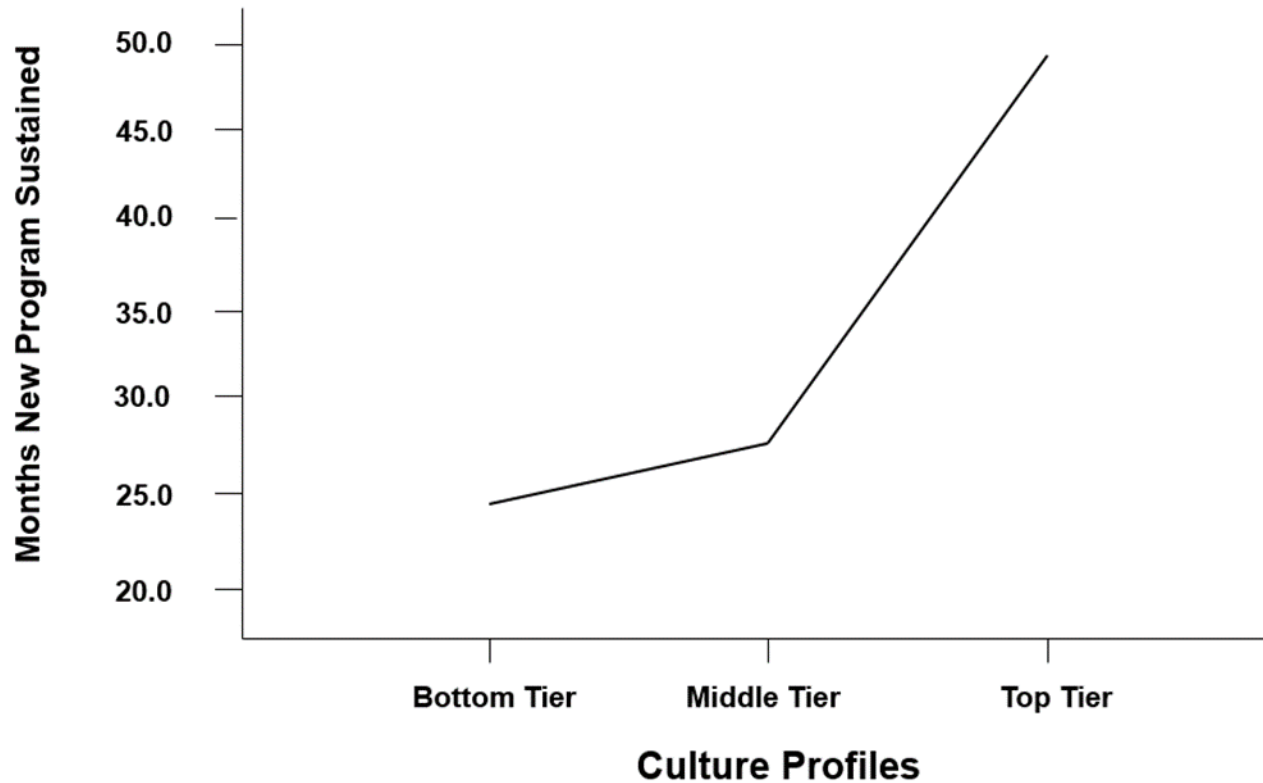## Organizational Climate (Perceptions of wellbeing)

- *Engagement*
- *Functionality*
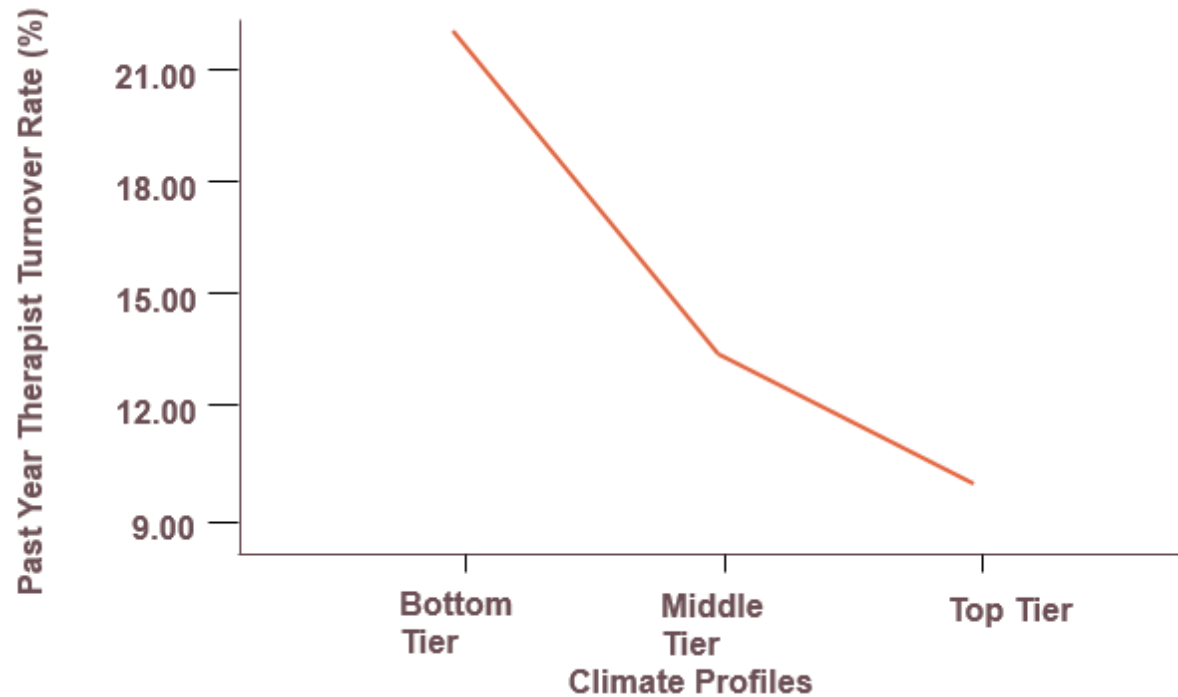- *Stress*

Social Contexts: What We Also Know

Leadership significantly influence Social Contexts through their...

- Actions, decisions, and approaches

- Comfort & "mentality" for change/improvement

- Approaches to systems & structures (Discipline, Training, Performance appraisal, Team structure, Communications, etc.)

- Focus on quality of relationships & staff participation

- Clarity of mission, strategic plans, and objectives:

    - Actions that back mission, clear communications, active involvement in change, clear plans & objectives

New Program Sustainability as a Function of Culture

# Therapist Turnover Rate as a Function of Climate

Introduction: Cocoon House

Cocoon House empowers young people, families and the community to break the cycle of homelessness through *outreach*, *housing* and *prevention*.

- **Location**: Snohomish County, WA

- **FYSB programs**: SOP, BCP, BCP-P, TLP, TLP (MGH)

- **Number of Employees** : ~100

- **Operating Budget**: $5.5M (FY20)

2014-2015: Creating the Culture
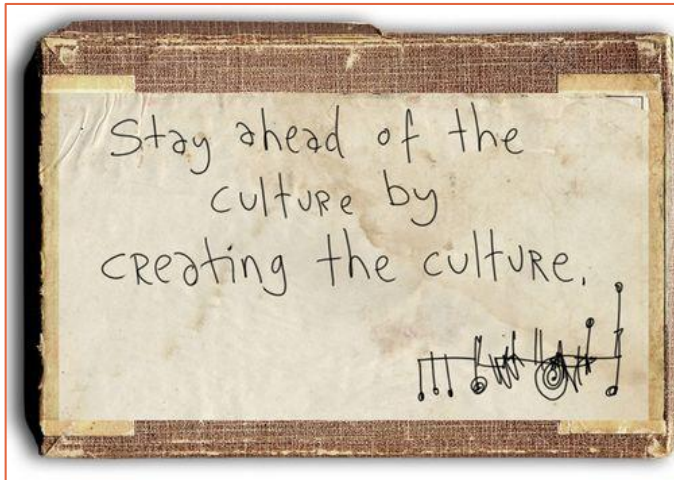
- New Leadership

- Exited crisis mode and entered growth mode

- Increased transparency around decision making philosophy

- Strength and competency development for management team

- Setting the strategic vision

2014-2015: Succession and Organization Structure

- CEO vision and plan to leave

- Management Structure

- Continuously look for leaders

- Build growth of leadership into strategic plan

- Culture of leadership team meetings and communication
    - Death By Meeting by Patrick Lencioni
    - 5 min, tactical, strategic meetings

2014-2015: The Strategic Plan

- Executive Board & key staff planning sessions

- Staff and board retreat

- Staff at all levels engaged

- Plan execution at all levels

- Update, revise, repeat

*Handout – Cocoon House's 2015-18 Strategic plan summary

STRATEGIC PLAN FY15-FY18 - ASSURE POSITIVE PROGRAM IMPACT												
Objective		Task	Start Date	End Date	% Complete	Lead	Team	Flag	Impact/Measurement	Comments	Impact	Weighted %
Implement a systematic approach to aligning and improving program outcomes by year-end FY16 – CORE LEAD : ALEX	1.1.1	Create and update a matrix of outcomes for each funder	4/1/2014	8/31/2014	100%	Alex	Joe, Max, Tarah, Alex	GREEN	Staff understands the outcome requirements for each funder and is able to ensure metrics are obtained easily for reports.	ongoing work as needed to remain current	20%	20%
	1.1.2	Use dashboard for reporting individual and cross program outcome performance to program staff, reviewing every program each quarter	6/1/2014	10/31/2014	75%	Joe	Alex, Joanna, Lindsey, Darrin, Elysa, Shira	GREEN	Increased awareness of performance issues across programs which will lead to increased cross-program assistance towards desired outcomes.	Monthly updates to programs/board - perhaps narrative only with annual report in July	15%	11%
	1.1.3	Train key staff on their program outcomes	8/1/2014	6/30/2015	85%	Joe	Joanna, Lindsey, Darrin Elysa, Shira, Joe, Tarah	GREEN	Program Outcomes are written and accessible to staff at all times.	trained, Prevention using specific program outcomes to adopt agency ones in AC PS	15%	13%
	1.1.4	Supervisors train teams on their program outcomes	1/1/2015	7/31/2015	60%	Joe	Joanna, Lindsey, Darrin Elysa, Shira, Joe, Tarah	YELLOW	Supervisors check on staff's performance and their impact relevant to their program outcomes.	outcome reports being sent to case mngrs and site supervisors	10%	6%
	1.1.5	Case Management goals agency wide will be consolidated into a unified continuum of care that reflects the unique goals of each program.	8/1/2014	9/30/2014	75%	Joe	Cacula, Andy, Kayla, Joanna, Marty, Joe	GREEN	A visual representation of the continuum of case management will enable program staff to be aware of client interactions and priorities.	Joe needs to connect with Marty on this	15%	11%
	1.1.6	Establish uniform metrics to align across programs that ensure funder requirements and agency measurement needs are met.	7/1/2014	9/30/2015	95%	Joe	Alex, Tarah, , Joe	GREEN	Develop consolidated definitions of outcomes and refine program reporting to eliminate duplication and ensure funder compliance.	Already doing aligning work with new reports and aligning with new cycles	15%	14%
	1.1.7	Standardize case plan documentation across programs to better reflect and support the continuum of care.	11/1/2014	9/30/2015	100%	Joe	Cacula, Andy, Kayla, Joanna, Marty, Joe, Lindsey, Darrin, Elysa	GREEN	Program supervisors oversee implementation and utilization of new form, making changes as needed.	Complete	10%	10%
Increase program integration with cross training and shared objectives by year-end FY16 – CORE LEAD : ALEX	1.2.1	Continuum of care model is implemented across programs, measuring the progress of clients as they receive CH services	7/1/2014	10/31/2015	95%	Joe	Joe, Marty, Kayla, Andy, Shira, Cacula, Joanna	GREEN	One standardized tool of measurement is created (or researched) and used for CH clients and case managers to gage how clients are doing as it relates to CH's continuum of care model.	Meeting with Shira to discuss outcome tool for PS/AC otherwise everything aligned	20%	19%
	1.2.2	Implement ongoing quarterly cross training opportunities across programs, including sub-programs, and create opportunities to shadow shifts in other programs	12/1/2014	7/31/2015	65%	Joe	Joe, Ruth, Tarah, Joanna, Elysa, Shira, Lindsey, Darrin	YELLOW	Staff surveys report they've gained additional insights into other programs through cross training and shadow shifts.	Development opportunities in multiple programs, sharing staff, prevention soon	30%	20%
	1.2.3	Programs share their outcomes and work related to the agency values statement quarterly	9/1/2014	9/30/2014	80%	Joe	Shira, Jessica, Kayla, Susi, Joe, Andy	GREEN	One program a month shares a narrative/outcome as it relates to the agency mission and core values at all staff meetings.	need to ensure happens consistently	30%	24%
	1.2.4	Create quarterly surveys to collate data from all departments for dissemination agency-wide.	10/1/2014	12/31/2014	100%	Ruth	Joe, Cassie	GREEN	All staff members are kept apprised of input collected that impacts work related to Agency	ongoing	20%	20%
Design system to incorporate education, employment and life skills by year-end FY17 – CORE LEAD : CHELSEA	1.3.1	Expand in-house opportunities and create opportunities with external partners for youth work-related experience	7/1/2014	7/31/2015	50%	Charley	Joe, Charley, Joanna, Brian	YELLOW	At least 10 youth successfully complete work-related opportunities logging at least 16 hours for 1 month.	Creating work opps for youth, Hopeworks, youthbuild, Job hunting skills program	20%	10%
	1.3.2	Create dedicated computer lab space for education, employment and life skills for all CH programs to be offered at outreach center	7/1/2014	1/31/2015	60%	Evan	Bryan, Evan, Charley, Elysa, Joe, Joanna	YELLOW	Computer lab space available, functioning and utilized by at least 20 unduplicated clients from outreach and housing programs per week.	Avg of 15 youth use lab each week, staff have FB pages now to engage youth	15%	9%
	1.3.3	Identify and address special barriers facing North clients in engaging in Ed, LS and Employment	7/1/2014	7/31/2015	50%	Joanna	Kayla, Joanna, Joe, Darla	YELLOW	Action plans in place to address barriers specific to North clients and increased # of clients participating	MGH Advisory Board active, biggest barriers are childcare and transportation	5%	3%
	1.3.4	Fully utilize WorkSource partner at U-Turn to engage CH youth in employment.	7/1/2014	7/31/2015	75%	Elysa	Elysa, Evan, Joanna, Charley, Joe	GREEN	At least 50 youth a quarter will access Worksource at u-turn.	Received grant for PT Ed person and $15K to help with internships and employment	10%	8%
	1.3.5	Prioritize ratio and other changes, such as adding							Priority areas implemented and leads have the time and additional resources required	Staffing model presented to leadership to reduce ratio		

2014-2015: Communication and Engagement

- Communicate the plan

- Building community trust in the vision

- Internal leadership and staff retreats

- Communication and feedback loops

- ARC concepts

- De-constructed Silos

2016-2017: A Culture Ready for Change….

- Highly functional leadership team

- Policies and structures set

- Clear and high expectations at all levels

- Diverse and complimentary skillsets

- Empowered teams

Major Changes in 2017

- Kicked off a $14.2 capital campaign

- Kicked off building design

- CEO Transition

- Implemented succession plan(s)

2017-2018: Executing the Plan

- Strategic and succession plan in full swing

- Shifting leadership styles

- Executive team readiness

- Transparency

- Messaging to staff and board

- Interim CEO

Challenges Encountered

- Complexities of starting a $14.2M campaign with a certain team, ending with a completely different team

  - Building Design Ideas
  - Turnover and pledge tracking
  - Ground breaking

- Impacts of co-leadership structure with internal and external focused roles

- Uncertainty among staff

- Managing Key Relationships

- Managing Community Expectations

- Constant decisions that were "firsts" for the agency

> "If you are going to pay the tuition, make sure you get the education"
> – disappointed donor

2018-2019: Executing a GAP Plan

Cocoon House Gap Plan – FY19-21

- Seamless Site Transition

- Assure Positive Program Impact

- Maintain Solid Operational Infrastructure

- Maintain Culture of Diversity

- Ensure Financial Sustainability

Handouts:
- Strategic Gap Plan Tool
- Organizational Change Workshop Structure
- Organizational Move Planning Template

Lessons Learned: Company Culture

- Unexpected leaders

- Opportunities to de-silo agency programs

- Major increase in work load for all

- Change is hard, even for leaders

- Culture Committee

- Culture work is never "done"

Lessons Learned: Strategic Planning

- Ultimately, the Strategic Plan and execution is what allowed success

- Framework kept people connected to the work and to our mission

- Staff driven plan

- Served as a fluid plan that became part of the daily work for everyone

- Strategic and GAP plans were constructed with outside facilitation and multiple retreats


"A GOAL WITHOUT A PLAN IS JUST A WISH"

Lessons Learned: Succession Planning

- Identify and cultivate skills – not necessarily individuals

- Community relationships and involvement

- Flexible and committed team members with shared vision and roles

- Consistency through turnover:
  Success: CEO transition, Program Director
  Opportunity: CFO transition(s), Capital team transition

- Re-evaluate positions at times of vacancy - restructure for success!

Lessons Learned: Communications

- Triad conversations

- Adapting to change

- Change is messy

- Impact of quick decision making

- Trust
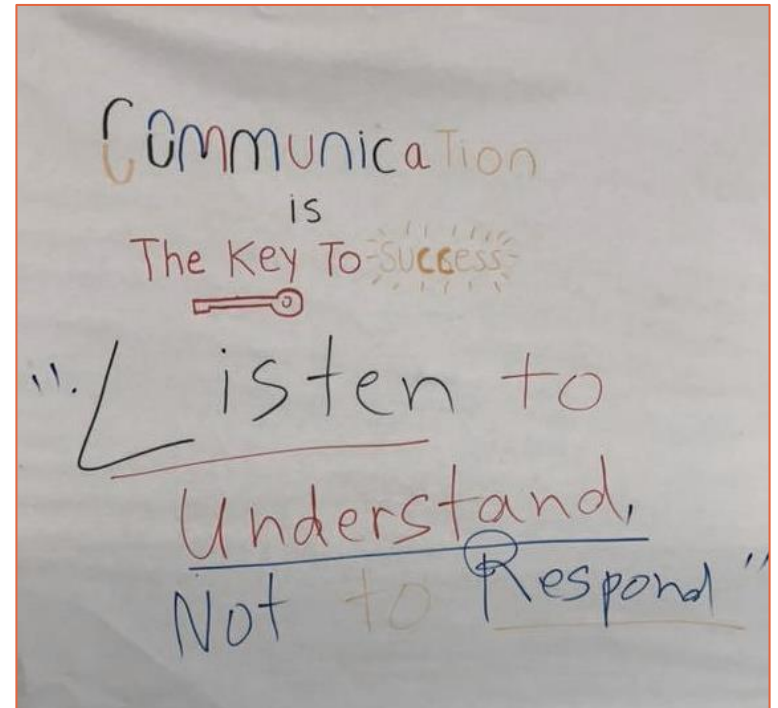
Lessons Learned: Community Relationships

- Keeping relationships connected to the organization vs. an individual

- Culture of philanthropy strengthens relationships in the organization

- Documentation and retention of current donors

- Be willing to invest in a communications and fundraising team

- Lean on the Board of Directors

Our Neurological Drivers of Success: SCARF

- Status: our relative importance to others

- Certainty: Our experience of knowing or predicting the future

- Autonomy: Our sense of discretion and control

- Relationships: Our feeling of inclusivity, trust, and safety with others

- Fairness: Our sense of being treated fairly and equitably

Reflective Comments:
Research support for what you have heard

Thank you!

Please feel free to contact us with any further questions!

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