

# Strategic Plan—Phase 1

December 13, 2001

On November 14, the Executive Committee accepted the final draft of the Strategic Planning Survey Report prepared by our consultant, Bart Grossman. The Committee reviewed the findings and suggestions in the report and the suggestions that emerged from the Board Workshop of September 7, 2001. We identified a series of action steps that would constitute a first phase of implementation of the new CalSWEC mission.

These steps certainly do not exhaust the ideas that have emerged from our strategic planning effort, nor do they constitute a ten-year action plan. A longer-term plan would seem premature in these rather uncertain times. Instead these one- to two-year action steps are designed to accomplish significant modifications in structure, provide new funding, and allow CalSWEC to begin addressing crucial social welfare workforce needs in California in new ways.

While this plan reflects the state's current budget limitations, it addresses the needs and directions that have emerged from recent legislative hearings and planning processes. We believe that CalSWEC can serve state and county leaders by supplying perspective and vision to more effectively address workforce needs. CalSWEC should also position itself to take advantage of opportunities for human services staffing and service improvement that will emerge as the economy recovers.

## Action Steps

- 1. Prepare a CalSWEC Prospectus.** This collection of documents would enable CalSWEC to more effectively approach potential funders and supporters as it reaches out to implement its new mission. The package would include selected materials from the 10-year anniversary report, summaries of accomplishments, explication of the mission, goals, plans, and capacity of the organization, and evaluation findings. There should be brief bulleted summaries that would be useful for mailing. Since most of the boilerplate language already exists it should take little time to produce this document.
- 2. Secure a multi-year (3-5 year) development grant to provide core funding for an expanded CalSWEC structure.** The model for this idea is the five-year Ford Foundation Grant which allowed CalSWEC to employ core staff, create the consortium, and build the capacity to access and manage federal funding. Initial steps would involve the identification of potential funders through existing contacts and outreach to these funders under the direction of the Executive Committee. There would be a need to staff informational meetings and respond to requests for information.
- 3. Create a non-profit independent corporation (501c3) to embody the new CalSWEC mission.** The Executive Committee, having considered a host of suggested organizational forms, sees a non-profit (501c3) as the most feasible and appropriate structure to embody the new mission and goals of CalSWEC. This new organization, which we have called for planning purposes "CalSWEC II," is not intended to house or replace the existing IV-E and

related grants and contracts. These projects need to remain at a university site for security and because of fiscal contingencies (such as match rates).

“CalSWEC II” would be a developmental organization with maximum independence and flexibility, something like a “Brookings Institution” for social welfare. Its work would not be primarily research; rather, it would distill and disseminate knowledge relevant to innovative social service workforce and practice models. It would seek resources, create, pilot, and evaluate new approaches to workforce development and service delivery for local, state, and federal systems.

New programs and training models would normally be housed at “CalSWEC II” for relatively brief periods until they could secure wider adoption or permanent homes in social services, governmental agencies, and/or academic institutions. The Center would, however, play a role in voluntarily coordinating such collaborative developmental efforts among agencies and academic institutions to avoid unproductive duplication and insure access to the best existing knowledge.

A Board made up of a coalition of members—agencies, schools, the state, funders, and advocates—would govern “CalSWEC II.” The structure would allow membership to grow as key constituencies assume ongoing roles in Center programs. The first phase would involve collection of information, development of a basic charter, and application for non-profit status to be accomplished within a year.

- 4. Prepare a white paper on Social Services Workforce Development.** This document would respond to the need for a vision of a multi-disciplinary, multi-level workforce for California human services. It would incorporate a continuous career path from client to professional worker, defining training alternatives, curriculum competencies and tasks for each, and explicating effective organizational structures to link levels and services. The white paper would draw on the best research and conceptual work in this area.

An outline for this document can be completed in a very short period of time because CalSWEC staff and members have been tracking this literature. Staff will need to devote some time to identifying and learning about relevant innovations around the state and country that should be described in the document. The workforce white paper would be disseminated to appropriate legislative committees, county and state planners, and other groups. CalSWEC could develop the capacity to engage in consultative relationships with organizations attempting to implement these ideas.

- 5. Develop a demonstration social services workforce development plan in mental health.** CalSWEC should deliver quickly on its stated intention to extend the IV-E curriculum and staff development approach by initiating a mental health project in one or more counties and schools of social work. Much of the groundwork for such a project exists, including the CalSWEC Mental Health Competencies, the presence of mental health leadership on the Board, connections that have been developed with the state Department of Mental Health and the Mental Health Planning Council, and the record of CalSWEC mental health efforts between 1993–1995.