

**BIG BROTHERS
BIG SISTERS
SOUTHWESTERN
ONTARIO
REGIONALIZATION
INITIATIVE:**

**TELLING THE
STORY**

PUBLIC SECTOR DIGEST
INTELLIGENCE FOR THE PUBLIC SECTOR. ®

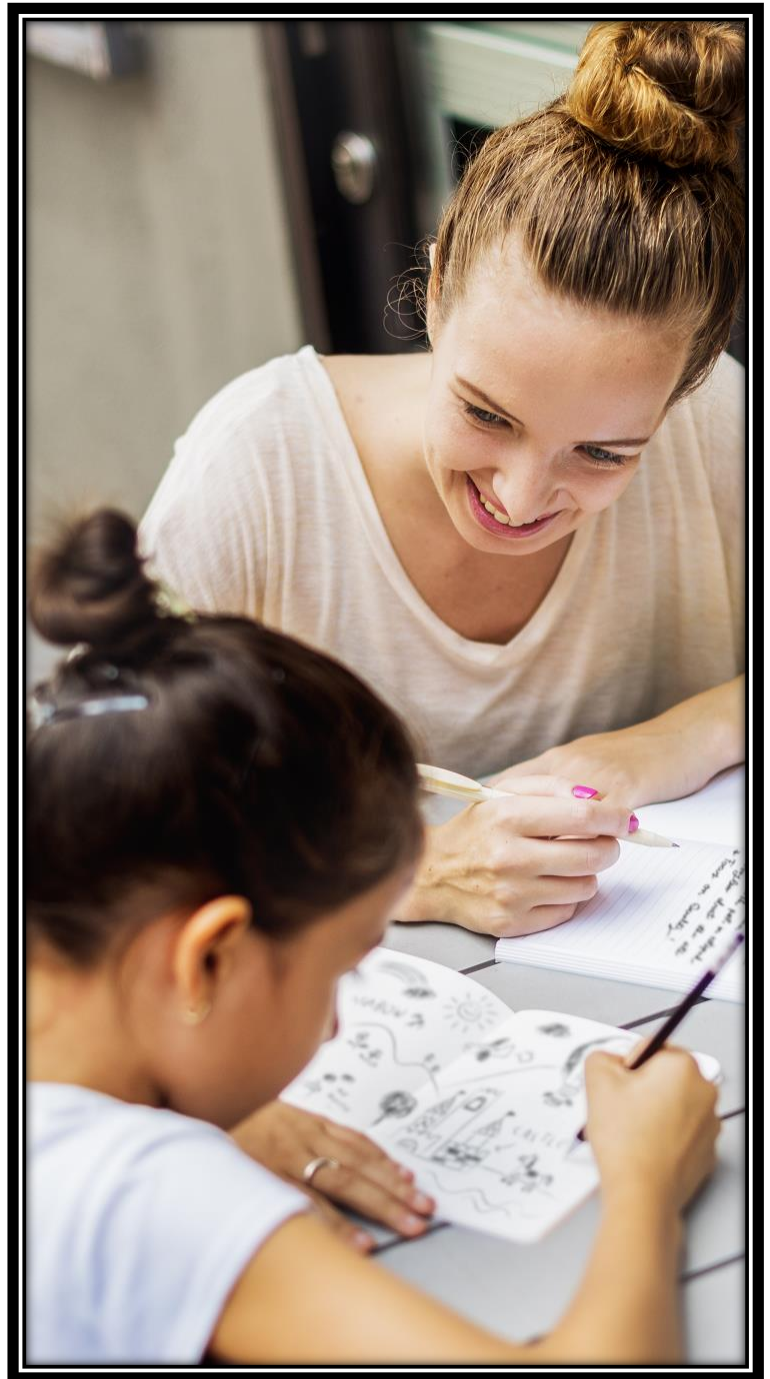


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Foreword

Interagency collaboration, be it between not-for-profit or government organizations, is a trend that cannot be ignored. Not-for-profits and governments alike face similar challenges. Strained budgets, a significant number of employees nearing retirement, and the need to continue providing quality services has caused organizations across the board to look closely at their service offerings and internal procedures in order to ensure long-term sustainability. In doing so, organizations are turning to each other for support. Oftentimes, collaborative models emerge.

Shared services is one popular and fruitful method of collaboration that is being used to address these challenges. As such, regional models can be beneficial in reducing duplication. For example, not-for-profit agencies in a given region may pool their resources to hire one regional employee to take care of, say, marketing tasks for all agencies, thus freeing up resources to improve public-facing services. Similarly, neighbouring municipalities might opt to share water, sewer, or transit services, as the northern municipalities of York Region have done.

Tough conversations often accompany such initiatives, as they raise apprehension and fear of the unknown. Despite the recognition that collaboration through means such as shared services or mergers can lead to increased efficiency, productivity, and improved quality of service, there is also the possibility that jobs or autonomy could be lost.

However, forward-looking organizations, like Big Brothers Big Sisters, not only recognize the necessity of such conversations, they embrace them. In fact, with the help of Pillar Nonprofit Network a consortium of Big Brothers Big Sisters organizations in the Southwestern Ontario region has demonstrated that change can be positive and that it does not have to come from the top down. Rather, collaboration in a way that takes the voices of all participants into account, eases fears and, ultimately, better positions organizations to fulfill their missions is possible.

This case study tells the story of the experience of the successful interagency collaboration between Big Brothers Big Sisters agencies in Southwestern Ontario. In today's fast-paced world that demands adaptability and teamwork, organizations elsewhere can learn from this endeavour and consider how to replicate its success.

Sincerely,



A handwritten signature in black ink, appearing to read 'Tyler Sutton', written in a cursive style.

Tyler Sutton, Editor & Research Lead
Public Sector Digest



Big Brothers Big Sisters Grands Frères Grandes Sœurs

41,700+

young people mentored annually

21,300

current volunteer mentors

108

member agencies in over 1,100 communities
throughout Canada

2,190,000+

volunteer hours spent mentoring annually

For over 100 years, Big Brothers Big Sisters has been giving young Canadians the confidence to achieve more by developing and implementing a wide range of mentoring services.

Many young people find themselves in vulnerable situations and facing adversities such as mental health struggles, family violence, identity issues or challenging living conditions, which put these youth at risk of not reaching their full potential. With the guidance and support of professionally trained volunteer mentors, these risks can be minimized or avoided all together.

Big Brothers Big Sisters of Canada is the National Office for 108 member agencies serving over 1,100

communities across Canada. Their role is that of a catalyst, facilitator, and guardian of our collective brand. We provide support, services, training, and leadership to our member agencies, who deliver quality mentoring programs to over 41,000 young Canadians annually by mobilizing 21,300 volunteers.

12 member organizations compose the BBBS Southwestern Ontario collective, they are:

- Big Brothers Big Sisters of Chatham-Kent
- Big Brothers Big Sisters of Ingersoll, Tillsonburg and Area
- Big Brothers Big Sisters of Kincardine and District
- Big Brothers Big Sisters of Listowel
- Big Brothers Big Sisters of London and Area
- Big Brothers Big Sisters of North Huron
- Big Brothers Big Sisters of Owen Sound
- Big Brothers Big Sisters of Sarnia Lambton
- Big Brothers Big Sisters of South Huron
- Big Brothers Big Sisters of St. Thomas-Elgin
- Big Brothers Big Sisters of Windsor-Essex
- Big Brothers Big Sisters of Woodstock and District



The Pillar Design Collective brings together social innovators, community collaborators and creative catalysts who are passionate about design thinking and leveraging the power of their collective wisdom, talent, experience and problem-solving skills to facilitate and co-create solutions that spark positive societal and organizational transformation.

Under the auspices of Pillar Nonprofit Network, a network of 340 non-profits focused on strengthening the impact of the nonprofit sector, and based out of Innovation Works, London's new social innovation shared space, the Pillar Design Collective brought together a team of five dedicated consultants experienced in feasibility studies, strategic planning, coaching, facilitation, impact measurement, team-building, systems change, community consultation, shared service models, data analysis, design thinking...and the list goes on. The members of the Design Collective included Jennifer Kirkham (Mischevious Cat Productions Inc.), Albert Brulé (Pillar Nonprofit Network), Chris Moss (Chris Moss Consulting Inc.), Janet Frood (Horizon Leadership Institute), and Matt Ross (Matt Ross Consulting). In addition to the core team, the Pillar Design Collective had access to a wide range of colleagues and specialists in the over 75 co-tenant organizations that share space, programs, services and bright ideas at Innovation Works. Its collaborative model was identified as ideal for providing Big Brothers Big Sisters with the best skills and expertise to guide the process of exploring regionalization options.




Introduction

Big Brothers Big Sisters has long served youth across Canada through the provision of one-on-one and group mentoring programs. In 2016, a consortium of 12 Big Brothers Big Sisters agencies in the Southwestern Ontario region joined forces to explore and evaluate opportunities for collaboration, with the intention of increasing efficiencies and maximizing resources. To do so, it engaged the Pillar Design Collective to facilitate an innovative process that is helping Big Brothers Big Sisters organizations in the region improve their internal procedures and collaborate to share certain services.

PSD partnered with the Pillar Design Collective to tell the story of how it worked with Big Brothers Big Sisters agencies from Southwestern Ontario to lead the exercise of exploring various regionalization models and identifying a new way forward, using an unconventional yet effective process called “design thinking” to do so. Ultimately, the process frees up resources to help Big Brothers Big Sisters fulfill its mandate of serving as many children as possible. Interviews with the Pillar Design Collective and Big Brothers Big Sisters representatives, as well as documentary research, were used to compile this case study, in order to capture the positive impacts of partnership and bring awareness to the benefits of

collaboration. The initiative can serve as a model for nonprofit organizations elsewhere to learn from this endeavour and consider how to replicate its success in order to yield similar benefits.

KEY TERMS		
Pillar Design Collective A team of five consultants hired by a consortium of Big Brothers Big Sisters agencies in the Southwestern Ontario region to facilitate and co-create solutions for collaboration.	Design Team A group of representatives (Executive Directors and Board volunteers) from Big Brothers Big Sisters agencies involved in the regionalization project who worked with the Pillar Design Collective to design, provide feedback, and identify a preferred way forward for their agencies.	Design Thinking An innovative methodological framework that prioritizes action and solutions to achieve preferred outcomes. Design thinking was used as the guiding process for this project. 

The Big Brothers Big Sisters Southwestern Ontario Regionalization Initiative

In 2016, Big Brothers Big Sisters agencies in the Southwestern Ontario region joined forces to explore and evaluate opportunities for collaboration. The process began with Executive Directors meeting to look at ways to work together and support each other. Initial conversations led to the recognition that their various smaller agencies faced similar struggles, such as the duplication of services. The group decided to apply for funding from the Ontario Trillium Foundation to address these challenges.

With funding secured, the consortium had the financial resources it needed to seek consulting services in order to identify possibilities for new organizational structures. The goals were to increase efficiency and cost effectiveness, maximize the use of resources, improve governance, and ultimately increase the quality and quantity of mentoring services for young people through Big Brothers Big Sisters programs. Specifically, the various agencies were looking to identify ways through which core business services

could be centralized. These include: accounting, human resources, grant writing, fundraising, event management, donor engagement, public relations, marketing, and communications. The Pillar Design Collective was chosen to lead the process due to the innovative way the team approached collaboration.

“The Pillar Design Collective pushed us to think outside the box.”

– Kristen Ralph, Interim Executive Director, BBBS of Woodstock

Design Thinking

Design thinking was the guiding methodological framework utilized for the process of exploring and identifying suitable regionalization options for the Big Brother Big Sisters agencies of Southwestern Ontario. The methodology is used by designers to help clients find solutions to complex problems. The focus of design thinking is solutions, not problems. It is an action-oriented strategy for achieving desired outcomes.¹ Given that multiple Big Brothers Big Sisters agencies voiced their interest in doing things differently, but were originally unsure of the direction they wanted to take, design thinking was a suitable means through which to explore options.

Enter the Pillar Design Collective. The Design Collective used the core principles of design thinking to lead the Big Brothers Big Sisters agencies through a blended approach to the project. It involved the Pillar Design Collective, as the consultants, conducting research and data-gathering, and then facilitating the process of helping the team of Big Brothers Big Sisters organizations explore feasible options. The key to the approach – and what sets it apart from traditional consulting processes – is that it was an organic process, and the Big Brothers Big Sisters agencies were seen as the “experts”, not the consultants.

¹ “Design Thinking as a Strategy for Innovation.” *Creativity at Work*. <http://www.creativityatwork.com/design-thinking-strategy-for-innovation/>.

Responsiveness and flexibility were key elements, as the process entailed ensuring all voices were heard and that each organization involved was satisfied with the outcome. Unlike conventional consulting services, recommendations were not prescribed. Rather, the participating organizations directed the process, with the Pillar Design Collective acting as facilitators.

“The design thinking process helped us to understand and be open to what others from the other agencies were thinking.”

– Deb Landon, Executive Director, BBBS of Ingersoll, Tillsonburg, and Area

The Process

After formally partnering with the consortium of Big Brothers Big Sisters agencies of Southwestern Ontario, the Pillar Design Collective led the team of BBBS Executive Directors and Board Members through a process that considered various regionalization options, using the principles of design thinking as a guide.

The five member team that comprised the Pillar Design Collective acted as facilitators. The Design Collective is based out of London, Ontario’s Innovation Works, a co-working space dedicated to sharing physical space as well as programs, services, and ideas. Innovation Works is committed to social innovation, and design thinking has been introduced in the space as a way to address challenges. The Design Collective sought to test it in a new way in their work with Big Brothers Big Sisters. Ultimately, the project was a fresh take on a feasibility study. The partnership stemmed from the unconventional approach offered by the Pillar Design Collective, as a unique way for Big Brothers Big Sisters to address its challenges, while still working with a team of experienced consultants and social innovators.



The first step for the Pillar Design Collective involved research and information-gathering, resulting in a “Phase One Report” of background information, including organizational profiles of each participating agency, and a literature review and an environmental scan. This involved surveying regionalization models and guides that have been used by nonprofits in the past, and synthesizing what worked and what did not, and putting these lessons into practice throughout the project. While this step represents a break from a true design thinking approach, which wouldn’t have involved these elements, the Design Collective recognized it as a key part of meeting the needs of Big Brother Big Sisters. This step was critical because it provided data and information that helped to generate new ideas that were considered as ways to improve existing processes at the various Big Brothers Big Sisters organizations.

The unique aspect of the exercise was that Big Brothers Big Sisters played a central role in the process. Members of the Design Team – a group of Executive Directors and Board volunteers representing participant organizations throughout the region – were involved each step of the way. The process was a far cry from the oft-used strategy of hiring a consultant to compile recommendations into a report that may or may not be utilized. Rather, with the Pillar Design Collective acting as facilitators, E.D.’s and Board members identified and refined options, and tested these options to determine which were preferable. The final stage of the process involved the Pillar Design Collective and Design Team working together to use the learnings to develop a new plan for moving forward.

PROJECT PHASE	DELIVERABLES
Phase 1	Data and information gathering
Phase 2	Generate ideas for potential options
Phase 3	Pilot and test top options
Phase 4	Create a plan to implement new opportunities

Design Jam

Despite using an atypical approach, the “Design Jam” was overwhelmingly described by members of the Pillar Design Collective, as well as the Design Team, as a highlight of the working relationship, demonstrating that traditional processes do not always work as well. A Design Jam is a collaborative brainstorming activity or event, geared towards generating solutions in a fun and creative environment. The event involved Big Brothers Big Sisters representatives coming together to engage in a day of piloting and testing ideas through unconventional means such as roleplaying. The group considered various regionalization options and their implications, from shared services to a merger. While the organic, unstructured approach required participants to step out of their comfort zone, it was enriching.

“At first, I wasn’t quite sure how to grasp [the process], especially the roleplaying. But it helped us delve into the root reasons as to why we were doing this. It allowed us to open up and be vulnerable. Ultimately, it helped us look at how to serve more children, while also saving dollars for the agencies.”

– Deb Landon, Executive Director, BBBS of Ingersoll, Tillsonburg, and Area



“I was a bit doubtful how well the day would go leading up to it. It included pushing past the usual analytical thinking processes we’re all used to. But, participants really seemed invested in the strategy and took it seriously. The Jam was able to promote conversation at all levels.”

– Kristen Ralph, Interim Executive Director, BBBS of Woodstock

Key Takeaways

Overall, the use of design thinking to guide the process of considering and implementing options for regionalization has been overwhelmingly positive, from both the consultant and client perspective. It enabled Big Brothers Big Sisters to identify the preferred way forward for themselves. The following tables compile the actions and considerations that led to the success of the process, according to the Pillar Design Collective:

THE POSITIVES, according to the Pillar Design Collective

The Pillar Design Collective did not own the process.

The process was about the participating Big Brothers Big Sisters agencies and ensuring their needs were met. By way of example and to underscore this point, Deb Landon, a Design Team member and Executive Director of Big Brothers Big Sisters of Ingersoll, Tillsonburg, and Area, took on the responsibility of welcoming everybody to the Design Jam. This was an important step in setting the tone for the day and reiterating that Big Brothers Big Sisters had ownership of the process and its outcomes.

The principle of *Change by Choice*.

The process is never imposed upon participant organizations. There was no preconceived outcome or "hidden agenda." There was no expectation or obligation for Big Brothers Big Sisters organizations to go along with "the majority." Instead, the goal is to pilot successes and demonstrate the benefits to encourage organizations to get on board.

The concept of on-ramps and off-ramps is essential.

Big Brothers Big Sisters representatives and their agencies can join and/or leave the process at any time. For example, if any of the decisions are not a good fit for one or more agencies, they can choose to opt out of that particular initiative, and rejoin when they see fit. It's a journey, not a final destination.

Building trust is critical to fostering commitment and engagement.

The Pillar Design Collective did so by recognizing that participants may be apprehensive, and taking steps to ease those concerns. For example, in holding meetings and focus groups, Design Collective members travelled to various locations, from Owen Sound to Windsor, instead of expecting participants to come to them. This made the experience easier and less rigid for the various Big Brothers Big Sisters agencies.



THE POSITIVES, according to the Design Team

The expertise of the Pillar Design Collective.

In addition to their role as effective facilitators, the Pillar Design Collective brought a wealth of information to the Design Team. They collected an extensive amount of data, which helped each agency understand how it compared to others, and they were positive and upbeat throughout the process.

Design thinking as a methodological framework.

Although the innovative design thinking approach was what led the consortium of Big Brothers Big Sisters agencies to select the Pillar Design Collective as consultants in the first place, several members of the Design Team still had reservations about how the process would work in practice. After taking part in the process, however, there was a broad consensus that the framework was central to the project's success. It allowed the participants from the various Big Brothers Big Sisters organizations to truly open up, be vulnerable, and identify the root reasons why change was necessary. Importantly, the process addressed fears that participants held, which is rarely a goal of conventional consulting processes.

A shared commitment to moving forward by Big Brothers Big Sisters representatives.

While departing from the way things have always been done can be uncomfortable, conversations with members of the Design Team made clear that they were in consensus that change was necessary. Many of the Executive Directors, for example, serve small organizations and thus wear many hats, from fundraising to marketing to accounting. They simply do not have the human or financial capacity to give each of these tasks the attention it deserves. Thus, sharing resources is preferable, such as by hiring one marketing specialist to work for several agencies in proximate geographic areas - ultimately leading to more young people accessing quality mentoring services across the region.

Be in it for the right reasons.

Serving the children and youth in their communities through quality mentoring programs was identified by all Big Brothers Big Sisters participants as the top reason for beginning and following through with conversations about possibilities for collaboration. Even though it could mean that some roles would become redundant and eliminated, new jobs could be created, and familiar processes would be uprooted, everyone involved recognized that the well-being of young people across the region was the number one priority. Collaborating is a way to free up resources to provide greater access to mentoring supports and services through Big Brothers Big Sisters.

No process is perfect. However, despite initial apprehension from members of the Design Team, especially pertaining to the concept of a Design Jam and how it would play out, many of the challenges were logistical. For example, the Design Jam was a critical feature of the process, but it was held in the

middle of winter, which prevented several participants from attending. While this often cannot be helped, it demonstrates that challenges like scheduling and inclement weather pose real problems that can hinder participation, and therefore lead to different outcomes than might have otherwise been arrived at.

The following takeaways were identified by the Pillar Design Collective and members of the Design Team as opportunities for learning:

ROOM FOR IMPROVEMENT	
Participation is critical.	Conversations with members of the Design Team made clear that greater representation and participation among all agencies involved would have been preferable.
Identify and address resistance from the get-go.	While the majority of the agencies involved were engaged participants, according to the Pillar Design Collective, they underestimated how much time it would take to engage those who were not initially interested in the process. As such, they recognized that it would have been beneficial to bring those agencies into the process earlier. For example, a webinar was held partway through the project to bring them into the fold; however, holding additional webinars earlier in the process would have likely engaged these agencies sooner.
Balance the need for productivity and thoroughness.	Being under a time crunch mandates that decisions be made efficiently. However, Design Team members raised the question of whether meetings were held often enough to explore each regionalization model thoroughly enough.
Logistics matter.	Many members of the Design Team and Pillar Design Collective recognized that poor weather hindered participation at key meetings. While such factors cannot be controlled, they should not be overlooked when making scheduling decisions. Having alternative arrangements, such as webinars or Skype meetings, in place to bring all participants into the decision-making process if challenges arise can be beneficial.
Not all problems need to be fixed.	The Pillar Design Collective took an introspective approach when problems presented themselves. For example, if people were not showing up, they asked themselves what that says about the system. Essentially, asking what insights can be gained when challenges arise can be as beneficial as eliminating those challenges.

Next Steps

As the Big Brothers Big Sisters agencies of Southwestern Ontario close out the process of working with the Pillar Design Collective, a number of next steps have been identified. These include the following action items as examples, among others:

1. Standardizing policies, practices, and procedures, across all agencies
2. Hiring a marketing professional as a shared service staff member across several agencies
3. Facilitating the seamless movement of families and volunteers from agency to agency. E.g. when families move between geographical areas they will still be able to access services
4. Implementing bulk purchasing
5. Obtaining additional funding to tackle these initiatives

Essentially, working with the Pillar Design Collective using the principles of design thinking has helped the participating Big Brothers Big Sisters agencies explore and identify preferred solutions that they are comfortable with. Through the process the ground work was laid to move forward. It is now up to the agencies to continue to work together to implement their chosen solutions. It's not an end goal, but an ongoing journey.

ADDITIONAL RESOURCES: www.cxcdesigncollective.org

Regionalization Initiative Online

To access resources developed over the course of this project and to follow the progress of Big Brothers Big Sisters of Southwestern Ontario as they implement their plan going forward, visit the Change by Choice Design Collective online: www.cxcdesigncollective.org.

Interviews

PSD in Conversation with W. Matthew Chater, National Vice President – Service and Organizational Development, Big Brothers Big Sisters of Canada

What is your role with Big Brothers Big Sisters?

I was the Executive Director for Big Brothers Big Sisters of London and Area. [After putting together the Request for Proposal and partnering with the Pillar Design Collective] an opportunity arose to transition to the national office, and I took advantage of that opportunity. The position I currently hold is the National Vice President, Service and Organizational Development. My role is really as an advocate for our 108 member organizations across the country. My job is to support those folks, as well as to look at our programs and services, ensuring that they're providing the best outcomes for young people.

Before the discussions for change through the regionalization process began, what did you see that was working well and what wasn't within your Big Brothers Big Sisters organization?

What was working well was all the agencies' dedication to children and youth. The primary reason for pursuing this work and looking at this feasibility study was to determine how we could get these services to more kids throughout Southwestern Ontario. We have so many small agencies – I would say that all the agencies in this region would be mid-sized to small – and there's a lot of administrative costs that go into running an office and providing its services. Often, it is backroom services, and the same resources could potentially be put into providing services right up front, therefore having more children served through mentoring programs.

What was the impetus for change? Why did the various Big Brothers Big Sisters agencies seek a new way forward and put out the RFP in the first place?

In this region specifically, and what we're seeing right across Canada, are agencies experiencing really challenging financial times. There's a significant shift in the not-for-profit sector that's requiring such organizations to look at sustainability differently. The framing for this group was the recognition that we needed to act now, not just talking about sustainability but also how the organization could thrive. We've seen two agencies within this region close in the past 2-3 years, and it was ultimately a conversation with several Executive Director recognizing that we would follow a similar trajectory if we didn't do something about it.

It's also important that we're doing this now because there are a significant number of Executive Directors in the region who will be retiring in the near future. This is sector wide, but it's certainly the case within Big Brothers Big Sisters, where we've seen Executive Directors who have been longstanding and have deeply rooted connections within their communities retire. When that person transitions out, there are significant challenges for that organization to continue to thrive. So, it means looking at these models and considering doing things differently, to ensure that when such transitions happen our organizations can be sustained.

Why did you choose the Pillar Design Collective as consultants?

They offered a very different approach than anything I've seen before. I've been working in the not-for-profit sector for 11 years and I've looked at a number of different RFPs, and their approach was very different in a way that did cause some discomfort in folks while engaging in the process. But, it was also different in a very impactful way. We're shifting as a culture, and that co-creation and collaboration –

the ability sit and design with the consultants, as opposed to the consultants gathering information on the front end, disappearing for four or five months and then coming back with your plan – that wasn't going to work well with this group.

Big Brothers Big Sisters are united in our service, but we're also very unique in the way that we provide those services to each community. So, with that element of local flare, when looking at the potential for coming together in a regional model, amalgamation, or shared service structure, we wanted to ensure that local flare wasn't lost – that it wasn't one community or a group of larger communities coming in and imposing this structure in smaller communities. Rather, we needed to ensure that everybody's voices were heard.

Given your transition partway through the project, what was your role? How did you participate in the project?

The element of having the national office present at the table actually transitioned out of being intimately involved in the project on the ground. My role at the beginning was to continue providing leadership to this project, as the London organization was the one that was taking the lead to put this work together and to package it for proposal, in collaboration, of course, with other Executive Directors in the region. Then, when this transition happened, because I was professionally and personally invested in this project, I really wanted to stay on to ensure that it continued on a similar trajectory.

That being said, it was very important to the national office for this project to succeed, and in many respects having the national office as a voice at the table could feel like there's some pressured guidance as to what should be taking place, and I wanted to ensure that this group felt that there was nothing being imposed by the national office. So, I took an intentional step away and now it's great to be able to come back to table to see how the project's evolved over the last several months.

What were your original impressions of the design thinking process? Did they change at all from the beginning of the project to the end?

My original impression was excited. The elements of innovation, co-creation, and collaboration were very inspiring. I was unsure of some of the methods that were being used, but again, it's because it's new to us. When you actually participate and get involved, such as by acting out services in the not-for-profit world, it illuminates the linkages and you understand your subconscious viewings about these structures. Interacting and getting away from the table when you're talking about strategic planning is very different, but it led to more thoughtful dialogue. I trusted [the Pillar Design Collective's] guidance and leadership.

What positive deliverables came from the process?

The most positive deliverable is the fact that these twelve organizations came together to have a conversation. That alone demonstrates a degree of vulnerability and commitment to the organization. I was very proud that people were coming to the table and leaving their personal apprehensions of what this project could mean aside – because ultimately it could mean that people could be losing their jobs or gaining different jobs. Despite those fears and challenges, people were still showing up and collaborating. Being able to share that with our collective of Big Brothers Big Sisters organizations across Canada will have a significant impact.

Was there apprehension – be it from the various branches or the national office – and did it dissipate towards the end of the process?

I think there was apprehension from the local level, of course, and it came more from the Boards of Directors, since most were not engaging in the process as much as the Executive Directors. When we

first started our conversations, it was largely the Executive Directors, and over the last year we started to bring these conversations to the Boards, and the other Executive Directors who hadn't yet been involved. So, that's likely where some of the hesitation came from. Folks were curious about what it meant for their role and for their organization moving forward. I'm not sure I can necessarily speak to whether that apprehension has dissipated over time.

At the national level, there's an investment in wanting this to succeed, and it already has in many respects. We now have to look at the ways in which the national office can leverage the learnings that were gained and support organizations in taking a proactive approach to long-term strategic discussions around the sustainability of the Big Brothers Big Sisters brand.

Overall, were you happy with the process?

I'm very happy with the process. Even small efforts went a long way. For example, the group at Pillar actually travelled to the various regions because expecting all branch representatives to always travel into London would have been a challenge. So, that level of engagement is quite significant. It makes clear everybody's voice is important.

Was there anything that you found challenging or that you would have liked to have seen done differently?

I would have liked to have been involved in the whole process! But, since that wasn't possible, and because it is such a large region, the challenges that came up were simply due to size. We weren't able to get everybody together for every single conversation. In the Thames Valley region, specifically, with the four agencies we have here, there's more cohesion among those agencies. So, when showing up to the table, you can contribute more because you have more of a history with those folks. You may not have conversations with the folks from, say, Owen Sound or Kincardine on a regular basis. Those geographic challenges were really the only ones that came up, that I'm aware of at least.

What are the next steps as you close out the process of working with the Pillar Design Collective?

From the national perspective, it's looking at this case study. We're currently working on a project to critically examine the *organizational health and vitality* of Big Brothers Big Sisters. It's an opportunity to strengthen our leadership across Canada by taking a close look at all of our agencies and undertake mindful reflection on the health and vitality of those organizations and learn, on a much deeper level, what each agency may need now and in the future to thrive. Or, to identify the strengths of our local agencies and facilitate a peer learning structure across the country. We know that amalgamations and shared service models are going to be part of our future. Being able to have leaders within the Big Brothers Big Sisters network approach those opportunities from a position of strength, and to know where gaps exist, will be very important. We'll be able to use this case study to demonstrate how conversations can happen.

PSD in Conversation with Jessie Rodger, Executive Director, Big Brothers Big Sisters of London and Area

What is your role at your Big Brothers Big Sisters agency?

Currently, I'm the Executive Director of Big Brothers Big Sisters of London and Area. I transitioned into that role about halfway through this regionalization process. I was the Manager of Service Delivery until November 2016, then I switched over, which gave me a bit of a unique perspective.

How did you take part in the regionalization project?

When I first came on as Manager of Service Delivery, it was as an observer. Our Executive Director at the time was taking the lead for our agency, as well as providing some leadership to the broader team of Executive Directors. I was brought in to offer my thoughts about service and making sure the voices of the little ones we serve was present.

I took on a bigger role as I became Executive Director in making sure we were having the tough conversations we needed to have, as well as continuing to participate in the collaborative model that we had created together.

The design thinking process is somewhat unconventional compared to more traditional consulting endeavors. What were your original impressions of the design thinking process? Did they change at all from the beginning of the project to the end?

When I first saw the plan, I was a little unsure. It looked a little whacky! We needed to trust the process and the facilitators to walk us through a journey that normally can be very muddy and confusing. It was a squiggle. As it unfolded, we started to understand the direction we were going in, so that squiggle started getting a bit clearer to us. We began to understand the route we needed to go, and why linear conversations about amalgamations and shared services did not work. So, trust was a big element from the beginning of the process. When I think about my counterparts from other Big Brother Big Sisters organizations, I'm really proud of how vulnerable they were able to be and dive head first, knowing that whatever we created would serve the community better.

How has working with the Pillar Design Collective benefitted Big Brothers Big Sisters of London and Area?

I think it has offered us an opportunity to take pause, which doesn't always happen in the non-profit world; we're usually moving at a rapid pace. The work with the Design Collective has allowed London to carve out the necessary time and space to reflect and to have deep conversations. These conversations might be uncomfortable and we don't always know where the end is. As a social worker, that's not my favourite thing! I like to have a plan and to know where I'm going. So, the process was a challenge, but it was also a gift. My team in London has been able to have some really fantastic conversations pertaining to services, fund development, and donor engagement that we might not have been able to have had we not gone through this process. We're thinking long-term, but in the short-term London has benefitted from great conversations that have turned into useful action items.

Was there anything you found challenging about the process? Was there anything you would have liked to have seen done differently?

There was lots of challenge, but I think it was necessary. Thinking about the way Pillar walked us through the process, it required us to be very honest with each other, with our Boards of Directors, and with ourselves in terms of our motivations for being at the table. What I found really helpful was that it grounded us in the communities that we serve, and helped us focus on being able to serve those communities better in the years to come.

There's also a lot of nervousness from our staff and boards when these conversations about how to come together as region take place. For example, folks were worried about their jobs, the sustainability of their programs, or not wanting to lose their local autonomy. So, that was definitely a challenge. However, we talked about how we could manage those challenges as part of the process.

A challenge that was unique to our geographic area was that we started a lot of our work in the winter. That meant that some of our colleagues who live in more northern areas weren't able to attend every

event. So, if I could do things differently, we'd be living in a different climate! But, since we can't do that we might have looked at timelines a little bit better to elongate the process. As it was, though, we did what we could with technology and made sure we connected with each other. For example, we had agency-to-agency buddies to make sure everyone was on the same page and kept aware.

Overall, are you happy with the process and outcomes so far? At this point, do you feel confident with the next steps that have been identified?

I'm really excited about the next steps for our region. I think we've overcome the biggest obstacle we had in front of us, which was the nervousness and trepidation about what the process meant for our organizations and the children we serve. We've already had those tough conversations. Now that we've done that, the next part of figuring out what we want to do and how we want to do it will be easy. I'm really motivated to figure out what that will look like.

What are the next steps for Big Brothers Big Sisters of London and Area as you close out the process of working with the Pillar Design Collective?

We want to make sure we don't lose momentum. It's been wonderful over the past ten months to be able to have scheduled meetings and have Pillar lead and facilitate the process, and help us mull through the questions that we have and the opportunities that are in front of us. Now, the next steps are to continue that work without losing any energy. Fortunately, we have 11 fantastic agencies who are excited to move forward. They're committed to seeing these pilot projects executed. We'll create a committee, continue conversations, and get moving on the timeline that Pillar's helped us create. We'll keep working until we can say with absolute certainty that the Southwestern Ontario region is being served the best it can be.

PSD in Conversation with Kristen Ralph, Interim Executive Director, Big Brothers Big Sisters of Woodstock

Can you describe your role with Big Brothers Big Sisters of Woodstock?

I took over the position of Interim Executive Director at the beginning of January 2017. Prior to that, I was Case Worker and Fundraising and Marketing Assistant with the organization, and I'd been here since 2010 so I was really familiar with the organization and what we do, and I worked very closely with our previous Executive Director before taking on the role as Interim Executive Director.

What was your role in regionalization project?

I started on the Design Team prior to taking on the role of Interim Executive Director because we knew that my position would be changing in January, so we wanted to make sure I was involved in the process as early as possible. I did come on board after the decision was made to explore the idea of regionalization, so since my first meeting in fall 2016, I've been active on the Design Team, meeting regularly with Pillar and the other agency representatives. I'm part of one of the smaller agencies that are on the Design Team. We do have an array of agency size.

What was working well, and what wasn't before the decision to explore regionalization took place?

Big Brothers Big Sisters has always been a small but mighty organization. We're continuing to increase the number of children we serve each year, and we're growing and adapting our programs to fit the specific needs of our community. We really listen to what the members in our community are saying, and we create our programs based on those needs. We're a grassroots organization that is great at providing quality service to our kids. However, as a small agency, we're required to wear many hats.

Case workers are also recruitment officers, fundraisers, and social media managers. All of those roles are very important, but it takes time and effort away from program management and making sure that we can serve as many kids in the best way possible. That's why we thought working together with other agencies in the region could be beneficial, so that we could share certain roles and processes across the region.

The design thinking process is somewhat unconventional compared to more traditional consulting endeavours. What were your original impressions of the design thinking process? Did they change at all from the beginning of the project to the end?

It's very innovative and different from other consulting processes out there. Pillar offered a method that involved agency participation instead of just information gathering and research, which made sense for what we envisioned for the future of our organizations. We wanted to be innovative and move forward in a collaborative way. Pillar created an environment that we felt comfortable joining. Each agency feels very strongly about the work we do, so we wanted to be involved in that process.

My impression remained consistent throughout the whole process. Pillar really pushed us to think outside the box, which was what we were looking for. It's very easy to continue to do what we've always done, so they pushed us out of our comfort zones and maintained an environment where we all felt comfortable enough to voice our opinions and our concerns, and really become a collaborative part of that process.

Thinking specifically about the Design Jam, what were your perceptions of that event?

Leading up to the Design Jam, I was a bit doubtful as to how well the day would go because, being part of the Design Team, I knew the plans of the Pillar Design Collective and what they were planning to do that day. It really included pushing past the normal analytical thinking we're all used to. However, they were able to encourage the group to move through their process quite seamlessly. I was concerned because of the focus on 2D, 3D, and 4D design solution thinking, which included roleplaying and building 3D designs of what our solutions might look like, but participants really seemed to invest in the strategy and took each step of the process seriously, including the roleplay. The Jam itself was able to promote conversation at all levels, between Executive Directors, boards, staff, and volunteers across all the agencies, which isn't something that always happens naturally.

How has working with the Pillar Design Collective benefitted Big Brothers Big Sisters of Woodstock?

It has created stronger relationships between us and the other agencies involved. It's allowed us to be more collaborative, and it's broadened my network as someone who's new to the management role, as well as for my staff. We've already had conversations with other agencies about how we can work together now, while we're still preparing for the next steps with Pillar. Our thinking here in Woodstock has already become more collaborative.

Were there any challenges? Was there anything you would have liked to have seen done differently?

I sometimes wonder if we took enough time with the process. Perhaps there could have been more time, including the agencies that weren't part of the Design Team, to meet more to explore the options a bit more thoroughly. But, at the same time, we were under a time crunch so I understand why that didn't happen. I do wonder, though, whether it would have yielded different conversations or outcomes if we had more time to explore.

Overall, are you happy with the process and outcomes identified?

Absolutely. I think these kinds of projects always bring the concern that you'll do a lot of work, but when

they come to an end there's no solution or push to move forward. I really feel that this process was different. Our agencies were able to identify the solutions that were best for us. I think being part of the process from the beginning pushed us to continue to invest in seeing it succeed.

What are the next steps for your organization as you close out the process of working with the Pillar Design Collective?

We're continuing to work and collaborate with our neighbouring agencies. To reach our goal, we've been keeping our vision locked on the bigger picture, which is serving more youth in Southwestern Ontario and serving them better. We still have meetings planned in the near future, and we're working on solutions to move forward.



PSD in Conversation with Deb Landon, Executive Director, Big Brothers Big Sisters of Ingersoll, Tillsonburg, and Area

Can you tell me about your role with Big Brothers Big Sisters?

I'm the Executive Director of Big Brothers Big Sisters of Ingersoll, Tillsonburg, and Area. I oversee and manage all operations of the agencies, including case work, fundraising, marketing, HR – everything. We're a small office, so you do everything!

What was your role in the regionalization project?

It started with a group of Executive Directors in the Southwestern region meeting to share agency news and brainstorm things that we could work on together. From there, we recognized some of the struggles that we as smaller agencies shared, such as the duplication of services. We recognized that there were areas we could use the support of other agencies. For example, some of the very small agencies only have one staff person. That's how we came to the decision to apply for Trillium funding. I was part of that effort. We received several proposals and we chose Pillar because of the very innovative way they approached collaboration. Instead of hiring a firm that would collect all the data and then come up with one or two models to present to us, this was, from the beginning, inclusive of all 12 agencies.

Pillar set up a Design Team, which is made up of five consultants from Pillar and Innovation Works, but also representatives from each agency who sat in on meetings, provided feedback, and basically helped to "steer the ship." Being able to navigate through the process together was beneficial. It allowed us to

“take the pulse” of everyone throughout the process, which was useful because there was a lot of apprehension and fear – for jobs, loss of autonomy, etc.

We also held a Design Jam, which brought all the agencies together in an event where all staff and board members were welcome, rather than just a couple representatives around the table. We went through a series of activities and exercises to develop our priorities, what we thought were the needs of the various agencies, and identify where we could best work together. That was a really great day. More information was gained through that event, but we still felt there was a lack of representation from the northern agencies. Part of that was due to holding some of these meetings over the winter months, which makes it hard to travel, so we just recently held a meeting in Clinton, which brought in a few more agencies as participants. I think we’ve prioritized some main ways we can work together as agencies. We’re still continuing to have our regional Executive Director meetings, and at the end of this process with Pillar we created timelines and assigned responsibilities, so we can keep moving forward.

The design thinking process is somewhat unconventional compared to more traditional consulting endeavours. What were your original impressions of the design thinking process? Did they change at all from the beginning of the project to the end?

At first, I thought it was different and I wasn’t quite sure how to grasp it. But the role playing really helped us identify the root causes of why we were undertaking this exercise in the first place. Sometimes you just talk about the surface stuff, but you don’t truly understand where others are coming from. And because we’re dealing with Big Brothers Big Sisters, there’s a lot of emotional attachment – it’s a “pull on your heartstrings” kind of organization. A lot of people who are involved are very attached to the organization, and they can become protective of their own agencies. This allowed us open up and be vulnerable, which you don’t normally have the opportunity to do. It ultimately helped us identify what we could do to serve more children more efficiently, while saving dollars for the agencies.

Each activity not only required us to think with our heads, but also with our hearts. In the end, we came up with a model that everyone had given their input and agreed upon, which we then shared with the big group for them to provide their feedback as well. That was done throughout the whole process. Everyone’s thoughts and feelings were taken into consideration, and any fears were addressed. It was a very unique experience, and there were times we were a little apprehensive, but once we went through it we realized what a neat process it was. We captured a lot of information that we wouldn’t have otherwise.

How has working with the Pillar Design Collective benefitted your Big Brothers Big Sisters agency?

They brought a wealth of information to us, like in terms of collecting data and follow-up information that they would send after each session, for example. It’s really been helpful for us to know what’s happening and how we compare to other agencies. Working with them directly, they were amazing people. They were always very positive and upbeat. They also learned a lot about who we are, and I think they had just as much fun going through the process and different models. We’ve developed a relationship with them now where we can keep calling upon each other for support or advice. We hope to continue working with them in some way.

I don’t think we would have reached the point we have if we had hired a traditional consultant and simply received a report back. This approach really helped us achieve buy-in from the various agencies, and assured everyone that we’re not just going to close their doors and create one big agency. There are different models available and there is flexibility.

The greatest part was that it wasn't Pillar telling us how to do it. It was us sharing amongst our peers. We created a chart for each priority, which have now gone into our agenda for upcoming meetings. We've talked about marketing as an example of an opportunity for shared services. London, for example, has a part time marketing person. So, we're looking at a way we can make that position full time and we all pay a portion of that person's salary to provide marketing materials and expertise for all the agencies. It would bring a unified voice and look, without each agency having to develop those materials themselves.

Standardization of policies and procedures is another item on the agenda, as well as fundraising and HR. Perhaps there's an opportunity for payroll to be managed by one organization, rather than everyone having someone take on that role in their individual offices. So, there may be ways we can collaborate that way.

Because of the size of the region, there may be what we call "clusters." For example, we work closely with Woodstock, St. Thomas, and London, so we could be a cluster in terms of collaborating on services. The northern agencies are, perhaps, too far away, but they might be able to cluster amongst themselves in the same way. Therefore, depending on the task at hand, collaboration could be done in clusters rather than as a whole region.

We're also looking at shared services for our case management system in terms of how we can work together to share views and collect data and statistics. Is there a person who can do that? So, it's not necessarily creating new jobs, although that's a possibility. But, maybe another agency has someone in place already and we can access their services. Some agencies just don't have the time and expertise to do everything, so they're not able to grow the way they want because their energy is put into background tasks instead of actual programming.

Is there anything you would have like to have seen done differently?

Not on the Design Team's part. They went above and beyond. But, it would have been nice to have had greater participation from local agencies. I know it's not always feasible, but seeing more commitment from some agencies would be great – and I think some of that will come with time.

Overall, are you happy with the process? Do you feel confident with the next steps that have been identified?

Yes. Now, I think it's up to us, as Executive Directors, along with our Boards, to make sure we follow through with what we talked about. It's like when you build a strategic plan, you can't just put it on a shelf afterwards if you want to see results. We're now looking at how we might be able to ask Trillium for more funding for our next steps to support some of these collaborative models and shared services.

PSD in Conversation with Mike Hurry, Executive Director, Big Brothers Big Sisters of Sarnia

Can you describe your role with Big Brothers Big Sisters of Sarnia?

I'm currently the Executive Director. The agency in Sarnia has been in existence for 50 years, and I've worked here for 40. So, I have a long history with the organization, as a Case Worker originally and then as Executive Director. As an Executive Director in any small organization, you wear many hats. You're responsible for staff, you're usually the person the community knows as the main contact at the agency – you become the face of the agency. I'm also responsible for hiring and firing if necessary. We get no

government funding, so a big part of my job is fundraising since we don't have a paid fundraiser at our agency. I'm the only staff person who's hired by the Board of Directors, so I'm responsive to the Board.

What was your role in the regionalization project?

I've been involved since the very beginning when we first sat down as a group of agencies. London was the leader at the time in terms of pulling information together for the Trillium grant and taking care of initial communications with the 12 agencies in the region. So, I've been there since the beginning when the decision to take on the project was made and I've been involved ever since.

The design thinking process is somewhat unconventional compared to more traditional consulting endeavours. What were your original impressions of the design thinking process? Did they change at all from the beginning of the project to the end?

You know what, I was very happy with the process from beginning to end. The team at Pillar did an excellent job of exploring different possibilities, and getting people to feel comfortable and talk. It got people out of their comfort zones.

What were your perceptions of the Design Jam, if that was an event you participated in?

Good and bad. The good was that we had a reasonable turnout, though not all 12 agencies were there due to holding the event in the winter. It would have been nice to have had representation from both boards and staff, as well as those from all 12 agencies. Nonetheless, the exercises they led us through were very positive.

How has working with the Pillar Design Collective benefited BBBS Sarnia?

I've enjoyed the process, but it's still a work in process as we're not entirely sure where it's going to go. However, we're all committed to seeing it through and achieving positive outcomes.

Is there anything that you would have liked to have seen done differently?

Had we been able to pick a different timeline the results may have been different, since we had a tough time getting everyone, especially those from northern agencies, to all our meetings.

Overall, are you happy with the process? Do you feel confident about the next steps that have been identified?

I am. I think the Executive Directors involved are committed to making sure it moves forward. We've got names, dates, and timelines, including additional meetings for the Executive Directors lined up, for example. We will further refine and move things forward. Everyone recognizes that it needs to happen.

PSD in Conversation with Warren Melhuish, Board Member of Big Brothers Big Sisters of St. Thomas/Elgin

Can you tell me about your role with Big Brothers Big Sisters of St. Thomas/Elgin?

I've been with the organization for some time. I've been an actual Big Brother twice over the years, starting in 1980 in Kingston, Ontario, where I was also on the Board of Directors. I moved from Kingston to St. Thomas in the late 1980s and joined the Board of Directors in St. Thomas in 1990 and also became a Big Brother again. I'm still in touch with both of my little brothers, who are now 42 and 31. Now, after travelling for ten years I came back and I'm semi-retired. I started back up with the Board as Vice President for two years and then became President. So, I just took over the Presidency position, which I'll serve as for two years before becoming Past President for another two years.

What was your role in the regionalization project?

I was one of the few Board Members that was part of the Design Team. Part of my goal was to give the Board Member perspective and input, as the people who have to make the decisions on things like budgets. As the Board President, I'm involved with leading that team. Along with our Executive Director, our Board was very open to the idea of a concept called "thrivability" – basically change by choice. We embraced it, we loved it, and we thought it was important to discuss how we could cooperate with other agencies to try to be more efficient and productive. At the end of the day, that helps us better serve the kids who are involved with the organization. That's the main focus.

I learned a lot from being around the Executive Directors and the different challenges that come along with the job. For me, then, it was providing input from a small to medium-sized organization, and from the Board perspective.

The design thinking process is somewhat unconventional compared to more traditional consulting endeavours. What were your original impressions of the design thinking process? Did they change at all from the beginning of the project to the end?

They say the only person who likes change is a wet baby. When you're faced with coming out of your comfort zone, it's difficult. I'm fortunate to have worked with Royal Caribbean International for many years as a Cruise Director on their cruise ships. There, we went through a lot of similar training, thinking out of the box, and interactive role playing. My first thought was that I didn't want to have to go through those processes again, but then I reminded myself that it had been a few years since I'd participated in those kind of exercises and I've always found them useful. It helps people be open minded.

When you have people who have been working in the same agency for, say, 25 years, their ways of thinking and doing things are pretty engrained. But change by choice is important. We have to thrive in today's world. Things aren't the same as they were 25 years ago. People volunteer differently now and give up their money for fundraising differently, too. These are all things that we discussed. We looked at other agencies similar to ours and case studies about what they were doing, and considered how we could learn from them. I didn't necessarily enjoy the whole process we went through, but I know it's necessary. It was very helpful and I know it achieved the goals it was meant to.

What were your perceptions of the Design Jam, if that was an event that you participated in?

I was unable to participate, but Barb, our agency's Executive Director attended, as did another one of our Board Members, David. They found it worthwhile. The overall feeling was that it was very productive. David did feel, though, that the segment on merger received more attention than he thought it should have. I think that's because, although we wanted to consider all options before making any decisions, merger was never one of the preferred choices. But, I realize it was nevertheless important to consider, and I think once all the facts were reviewed it became evident that merger wasn't in the cards. Shared services are a better option to start with. It helped us recognize what agencies are able to come on board to join forces now. And, the agencies who prefer not to be involved right now have the option to join in whenever they want to.

How has working with the Pillar Design Collective benefitted Big Brothers Big Sisters of St. Thomas/Elgin?

The Pillar group was very good at facilitating and driving the process in the direction we needed to go. You need someone who can get you moving in the right direction, which will ultimately help us determine how we can reach more kids and thrive into the future. Specifically, they were great in the sense that they were able to do all the documentation, which was helpful to us to have such concise

notes prepared properly. As well, they made us think outside the box and consider all options. I would say it was a very positive experience.

Is there anything you would have like to have seen done differently?

It's the old 80/20 theory – 80 percent of the work comes from 20 percent of the people. It was disappointing that there were originally 12 agencies who were supposed to be sitting around the table, and we really ended up with about five or six that truly stuck with it and a still part of the initiative now. There are challenges that I completely understand. First of all, we started the process in the winter time, so anyone living in the northern part of the region was finding it difficult to make it down to our meetings throughout November, December, January, and February. So, there were people who weren't able to participate for four months of the whole process. Our solution to that was to make sure that we kept them informed, and then we decided that we would actually drive up to their neck of the woods, which we did when we went to Clinton. That was successful – I believe everyone was there for that meeting except one agency. So, I would have liked to have seen much stronger representation from some of the agencies – but I also understand the challenges they had.

Overall, are you happy with the process? Do you feel confident with the next steps that have been identified?

Yes, I'm very happy and I've expressed that to the Board. Barb, who is our work horse, is the key to the whole thing. She's got us where we need to be and understands and works closely with the other Executive Directors. She's got the networking and next steps set up, and I feel that positive things will happen. My job as a co-chair along with Deb Landon is to follow-up to make sure that the plan and goals we've set up are implemented, and to ensure everyone is completing their assigned steps. I feel very confident, and so far everything is falling into place.

Overall, it was a great exercise. I look forward to hopefully being able to get a second grant and continuing what we're doing. To me, this was just Part 1 of many phases that we'll go through.