

The Future of PACS

**Consultant's Report on Strategic Planning
for the Board and Officers**

1996

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Introduction & Background

I was asked in the fall of 1995 to provide consultant services to Portland Adventist Community Services (PACS) in the area of strategic planning. An initial session with the PACS board was scheduled for January 29, 1996.

The purpose of the one-day meeting with the PACS board was to help the group initiate long-range planning and develop a vision for the future of the organization. Much of the day focused on how to conceptualize a management philosophy for PACS.

This report presents key information shared during the day and recommendations for the next steps in the development of a strategic plan for PACS. It includes the hopes and dreams for the organization and its ministry jotted down by each board member present.

PACS is one of a handful of ADRA Affiliate agencies in the U.S. and Canada. Although the Seventh-day Adventist Church has a strong program of relief and development work in the Third World, as well as a significant history of social action up through the end of the 19th Century, ministries of compassion have declined here in North America over much of the 20th Century. The "Dorcas Society" has become the paradigm for Adventist social services in the minds of the clergy and most of the membership.

The "Dorcas" paradigm focuses on recycling used clothing, an amateur approach to the needs of the poor that features the most minimal investment possible on the part of the church. Generations of Adventist young people have grown up going out Ingathering, asking the general public for donations "for the poor and needy" while knowing that what the church was actually doing for the poor required and received little, if any, of the funds raised.

This Dorcas/Ingathering approach has not only killed these programs for church members born since 1945, but created a serious integrity problem for the denomination in the view of many of its members. Surveys consistently indicate that the vast majority of church members wish that the Adventist Church had a stronger program of social action. Focus group research has demonstrated that the lack of clergy leadership in sponsoring visible, effective ministries of compassion undermines the entire stewardship effort of the denomination.

The ADRA Affiliates network began in 1993 when the ADRA International board and the NAD-ADRA committee adopted guidelines for domestic hunger and poverty projects. PACS was one of the first organizations to qualify. This came as a result of a decade of work in Portland by lay people, pastors and conference and institutional leaders in creating an exceptional community services program.

Now PACS has come to a crucial moment in its history when there is opportunity to greatly expand its impact and ministry. It can become a key agency for a greater Adventist public awareness and ministry of compassion throughout the metropolitan region. Leadership needs a clear vision and careful strategic planning.

Summary

The board's hopes and dreams for the future of PACS, a new management paradigm for community service agencies, a look at the geography and key statistics from the Portland area, a tool for continued planning and program development, and next steps recommended by the consultant were all considered in this consultation.

Hopes & Dreams of the New Board

A new group of individuals have recently been brought together as the board of PACS. Some have long history with the organization, others have not served on the board in the past. It is an excellent group, including pastors, conference administration and capable church members with expertise in social work, health care, business management, education, development and other professions.

Much time was spent on January 29 exploring their hopes and dreams for PACS. There is strong consensus on the following key elements of a vision:

1. PACS should become a metro-region resource center to enable, empower and coordinate a full range of Adventist community action.
 2. Several new program ideas can be developed.
 3. The successful health clinic should be expanded.
 4. Physical plant facilities need to be improved, and perhaps decentralized.
 5. Volunteerism should be expanded.
 6. The fiscal position of PACS should be strengthened.
 7. PACS leadership has a growing management philosophy.
 8. There is dynamic support from the Adventist community, and it must be increased significantly.
 9. A strong public relations program should be developed so that PACS becomes a major public awareness asset for the Adventist Church in Oregon.
 10. Many collaborative efforts with community organizations outside the Adventist sphere can be created to expand the impact and effectiveness of PACS.
- The detailed report, typed from the hand-written papers of each board member present on January 29, and clustered by the consultant into ten consensus areas, is included on pages 5 and 6.*

A New Paradigm for Adventist Community Services

The old paradigm focused on a standardized "Dorcas" program carried out in a largely amateur manner in every local church across the denomination. The new paradigm is called "ADRA Affiliates," and it focuses on developing a set of catalytic skills in a social services agency that has the capacity to address a wide range of needs in the community by mobilizing Adventist volunteerism and institutional assets, entering into partnerships with outside organizations, leveraging limited Adventist funds with outside funding, and achievement of a level of quality that gains the recognition of civic leaders and the news media. In summary, the new paradigm focuses on the creation of a professionally-led organization that meets the standards of United Way

membership. [United Way membership here is used as a widely-recognized professional "watermark." Because of local politics, seeking United Way membership may not actually be advantageous to PACS.]

Initiatives from the North American Division such as the Campaign for Community pilot projects as a replacement for Ingathering, and the Adventist Health Network project development grants, are intended to encourage the development of ADRA Affiliates. In addition, a regular cycle of in-service education is provided for ADRA Affiliate directors and key staff. Board training is also provided on site and through satellite-linked events.

A diagram outlining this new paradigm is included on an attached page. The page is not numbered in order to make it easy to photocopy it.

Analysis of Metro-area Geography, Churches & Impact

PACS has developed a close working relationship among a cluster of constituent churches on the east side of the Willamette River and south of Route 84. In order to become a metropolitan area-wide agency, it needs to develop relationships with churches west of the river, north of Route 84 and in the western suburbs.

The PACS executive director shared a map that had been prepared for the day which shows the number of families served during 1995 in each Zip Code area. Families are being served in Beaverton, Tigard, and downtown in Zip Codes 97209, 97201, 97219, 97221 and others. Scores of families are being served in the neighborhood where the Sharon church is located and the neighborhood where the University Park church is located. This is in addition to the large numbers of families served in the East Portland, Creston and Lents neighborhoods near the PACS center.

A copy of the map is attached to this report. Further recommendations regarding this information is included in the consultant's recommendations section of this report.

Program Development Matrix

The consultant shared a matrix designed to help the board and staff think about the types of programs that can be developed. It focuses on the types of operations and the kinds of funding that can be utilized. It does not address the type of needs and issues that programs must focus on. It is a management tool, not an approach to understanding human needs.

A copy of the matrix is attached to this report. The page is not numbered in order to make it easier to copy for use as a handout or an overhead.

Next Steps & Recommendations

I have put in writing specific recommendations that I believe are important next steps for PACS to take. These steps will help to move PACS into the future. These steps will significantly move PACS toward the vision which the board and director share. These recommendations were written on January 30 as I reviewed all of the notes and information from the day of strategic planning.

The consultant's recommendations begin on page 7.

The Hopes & Dreams of Board Members

Early in the meeting on January 29, the members of the board were asked to think quietly and jot down their hopes and dreams for PACS. They then interviewed each other in 2's to add more detail and substance to their ideas, and later a summary of these hopes and dreams was created on a flipchart in a full-group process. I have recorded here the original notes of the board members. I have clustered the ideas of the individuals into groups of similar ideas. The clusters appear in no particular order.

Cluster 1 - PACS should become a metropolitan area resource center to enable, empower and coordinate a full range of Adventist community action.

PACS as an umbrella for local-church centers

Metro area coordination of community services

Satellite facilities

Coordinated community care

Make PACS a resource for church groups wanting to increase their service level

PACS as a center for engaging people in our local communities and churches in ministries with mission/outreach foci

Develop a satellite community services system in the metro area

Break down turf barriers

Cluster 2 - Suggestions for new program ideas.

Dental clinic

Crisis housing

Job search

Eastside weekend feeding program for the homeless

Opening a homeless shelter

Provide education for clients

Job training

Transitional housing

Financial planning

Cluster 3 - Expansion of the health clinic.

A fully-funded position as director of the health center

Physicians involved in the clinic

A nurse-practitioner clinic for adults

Cluster 4 - Improvement of the physical plant facilities.

Adequate space

Expanded and more adequate facility

New facilities for social services, clinic and thrift store

PACS having a new or remodeled facility to work in

A new building and/or situation for all components of PACS to grow

Cluster 5 - Expansion of volunteerism.

More volunteers

Expanded involvement of volunteers from the churches

Addition of another paid staff too coordinate church/volunteer staffing of center(s)

More involvement by individuals seeking to serve

Regular involvement by young people from the academy and elementary schools

Provide opportunities for church members of all ages to become involved

A "waiting list" of volunteers

Cluster 6 - Strengthened fiscal position.

Director position fully funded by the conference

Stable financial base

Corporate and private funding support

Increased financial stability of salaries for full-time staff

Cluster 7 - A growing management philosophy.

Become experts in social compassion

Community-based, family-centered and culturally competent

Diverse services

To meet a wider range of needs

Cluster 8 - Dynamic support from the Adventist community.

Constituents see PACS as an important ministry

Additional constituent churches and greater church-member involvement and support

Tell the PACS story

More Adventist churches in Portland supporting PACS

Cluster 9 - Build a strong public relations program so that PACS becomes a major public awareness asset for the Adventist Church in Oregon.

Greater recognition in community of PACS

Greater public knowledge of PACS's contribution to the community

Improve visibility and exposure in Greater Portland area

Have volunteers blanket the area with people telling the good news of PACS in churches, social organizations, Rotary, Lions, and radio programs

PACS being perceived by the public as a premier agency of compassion in Portland

Develop a greater public awareness of ACS in the metro area

Cluster 10 - Collaborative efforts with community organizations outside the Adventist sphere.

Ability to interact with other established organizations in meeting needs

Provide case management and work closely with other service providers

Next Steps and Recommendations

1. The staff needs to be re-organized so that the PACS director is freed-up to focus on development of new programs, fund-raising, and building relationships with the constituent churches and outside organizations.
2. Sufficient information needs to be gathered on all of the options so that the board can make a solid decision about how to solve the problems that PACS faces with regard to its physical plant.
3. At least two new program teams should be formed to explore the development of decentralized programs in collaboration with key churches in the metro area. Each team should include key staff and volunteers, as well as pastoral and lay representation from the collaborating church or churches in that neighborhood.
 - A. One team should focus on the development of a collaborative project with the Sharon and University Park churches in the northern neighborhoods of Zip Codes 97211, 97217, 97203, 97218, and 97213.
 - B. One team should focus on the development of a collaborative project with the Tabernacle church, or possibly with the Hillsboro and/or Beaverton churches.
4. An information strategy is needed to educate the church members throughout the Portland metropolitan area about the re-positioned mission of PACS, the needs in the community and what Adventists can do about those needs. This should include a series of messages, written to support a focused curriculum and designed to be packaged in many forms such as bulletin inserts, direct mail, newsletters, audio-visual presentations, etc.
5. A systematic process must be undertaken to strengthen and expand constituency relations. This should include an annual time when the PACS director or a board member meets with each of the church boards to report on the mission and activities of PACS, review the budget and plans for the coming year, and seek a renewed commitment, as well as seek input from each church board as to needs in that neighborhood and opportunities for community action. It should also include a yearly constituency meeting with a speaker or speakers of sufficient stature among civic leaders to bring some visibility and challenge Adventists regarding the needs in Portland.
6. PACS should work toward a funding strategy that includes approximately equal shares of income from church and conference subsidies, a yearly Campaign for Community, earned income from program fees and the thrift shop, a direct-mail donor

base and grants or service contacts. If the first category were sufficient to cover the director's salary and costs of the management office and fund-raising functions, it would permit all donors to be honestly told that 100% of their gifts will go to program activities. It would make it much easier to work with donors wishing to make gifts designated to specific projects.

7. The above steps will likely take several years to achieve. It would be may be helpful to the director and board to enter into a long-term relationship with a strategic planning consultant so that they can keep focused on their vision and continue to make progress to sometimes illusive goals.

A New Paradigm for Adventist Community Services

Core Expertise

Program Development

Community Organizing

Volunteerism

Grantsmanship & Fund Raising

Intake & Case Management

Member Education

Media Relations

An ADRA Affiliate agency uses its core expertise and all the assets available in the Adventist community to enter into partnerships with local churches and outside community groups to meet identified needs. It looks for opportunities for collaboration and facilitates and empowers the creation of many programs through the following, step-by-step community organizing process:

1. Opportunity identification
2. Convene a working group
3. Conduct a needs assessment
4. Develop a partnership
5. Enable the partnership to create a program design
6. Find the needed resources

Programs

Food Pantry

Homeless Shelter

Inner City Project

Refugee Resettlement

Family Clinic

Health Education

Thrift Store

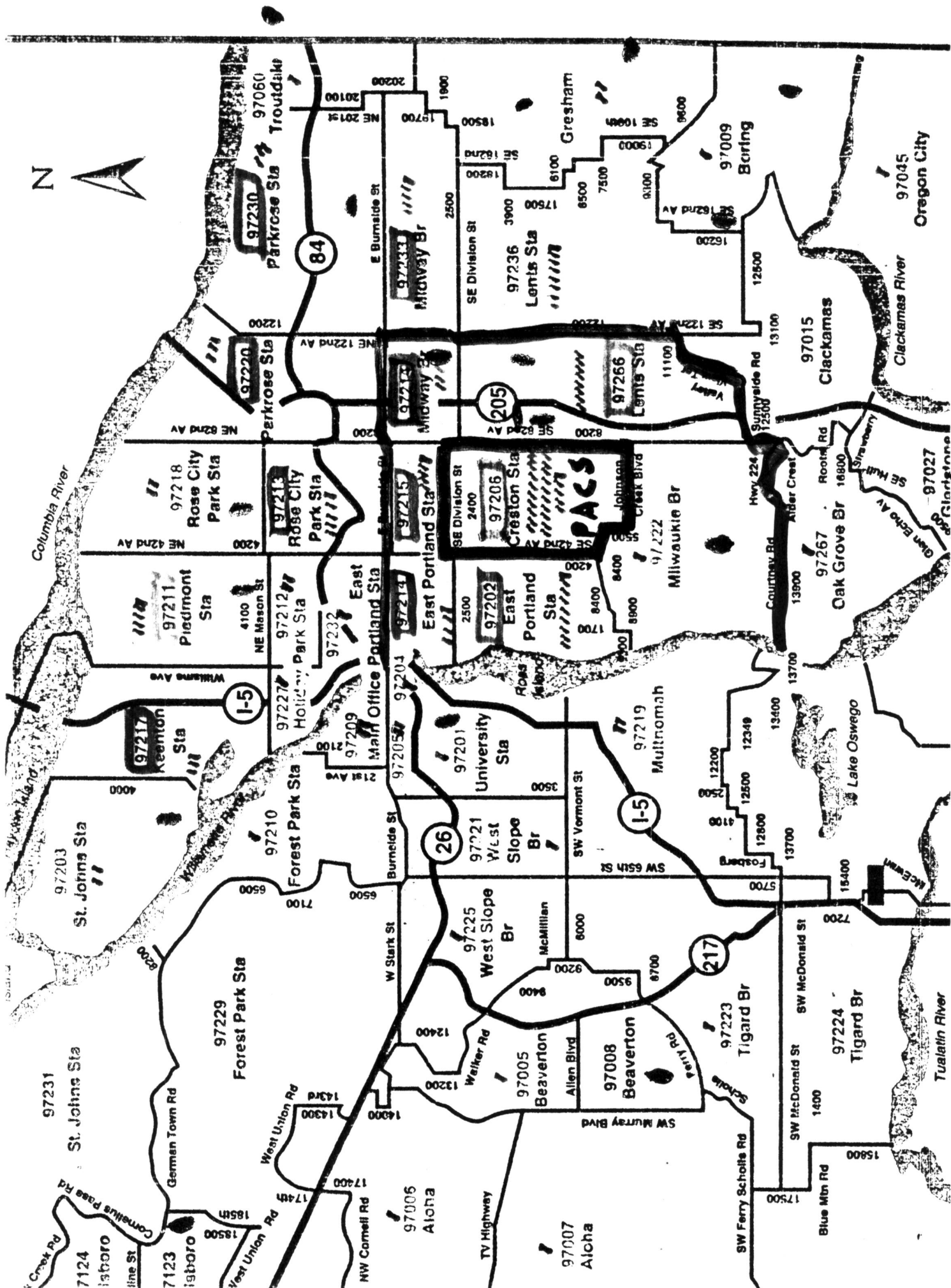
Job-Net

Literacy Tutoring

Program Matrix

| | Fee for Service | Contract | Grant | Donor Base | Gifts-in-Kind (GIK) | Volunteers | "loss leader" |
|------------------|-----------------|----------|-------|------------|---------------------|------------|---------------|
| Relief | | | | | | | |
| Casework | | | | | | | |
| Self-help Group | | | | | | | |
| Education | | | | | | | |
| Development | | | | | | | |
| Community Action | | | | | | | |

The program matrix is a tool that the board and staff of PACS can use to identify the kind of program that might be developed in a specific situation or opportunity. It compares a range of types of projects against a range of types of funding. It does not address the purposes of programs or the kinds of human needs that specific programs address. Any kind of need can be addressed with some type of program shown on this matrix. This matrix is useful primarily for program development and management issues.



PACS FACT SHEET
1995 - 1989

| | 1995 | 1994 | 1993 | 1992 | 1991 | 1990 | 1989 | 1987 |
|----------------------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| Total Clients Served | 18,249 | 22,564 | 25,349 | 25,090 | 23,946 | 20,300 | 18,297 | 21,672 |
| \$ Food dispensed | \$150,860 | \$184,280 | \$204,330 | \$203,340 | \$200,310 | \$162,080 | \$150,435 | \$186,550 |
| Clothing dispensed | 49,963 | 60,087 | 65,139 | 64,375 | 60,923 | 49,200 | 50,727 | 60,335 |
| Linens dispensed | 2,825 | 1,804 | 3,331 | 2,291 | 2,081 | 2,932 | 2,401 | 3,171 |
| Total Volunteers | 147 | 121 | 414 | 474 | 494 | 75 | 516 | 572 |
| Total Vol. Hours | 9,776 | 9,346 | 8,935 | 11,495 | 9,181 | 12,708 | 8,811 | 15,349 |
| Clinic Patients | 528 | 1,357 | | | | | | |
| Actual Budget (no clinic) | | | | | | | | |
| Income | \$120,915 | \$98,077 | \$65,708 | \$69,185 | \$66,986 | \$65,219 | \$52,242 | |
| Expense | \$104,736 | \$93,854 | \$86,752 | \$75,306 | \$60,404 | \$61,373 | \$45,396 | |