

Community and National Consultation

Business & Funding planning process 2015/2016

Board Conference Calls, April 2016

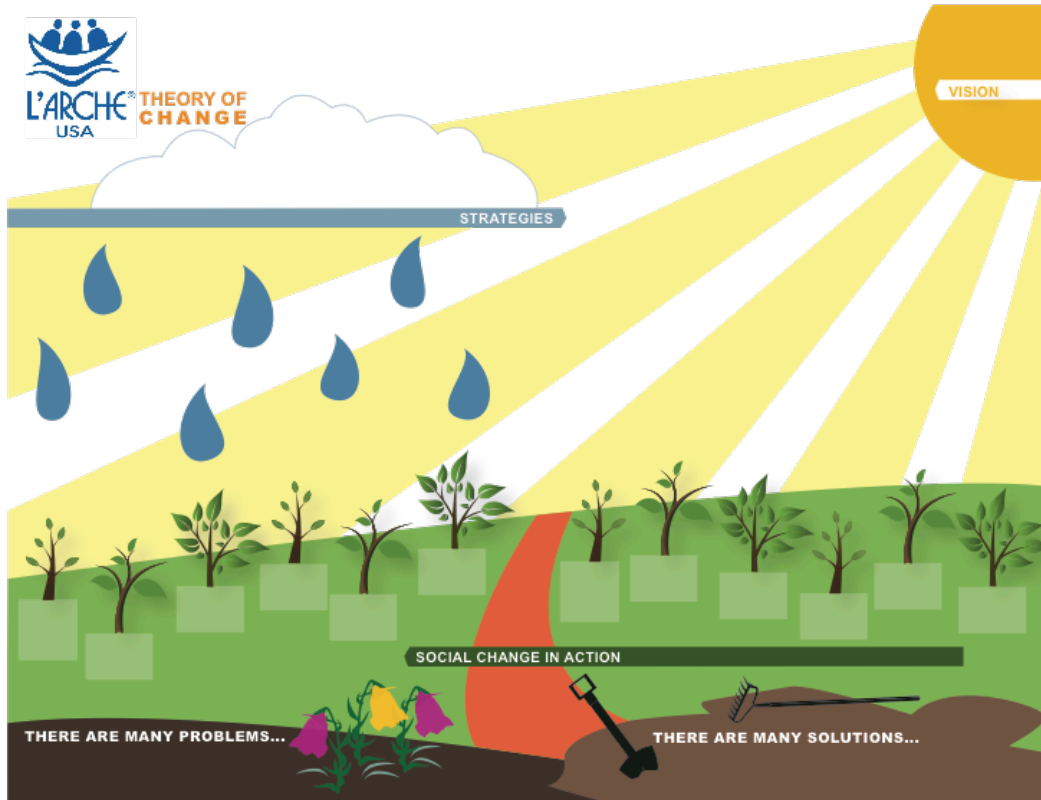
Reflection

L'Arche is first and foremost an individual experience of encounter through which we experience vulnerability and transformation. How does our individual experience inform this process?

The process so far

- 2015: Mandate discernment process 2015-2020
- May 2015: Discussion at National Assembly in Washington D.C.
- Summer 2015: Development of strategic projects 2015-2020 in cooperation with communities
- September 2015: National Board approves projects
- Fall 2015: Launch of priority projects #4 and #5, project teams, consultants, process, etc.
- December 2015 / January 2016: individual consultations of representatives of all communities, members of strategic project teams, national board and team and development of a “laundry list” of programs & services
- Extended Leadership Team Meeting, February 2016: discussion and first prioritization.
- Community and National Team & Board Survey, March 2016
- Interpretation of results with Regional Councils, April 2016
- Presentation of summary in Conference Calls with local Board members and national Board, April 2016

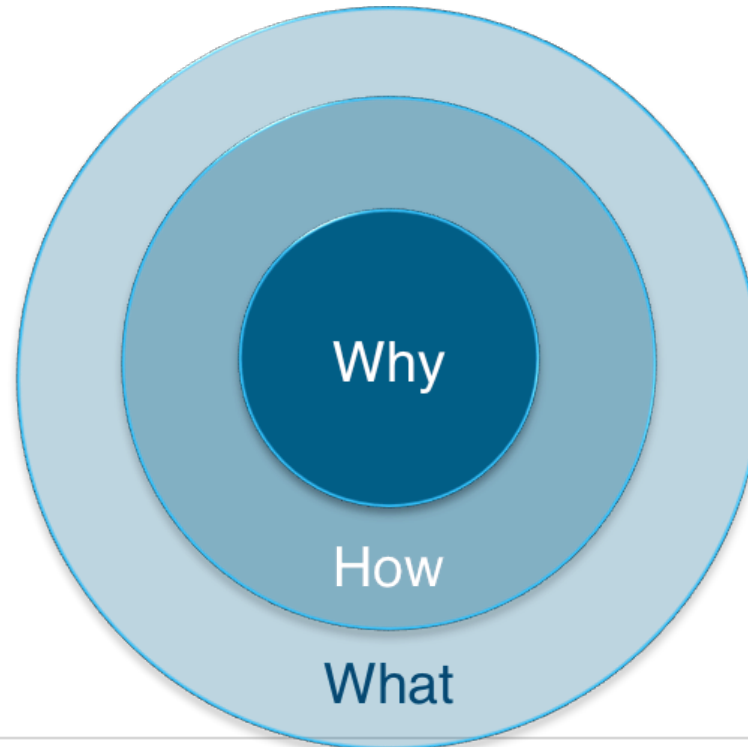
Ultimate Goal: develop a coherent plan for L'Arche's vision, mission, strategies, activities and funding in the United States



Infographic adapted from IDEX's Theory of Change
<http://www.idex.org/2014/01/26/new-theory-of-change/>

The Why – How – What Process

Why do we do what we do? (Vision) — How do we do it? (Strategy) — What do we do? (Action)



Requests made in California

Thoroughness, Transparency, Partnership, Clarity ----> appropriate pace of the process and sufficient information

Goal of the survey and the interpretation of its results

The survey was not designed to allow for a statistical analysis of the data. The goal was to interpret the data in order to design next steps in the process and get a sense of where we are as a body. Guiding questions of the interpretation / conversation were:

- What are the commonalities in communities' and national responses?
- Where are responses heterogeneous and do we see patterns that explain our heterogeneity?
- Where do we as a body express opportunities and energy?
- Where do we as a body express resistance or anxiety?

Regional Councils, Spring 2016

Each Regional Council dedicated one full day to the results of the survey.

Each community leader was invited to give a **succinct presentation** of their community's conversation. Every Regional Council then **jointly analyzed the data of all communities** based on a longer version of this presentation. Last but not least, every council developed a **joint understanding of the results to be transmitted back to the Strategic Project Teams** in preparation of the National Assembly.

Board Conference Calls, April 2016

Local board members were invited to a one-hour conference call. These calls are to give Board members the possibility to understand the results of the survey and offer feedback PRIOR to the National Assembly. We are aware that all of our Board members are volunteers and seek to offer you opportunities to engage in the conversation so that you can fully contribute your perspective at the National Assembly.

The National Board will equally discuss the results of the survey in its April Board meeting. The National Board received a summary of the results of the community and the national consultations.

Summary of Results

All data is available in two separate excel files.

Q1a: Which community are you from?

Answered: 16 Skipped: 0

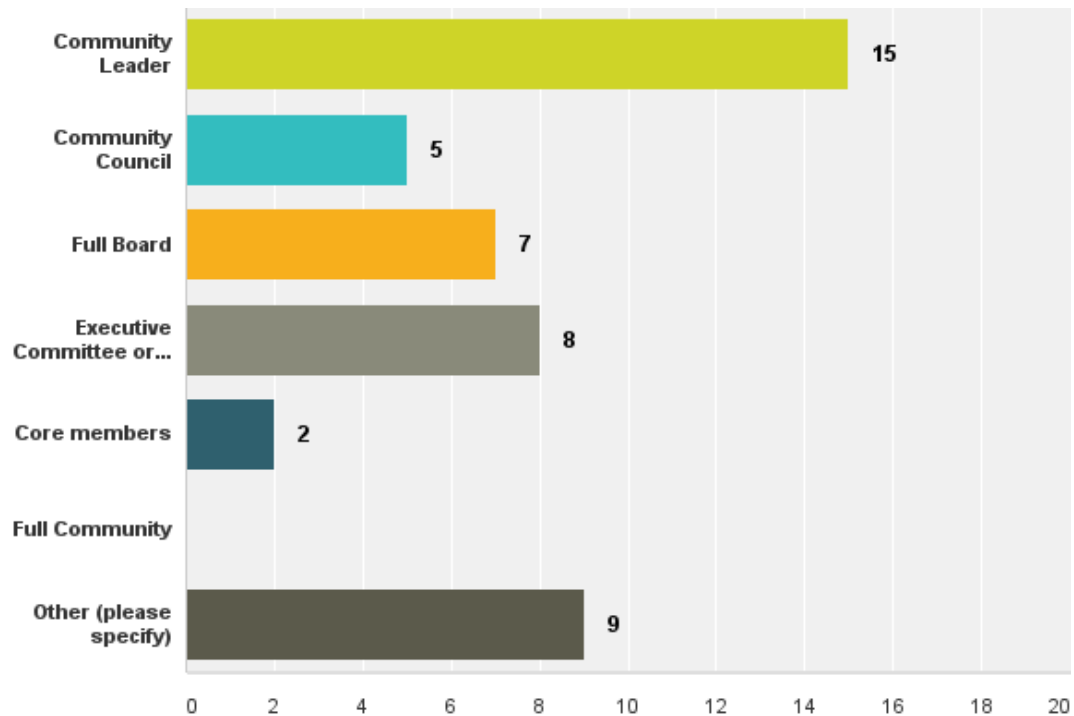
16 communities participated

One community could not fill in the survey, but discussed the questions and offered written feedback

Projects were not invited to contribute

Q2: Who has provided input to communities' answers?

Answered: 16 Skipped: 0



Q1b: Who participated in national survey?

Answered: 14 Skipped: 0

14 individuals participated

5 Board members

8 National team members

1 international team member

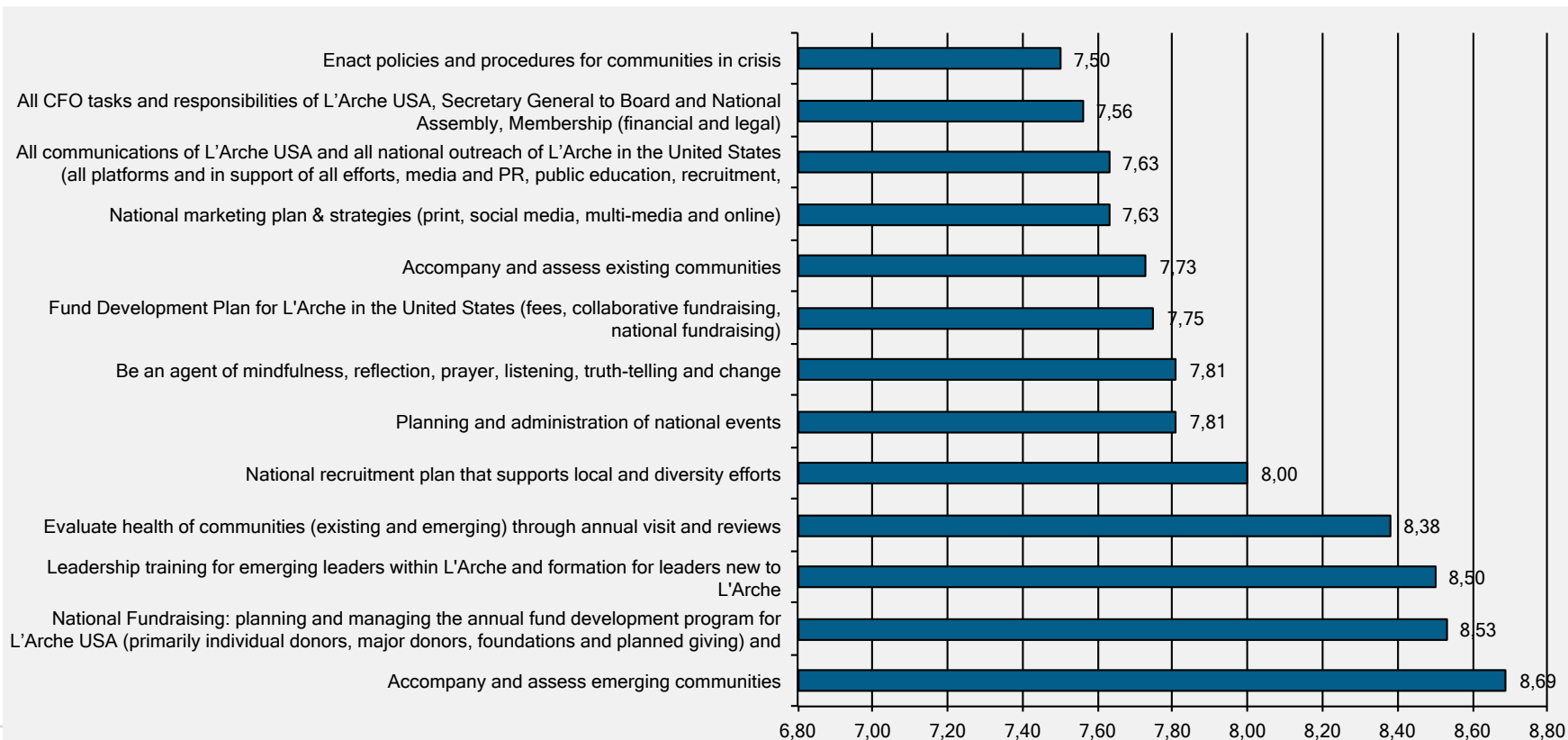
How important is it for L'Arche USA to engage in the following activities?

Scale from 1 (not at all important) to 10 (extremely important)

Importance of activities for communities: all answers with a rating of 7.50 or higher



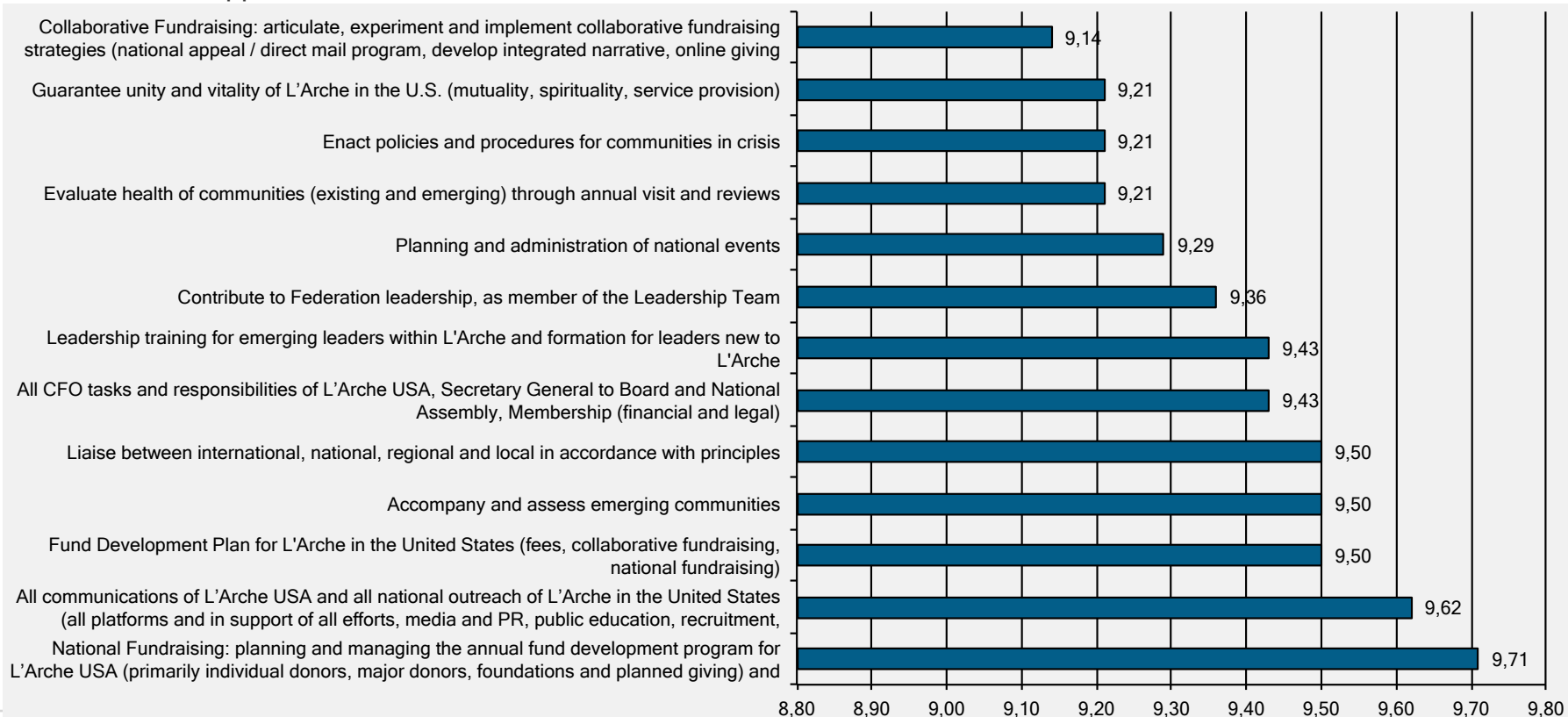
Answered: 16 Skipped: 0



Importance of activities for national: first 13 priorities



Answered: 14 Skipped: 0



Importance of activities: 13 highest rated activities by fields - communities



Development	Communications	Public Policy	Confirmed Country + Admin	Voc Dev.	Local support
National Fundraising: planning and managing the annual fund development program	National marketing plan & strategies (print, social media, multi-media and online)		Accompany and assess emerging communities	Leadership training for emerging leaders within L'Arche and formation for leaders new to L'Arche	
Fund Development Plan for L'Arche in the United States	All communications of L'Arche USA and all national outreach of L'Arche in the United States		Evaluate health of communities (existing and emerging) through annual visit and reviews	National recruitment plan that supports local and diversity efforts	
			Planning and administration of national events		
			Be an agent of mindfulness, reflection, prayer, listening, truth-telling and change		
			Accompany and assess existing communities		
			All CFO tasks and responsibilities of L'Arche USA, Secretary General to Board and Assembly, Membership (financial and legal)		
			Enact policies and procedures for communities in crisis		

Importance of activities: 13 highest rated activities by fields - national



Development	Communications	Public Policy	Confirmed Country + Admin	Voc Dev.	Local support
National Fundraising: planning and managing the annual fund development program	All communications of L'Arche USA and all national outreach of L'Arche in the U.S.		Accompany and assess emerging communities	Leadership training for emerging leaders within L'Arche and formation for leaders new to L'Arche	
Fund Development Plan for L'Arche in the United States			Evaluate health of communities (existing and emerging) through annual visit and reviews		
Collaborative Fundraising: articulate, experiment and implement collaborative fundraising strategies			Planning and administration of national events		
			Be an agent of mindfulness, reflection, prayer, listening, truth-telling and change		
			Accompany and assess existing communities		
			All CFO tasks and responsibilities of L'Arche USA, Secretary General to Board and Assembly, Membership (financial and legal)		
			Enact policies and procedures for communities in crisis		
			Contribute to Federation leadership, as member of the Leadership Team		

Importance of activities (cont'd): Next 12 highest ranked activities by field - communities



Development	Communications	Public Policy	Confirmed Country + Admin	Voc Dev.	Local support
Collaborative Fundraising		Public policy watchdog for relevant laws and policy shifts affecting L'Arche and adults with intellectual disabilities	Develop strategies, ensure programmatic, organizational and financial alignment and development	National coordination of L'Arche trainings, retreats and formations offered on all levels	
Support capacity-building of local development efforts			Ensure inculturation: intentionality around how the L'Arche Identity & Mission is lived in our cultural context	Accompaniment and mentoring program for CLs and national team	
			Provide resources for community resiliency, growth and renewal	Inclusion training and an eye for engaging core members in varied aspects of vocational development for selves/ others	
			Ensure unity and promote solidarity and sharing		
			Guarantee unity and vitality of L'Arche in the U.S. (mutuality, spirituality, service provision)		

Importance of activities (cont'd): Next 12 highest ranked activities by field - national



Development	Communications	Public Policy	Confirmed Country + Admin	Voc Dev.	Local support
Liaison with International Foundation, L'Arche International (particularly financial aid) and other countries	National marketing plan & strategies (print, social media, multi-media and online)	Public policy watchdog for relevant laws and policy shifts affecting L'Arche and adults with intellectual disabilities	Accompany and assess existing communities	National recruitment plan that supports local and diversity efforts	
			Ensure unity and promote solidarity and sharing	Alumni database, communication and engagement	
			Cooperation with finance staff of local communities, L'Arche International and L'Arche International Foundation	Accompaniment and mentoring program for CLs and national team	
			Develop strategies, ensure programmatic, organizational and financial alignment and development	Board formation on the fruitful triangle and how to be a L'Arche Board in the USA	
			Ensure inculturation: intentionality around how the L'Arche Identity & Mission is lived in our cultural context		

**Which of these activities do you consider to be a core service provided by L'Arche USA to member communities?
Which of these core services should be covered by dues?**

Community Responses

12 core services with response counts of 10 or more - communities



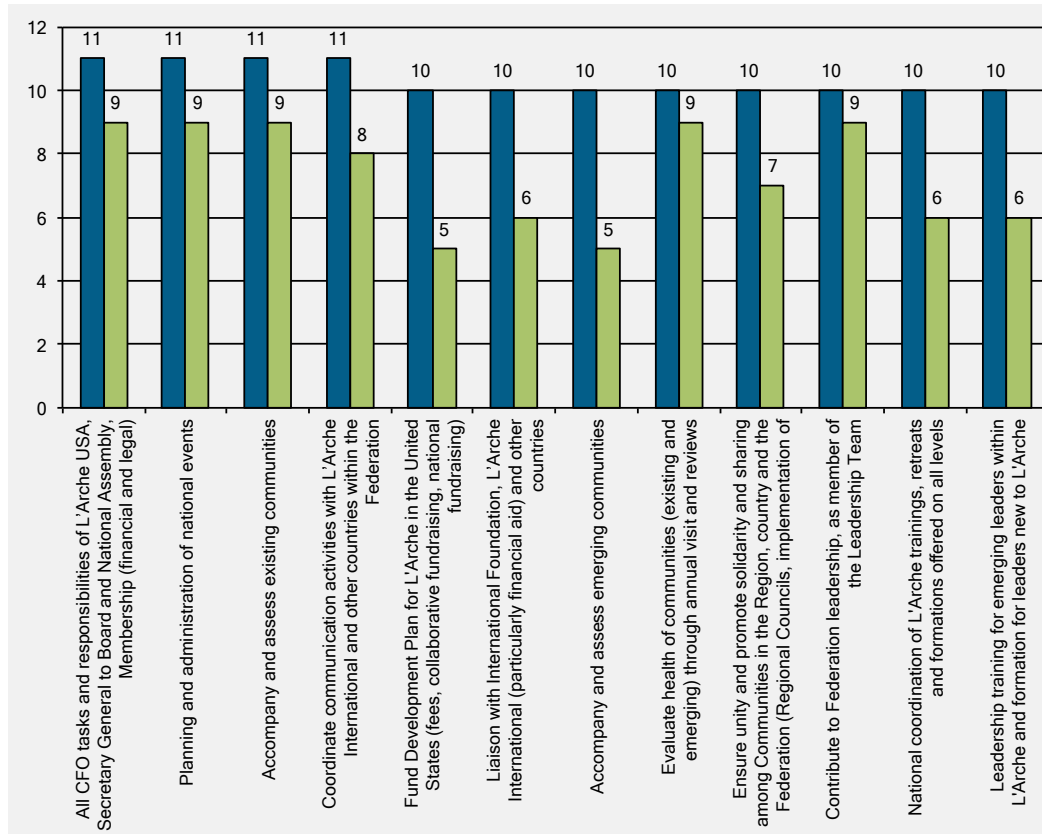
Response 10 +11: Development – Communications – Public Policy – Confirmed country + Admin – Voc Dev. – Local Support

All CFO tasks and responsibilities of L'Arche USA, Secretary General to Board and National Assembly, Membership (financial and legal)	11
Planning and administration of national events	11
Accompany and assess existing communities	11
Coordinate communication activities with L'Arche International and other countries within the Federation	11
Fund Development Plan for L'Arche in the United States (fees, collaborative fundraising, national fundraising)	10
Liaison with International Foundation, L'Arche International (particularly financial aid) and other countries	10
Accompany and assess emerging communities	10
Evaluate health of communities (existing and emerging) through annual visit and reviews	10
Ensure unity and promote solidarity and sharing among Communities in the Region, country and the Federation (Regional Councils, implementation of int'l / nat'l policies, liaison between local and structures, solidarity)	10
Contribute to Federation leadership, as member of the Leadership Team	10
National coordination of L'Arche trainings, retreats and formations offered on all levels	10
Leadership training for emerging leaders within L'Arche and formation for leaders new to L'Arche	10

12 highest ranked core services and their relevance for membership fees – communities



Response count 10 and 11



Core service
Paid by dues

12 core services with response counts of 10 or more - national



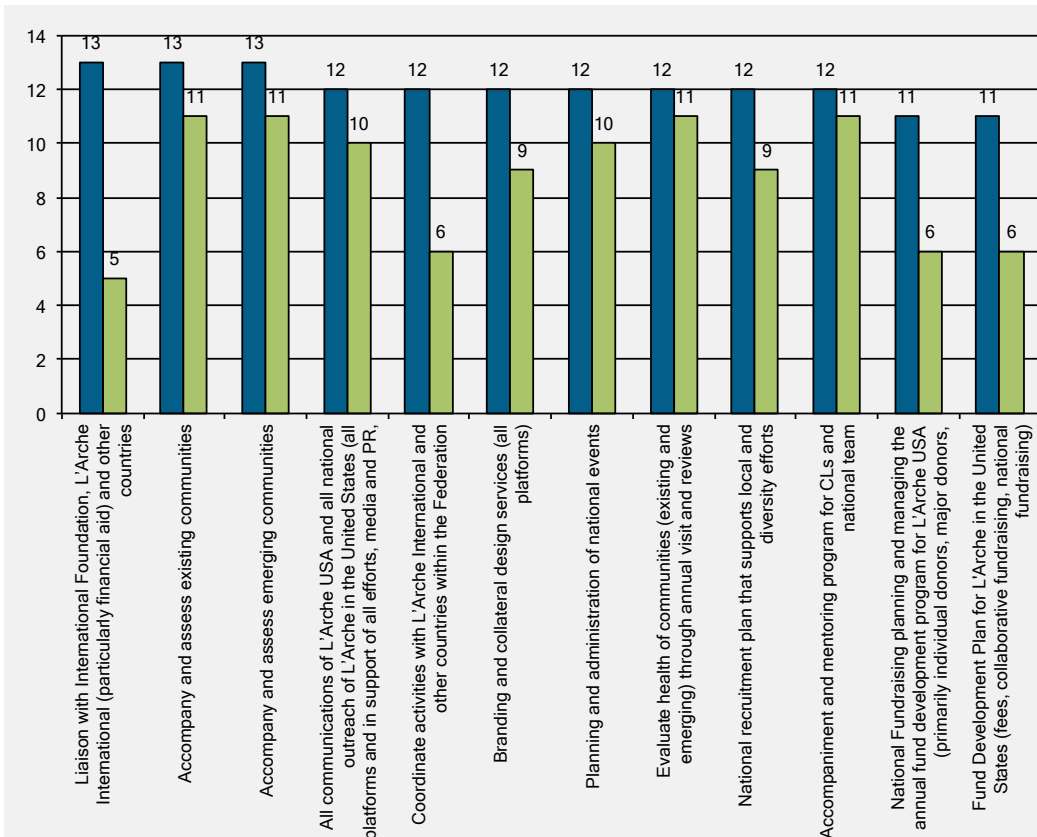
Response count 11-13: Development – Communications – Public Policy – Confirmed country + Admin – Voc Dev. – Local Support

Liaison with International Foundation, L'Arche International (particularly financial aid) and other countries	13
Accompany and assess existing communities	13
Accompany and assess emerging communities	13
All communications of L'Arche USA and all national outreach of L'Arche in the United States (all platforms and in support of all efforts, media and PR, public education, recruitment, marketing, fundraising, partnerships, ...)	12
Coordinate activities with L'Arche International and other countries within the Federation	12
Branding and collateral design services (all platforms)	12
Planning and administration of national events	12
Evaluate health of communities (existing and emerging) through annual visit and reviews	12
National recruitment plan that supports local and diversity efforts	12
Accompaniment and mentoring program for CLs and national team	12
National Fundraising planning and managing the annual fund development program for L'Arche USA and L'Arche in the United States	11
Fund Development Plan for L'Arche in the United States	11

12 highest ranked core services and their relevance for membership fees - national



Response count 11 - 13



Core service
Paid by dues

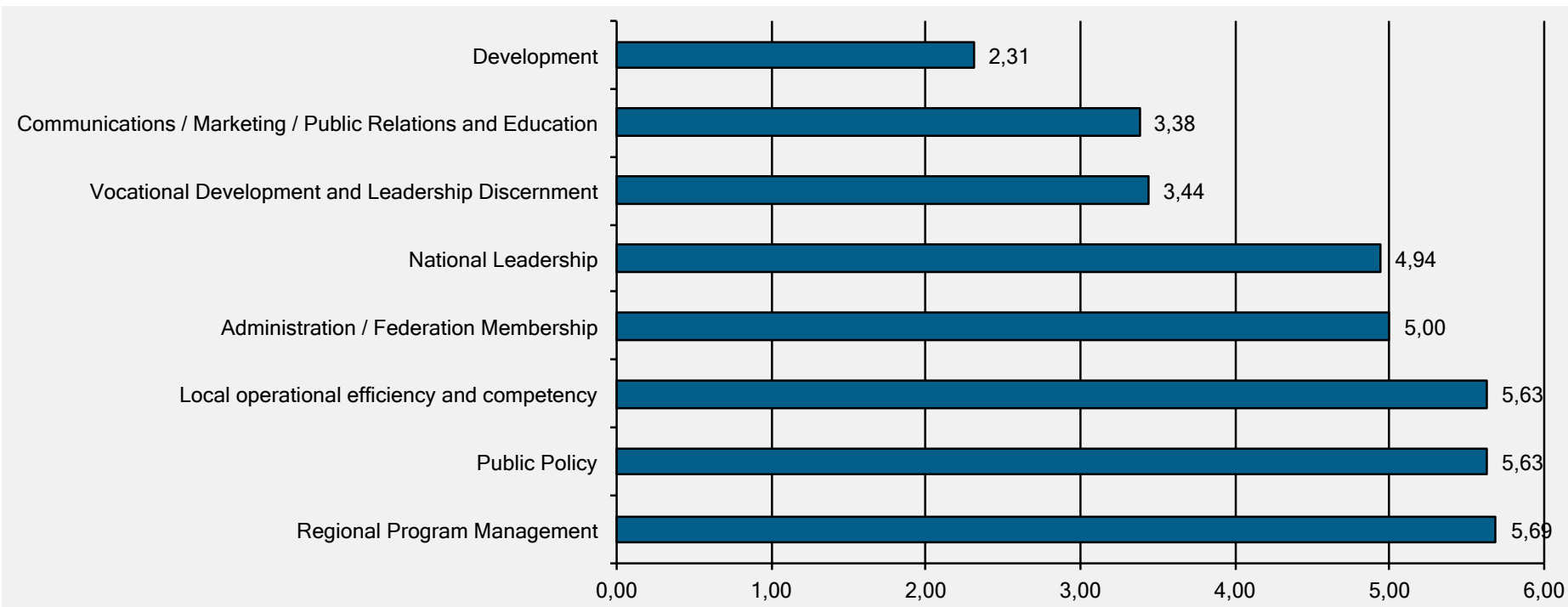
If we were to invest additional resources in any of the below fields: how would you prioritize the categories for implementation, based on your community's perspective and need?

Response shows average rating for each of the eight fields

Q21: Prioritization of additional investments and implementation - communities



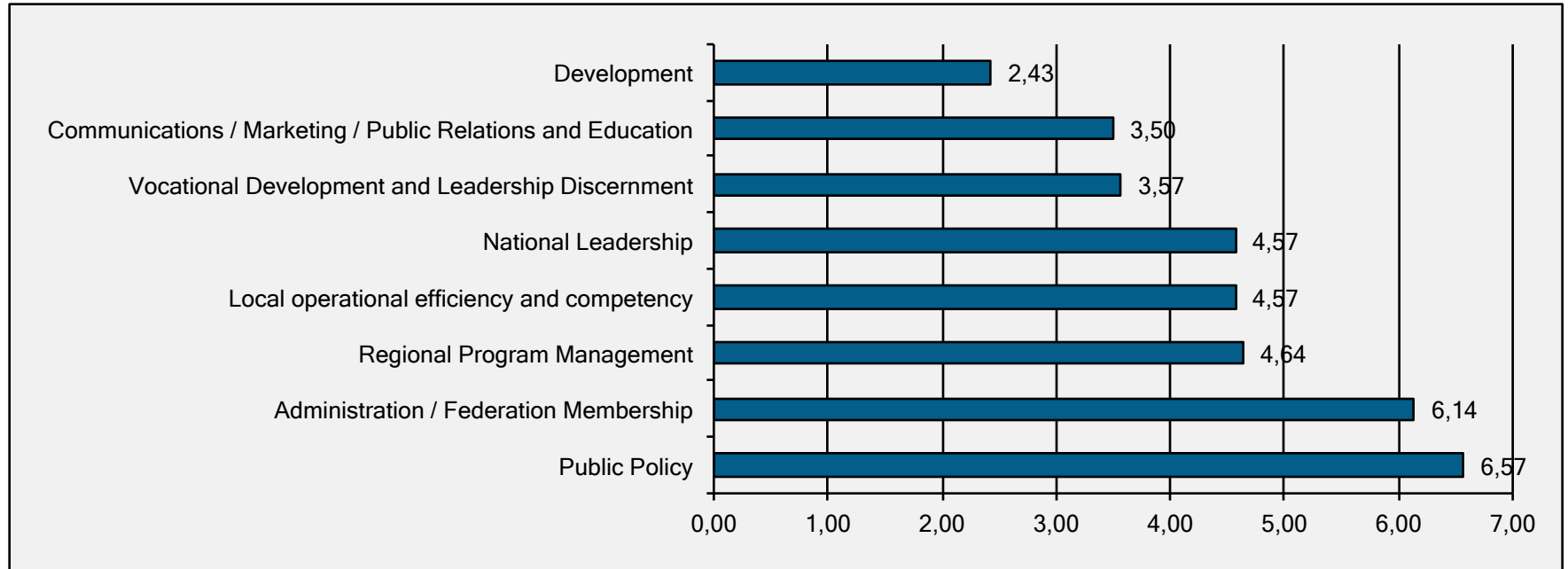
Answered: 16 Skipped: 0 1 – highest priority / 8 – lowest priority



Q21: Prioritization of additional investments and implementation - national



Answered: 14 Skipped: 0 1 – highest priority / 8 – lowest priority



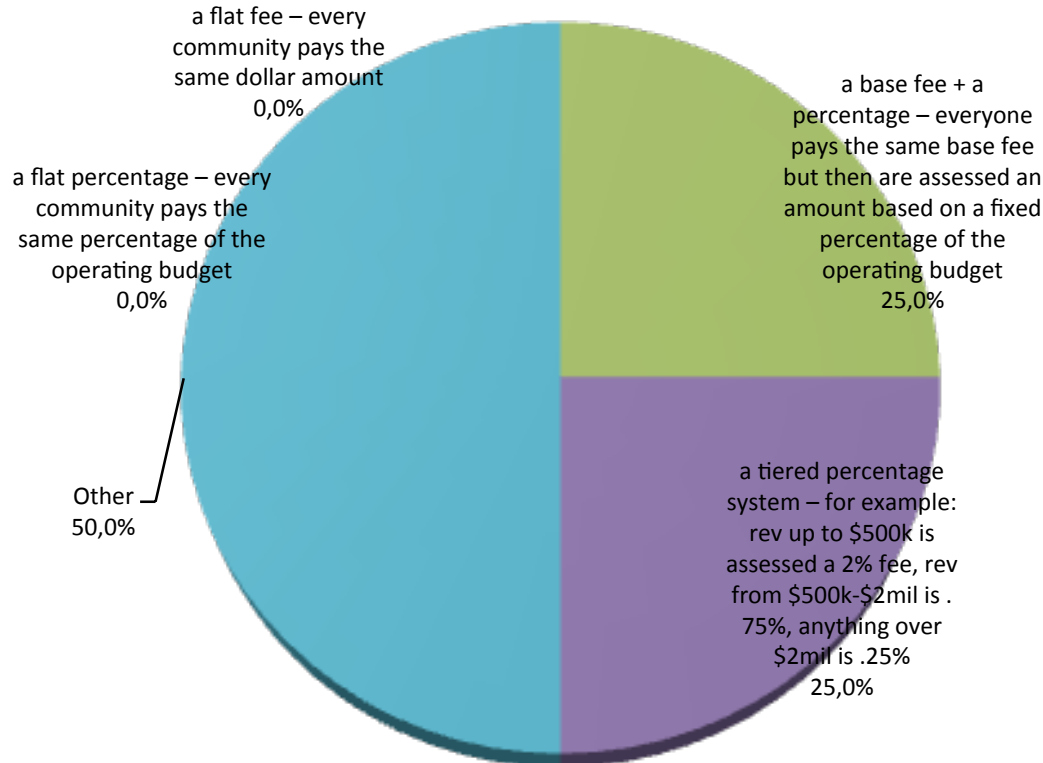
What is your advice on the most equitable way of distributing the total cost of the membership fee, regardless of what the total fee is?

How should the total fee amount be calculated?

Q22: Most equitable way of distributing the total cost of membership? - communities



Answered: 16 Skipped: 0



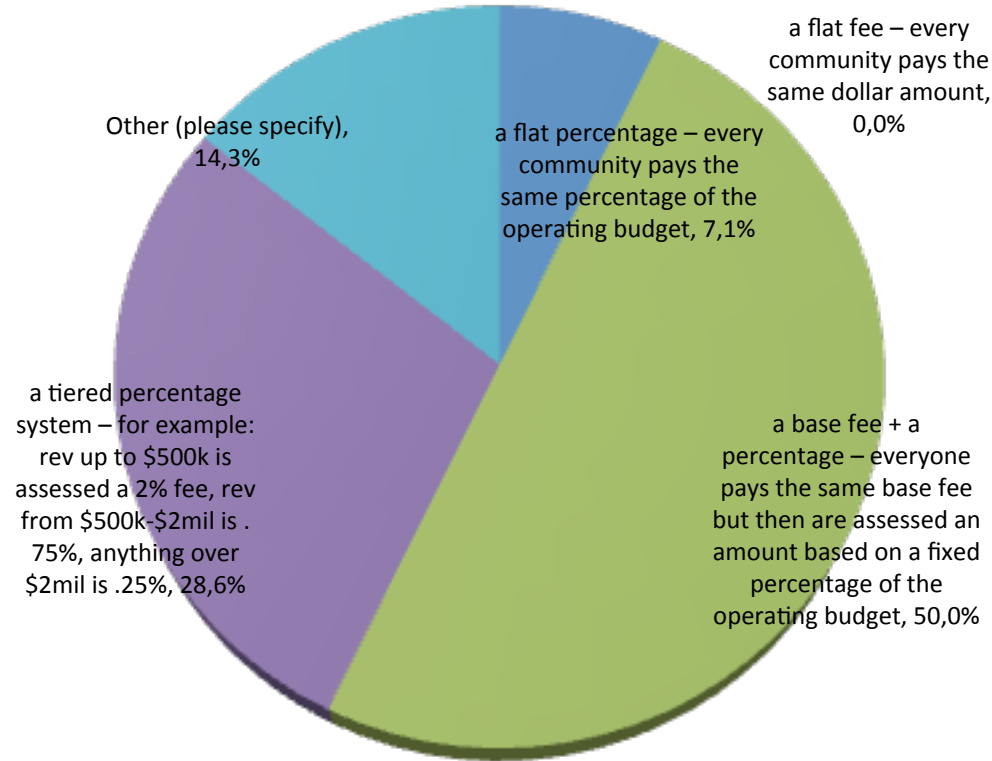
Other

- Not sure yet
- Tiered percentage system where the larger communities are responsible for higher percentages.
- Base fee and percentage, plus a fee for services used
- Individual assessment of level of government support, number of core members who do not receive support and amount that must be fundraised each year.
- Flat percentage: each community pays same % of operating budget or category of operating revenue; but ensure that budget compares apples to apples.
- Small base fee + progressive fee based on fixed percentage of total revenues of entities benefitting from L'Arche brand, e.g., \$1,000 + x% of all revenue.

Q22: Most equitable way of distributing the total cost of membership? - national



Answered: 14 Skipped: 0



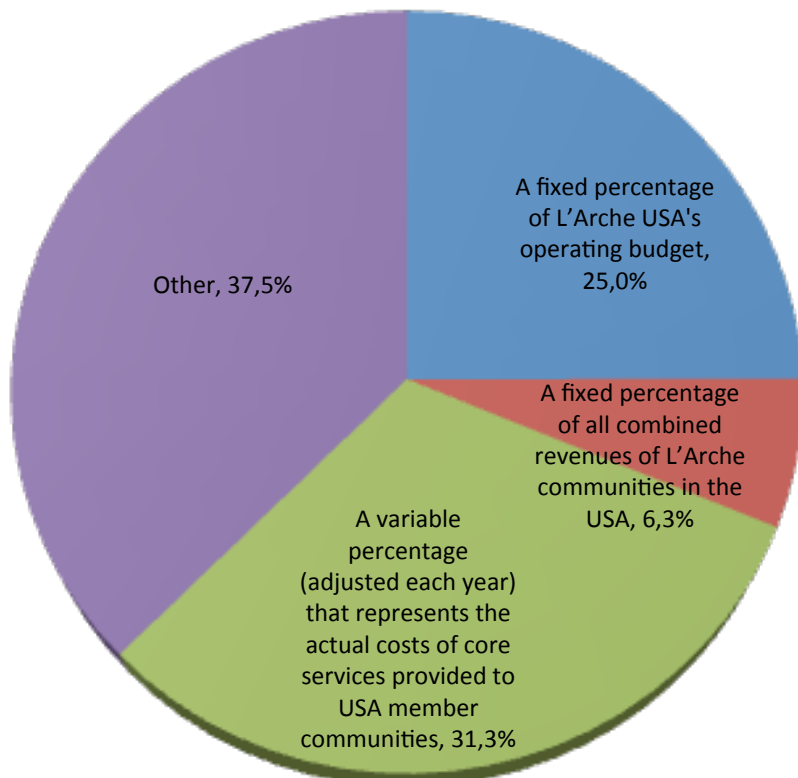
Other

- I would lean towards a tiered % system, with a close second being a base fee+ percentage. I'd like to see the specific numbers being proposed to make a better informed decision
- Any system would need to take into account both the total operating budget of the community and the amount communities receive in state/federal funding.

Q23: How should the total fee amount be calculated? - communities



Answered: 16 Skipped: 0



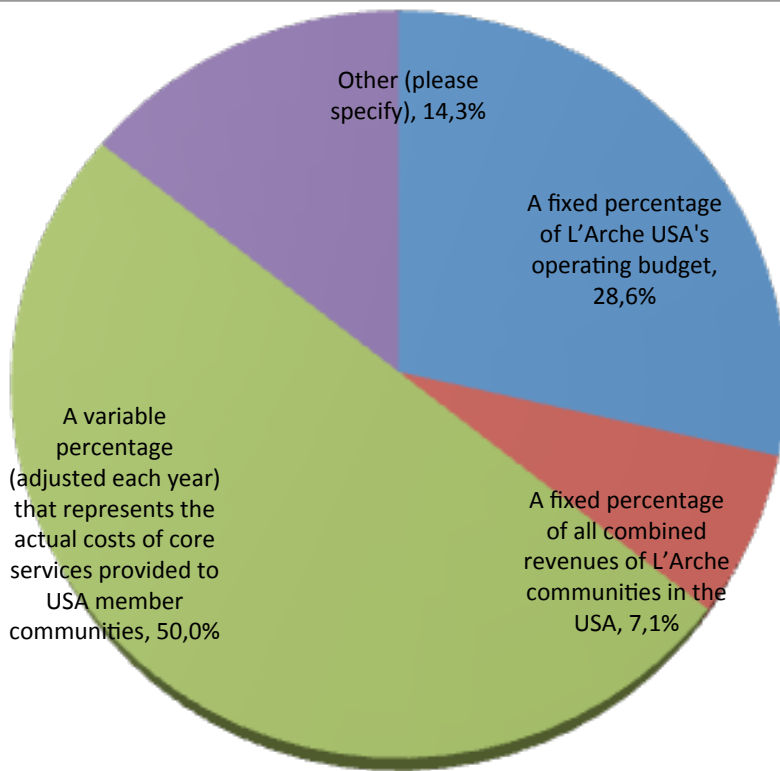
Other

- Don't know yet
- Fee based on fund development plan and need to be covered by each revenue source, including from fees
- Based on the amount of government support. Communities that receive less support cannot afford to pay as much as communities that receive substantial government funding.
- Variable percentage to be adjusted based on core services that limits the amount of adjustment that can occur in a single year

Q23: How should the total fee amount be calculated? - national



Answered: 14 Skipped: 0



Other

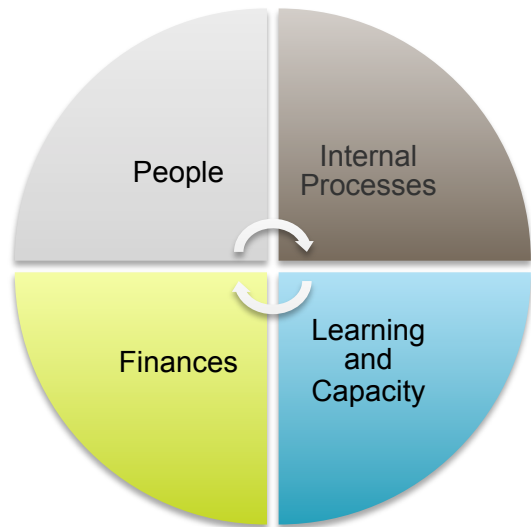
- Variable percentage of actual cost of core services, with a max. increase % year over year
- Not sure. Would need additional information to be able to answer this question.

Fast forward to ultimate goal: a dynamic organizational culture of continuous conversation and adjustment to build and maintain a healthy and mission-driven L'Arche in the U.S.

Performance measurement based on the Balanced Scorecard and the practice of spiritual discernment

Performance assessment and measurement ...

Business plan 2017-2020 with an annual review and an assessment prior to 2020-2025 mandate discernment



People

- To achieve our goal, how do we relate to people with a disability, member communities, donors, partners, the State, ...?

Internal Processes

- Which operational processes and L'Arche practices must be improved and/or maintained in order to achieve the goal?

Learning and Capacity

- How must we learn, communicate and collaborate together to achieve our goal and provide satisfaction and meaning to all?

Finances

- In order to support this goal: how do we maximize funding, ensure cashflow and craft sustainable budgets?

Discernment is the interpretation of what St. Ignatius Loyola called the
“**motions of the soul.**”

These interior movements consist of thoughts, imaginings, emotions,
inclinations, desires, feelings, repulsions, and attractions.

Spiritual discernment involves **becoming sensitive to these
movements**, reflecting on them, and understanding where they come
from and where they lead us.