



STRATEGIC PLAN 2020 - 2030

Approved by the Board of Directors on July 29, 2020 — Original Version

Throughout Santa Barbara County, Alpha Resource Center empowers individuals with intellectual and developmental disabilities by supporting families, creating opportunities, and fostering belonging.

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“From the beginning, the purpose of Alpha Resource Center, starting with our founding mothers, has been to open every opportunity to individuals with intellectual and developmental disabilities. It began with education. It has grown to include fine arts, music, theater, culinary, employment, and dreams yet to be dreamed. That is why we will continue to listen to the voices of each generation and innovate into the years ahead.”

Joshua Weitzman
Executive Director

LETTER FROM THE BOARD PRESIDENT & EXECUTIVE DIRECTOR



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Dear Friends and Colleagues,

In September 2010, the Alpha Board of Directors adopted an ambitious ten-year strategic plan. The plan targeted objectives to address critical issues identified by our participants, families, funding agencies, community members, and staff.

In 2017 we began planning for the next decade by evaluating the critical issues facing the organization, external threats to services, and public policy issues that had the potential to impact the lives of individuals with intellectual and developmental disabilities and their families.

Today, the board of directors and staff have prepared a plan for the next ten years of Alpha's future.

At the heart of this strategic plan is the commitment of the organization to ensure high quality services and supports are available for children and adults with intellectual and developmental disabilities and their families, now and for generations to come. This commitment includes building the financial stability of the organization so we are able to meet the emerging needs in our community.

The leadership of our organization has built a strong foundation. We still have much to accomplish to reach financial sustainability, reduce the number of people in need of services, provide ongoing high quality individualized support, ensure every family has access to resources and supports when raising a child with special needs, and offer a safety net for continued quality of life as our participants age.

We celebrate the accomplishment of goals in our previous Strategic Plan along with other successes. We look forward enthusiastically to the next decade of achievement.

Carol Kallman
President, Board of Directors

Joshua Weitzman
Executive Director



MISSION AND VISION

ALPHA RESOURCE CENTER MISSION STATEMENT

Throughout Santa Barbara County, Alpha Resource Center empowers individuals with intellectual and developmental disabilities by supporting families, creating opportunities, and fostering belonging.

ALPHA RESOURCE CENTER 2030 VISION STATEMENT

As 9:00 a.m. rolls around, the buses and taxis are already dropping off participants at Alpha Resource Center campuses all over Santa Barbara. The excitement can be felt as artists, cooks, actors, musicians, and other participants arrive eager to start their day.

Each individual has played the leading role in creating their schedule for the week. For some, this means a single focus in art, culinary training, life skills, or supported employment. For others, the week will entail starting or finishing each day at a different Alpha campus, spending time in a variety of activities.

On the main campus on Cathedral Oaks, Alpha vans quickly fill up with participants. Those who use a wheelchair head out two by two, with a friend by their side and two support staff to join them on their adventure. Multiple vans have volunteer opportunities on the agenda. Three or four more head out to go swimming, horseback riding, or a mix of social and recreational activities.

Behind the scenes, highly trained staff ensure every participant goal will be met by intentionally planning the details of each activity. Staff skilled in particular trades partner with staff skilled in direct support, the later moving from campus to campus as needed to ensure adequate support for every participant. No matter the trade, each participant finds belonging in being recognized for their contribution.

Going over the details of which job locations they will visit and the unique support each participant needs, the supported employment team ensures opportunities are available for dozens of participants who desire employment. Their territory covers the entire county, with participants employed from Carpinteria to Santa Maria and all parts in between.

In yet another staff gathering, the Children, Family, and Advocacy team discuss the needs of families who have requested help related to education, public benefits, healthcare, etc., dividing contacts among themselves based on expertise and experience. They, like the supported employment team, have staff spending time throughout the county, ensuring families speaking any language and at any economic level are receiving the services they need.

The Alpha Board of Directors and executive team are confident that each program has top-tier staffing and ample resources to support the participants and families. Development income has grown six-fold, bringing in as much from donors each year as the entire program budget only a decade prior. On top of that, the Alpha Thrift Stores supply over one million dollars to the program budget each year. Even with the number of programs and staff at Alpha, government funding is used to cover nothing more than continued innovation.

The entire Santa Barbara community knows the work of Alpha Resource Center. No longer are the thrift stores better known than the services of the resource center. Now Alpha Resource Center is an integral part of the community, with participants contributing their ability every day in a variety of setting throughout Santa Barbara County.

STRATEGIC PLAN OBJECTIVES

Over the next 10 years Alpha Resource Center intends to:

1. Put in place the financial components needed to sustain and develop our programs and supporting activities, such as
 - a. Diversifying funding sources by growing our private-donor base to offset state-funding reliance, increasing thrift store income year-over-year, and creating additional program-related earned revenue streams;
 - b. Building and maintaining a board-designated reserve fund capable of covering a minimum of three months of program operations toward a 10-year goal of 1 year worth of reserves;
 - c. Improving recruitment and retention of talented staff by providing staff at every level of the organization with a living wage, competitive benefits, personal and professional development, and career-advancement opportunities;
 - d. Maintaining and remodeling existing facilities with an understanding of the vital role property, plant, and equipment play in program success, and;
 - e. Entering into sustainable lease and rental agreements when expanding program space needs into the Santa Barbara community, utilizing community partnerships when possible.
2. Provide every family in Santa Barbara County who has a prenatal diagnosis or a child with special needs, in partnership with the Regional Center and other community-based referrals, the knowledge, experience, information, resources, and parent-to-parent support they need and desire.
3. Serve adults with intellectual and developmental disabilities in Alpha's programs as they seek to lead lives of meaning when away from home by supporting them in competitive employment; community-based opportunities; health and wellness practices; and a diversity of social, recreational, and cultural experiences.
4. By way of the above goals, be recognized as a leader in the field of service and support providers for children and adults with intellectual and developmental disabilities and their families.



CHILDREN, FAMILY, & ADVOCACY SERVICES TEAM

Patty Moore

*Manager of Children, Family
and Advocacy Services*

From prenatal diagnosis through adulthood, we provide the support needed to ensure no person or family is ever alone. Parent support groups, children's playgroups with child development experts, educational forums, and future planning are just some of the many ways our Children, Family, and Advocacy Services team partners with families throughout Santa Barbara County, giving them the confidence needed to help their child of any age with an intellectual or developmental disability succeed.

If and when the need arises, Alpha Resource Center also helps families and individuals navigate available services provided by Social Security, Medi-Cal, school districts, and many other agencies.

CRITICAL ISSUES

Demand for support increases every year as more families receive a diagnosis and services and systems become ever more complex. As a result, we are faced with many challenges, including

- Limited staffing and meeting/office space to serve a growing north county;
- Language and immigration fears creating barriers to meeting the needs of families;
- Assisting with complex medical needs in addition to developmental delays;
- Inadequate web-based resources to assist families looking for immediate answers.

OBJECTIVES

- ⇒ **Build and maintain a web-based resource and education platform to equip and strengthen families.**
[\$500-\$5000, 2020-2022, in process]
- ⇒ **Increase support capacity by implementing a training plan for volunteers/parents and expanding staff.**
[unknown, 2020-2023, in process]
- ⇒ **Expand children's playgroups to include activities relevant to elementary school grade children.**
[\$4000 p/yr + additional staffing, 2023-2026, upcoming]
- ⇒ **Formally document knowledge base and internal processes and procedures.**
[\$2500-\$7500, 2022-2024, upcoming]
- ⇒ **Hire and/or train new Family Resource Center and Advocacy leadership to ensure continuity and growth beyond upcoming, planned leadership transitions.**
[\$60k-\$150K+, 2021-2025, upcoming]





Amy Buesker
*Manager of Adult Day Services
and Katie's FUNd*

Alpha Resource Center works with participants to explore interests, establish goals, and expand skills. Every plan and activity prioritizes the aspirations of the people we support. Social, recreational, and wellness activities take place in on campus and the community. It is the participants' dreams and desires that are the starting point for service plans.

CRITICAL ISSUES

The field of direct support needs to be professionalized, providing staff with appropriate recognition for their expertise, equitable pay, ongoing training, and career advancement opportunities. Furthermore, the quality, type, and availability of services needs to expand to meet the expressed desires of future generations ready to leave the school system. As such, we must address

- Underfunding from the state leading to program-staff salaries below the living wage;
- Limited interest-based programs and associated discipline-specific staff;
- Insufficient program spaces available to decrease the waiting list; and
- Inadequate impact measurement and performance indicators to gauge progress.

OBJECTIVES

- ⇒ **Restructure staffing model to include direct support and discipline-specific roles and positions for interest-based programs and new service delivery methods at main campus program.**
[unknown, 2021-2024, upcoming]
- ⇒ **Increase interest-based, vendorized program offerings to increase participant opportunities.**
 - **Expand and vendor performing arts program.** [unknown, 2021-2023, upcoming]
 - **Expand and vendor culinary program.** [105k, 2022-2024, on hold]
- ⇒ **Complete vendorization for Supported Employment and reclassify current work opportunities.**
[unknown, 2020-2021, in process]
- ⇒ **Hire a Director of Programs to provide continuity to increasing interest-based program offerings.**
[\$95k-110K, 2022-2023, upcoming]



SLINGSHOT

alpha ART STUDIO AND GALLERY

Sue Dumm
Gallery Manager

Kelly Cottrell
Studio Manager

SlingShot is an art studio and gallery for artists with intellectual and developmental disabilities (I/DD) interested in creating a meaningful art practice. Through gallery representation and individualized support, each artist's creative expression and artistic development is fostered. There is opportunity for making community connections, earning income, and developing respect within the contemporary art market.

CRITICAL ISSUES

SlingShot promotes the value of artists with I/DD to the community and beyond by supporting our artists and elevating their artwork within the progressive art world. To do this, we will need to address

- Challenges in retaining teaching artists with expertise in specific medium;
- Increasing quantities of art that need to be effectively stored and displayed;
- Where SlingShot fits within the progressive art community.

OBJECTIVES

- ⇒ **Establish and utilize an Arts Advisory Council to promote visibility and inform funding initiatives.**
[unknown, 2020-2021, in process]
- ⇒ **Create and implement a marketing plan focused on branding and product development.**
[\$10k, 2021-2023, upcoming]
- ⇒ **Improve financial sustainability through art and product sales and the licensing of SlingShot artwork.**
[\$3500-\$6000 start up, then self-sustaining, 2022-2024, upcoming]
- ⇒ **Invest in technology, storage, and displays to systematize the tracking and promotion of artwork.**
[\$10k-\$20k, 2020-2022, in process]
- ⇒ **Design an art storage policy and process to make artist work accessible to potential buyers at all times.**
[\$7k+, 2021-2025, upcoming]
- ⇒ **Elevate SlingShot's place in the I/DD art community by exposure in national shows and publications.**
[unknown, 2022-2025, upcoming]
- ⇒ **Expand studio hours to include evening and weekends in order to meet artist scheduling needs.**
[unknown, 2020-2025, in process]
- ⇒ **Restructure and build teaching artist team to include multiple experts in all available disciplines.**
[unknown, 2021-2023, upcoming]





Amy Buesker
*Manager of Adult Day Services
and Katie's FUNd*

Katie's FUNd provides social and recreational opportunities for youth and young adults with intellectual and developmental disabilities and is a donor-funded service provided by Alpha Resource Center. Teen EXTREME and EXPO are the programs operated under the umbrella of Katie's FUNd. Teen EXTREME provides activities for youth ages 13-22 at no cost to participants. EXPO is a social and recreation program for Katie's FUNd alumni, which is supported in part by fees for services.

CRITICAL ISSUES

Katie's FUNd services are desired by many individuals, but current funding levels limit our ability to make the program available to all who express interest. Specific challenges include

- Inadequate funding sources for social and recreational activities and programs;
- Limited adult services compared to youth services in this area;
- Geographical limitations based on resources and staffing.

OBJECTIVES

- ⇒ **Secure a steady endowment-style revenue stream to allow Katie's FUNd to cover the ongoing yearly budgets for all Alpha social and recreational programs.**
[\$95k+ per year (min \$950,000 over 10 years), 2022-2026, upcoming]
- ⇒ **Create a scholarship program for participants unable to pay for services.**
[\$500 per year (min \$5000 over 10 years), 2020-2022, upcoming]
- ⇒ **In partnership with Children, Family, and Advocacy services, expand program opportunities to include elementary through adult in both Southern and Northern Santa Barbara County.**
[\$100k per year (min \$700,000 over 7 years), 2023-2028, upcoming]
- ⇒ **Develop and implement an outreach and education plan to help families and individuals seeking social and recreational opportunities to access Katie's FUNd programs.**
[included in yearly budget, 2020-2022, in progress]





Cory Sherman
*Director of Finance
and Thrift Store Operations*

Alpha Thrift Stores provide funding that makes the mission of Alpha Resource Center possible. Started in the mid-1960s as the need for services began to outpace state funding, the stores have provided stability to the organization for many decades. The continued growth of income from the stores is key to growing new programs and sustaining current programs.

CRITICAL ISSUES

While affordable rent for the current stores is made possible through leases from the Hutton Parker Foundation, daily operations and building maintenance do present room for growth, specifically

- Hiring and retaining staff committed to the mission of Alpha Resource Center;
- Building e-commerce capacity to increase profits;
- Addressing increasing trash and recycling costs;
- Balancing capital needs with net income budgeted for program funding.

OBJECTIVES

- ⇒ **Upgrade production vehicle fleet to address inter-store and community accessibility needs.**
[\$50k+ per truck (\$100,000 to revamp fleet), 2020-2022, in process]
- ⇒ **Expand and grow e-commerce sales beyond books to high-value items, collectables, etc.**
[unknown, 2020-2026, in process]
- ⇒ **Set up donation and production center at Cathedral Oaks campus with storage and sorting areas.**
[\$35k-\$80k, 2020-2025, in process]
- ⇒ **Implement a detailed inventory tracking system through every part of the production/sales cycle.**
[unknown, 2021-2023, upcoming]
- ⇒ **Optimize the internal supply chain to increase cohesion between production, retail, and recycling.**
[unknown, 2021-2023, upcoming]
- ⇒ **Develop a business plan and KPIs for production and retail activities, both in-store and online.**
[unknown, 2021-2023, upcoming]





DeeDee Barthelmess

Director of Development

Financial sustainability achieved through diverse revenue streams is necessary for Alpha to continue adapting current programs and building the new programs required to meet the needs of current and future generations of individuals with intellectual and developmental disabilities. Private donor and community support are the foundations upon which this stability must be attained.

CRITICAL ISSUES

Overreliance on state-based funding leaves Alpha Resource Center vulnerable to changing political climates, economic downturns, and outdated regulations. The increasing cost-of-living in Santa Barbara County also continues to outpace revenue growth. We need to consider the following risks to financial stability as we plan for the decade ahead:

- State funding mandates have lost substantial support in the California legislature;
- State leadership continues to ignore the gap between current rates and real costs;
- Earned-income ventures, while a needed revenue stream, includes significant expenses;
- Wage growth must keep up with cost-of-living increases and inflation; and
- The average age of the current donor base is increasing.

OBJECTIVES

- ⇒ **Reduce dependence on state funding to no more than 50% of operating expenses by increasing yearly private-donor contributions and pledges in conjunction with earned income.**
[unknown, 2025-2030, upcoming]
- ⇒ **Expand planned giving (Legacy Society) and multi-year pledge opportunities (Circle of Life Society) by creating a robust donor track considering the individual capacity of each donor.**
[unknown, 2020-2022, in process]
- ⇒ **Fund a capital campaign to renovate the Cathedral Oaks campus.**
[\$2-5 million, 2024-2028, upcoming]
- ⇒ **Create entry points for new donors based on giving trends attractive to younger generations.**
[unknown, 2020-2022, upcoming]





Francisco Javier Gomez
Facilities Manager

Alpha Resource Center moved to its current location on Cathedral Oaks in the early 1960s. It leases the property from the County of Santa Barbara at no cost. The buildings onsite are owned by Alpha. In 2018 a Capital Reserve Study was completed revealing \$478,786 in maintenance needed over a 10-year period. Alpha also occupies multiple leased buildings that are used for programs and thrift stores. All locations are commercial leases with significant tenant maintenance requirements.

CRITICAL ISSUES

While the current lease arrangement with the county keeps property costs low, deferred maintenance on Alpha-owned buildings, an increasing number of tenant-maintained rental properties that Alpha occupies, and much needed renovations to current facilities that go beyond the scope of regular maintenance put programs at risk when facility care is not properly prioritized. This leads to

- Unsafe environments for staff and participants;
- Basic building features that no longer function to serve their intended purpose;
- Increased work for staff who must deal with regular facilities-related issues;
- A non-inviting setting in which participants are supported; and
- Limited access to needed facilities when repairs are needed on a regular basis.

OBJECTIVES

- ⇒ **Create a multi-location and fleet maintenance plan and increase staffing to meet requirements.**
[unknown, 2020-2022, in process]
- ⇒ **Adjust facilities budget to prioritize preventative maintenance and safety as program costs.**
[\$25k+ per year, 2021-2023, upcoming]
- ⇒ **Renovate all buildings on the Cathedral Oaks campus, addressing current and future use plans.**
[\$2-5 million, 2025-2030, upcoming]
- ⇒ **Create a plan for procuring additional/new program and retail locations within the Santa Barbara community that includes both lease and purchase options.**
[unknown, 2023-2025, upcoming]





Carol Kallman

President, Board of Directors

The Alpha Board of Directors provides organizational governance and financial oversight. Composed of parents whose children have an intellectual or developmental disability (I/DD), program participants, and community members, the board's diversity represent all those touched by the world of disability.

CRITICAL ISSUES

For any nonprofit organization, the board must serve both oversight and representational roles. Not only should Directors be diverse in experience, they must also be diverse in the skills they bring to the organization. This requires

- Board recruitment that insures Directors represent a diversity of background, experience, skills, interests, and community contacts to grow and sustain the organization;
- Roles are broad enough to involve Directors in fundraising and committee participation based on their individual skills and interests; and
- Leadership development opportunities are sufficient to prepare Directors to effectively carry out the responsibilities outlined in the Alpha Board Member Job Description.

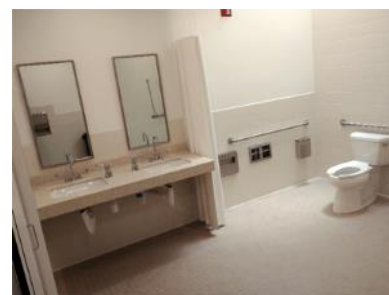
OBJECTIVES

- ⇒ **As part of continuous board succession planning, create and implement a recruiting process for potential board members to introduce them to the organization and explore unique contributions they could provide to the Board of Directors.**
- ⇒ **Develop and utilize a board self-assessment tool to gauge training practices, communication with the general membership, and development of governing capacity.**
- ⇒ **Establish a schedule and implement a process for regularly updating board policies and procedure as well as organizational by-laws and articles of incorporation.**
- ⇒ **Increase board participation in all development activities, writing and implementing a policy on board giving expectations.**
- ⇒ **Represent the organization's position on public policy issues impacting individuals with developmental disabilities and their families through intentional relationship building with elected officials on a local, state and national level.**
- ⇒ **Create/reinvigorate an Alpha Advisory Committee that includes former board members and is actively called upon to educate and advise board and management on matters related to members' background, interests, and expertise.**
- ⇒ **Develop an annual calendar of events and activities necessary to insure that the directors and organization are meeting the highest standards of board governance.**

ACHIEVEMENTS FROM THE PREVIOUS 10-YEAR STRATEGIC PLAN

In 2010, Alpha Resource Center's Board of Directors wrote and adopted the organization's first 10-year strategic plan. It provided guidance to financial and programmatic decision over the decade that followed. Among the accomplishments spearheaded by the 2010-2020 Strategic Plan are the following:

- Opened an Alpha Thrift Store on Milpas to expand into new customer territory.
- Opened SlingShot Art Studio & Gallery.
- Built Imagine Park, a multi-use amphitheater on the Cathedral Oaks Campus.
- Transformed Serenity Garden from an undeveloped, unused greenhouse to a premier event venue.
- Made advancements in entry level wages and career opportunities for all Alpha staff.
- Developed, adopted, and implemented a Succession Plan for the Executive Director position.
- Established a fee-for-service Adult Recreation Program for graduates of Katie's FUNd.
- Addressed health and safety staffing needs in the Cathedral Oaks Adult Day Program.
- Established the Legacy Society to acknowledge donors whose planned giving includes Alpha.
- Developed strategic plan goals specific to the work of the Board of Directors.
- Utilized our 60th and 65th Anniversary celebrations as unique fundraising opportunities.
- Completed a reserve study on the Cathedral Oaks campus.
- Renovated the lobby restrooms, updating the layout to address staff and participant needs.
- Secured a new, larger location for the SlingShot Art Studio & Gallery.
- Raised \$1,900,000 in donor support over the course of the 2010-2020 Strategic Plan.



ORGANIZATIONAL STRUCTURE

Founded in the early 1950s, by three mothers of children with developmental disabilities, Alpha Resource Center of Santa Barbara is a 501(c)(3) non-profit corporation structured as a membership organization and governed by a 17-seat, member-elected Board of Directors.

Board Officers are selected yearly by the membership from among current Directors. Directors are elected on a rotating basis to 3-year terms with a three-term limit. Membership is open to all adults, with the exception of paid staff.

To help influence and advocate for local, state, and federal legislation and public policy favorable to individuals with intellectual and developmental disabilities, Alpha Resource Center affiliates with The Arc of California and The Arc of the United States.

The Executive Director is employed at the will of the Board of Directors.

KEY PERSONNEL POSITIONS

Joshua Weitzman, *Executive Director*

Cory Sherman, *Director of Finance and Thrift Store Operations*

DeeDee Barthelmess, *Director of Development*

MJ Bakove, *Manager of Human Resources*



4501 Cathedral Oaks Road
Santa Barbara, CA 93110
(805) 683-2145 | www.AlphaSB.org



220 W. Canon Perdido
Santa Barbara, California 93101
(805) 770-3878 | www.SlingShotArt.org



5624 Hollister Avenue, Goleta
700 N. Milpas, Santa Barbara
(805) 964-1123 | www.AlphaThriftStore.com