2022-2023

THE POWER AND WISDOM OF TEAM DECISION-MAKING

How Seniors and Active Adults Can Benefit From Equitable Funding Allocations

A Project of the City of Daly City Department of Library and Recreation Services

Introduction

When we ensure all of our team's voices are heard and we honor such team's unique identity, we give flight to that team's audaciously sound decision-making and enjoyably effective team meetings. This is what happened to two groups of recreation professionals in the City of Daly City's Department of Library and Recreation Services in 2022 and 2023.

This is a story about outcomes being as important as process and about innovative ways of convening teams of people who would not typically sit in the same task forces or committees. The results? Inspirational and enlightening decisions, grounded team processes, and equitable funding practices from which we can all learn.

The mission of Daly City's Department of Library and Recreation Services is *Serving our neighborhoods and empowering generations by bringing people together to foster community, lifelong learning, and healthy lifestyles.* Specific to our Active Adult / Seniors, staff is guided by its mission: *We provide social, educational, recreational and health services to all adults 50 years and over.* At its core, Recreation Services has focused on providing wellness and enrichment activities, nutrition programs, and offering engagement opportunities through volunteerism to prevent isolation, encourage social interaction, and promote active lifestyles for adults over 50.

In 2021, the City Council allocated $500,000 in Measure Q funds to be used towards the Active Adult/Senior Services area, within the Recreation Division. The first decision Recreation Services made was to hire two full-time staff to support city-wide programming specific to this population and in 2022, two Senior Services Specialist were hired. In addition to allocating funds for permanent full-time staff, funds were used to: hire part-time staff, provide support funding for two National Fitness courts at Lincoln Park and Westlake Park and to purchase senior lunch program supplies for three locations (Doelger Senior Center, Lincoln Park Community Center and Bayshore Community Center) and provide items needed to better serve active adult / seniors citywide. Funds were also designated to hire a consultant to work on an operational and strategic planning project leading to an action plan for the active adults and senior services area. With guidance from the consultant, Recreation Services created two task forces in recreation (some members were part of both groups) to determine how to best serve the community using Measure Q funds.

Executive Summary

Public service agencies all over the world make funding decisions everyday on behalf of their constituents such as residents and community members that use their services. If you ask decision-makers in such agencies whether their funding decisions are equitable, most will tell you that they are or that, at least, they try and intend for such decisions to be equitable.

While traditional, decision-making bodies in public agencies can and often do make equitable funding decisions, the bureaucratic nature of their structures and systems can often miss innate emotional intelligence that lives in small, less formal groups of work colleagues or in teams that may often be assembled “outside the proverbial box” of organizational charts and of rank-and-file structures.

The City of Daly City allocated Measure Q funding in 2021 to several of its departments, Library and Recreation Services being one of them. A part of the Measure Q funding ($500,000) was earmarked for Active Adult and Senior programming and services. Two taskforces in the Recreation Division were created in fiscal years 2022 and 2023 and to engage in a process for allocating Measure Q funding.

The two task forces used an innovative, team-coaching approach known as Relationship Systems Intelligence (RSI) coined so and authored by the Center for Right Relationship (crrglobal.com) as a concept and methodology to propel teams from conventional meeting processes to powerful and emotional intelligence-based meetings and ways of working collaboratively.

The strategic question to be answered by the task forces was: **What is the most strategic way to allocate Measure Q funding within our recreation services that centers equity as a value?**

The outcomes were two separate groups of staff members who made equity-grounded, funding decisions supported by strong data and who enjoyed camaraderie, while engaging in an effective and efficient discussion through a series of meetings.

The focus for taskforce #1 was to determine how to use the remaining $25,000 for fiscal year 2023 to meet the needs of active adults and seniors in the community. The taskforce worked on creating and implementing a survey to the community. In reviewing the 8 Domains of Livability, staff identified 4 domains to survey that best aligned with recreation services. The domains surveyed included:

- Outdoor Spaces and Buildings
- Social Participation
- Respect and Social Inclusion
- Community and Health Services

Surveys were conducted at the Recreation Services Back to Programs Event and at neighborhood recreation facilities between April – August 2022. With a completion rate of 180 responses, the task force assessed the data and discovered a variety of findings and concluded the following areas to support with the remaining $25K for fiscal year 2023:

Key Findings from 180 survey responses:

- 3 of every 4 respondents said they would visit a facility even if no activities were planned
- Respondents' ideas about what they would like to see more are diverse and fairly spread out in terms of who wants what with some of the larger percentages of responses including games, fitness, and dance offerings and smaller percentages going to music, events, and instructional offerings
- About half of respondents answered "no" to this question that having a translator would have made their visit more enjoyable
    - One in every four respondents answered "yes" to the question about having a translator making their visit more enjoyable
    - A little over 1 in every 4 respondents said this question was not applicable to them
- 9% said more parking, bathrooms, floor remodel for dancing, and paint, (Facility Upgrades)
- 11% said basketball courts, seats for shorter people, billiards room, TV, swimming pools, outdoor pickleball. (Facility Additions)
- 13% said more of existing programs, dance, table tennis, aerobics. (Service Upgrades)
- 9% said coffee and snacks, movie nights, microwave, cable TV, archery area. (Service Additions)
- 58% answered with "not applicable"

Upon completion of the first task force, staff recognized the need for guiding principles as recreation planned for future programming. It was concluded that planning programs and services with an equity, diversity and inclusion lens was a must. The second taskforce worked on creating the guiding principles that would support this work. The guiding principles with equity at its center that came out of Task force #2 included:

Category	Equity-Centered Guiding Principles
Accountability	We will prioritize Daly City residents in all our funding allocation decisions
Educate to Increase Awareness and Participation	We believe in and will invest in educating our community of active adults and seniors on crucial concepts and practices around equity, equality, and inclusion as well as the differences between them. We will do this so that our active adults and seniors can more effectively take advantage of the services we offer.

Combating Isolation	We will minimize geographic and distance barriers to those who are most impacted by them
	We commit to addressing language barriers that continue to isolate our active adults and seniors
Facility Improvements	Our investments will contribute to all of our facilities feeling welcoming, familiar, and safe to our active adults and seniors regardless of where they live in Daly City
Health Needs	Our funding allocations will prioritize flexibility in order to meet active adults' and seniors' health needs
"It Takes A Village"	We believe that equity can be greatly augmented by the opportunities created through philanthropic initiatives and projects that bring donors and supporters to the table
Specific Systems Improvements	Our registration process will reflect equity in the way in which it is responsive to the needs of our most vulnerable active adults and seniors
	We believe that all our active adults and seniors value, in their own way, the services we offer. We will invest in resources and systems that help them better express how they value our services and how we can do better so that this can serve as a great feedback loop for us and for our community

Using the guiding principles, it led the group to create the following action plan:

Educate to Increase Awareness and Participation & Combat Isolation:

- Hourly wages to support work towards welcoming and inviting participants over 50 to our center (Receptionists/Translation Services) – specifically, but not limited to, Bayshore and Gellert

Health Needs, Combating Isolation and Accountability

- Continue to provide funding for contract led classes at recreation facilities, offering a one-day Daly City Priority Registration (similar to aquatics)

Facility Improvements

- Equipment such as bulletin/display boards, furniture, smart tv, sound system, to provide a welcoming space
- Flooring, class enhancements
- Rebuild cabinets; renovate lunch equipment

"It Takes A Village"

- City-wide Active Adults / Senior Class Workshops and Events (Fun Fair, Volunteer Appreciation). Bring back special events such as Crab Feed and Pancake Breakfast

Specific Systems Improvements

- Registration (reception desk at centers and translation services)

Internal Environment

Surrounding the Formation of the Task Forces

When we truly honor a team's intelligence, traditional organizational charts can become obsolete because these charts can and often promote siloing or "clicks" based on functions, service areas, etc.

How to honor and leverage a team's inherent emotional intelligence? Welcome to Relationship Systems Intelligence! (RSI) is a methodology and team coaching approach that works with the naturally intelligent, resourceful, and creative strengths of any team.

Intelligent teams in organizations are created using a diagonal, selection criteria. This means that participants are not necessarily in the same program, function, or rank; instead, they are selected by what they bring to the table and by working to recruit a good mix of big-picture thinkers and nuts-and-bolts thinkers. It is also useful to keep teams to a size of 6 to 8 members, which is ideal for taskforces of this kind.

See Addendum B for current, department organizational chart and, as desired, compare to the lists of team members in each task force in the Acknowledgements section below.

Our first task force was made up of staff members from different recreation facilities that offer senior programming. Our second Task Force was made up of staff members who support active adult / senior services programming in areas such as marketing, food services, recreational programming, and volunteer management.

See **Addendum D** for the two lists of both task force's shared values and for images of each team's spirit images also known as "team essence" in RSI terms.

In keeping with our desire to think "outside the box" and to hear all voices in our department, we invited staff members from a broad range of experiences and roles:

- Staff who were new to working with active adult /senior services to staff who have worked in this area for 20+ years,
- Staff who were starting out their career in a full-time capacity in recreation to staff who have worked in Daly City for over 20+ years,
- Staff with different levels of responsibility within Recreation and/or the City such as coordinators, specialists, supervisors, senior supervisors, manager and City Manager's office members. This recruitment strategy contributed to a wonderfully diverse group of people who engaged in rich and insightful discussions.

External Environment

Surrounding the Task Forces

In 2020, the City of Daly City requested the designation by both AARP and the World Health Organization to bean Age-Friendly Community. Daly City maintains a strong commitment to serving the various needs of our community, and as an Age-Friendly City will continue to support the health and vibrancy of all ages.

Located on the southern border of San Francisco, Daly City is the "Gateway to the Peninsula" and nearby Silicon Valley. Daly City has a highly diverse population of approximately 109,122, with more than half of the population born outside of the country. Currently, about 23% of our population is over the age of 60, which is the most rapidly growing age demographic in the City. Through our commitment to Age-Friendly City goals the city will ensure that older adults in its community receive respect, dignity, and involvement in all aspects of our City's future. *(extracted from letter to AARP by former mayor, Glenn Sylvester.)*

Providing an opportunity for community members to share their feedback with the City is an important part of our engagement efforts. To better understand the needs of the community and tailor programs and services accordingly, it is necessary for our City to hear what is working well and what improvements are desired to inform the Age-Friendly Action Plan.

- AARP Survey opened end of January - June 2023
- 169 completed surveys as of: 6/29/23
- The City-wide taskforce will be working with the Center for Age-Friendly Excellence to assess the findings of the City-wide AARP survey and create a city-wide action plan.

The Planning Process Phases

RSI-influenced processes rely heavily on a sound set of ground rules that help teams get things done, enjoy the process, and give voice to the team's own identity, while ensuring all voices are heard. See Addendum E for a sample of the ground rules we used in our meetings)

In our task force planning, we used the following step-based approach:

a) Agree on ground rules for team interactions,
b) Agree on the strategic question we are going to answer,
c) Access and identify our unique team identity,
d) Gather relevant and useful data to answer our question,
e) Compile and analyze collected data,
f) Identify priorities and strategies from data analysis that inform funding allocations.

With the exception of "c", this logical sequence of steps is commonly used in most public sector, strategic planning processes. Steps "a" and "c" above are unique contributions from RSI technology to strategic planning processes. Carefully curated ground rules set the stage for RSI principles to be fully utilized by any team and accessing a team's own entity and listening for what it, the team, is saying is the best way to create intelligent teams. It also is a powerful way to unleash a team's creativity regardless of its members formal rank, titles, and roles within their organization.

Each task force began by considering the three levels of reality present in all teams, according to RSI: Consensus Reality level, Dreaming level, and Essence level. See **Addendum C** for "three levels" description.

Both teams discussed how these levels of reality connect them to the department's mission and values and what other values are present for each team. See **Addendum D** for mission, team values, and team identities.

The intent of both task forces was to respectfully and diligently asses show to use Measure Q funding to meet the needs of the active adult and senior community in Daly City and beyond by co-creating an action plan that will bring clarity and alignment to current and future programming and services for Active Adults and Seniors.

Task force #1 contributions:

- Identified and integrated additional domains from "Age-Friendly City" designation into the department's action plan

- Aligned hearts and minds about what is possible for this team in an environment of collaboration, integration, and enjoyment
- Allocated $25,000 in Measure Q funding for:
    - Workshops/Classes free of charge in the areas of fitness, exercise and dance.
    - Cooking Classes/Tastings
    - Facility/Program Enhancements
    - Celebration of our Volunteers

Task force #2 contributions:

- Reviewed and clarified background information from WHO/AARP application and from previous task force investments and recommendations
- Discussed, clarified, and aligned around how equity is held by this team, how it is practiced, and how else it could be practiced so it informs its investments for fiscal years 2023 and 2024
- Determined guiding principles for decision making and action planning steps to implement for fiscal years 2025 and 2026

Team Decision Making

Both task forces used the five RSI principles as a foundation for their work. These principles are:

- Each relationship system has its own unique identity or personality
- Every member of the relationship system (team or partnership) is a voice of the system
- Relationship systems are naturally intelligent, generative and creative
- Relationship systems rely on roles for their organization and execution of functions
- Relationship systems are in a constant stage of emergence

Note: *The RSI literature uses the terms" relationship system" and "team" interchangeably.*

Both task forces also used several innovative team coaching tools to get their work done. Some of them included the following:

- *"The Metaskills Wheel"* which is an RSI-facilitation technique to help teams identify their own, unique set of values and their own, unique team essence such as those depicted in Addendum D,
- *Values List* - Values that live in each team,
- *"Original Myth"* which is a tool that helps organizational staff members reconnect with their initial "hearts and minds" experiences with their work in this department,
- "*Three Levels of Reality"* Syntax
    - Consensus Reality level, Dreaming level, and Essence Level

- *"Team Visualization"* techniques to help teams think "outside the box" and to use team essence level to better understand themselves

Concluding Remarks

In general, structures and systems used by public agencies like Daly City's Recreation Services provide a needed role that allows residents and community members to enjoy services and improve their quality of life. There are times when such systems and structures are not enough to make the best strategic decisions of the day that address our complex, ever-changing, and fast-moving world. This is where RSI helps teams like these two task forces question, discuss, and ultimately re-imagine recreation services like the caterpillar that organically transforms itself into an innovative and gorgeously new butterfly.

Overall, through the collective minds of two unique task forces, staff learned the values of:

- Differing perspectives from varying levels of experience and work responsibilities
- Reimagining recreation services for Active Adult/Seniors
- Living and growing with shared values and goals
- Examining current practices and how to better outreach and provide services in a more diverse, inclusive and equitable way
- Listening first and trying to understand community (external customers) and those on the task force (internal customers) perspectives

Acknowledgements

We would like to acknowledge the individuals that represented our division on the two task forces. Their commitment, honesty and transparency were appreciated in guiding this process to fruition.

Task Force 1:

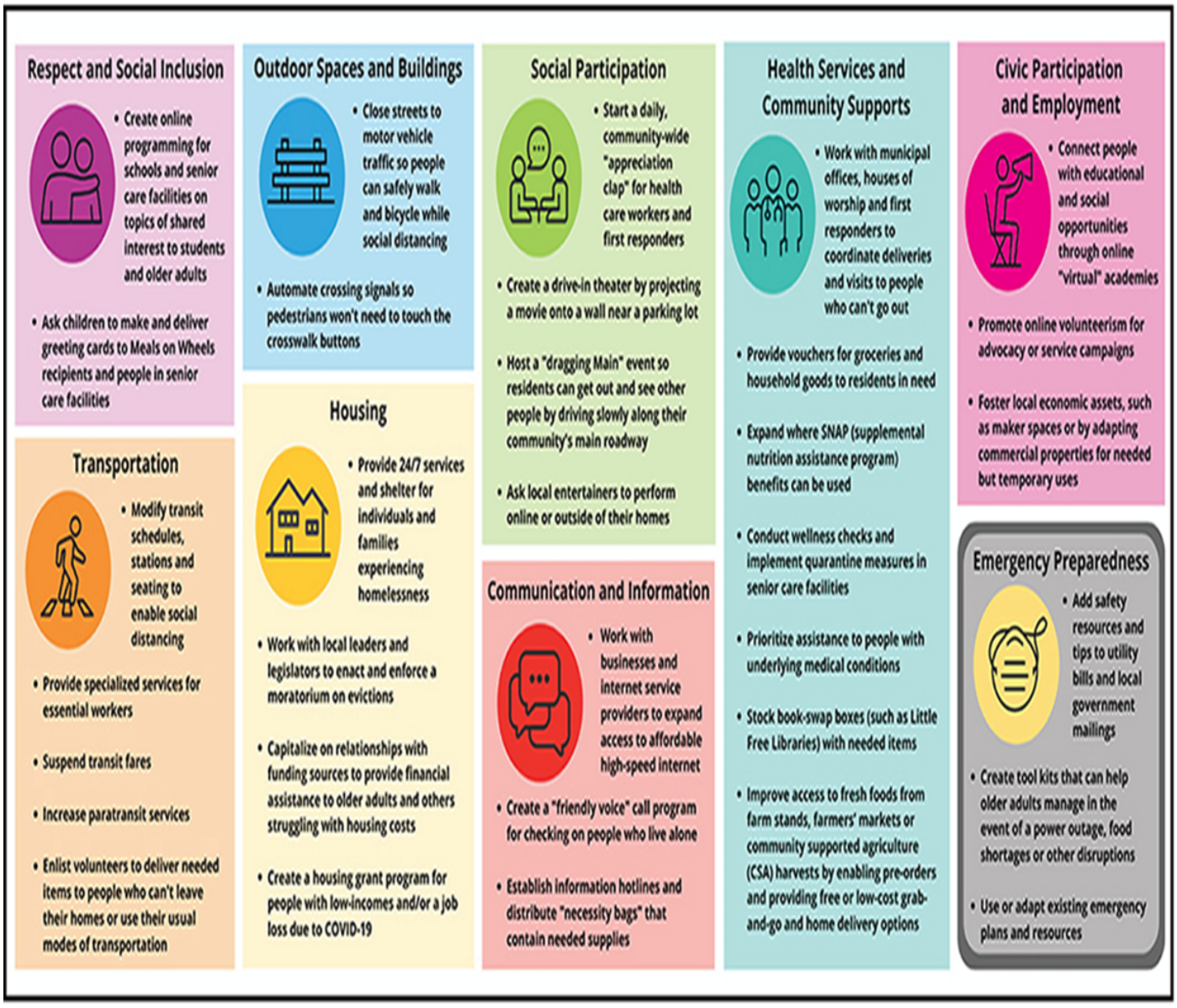
- Andrea Tsang, Senior Services Specialist
- Angelo Ignacio, Recreation Services Supervisor
- Ann Cooney, former Active Adult / Senior Services Supervisor
- Gina Magagnini, Recreation Services Supervisor
- Janette Ghnaim, Recreation Services Coordinator
- Jennifer Der, Senior Recreation Services Supervisor
- Karen Parque, Senior Services Specialist
- Ray Reyes, Recreation Services Supervisor

Task Force 2:

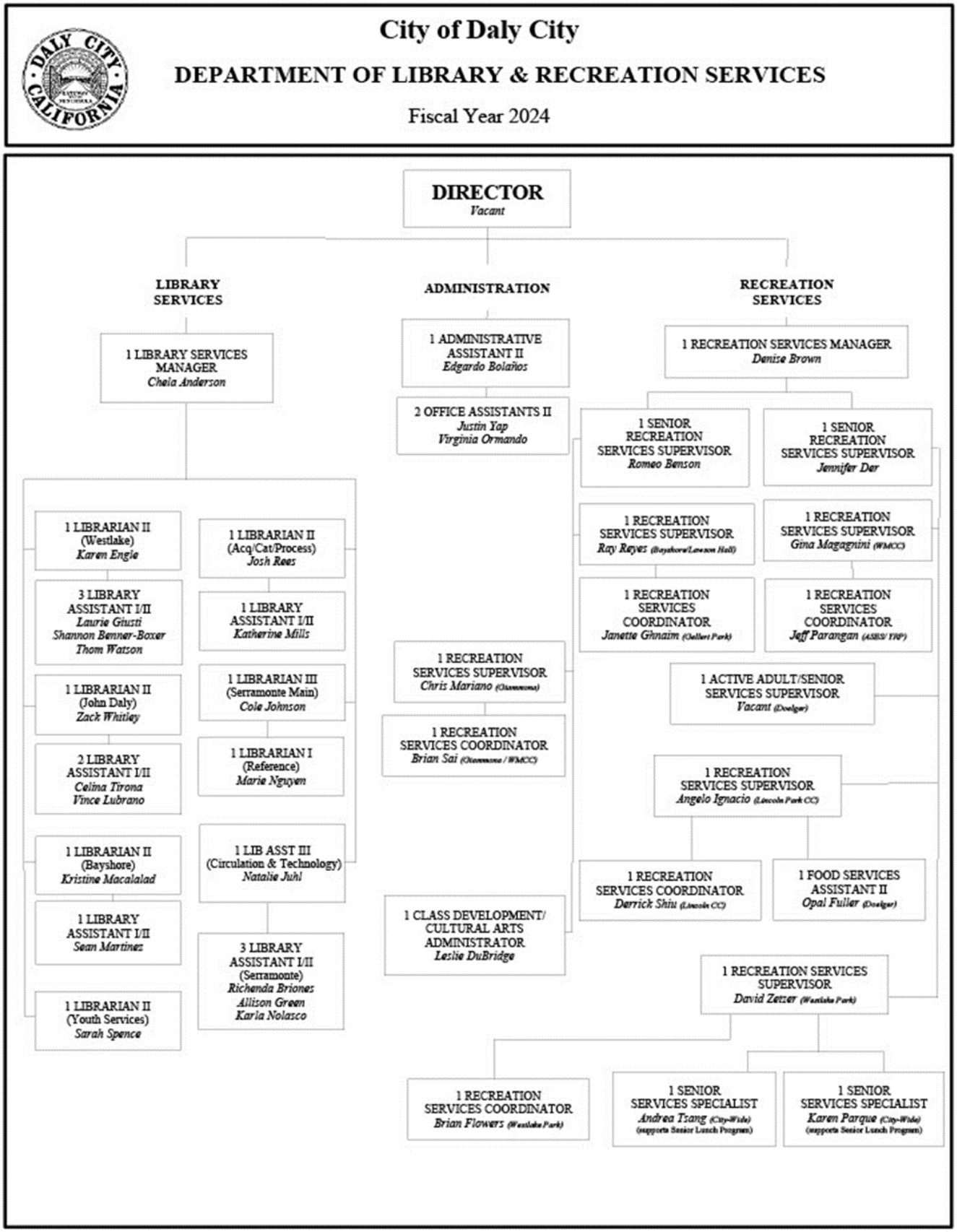
- Ann Cooney, former Active Adult / Senior Services Supervisor
- Denise Brown, Recreation Services Manager
- Derrick Shiu, Recreation Services Coordinator
- Jeff Parangan, Recreation Services Coordinator
- Jennifer Der, Senior Recreation Services Supervisor
- Karen Parque, Senior Services Specialist
- Leilani Ramos, Assistant to the City Manager
- Romeo Benson, Senior Recreation Services Supervisor

Addenda Section

Addendum A - Livability Domains and Community Responses to COVID-19 (AARP)



Addendum B - Department Organizational Chart



Addendum C - Three Levels of Reality

The Three Levels of Reality in Organizations

Consensus Reality Level

The Concrete and Observable.

Titles, Org Charts, Program/Service Evaluations, Budgets, Events, Measurable Outcomes, Statistics, etc.

Dreaming Level

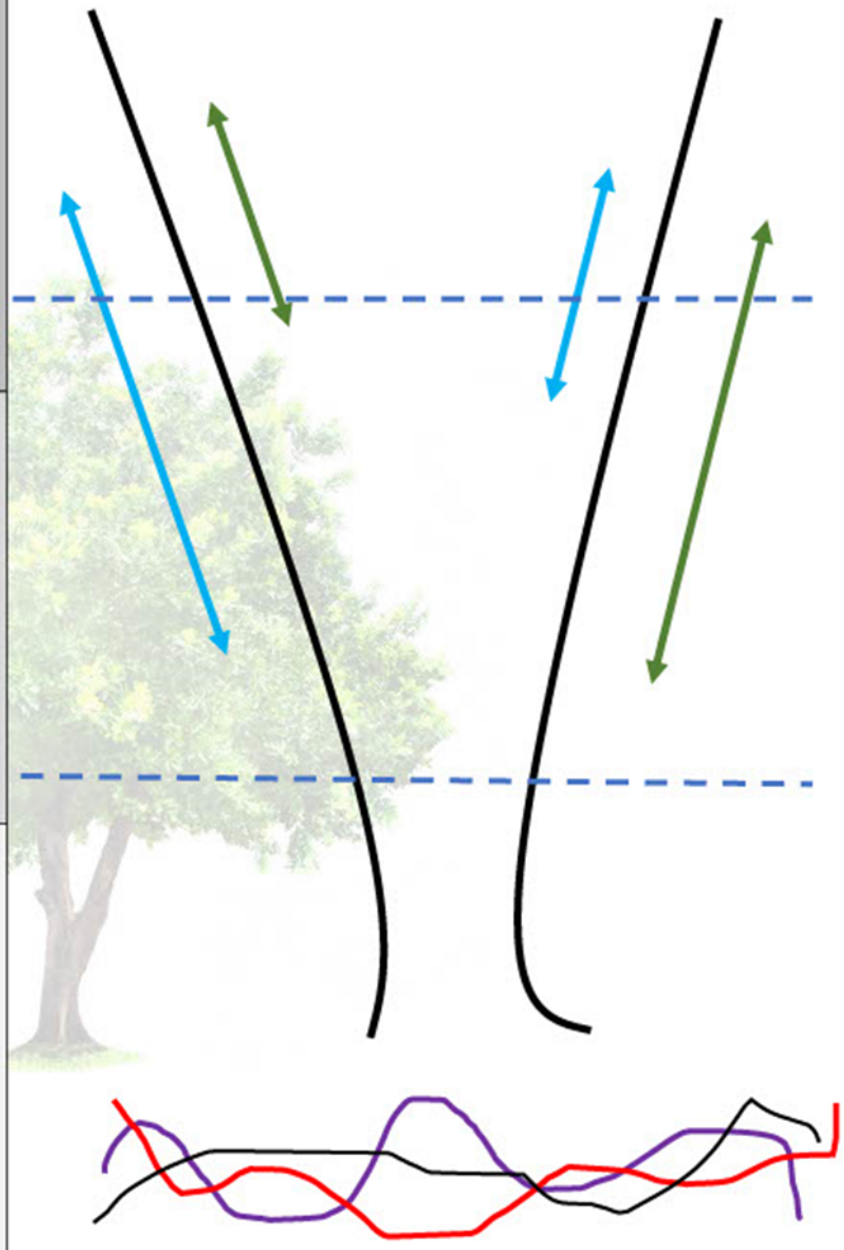
The Emotional Field.

Organizational Projections, Hopes, Dreams, Expectations, Much of Planning, Most of Program Designing, Much of Theory of Change, Much of Business Modelling, Team Communication Patterns, etc.

Essence Level

The place of vision and inspiration.

Team Spirit, Epic Story, Mission, Vision, Values, Principles, Unspoken Organizational Philosophy, Branding, Community Image, the Place where All Are and Act as One, etc.



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Addendum D - Mission Statement, Team Values, and Team Identities

Active Adults / Senior Services Mission Statement

- Our Purpose: We enhance the quality of life and promote wellness for all adults 50 years and over.
- Our Core Activities: We provide social, educational, [recreational] and health services to all adults 50 years and over.

Task Force 1 (2022) Team Values

- Heart
- Ability to influence
- Friendships
- Commitment
- Helping Others
- Community Involvement

Task Force 1 (2022) Team Spirit

A creature that can be competitive, observant, and a hunter and who can grow limbs if it loses them: a reptilian owl!

Task Force 2 (2023) Team Values:

- Accomplishment
- Cohesiveness
- Collaboration
- Dedication
- Fun

Task Force 2 (2023) Team Spirit:

A creature that, like a caterpillar, transforms itself into a breath-taking butterfly and that, like a grove of redwood trees, its roots connect with one another underground. This team's essence is about transforming themselves and their workplace into its next version, like a butterfly, and about staying connected with each other to accomplish this over time like underground roots of magnificent redwood trees!

Addendum E - Sample Ground Rules for Meetings

Team Ground Rules		
All voices need to be heard	Observe agenda times	Everyone's right…partially!
No texting, checking email,or doing other work, please.	Step up, step aside	Use "I" statements
Practice curiosity	Safe harbor	Value learning and working differences