MISSION DELIVERY IN THE NEXT 50 YEARS

This special edition of the BI News explains what our vision for BI is for the next half-century and how it benefits the people we support - our neighbors, friends, and family members with intellectual and developmental disabilities. In this issue, you’ll hear about the steps we are taking to manifest our vision. The bottom line is this: how and where we deliver services, and also the business model that we’ve relied upon for decades, is shifting. We want to ensure that BI remains healthy and sustainable to effectively support people with intellectual and developmental disabilities (IDD) for the next 50 years. The strategies and actions we’re pursuing were decided after significant deliberation by our Board of Directors and input from the people we serve, stakeholders, and staff, as well as advice from a broad spectrum of carefully chosen advisors.

To learn more about Becoming Independent, visit www.becomingindependent.org
## Our Vision is Grounded in 6 Key Objectives

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<th>Objective</th>
<th>Description</th>
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<td>1</td>
<td>Provide all of our clients with greater individualized services in smaller group ratios that allow them to meet their personal life objectives.</td>
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<td>2</td>
<td>Expand vocational, educational, community service and training opportunities for our clients.</td>
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<td>3</td>
<td>Extend our services to other communities and families who request them when we can.</td>
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<td>4</td>
<td>Continue to anticipate change, embrace innovation, and remain the “best practice” leader in our field.</td>
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<td>5</td>
<td>Achieve greater financial independence from government funding through revenue diversification.</td>
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<td>6</td>
<td>Invest in our employees with competitive salaries, premium benefits and opportunities for professional growth that reflect their essential value to our clients.</td>
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We are developing specific strategies and actions to achieve each of these objectives. In this newsletter, I will touch on several of these activities. But first, some important history.

## California’s Commitment Faltered

For decades, California was considered the most progressive state in the nation when it came to funding services for people with IDD. Funding priorities were beginning to shift prior to the 2008 financial crisis, but soon across-the-board cuts arrived. BI engaged in legislative advocacy, established a fund development program, and tried to stem the flow. But it was never enough.

By 2015, the decline in funding had reached a crisis across the state. A report titled “On the Brink of Collapse: The Consequences of Underfunding California’s Developmental Services System,” released by California’s Association of Regional Center Agencies, illuminated the full extent of the situation.
“California’s community-based service system for people with developmental disabilities, once the pride of the nation, has fallen to the very bottom due to chronic underfunding and indifference….. Actions during the recent recession have pushed the community system to the tipping point and only immediate relief will prevent the collapse of the system, a system that has increasingly struggled under the weight of inadequate funding to provide appropriate services and supports to allow individuals to achieve meaningful, integrated lives in the community.” p. 11

The report went on to state that severe, chronic underfunding was forcing organizations similar to BI to close their doors across the state.

“Many service providers have exhausted financial reserves and are now faced with the difficult choice of closing programs or trimming service offerings and expectations with the hope of remaining open.” p. 34

It was clear that if BI was to remain viable, we would need to think differently, creatively. We had to embrace the challenge and develop a new and sustainable business model.

**SCALING UP SOCIAL ENTERPRISE**

As we watched our governmental revenue fall to levels that made our business unsustainable, we knew that we needed to get clever in order to survive. So we took what was a very modest social enterprise – drop off document shredding – and built it into a game changing Social Enterprise Division that has three clear objectives:

- Create **JOB TRAINING AND EMPLOYMENT** opportunities where people with disabilities work with other community members while gaining valuable experience, income, and skills.
- To provide **EXPANDED VISIBILITY FOR BI**, our programs and, most importantly, the people we support.
- To generate stable sources of **EARNED INCOME THAT WILL UNDERWRITE BI PROGRAMS**, while also filling an unmet business need in the community.
Our Social Enterprise Division now includes the operation of all concessions on the SMART train as well as the Buzz Café inside Kaiser Permanente’s new Mercury Way Medical Office Building in Santa Rosa. We’ve added a mobile secured document shredding business and are beginning to reap the rewards of our contracts with the County of Sonoma, and others. Each of these enterprises create highly sought after job training and employment opportunities for the people we serve, while simultaneously generating revenue to help fuel services.

PAVING THE WAY FOR THE NEXT 50 YEARS

These are the immediate steps we’re taking to meet some of our visionary objectives:

1. **Responding to Service Appeals from Families in Marin County**

After years of receiving requests from families, BI has expanded its footprint to include Marin County. We’ve secured a lease located at 777 Grand Ave., Suite 101 in San Rafael, and have received a warm welcome from our landlord and long-time Marin resident Stephanie Plante of CPI Developers. Referrals from the Golden Gate Regional Center are now arriving, with services set to begin in late November. A Ribbon Cutting will take place on December 5th at 4:00pm, with an Open House immediately following from 4:30pm – 6:30pm. All are welcomed to attend!
2. Redeveloping Santa Rosa’s “South Campus” Building

Redevelopment of our “South Campus” building will include both program space and BI’s newest social enterprise initiative: a flexible workspace community that will produce the following benefits:

- New and varied employment opportunities for those we serve.
- Social and economic engagement between adults with intellectual and developmental disabilities and workspace members, and an overall greater awareness of BI’s mission and services.
- A new working environment option for Sonoma County businesses and professionals that includes a strong humanitarian benefit.
- An economic incubator for Sonoma County’s thriving businesses.
- A new, predictable earned income stream to support BI’s services.
- A 10,000 sq. ft. flexible event space that will provide event related job opportunities for the people we serve, plus rental income and a home for BI’s three annual signature events: our Dinner Under the Stars gala, Crab Feed, and Luau.

A feasibility study was conducted by Evelo Agency, experts who work across the globe assisting with the strategic development of flexible workspace communities, and they shared this reflection:

“One of the most critical components of a successful flexible workspace concept is the commitment to creating a culture that aligns with a specific audience. Rather than copy the culture of other coworking spaces, many unique and successful spaces create a new, differentiated model that aligns with their unique company culture..... Based on our on-site experience with the team at BI we were able to observe and participate in a culture that uniquely positions BI to be successful in the flexible work industry. The “people first” mentality, that many successful flexible workspace models embrace, is outlined in the core values at BI and is, most importantly, LIVED through staff, participants, board members, and guests of the organization. The core values at BI are more than a statement, they are a positive way of living that permeates all aspects of the organization, and will undoubtedly flow through this potential, flexible work concept.”
3. Selling the “North Campus” Building

The smaller of the two adjacent buildings we own in Santa Rosa - 1425 Corporate Center Parkway\“North Campus” - is now on the market for $3.2 million. Carlos Rivas, the Commercial Realtor who is representing us, is fielding inquiries and can be reached at (707) 708-2386. Proceeds from the sale will pay off our bond, eliminating $360,000 per year in debt payment, and provide start-up funds for redeveloping “South Campus”.

4. Developing a Capital Fundraising Campaign

This campaign will finance the redevelopment of “South Campus” and provide financing to scale-up operations in the new facility. The goal is being finalized, a volunteer leadership team is being formed, and kickoff is planned for early 2020.
PURPOSE IN PRACTICE

Just as our founders did in 1967, two years before the state of California declared that adults with intellectual and developmental disabilities must be afforded universal human rights, BI continues to break barriers for people with disabilities. Our creative implementation of social enterprises that create community employment partnerships, while generating much-needed revenue, firmly establishes BI as a cutting-edge model of not-for-profit leadership.

Turning challenges into opportunities has always been central to who we are as a Becoming Independent community. Whether it’s working with individuals to create adaptive devices that allow them to achieve their goal of living independently, or conjuring up dynamic new business models, we are willing and able to think outside the box creatively and effectively. Often, those rewards are bigger and more profound than we could have even imagined.

BI is and always has been an organization that is willing to take risks in order to reap rewards. As we launch the campaign to secure Becoming Independent’s future, I look forward to sharing updates and having you with us for the journey. Thank you for being an integral part of the BI family, and for standing alongside us as we lay the foundation for our next phenomenal 50 years.

With gratitude,

Luana Vaetoe
Chief Executive Officer

Exciting developments are unfolding here at BI every day. If you’d like to learn more, contact me at: 707.524.6607 | lvaetoe@becomingindependent.org
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Donations were made in memory of these friends...

Todd Thomas Burrell
Claudia Caaffey
Timmy Crew
Kim Dubato
Margaret Gans
Anita Herdman
Ann Marie Joergenson
William O’Keefe
Earl Sandstrom
Geneva Scheihing Folsom
Helle Siegert
Keith Taylor
Lenote (Joe) Vigare
Richard Charles Watso
Larry Wilmoth
Mynola Jean Wilmoth

Our Purpose
Elevating human abilities for the mutual benefit of our Community.

Who We Are
Leading innovators in the field of human services.

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