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COMMUNITY LIVING FORT ERIE

Strategic Plan-November 2010

Facilitated by

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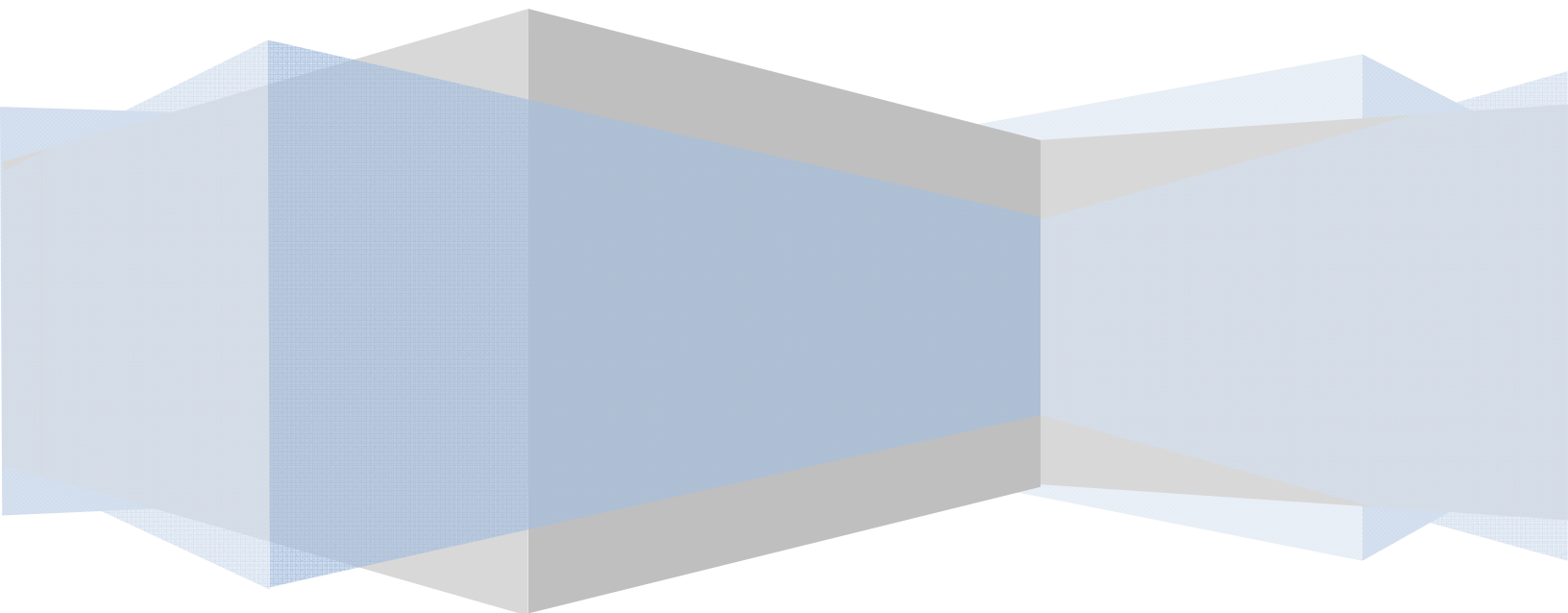


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Purpose of Strategic Planning:

Planning is an integral part of organizational management and leadership. As well, it is well known that people tend to lend greater support to those things that they have help to create.

Strategic planning can be defined as a planning process that requires engagement and input from a range of stakeholders. It uses a process of assessing the present and emerging environment or state in which an organization is operating. The goal is to then establish a series of directions that respond to what the environmental assessment dictates as important themes.

It begins by discerning the organization's internal strengths and limitations through input from a variety of stakeholders. (Staff, Board, families, others from outside the organization.) It also considers the external opportunities (positive) present and the possible threats (negative) that the organization may be facing into the future.

Paying attention to the best interests of the people receiving services is always essential, but strategic planning can also incorporate any aspect of organizational life that requires response or establishment of new direction.

The process must also include the confirmation or adjustment of the agency's mandate or mission statement as well as its vision of the future. Both of these elements are crucial in terms of the methodology.

Following the creation of a planning document, implementation planning occurs and activities begin in earnest. Implementation planning is essential to future success in realizing the goals or benefits of the plan itself.

Community Living Fort Erie undertook a major strategic planning effort of this type in 2008. After almost three years of activity and hard work, most if not all the objectives from the plan have been completed. As such, the Executive Director and Board determined in the Fall of 2010 that it was time to establish a new plan. (The results achieved from the first effort are attached to this document as Appendix One.)

As per the original plan, the new process would continue to be based on the input of staff, Board members, people supported and external stakeholders. This work was undertaken in several phases including a strategic planning day in August 2010 with agency residential staff followed by an internal and external environmental scan in late October 2010.

Paul Muldoon of PGM Consulting & Training Services facilitated both events. In the latter case, all senior staff and the Board members met collectively on October 23rd to review the results of all the information gathered from the process.

From this analysis consensus emerged regarding the strategic issues facing the organization. Strategic directions then were developed in response to each major theme. A further implementation planning date is scheduled for December 14th to review the directions and establish more detailed responses in each case.

Vision of Future Success for CLFE:

- ❖ *The philosophy of inclusion and the approach to reaching it will be better understood and accepted within our communities and within the organization.*
- ❖ *Defined transition points and expert planning will be in place as individuals move from one major area of service to another. E.g. FSS to Youth to Adult support to seniors. (seamlessness)*
- ❖ *People we support will have more involvement in the leadership of the organization.*
- ❖ *New partnerships will be in place that will be influential in enhancing the level of support received by individuals.*
- ❖ *CLFE will be a more transparent and efficient organization in terms of communicating the rationale for its decision making, financial management/information sharing and in relation to managing its support services.*

Confirmation of Mandate/Mission:

- ❖ *To provide high quality care and support to each person as per their individual needs and desires.*
- ❖ *To ensure individualized access to community based opportunities and services.*
- ❖ *To ensure that people with disabilities are seen as valued citizens of our community.*
- ❖ *To provide opportunities for inclusion within a framework of rights and self determination.*

Key Results of Environmental Scan Process:

Strengths Reported:

a) Programs & Services:

1. *Community Support services are now fully integrated into the community. Segregated programs and menu driven approaches are no longer present.*
2. *Services are increasingly becoming more individualized and community based.*
3. *A fully inclusive summer camp program is now in place as negotiated by agency staff with a variety of camp providers. Kids with intellectual disabilities are attending camps with other children.*
4. *The level of volunteer engagement in the organization is much higher than at any point in the past. It also continues to grow with increased demand for community-based approaches and more individual support capacity.*
5. *The outcomes based approach to supporting people with a focus on accountability is taking root internally.*
6. *More connections in the community are being made for people. The focus of planning and finding solutions in the external world is growing. Community supports are happening.*
7. *A new Vision for residential services specifically has been articulated by this staff group and is now formally in place.*
8. *More person directed services are occurring.*
9. *Volunteer services are growing and are being increasingly valued.*

b) Culture Transition:

- 1. Resistance to change from families has diminished significantly over the past 12-18 months. Many family members are now bringing forward new ideas for more inclusive opportunities.*
- 2. Staff members have become much more creative, enthusiastic, positive, community oriented and critical thinkers as a result of the transition of the approach to offering support.*
- 3. Increased staff involvement is present in discussions regarding support for people and in decision making.*
- 4. Increased knowledge transfer for staff is occurring.*
- 5. Quality Assurance has become a focal point for the organization at all levels and is being discussed and incorporated into the basic fibre of the agency.*
- 6. There is increased acceptance within the culture of the rights and choices for each person supported.*
- 7. Volunteers/staff both feel appreciated and increasingly valued.*

c) Community Connections:

- 1. Partnerships are growing and now occurring with school boards and other organizations. (YMCA, industry)*
- 2. CLFE is widely viewed within the DS sector and locally as an organization that collaborates effectively with others.*

d) Governance/Operations:

1. *The 2008 Strategic Plan has now been fully implemented. (See Appendix One)*
2. *Communication is improved internally with the installation of new computers in homes and a revised agency newsletter.*
3. *The agency has a very professional and attractive looking new website.*

Limitations/Challenges Reported:

1. *Resistance to change continues to exist in some areas of the organization and with some families. (attitude, beliefs). This is evident in the area of inclusion where traditional practices and approaches are viewed at times as being threatened by the new emphasis on individual support and community engagement.*
2. *In spite of many success stories, volunteers are not yet universally understood or widely accepted within the culture of the organization. A similar problem is apparent with students. For their part, the experienced volunteers want more training and a bigger role in the organization.*

The roles of these two groups (volunteers/students) may not be fully understood and/or valued by some staff in terms of their potential impact on the people supported by the organization. Education and modeling may be necessary in this regard.

3. *Human Resource strategies are needed in a variety of areas to strengthen the long term development of the organization. (core competencies, mentoring, succession planning)*
4. *The program areas of transitional aged youth support/planning needs focus and attention, as this is a crucial life transition point for young adults with disabilities.*
5. *Families occasionally feel under supported by the existing system and approach. They typically want and feel entitled to more assistance than is available.*
6. *The agency is facing the financial pressures of two consecutive years without any additional funding (zero increases) due to the Wage Restraint Act.*

Reported Opportunities for Change:

1. *Expansion of volunteerism and capacity for creating social capital and inclusion exists. It has to be capitalized on.*
2. *Untapped partnership potential in the community is apparent and needs to be responded to more assertively.*
3. *Full Accreditation for CLFE is now within sight.*
4. *Individualized funding may be coming and will have advantages in some ways for people supported and for the organization.*

Possible Threats to the Organization's Future:

1. *Individualized funding may be coming and could prove very difficult to support administratively and financially.*
2. *There is a great deal of unknown impact of the impending Application Entity and Funding Entity in 2011-12 and beyond within Niagara Region.*

Identification of the Strategic Themes:

- 1. CLFE will reach a higher level of community inclusion both internally and in the community on behalf of the people we support. Barriers to greater inclusion will be identified and overcome.*
- 2. CLFE intends to strategically expand and grow its volunteer services as well as the level of student participation & development. There is substantial untapped potential that could enhance the level of individualized support and strengthen the overall quality of life of people supported by the organization.*
- 3. Partnership development and existing arrangements will expand and evolve to incorporate a broader range of opportunities for people supported.*
- 4. Communication processes will be strengthened to increase internal transparency and understanding as well as increase our effectiveness.*
- 5. The agency will undertake the completion of a strategic Human Resource development strategy. Our plan will be in full alignment with the new provincial Developmental Services Human Resource strategy as well as meet all identified agency strategic HR issues.*
- 6. Planning and support for Transitional aged youth will receive greater focus and attention, particularly given the advent of the new Application Entities across the province in 2011.*
- 7. Achieving successful Accreditation status will continue to be pursued and will be accomplished within one year.*

Appendix One:

Accomplishments of the 2008-10 STRATEGIC PLAN

Governance:

1. Executive Director Reports were streamlined to include strategic priorities and progress made on outcomes achieved.
2. The Performance Management process for the Executive Director was reviewed and a new evaluation was completed in 2009 and 2010.
3. Board annual evaluations are now completed annually.
4. Board Orientation of new Board Members takes place annually. .
5. The Board is participating in the Governance domains in preparation for Accreditation in 2011.
6. A Board calendar is now developed annually.

Day Supports Transition:

1. Day Supports are no longer segregated. The staff are no longer in a Program Management role but rather in a personalized support role. Staff are working with people supported to achieve their individual goals and dreams.
2. The Association no longer operates any menu driven programs. The staff are working daily to engage community partners and to find a variety of ways for the people supported to achieve success. The staff operate flexibly with their hours to meet the goals identified for people supported.

3. An Agency Wide Marketing Strategy was put in place with the goal of engaging and educating community stakeholders.
4. Staff participate directly in the creation and review of Personal Life Plans for people supported.
5. An Inclusion Wall has been created at our offices to remind staff and families of what is being accomplished in this regard.
7. Family members and people supported are being asked to sit on a variety of committees.
8. Volunteer Recruitment continues to be a priority. The increased need for Leisure Buddies particularly in Residential is critical due to the single staffing component.
9. Family Support and Community Support continue to work closely with the local High Schools to partner in the transition challenges of young adults.
10. Volunteers are assisting with transportation and support at various community outings including the YMCA, tutoring at the Adult Literacy Council to tutor a gentleman once a week and supporting people who live in our residential homes.
11. Community Support staff are no longer involved with a drama production.
12. People supported are members of a variety of committees relating to day supports implementation plans as well as the rights initiative and self-advocacy.

13. Messaging of vision for Community Supports through the newsletter, face to face meetings with family members and people supported. Surveys sent to stakeholders.
14. Some of the staff in Community Support has adjusted their working hours to include evenings and weekends if an opportunity arises.
15. All of the Services for Children within the Agency have become inclusive.
16. Staff has moved forward with all the recommendations from their planning day held in April.
17. Many new Inclusive Opportunities have been found for people.
18. Respite Program has proved beneficial for families and people supported.

Quality Assurance:

1. A Quality Assurance Newsletter is being prepared quarterly and circulated widely to all.
2. Quality Assurance has become a focal point at all staff meetings. A Quality Assurance Newsletter has been developed and circulated to all. The Manager of Quality Assurance attends various staff meetings to highlight the role, expectations and any concerns staff may have.
3. Manager of Quality Assurance has become a validator with the Focus Accreditation Group. This has helped us greatly when moving forward to our own accreditation.

4. The Rights, Respect and Responsibility training is dependent upon Welland/Pelham Association. This has created a delay for us in this area, but we are hopeful for a resolution shortly in order to train all the people supported by CLFE.
5. A get together for Stakeholders will be planned for during the summer to highlight our Vision for the future and to respond to any questions/concerns.
6. Manager of Quality Assurance has continued to attend Team Meetings and the Residential Planning Day. This has increased the amount of questions and conversations with the Staff around Accreditation. This is great as it is clear that people are much more comfortable and interested in knowing about the process, what it means to the agency and how it will affect them.
7. As of the end of June 2009, The Management Team completed the initial Gap Analysis. It was an excellent learning experience/tool for the Team. A better understanding of the Accreditation Standards that will be reviewed throughout the next two years was achieved through this exercise.
8. The 3 R's Project that we are partners with Community Living Welland Pelham is now on track – we have received the tools to begin the training we are just awaiting the user guide.
9. The new focus accreditation guidelines and domains are being circulated to all the Managers to begin to use and work on.
10. Satisfaction Surveys are being sent out to People Supported, Family Members, Direct Support Staff. These surveys will gather information on our strengths and weaknesses as well as hear any comments and recommendations.
11. A self-advocates council has been formed – this is to empower the people supported by giving them information and guidance.

12. The Manager of Quality Assurance has made herself available to staff and people supported to answer any question around our accreditation journey, how they fit in to the process and what will be required as we move forward.
13. Self-Advocates Council is fully operational. They have elected their Executive and are meeting on a Monthly basis.
14. The Monthly Accreditation Newsletter is being circulated.
15. Manager of Quality Assurance is working closely with all the staff to prepare for Accreditation.
16. The Web Site has been expanded to include a variety of initiatives taking place within the Organization.
17. Two Staff are working with People Supported around the three R's – Rights, Respect and Responsibility.

Enhancing Residential Services:

1. Through the new life plan process all the people supported in residential are able to identify their preferences, whether it be where they live, work or participate in leisure opportunities.
2. Residential continues to encourage natural supports for the people supported in 24 hour settings. As well we continue to recruit leisure buddies and volunteers. Community Support Staff are able to assist with some of the supports to free up the residential staff to do some individual supports for people.
3. Properties are continually being upgraded and maintained. The Managers of Residential and the Manager of Operations frequently meet to ensure we are

responding to the need to provide quality accommodations for the people who receive service.

4. Opportunities for more independence are being created in the current residential locations for those that have expressed an interest.
5. Staff have been asked to submit lists of people supported who could benefit from some type of volunteer support
6. The Manager of Community Development has been attending Residential Team Meetings to encourage discussion around meaningful volunteer activities and residential priorities
7. Residential Staff attended a Planning Day in August to look at their roles in relation to the rest of the Association and to get a better understanding of how our new vision and mission will affect what they do. How the Strategic Plan relates to them and their day to day work. Accreditation was highlighted and explained.
8. Staff at Madison Group Home received two days of training on Autism from the Geneva Centre. This will enable them to better support a person who resides there.
9. Staff is working very hard at offering residents opportunities for inclusive opportunities in the community.
10. Increased use of Leisure Buddies has proved very successful.
11. Looking at a variety of ways to enable people living in the group homes to form natural friendships. Looking at each person and taking one step at a time.

12. Program Managers continue to work with staff teams to educate and motivate around our vision and the opportunities it creates.
13. Staff attended training on August 25th, 2010. A vision for Residential Services was created.
14. Staff are finding a variety of ways for people living in Group Homes to participate in their community. Many new doors have been opened up.
15. Increased use of Volunteers and Leisure Buddies has proved very beneficial.
16. Computers in the Homes have increased Communication and Learning Opportunities.

Human Resource Planning

1. We are continuing to participate in the Provincial Initiative around Core Competencies, training and recruitment. As well we have participated in the new apprenticeship initiative through Community Colleges.
2. All staff has received a copy of the Strategic Plan and Implementation Strategy. Regular updates are given at staff meetings and through internal newsletters and communications.
3. Our Collective Agreement was ratified on June 17th, 2009 for two years. This should assist with staff stability.

4. Staff retention for 2009/2010 was very high. Turnover was generally due to people being offered full time positions.
5. Work is continuing on refining our hiring practices.
6. A new Employee recognition event took place in May. This was very well received.
7. Staff turnover remains very low. Currently hiring for Casual/Part-time.
8. Concerns have been expressed by the Union around the Public Sector Wage Freeze implemented by the Government.

Strategic Financial Planning:

1. New fund raising opportunities have decreased our dependency on Lottery sources. Through budget reorganization and some cutbacks we are in a balanced budget position. Staff has worked very hard to save funds and work within the budgeted amount.
2. The Board receives a monthly financial spreadsheet indicating our position.
3. We have currently upgraded our computer system through a grant from Trillium. This will assist with enhancing the data analysis and ensuring accountability.
4. A variety of grants have been received to enhance services and supports to the agency and to people supported and their families

- 5.** The Annual Performance is a fund raising event. Many sponsors have already committed for this year. The event is for two evenings December 4th and 5th, at Crystal Ridge Community Centre. All participants are volunteers.
- 6.** We have added a link on our web site to CanadaDonate.org for online donations.
- 7.** We are currently in the process of organizing a new fund raiser. Due to the lack of necessary human resources needed to continue with our drama fundraiser this has become necessary.
- 8.** We have totally removed our dependency on lottery.
- 9.** Board reporting has changed to include any additional funds raised by grants or other means other than our Ministry funding.
- 10.** Computers are now in all our group living locations – This was as a result of a grant from Canadian Tire Acceptance. This will help with communication and reporting.
- 11.** Looking at ways to become more flexible with our funding to people supported.
- 12.** Received Grants for our Summer Programs.
- 13.** Spaghetti Fundraiser very successful.
- 14.** Annual Fund Raiser Scheduled for December 4th at Crystal Ridge. Over \$8,000.00 received in Corporate Sponsors to date. Many table sponsors have already committed and we have some new sponsors this year.

15. Regional Trillium Grant received for Volunteer Promotion and equipment.

Addressing Transformation Directions:

1. We continue to get our message out to stakeholders and will increase this hopefully through the efforts of the Marketing Student we will be hiring in May.
2. The Ontario Government booklet in Plain Language “About the Services and Supports to Promote the Social Inclusion of Persons with Developmental Disabilities Act 2008) was mailed or delivered to all staff and Stakeholders.
3. Participated in the discussions around the new regulations for the Social Inclusion Act.
4. Highlighted the new legislation in our newsletters and correspondence.
5. Have participated in Regional Groups around specifics of the legislation i.e. application entities.
6. Continue to circulate information on Transformation through a variety of mediums.

Other Considerations:

- The Personal Life Plan process will be reviewed. The committee will make recommendations to improve the tool. This will assist staff to work on the priority areas identified by the person receiving support to ensure success.
- All Person Centered Plans were completed by the end of June 2009. Surveys were developed and sent out to evaluate the new Person Centered Planning tool. There were three different surveys: one for people served, one for family members who participated and one for support workers. The results will be compiled over the next few weeks.

- ▶ Through a grant from Brock University/Meridian Credit Union Skill share Program, we were able to hire a very creative, enthusiastic fourth year Business Graduate. He developed many marketing tools to assist us with ensuring that we are sending consistent messages to stakeholders and community members. We have standardized the content and design for all marketing materials similar to that of Community Living Ontario.

With his assistance we have developed a new agency wide brochure, volunteer brochure, new material for family support, community support and residential services, letterhead and business cards. We have taken steps towards our goal to simplify communications and “engage” stakeholders through the implementation of an email newsletter channel to create and send news and updates electronically. We have compiled email addresses from people we support, families, volunteers, staff and community partners, this will allow for “constant contact” and feedback.

Our web site has been overhauled and content simplified to ensure user friendliness and consistent messaging. We have redeveloped our website. We have added a link to CanadaDonate.org for online donations. The development of these strategies will help to ensure that we have an informed community willing to invest in our organization.

- ▶ Our “NEW” Newsletter went out in July 2009. Many compliments have filtered back regarding the new layout and content.
- ▶ Our next information sharing meeting will be held on October 22nd, 2009.
- ▶ Held a successful Information Sharing Day on February 9th. – over 100 people attended.
- ▶ We continue to do quarterly newsletters. This has proved to be an excellent vehicle to communicate with our stakeholders and highlight our successes.
- ▶ Next Information Sharing Day will be held May 20th, 2010.

- ▶ The ability to use the internet has proven to be a wonderful way to get our message out. Our web site has received many hits and stakeholders appear to enjoy going on the site on a regular basis.
- ▶ We will be meeting with Community Living Ontario to look at how we begin to develop our Marketing Plan.
- ▶ Successful Information Sharing Day held in May. Over 80 people attended. The next Information Sharing Day will be held on September 23, 2010.
- ▶ Our Newsletter continues to be refined, many stakeholders have commented on how informative it is and how it makes them feel more connected.

This plan has been updated to September 2010.