

# Community Living Guelph-Wellington

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## Strategic Plan, 2015-2017



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# 1 Introduction

Community Living Guelph-Wellington has for some sixty years been providing supports and services to people with intellectual and developmental disabilities, and their families, in the communities in which they live throughout the City of Guelph and the County of Wellington. As with all Community Living organizations across Ontario, they have transitioned significantly from small, operational focused agencies, to become significant service providers to an ever changing group of people and their families who require supports.

The transition process within the Developmental Services operating environment continues to evolve. The introduction of the Passport Program, Development Services Ontario, new funding initiatives, increase diagnosis of aligned conditions such autism, the continuing aging of the service population and other factors create significant opportunities and challenges for the organization and the people supported.

Community Living Guelph-Wellington has utilized strategic planning and aligned planning processes to establish its priorities and directions, that then align with its annual service planning, budgeting and implementation activities. The organization completed a Strategic Plan in 2011 for the 2011-2013 period and has actively worked on the implementation of that Plan over a four year timeframe. In the late summer of 2014, the Board of Directors and the Executive Director identified the need to initiate the next generation of strategic planning for Community Living Guelph-Wellington. This evolved as the previous Strategic Plan was nearing the end of its lifecycle and significant new changes were emerging within the Development Services sector.

On Saturday, November 29, 2014, four members of the Board, three members of the Resources Committee, and nine senior staff participated in the Strategic Planning Workshop. The Workshop undertook a presentation on strategic and sector trends; followed by the development of a strengths, weaknesses, opportunities and threats assessment that is available in Appendix I. Following these tasks, the Vision, Mission and Values were reviewed and then a Strategic Goal, along with aligned strategies were developed for the 2015 to 2017 period.

The Strategic Plan was prepared based on the workshop results and was circulated to the Board and staff for comment and further development. The Board approved the Strategic Plan on Wednesday, January 28, 2015. With approval, the Implementation Plan for the next three to four years can be completed by management, potentially using the implementation template charts available within this document.

## 2 Vision

A Vision is like a horizon or the North Star. It identifies that point in the future or ahead that can galvanize the energy and goodwill of all stakeholders to move with common cause and purpose towards the desired organizational outcome. Like a horizon, as one moves towards it, it also moves which denotes the constant changes and evolving realities of the operating environment.

The following Vision was affirmed for Community Living Guelph-Wellington.

Enrich

Inspire

Engage

### Enrich

All the organization's supports and activities are undertaken within the perspective of enriching the quality of lives and the realization of the potential of the people supported. It is through this focus on enrichment that allows people with developmental disabilities to overcome their barriers, to realize their potential, to pursue their aspirations and to be included in the community. Enriching their life experiences and outcomes is a central dimension of Community Living Guelph Wellington's Vision.

### Inspire

Describes a key focus of the organization, which is to create a community and living environment, where people with developmental disabilities and their families feel inspired and motivated to identify, pursue and realize their potential and dreams. As full members of their community, these individuals can contribute. Inspiring them to reach beyond the stereotypes and to realize that potential is a central dimension of Community Living Guelph Wellington's Vision.

### Engage

Active engagement supports people with developmental disabilities to realize their potential and to pursue their dreams, as well as educating the community to be accepting of and to nurture all its members as contributing citizens. Continuously engaging with the people supported and the communities is a third central dimension of Community Living Guelph Wellington's Vision.

### 3 Mission Statement

A Mission Statement informs the reader as to the essence and fundamentals of an organization’s purpose and focus. In application terms, every strategic and operational decision the organization is considering needs to align with its Mission Statement. If a strategic or operational decision is being discussed that does not align with the Mission Statement, the organization needs to ask why they would make such a decision or whether it would be timely to review its Mission Statement.

The following Mission Statement was affirmed for Community Living Guelph Wellington for 2015 to 2017.

**We are dedicated to facilitating opportunities for people with developmental disabilities to realize their potential and dreams in their communities.**

The following perspectives provide additional understanding of the focus and intent of the Mission:

<b>Facilitating Opportunities</b>	Describes the focus and intent of the work of Community Living Guelph Wellington. The organization actively undertakes the ongoing identification, development, delivery and evaluation of supports and programs that provide unique opportunities for people with developmental disabilities to pursue their goals.
<b>For People With Development Disabilities</b>	Identifies the service population that the organization focuses all its attention and purpose on, involving individuals with developmental disabilities and their families.
<b>Realize Their Potential And Dreams</b>	Outlines the outcome that Community Living Guelph Wellington strives to achieve each day in supporting individuals with development disabilities, that is realizing their hopes and capabilities.
<b>In Their Communities</b>	Identifies where the delivery of its supports and its work with people with developmental disabilities occurs, which is in the community where they live, work and play.

## 4 Principles and Values

Principles and Values have three applications within a Strategic Plan. First, they provide an opportunity to further define key themes within the Mission Statement. Second, and possibly most importantly, they identify how the organization views, treats and engages with people each day. They also have the potential to identify the organization’s key accountabilities.

The following Principles and Values were affirmed for Community Living Guelph Wellington.

### We believe.....

<b>Purpose and Potential</b>	That each person has a purpose in life, the potential to develop and to contribute, and is worthy of achieving a positive quality of life.
<b>Dignity and Respect</b>	That each person is an individual, has dignity, and is to be respected in order to develop positive and trusting relationships with them.
<b>Voice</b>	That every individual has the right to be heard, included and to have their views listened to within their community.
<b>Rights with Responsibilities</b>	That every person has the right to be safe, and to be treated with fairness and equity, but also has important responsibilities to themselves, their family and their community.
<b>Community Responsibilities</b>	That the communities in which the people supported live, have a responsibility to support, accept and engage all their members, and to celebrate their potential and citizenship.
<b>Collaboration</b>	In the importance of working collaboratively and being active partners in order to access all the community’s resources and supports in achieving the best outcomes for the people supported.
<b>Culture of Innovation and Learning</b>	In developing an organizational culture that continually fosters learning, innovation and team; promotes best practices and being evidence-informed; and recognizes the valued contributions of staff and volunteers.
<b>Accountability</b>	In being environmentally, socially and fiscally responsible for the resources and goodwill provided, and acting with transparency and ethically in all that we do.

Community Living Guelph Wellington believes that every person has potential and can make meaningful contributions to the community in which they live. Through this life **purpose and potential**, they have the opportunity and right to experience a positive quality of life as full members of their community.

Every person is deserving of being **treated with dignity** and to **receive our respect**. Recognition of their individuality and dignity, and being respected and engaged, allows positive relationships to be developed that become the foundation upon which the people supported can prosper, realize their potential and pursue their dreams.

Community Living Guelph Wellington believes that every person **has a voice**, the right to be heard and can contribute. They need to be heard and to be valued for their views, perspectives and contributions.

All people living within our communities have rights. Rights that speak to equity, fairness, safety from harassment and abuse and being valued. However, with rights also come responsibilities, as a member of a family and a community. Therefore, the people we support need to learn and **know their rights** and have the opportunity to exercise them fully. They also need to know that they **have responsibilities** to themselves and others that are important to their inclusion and meaningful **participation in community life**.

**Collaboration** is a fundamental belief of the organization. Through collaborating with all Community Living Guelph Wellington's stakeholders and partners, greater access can be gained to all the resources of the community in order to provide and facilitate a wider range of supports and resources to the people supported.

Developing an **innovative**, enriching and engaging organizational culture, that supports continuous learning, creativity and team approaches, is a key success factor for Community Living Guelph Wellington. Today it has a **strong organizational culture** to build upon. Continuing the building and enrichment process of that culture is important to its long term success. This Principle also includes the importance of recognizing the valued contributions of staff, volunteers, partners and others who all form part of the team, and who are committed to the people supported. The organizational culture also needs to embrace the ongoing identification, assessment and implementation, as appropriate, of best practices that enhance and enrich the supports provided by the organization, as well as embracing the evidence-informed approaches, that is, being able to identify what the key outcomes of the organization are, the contributions made and how the lives of the people supported have been improved by the work of Community Living Guelph Wellington and its partners.

**Being accountable** is an important Principle of Community Living Guelph Wellington. Accountability involves social, environmental and fiscal perspectives, as well as transparency and acting for integrity in all the organization does and undertakes. Accountability represents a key Principle that funders, the community and other stakeholders are increasingly focused on and recognize as being important to the good works and the strength of effective and valued non-profit organizations.



## 5 Strategic Goal and Strategies

The Strategic Goal identifies the priority that Community Living Guelph-Wellington believes it needs to focus and act on in fulfilling its Vision and Mission. The Strategic Goal established for Community Living Guelph-Wellington is particularly vital in a high change environment where significant demographic, funding, policy, waitlist and other perspectives are emerging. These change elements are strategic in scope, will impact all stakeholders and will require innovative strategies and solutions to be developed and implemented in order to effectively position the organization to be able to meet the evolving needs of people with a developmental disability and to be relevant on an ongoing basis. There are also a series of aligned strategies that collectively support the achievement of the Strategic Goal.

The following Strategic Goal and strategies have been developed for Community Living Guelph-Wellington for the 2015 to 2017 period.

### Strategic Goal – Inspiring Innovation

To inspire innovation across all dimensions of Community Living Guelph-Wellington's relationships and work in successfully meeting the needs of the people supported, their families and the communities served.

### Strategies – Fostering Innovation

- 1 To grow the organization's financial resources through the development and implementation of a Funding Diversification Plan, involving:
  - Exploration of new and more significant approaches and outcomes for its Fund Development initiatives
  - Implementation of strategies to enhance fee for service income-based offerings and sources
  - Pursuing partnerships and other consolidation initiatives that have the potential to expand available resources and / or that achieve operational efficiencies that support current funding reallocations

- 2 To increase the investment in and utilization of technology in enhancing the lives and capabilities of the people supported, to improve the reach and effectiveness of all agency communications; and to increase operational efficiencies and capacities.
- 3 To continually improve the agency's marketing and communication programs through the increased use of differentiated and targeted audience channels and core messaging across all operational and functional areas.
- 4 To foster an organizational culture that is more proactive in its actions; innovative in its programs and operations; and understanding of the changing needs of and opportunities for the people supported, e.g. Passport, through:
  - Fostering creativity and the permission to experiment
  - Being more agile with an enhanced ability to adapt and effectively and proactively manage change
  - Investing in continuous learning and development of staff and volunteers to better serve and operate
  - Ensuring effective succession planning processes in sustaining organizational knowledge, capacity and continuity.
- 5 To develop a comprehensive organizational Performance Management Program that annually reports on Key Performance Indicators that provide evidence as to the outcomes achieved and the importance and value of the organization to the people supported, their families and the communities in which they live.

The **Strategic Goal** was established at the workshop in recognition of the significant transitions in the opportunities and challenges that currently and will continue to exist and grow in Community Living Guelph-Wellington's operating environment. The workshop discussions clearly articulated the need for the organization, if it is to remain relevant, to foster the ability to be increasingly innovative in all dimensions of its work, to be agile and adaptive, to be able to change, and to continually reposition and re-evaluate. These capabilities were identified as important enablers for the ongoing achievement of its desired outcomes and Mission.

A number of factors identified the dynamic nature of the operating environment that Community Living Guelph-Wellington will need to consider, plan for and implement around. Some of the most important considerations involved:

- **Changing demographics** in terms of the aging service population; increased multi-cultural dimensions within the general population; and differentiated generational perspectives, needs and engagement requirements.

- Continuously **changing funding and policy perspectives** from the provincial government, along with changing perspectives of parents with children with developmental disabilities and their needs and expectations.
- The introduction of the **Passport Program** which will establish a broader fee for service operating platform with income having to be earned rather than being provided on an annualized basis. This delivery approach will have increased impacts related to marketing, core messaging, sales, competition and related business-oriented considerations and skill sets on the organization.
- Working with **Development Services Ontario** as new entity in the sector, and being able to more effectively address waiting lists.
- Effectively responding to the needs of the **560 children** that are expected to come into the adult sector in the short term, and who will require and expect access to significant supports and services.
- Investing in, and effectively managing the **impacts of technology** that will support innovation, improve communications and potentially gain efficiencies in operations, along with being able to adapt to new technologies that will directly enhance the capabilities of the people supported and which the agency will need to be able to support and respond to.

#### Technology and Globalization

- Social networks becoming dominant communication uses – politics to advocacy to sales, tools for social change
- Younger generations heavy users and demand electronic access
- Increasing demand for instantaneous response
- Global reach and vision
- Technology driving towards bigger systems, centralization, economies of scale
- Constantly changing – staying current is a challenge for hardware, software, training and use

The Strategic Goal has been developed around the principle perspectives that the organization needs to be more proactive in moving into a changing future in order to enhance its services and supports, the outcomes it achieves and its continuing relevance as an important and valued service provider to people with developmental disabilities, their families and their communities.

The **first strategy** in support of the Strategic Goal, recognizes that there is a significant need for increased financial resources in order to innovate and to make the needed investments in supports and services development, staff and volunteer training, technology, marketing and communications, facilities and equipment and related dimensions of the work of the organization. The current funding model will not allow for the levels of investment required. It also sustains a significant level of dependency on a single source and its funding and policy priorities. In order to achieve the Strategic Goal, it is recognized that Community Living Guelph-Wellington needs to **diversify its funding sources** to both broaden its income and to decrease its overall dependency.

Three action initiatives were identified for this strategy. The first is the need to **explore, re-think** and potentially **reposition the scope and scale**, focus and implementation tactics associated with the agency's fund development activities. Community Living Guelph-Wellington has undertaken a number of fund development strategies over the years. From a capital campaign perspective, it has achieved significant success. However, in moving forward, a need exists to significantly enhance the agency's ability to secure increased operationally-based fund development income, whether through annualized campaigns and appeals, or events or planned-giving or other approaches. There needs to be a significant exploration of the various strategies and techniques within a comprehensive fund development program as to how to organize and implement enhanced fund development without putting undue stress on staff and volunteers who have other important tasks and responsibilities.

The second action item in the **Funding Diversification Plan** involves exploring opportunities for increased **fee for service** initiatives. With the emergence of the Passport Program, and funding going to the individuals and/or families supported, there will be over time, a significant portion of income that the agency will need to earn through more business-oriented models and which will not be available within annualized core funding. Fee for service initiatives are becoming more apparent across the not-for-profit sector as funding constraints escalate, and the need for income grows to sustain services. There is an increasing perspective that the beneficiaries of services may need to contribute towards services development and delivery. Fee for service could be considered for respite, day programs and a host of other perspectives. These need to be explored and assessed as to their viability, net benefit and alignment with the Mission.

#### Increased Competition

- Marketing of supports and services will be necessary
- Fewer dollars coming into the sector which increases competition for funds to grow
- Fee for service options will need to be competitively priced as families may be resistant to pay for something they see as a government responsibility

The third action item of this strategy involves the pursuit of consolidation on partnership initiatives that may increase resources and / or reduce operating costs. **Collaborations with other service providers and aligned organizations** could create opportunities where reduced expenses are incurred due to the collective contribution of all the partners, such as administrative activities, that will result in the freeing up of operating income to invest in other key operational areas on an annual basis.

Historically, partnerships and consolidation have been widely used but potentially have not seen the depth and impact that needs to be achieved in the different funding world that is emerging. Therefore, the intensification and deepening of partnerships and consolidation initiatives needs to be considered on a much more active basis to maximize efficiencies and resources generation.

The second strategy focuses on the active development of an organizational culture that fosters **innovation, experimentation, learning** and is more business oriented as Passport and related programs roll out. Organizational culture is the life blood of an organization. The ability to be more proactive, to be agile, to effectively adapt and to constantly be thinking ahead and be progressive are

vital characteristics of successful organizations. Continuous learning and improvement are key dimensions of an active and dynamic culture, as are effective communications on all levels using multiple communication channels, pursuing staff development and organizational evaluation, using best practices and related perspectives.

For Community Living Guelph-Wellington, the Strategic Goal to be more innovative and relevant in a changing world in order to better serve the people supported, needs to be built around a culture of innovation, change management, learning and development, succession planning and other dimensions, Focusing on these attributes and behaviours are important in being more dynamic and proactive in services planning and implementation, resources generation and operations.

A third strategy in support of the Strategic Goal, is to significantly enhance the **marketing and communication capacities** of Community Living Guelph-Wellington. It is recognized, that the ability to market the organization’s programs and services, fund development activities and related perspectives is going to be vital in a world where there will be more competition as Passport and fee for service programs become more mainstream. It is also recognized, that the improved use of differentiated audience communication channels will be increasingly important to reach different generational audiences who receive and provide information and input uniquely differently.

#### Communication

- Need to find alternate ways to educate members, families and other stakeholders, as we do not have the direct face to face contact.
- Social media is one option that agencies are trying to manage.

It is important for the agency to enhance its marketing and communications, along with its core messages and related perspectives in order to increase awareness, engagement, revenues and to support and grow a more innovative culture.

The fourth strategy involves investing in **increasing the application of technology**. Technology is a continually growing tool for successful organizations, and also is increasingly involved in supporting people with developmental disabilities to improve their quality of life and day to day experiences. Community Living Guelph-Wellington needs to ensure that it is continually investing in and applying technology relative to communications and social media, operations, and programs and services as a strategy to both improve its services and engagement, as well as to increase operational efficiencies. Technology is an enabler, a tool, not an outcome. In the evolving operating environment, technology will be an increasingly important dimension in having the capacity and presence to meet the opportunities and challenges that are evolving.

The fifth strategy for the Strategic Goal, is a need to develop an integrated **organizational performance management program** that gives evidence to and demonstrates the outcomes achieved and the value and relevancy of the organization moving forward. Funders are moving increasingly to outcome-based funding models that move beyond simple service statistics to how the lives of the people supported were improved. The ability to identify key outcomes, measure organizational performance against outcomes, and to report on the achievements realized, will be increasingly important in securing funding and community support, in enhancing the lives of the people supported and to remain relevant.

Organizational performance management involves a range of tasks, involving identifying relevant trends and how they will impact the organization before they become mainstream; to articulate the key outcomes and deliverables of the organization; to measure the outcomes realized; and to report on them to funders, the people supported, the community and others. **Key Performance Indicators** within a dashboard model are often utilized and have been evolving within Community Living Guelph-Wellington. The overall program needs to be broadened to be more strategic and aligned more directly around Key Performance Indicators in order to enhance Board governance activities, management planning and leadership, operational activities; to better inform stakeholders on the value and importance of the organization; and to align with funder evolving expectations.

## 6 Implementation

The following charts provide a framework for developing the implementation plan for Community Living Guelph-Wellington 2015 to 2017 Strategic Goal.

The implementation plan represents a roadmap that guides the specific activities undertaken in support of the Strategic Goal and strategies. However, this roadmap must also remain flexible as change continues to evolve within the operating environment and other impacts will occur that will adjust/amend priorities, methods and activities.

The following priorities framework could be considered.

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A	B	C
Activities within the various Strategic Directions that are the highest priority and need immediate initiation, though they may take a shorter or longer time to be completed. Also represent activities that may need to be completed before other activities can be initiated, as the follow-up activity may be dependent on the outcomes of an A priority activity;	Involves activities that are dependent on another activity to be completed first or can be initiated in the second or third year of the Strategic Plan's implementation as they may not have imminent requirements;	Activities that are important to the organization, but could be undertaken in years three to four, depending on the resources and capacities of the organization to implement the multiple objectives within its Strategic Plan

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### 6.1 STRATEGIC PLAN REVIEW

A three-part Strategic Plan review process is identified for the Community Living Guelph-Wellington:

- Quarterly, the Board and senior staff should complete a review on the following:
  - Actions taken
  - Barriers occurring
  - Recommendations on revisions and new inputs
  - Other key information

- Every year, the Board and senior staff should allocate a block of time to review the Strategic Plan, the key inputs, changes in the operating environment and make appropriate adjustments to the timing, tasking and related dimensions of the Strategic Plan's implementation.
- Every three years, the Board and senior staff should engage in a full review process similar to their current initiative in order to ensure the relevancy, timeliness and scope of the Strategic Plan in moving the Community Living Guelph-Wellington towards the realization of its Vision and Mission.
- Also, the Board should report on the progress being made on the Strategic Plan at its Annual General Meeting, in its Annual Report and newsletters, on its website and use other opportunities as occur from time to time.



Priority	Tasks	Responsibility	Timeline	Approval Requirements	Metrics
<b>Fostering Innovation</b>					
<b>1.</b>	To grow the organization's financial resources through the development and implementation of a Funding Diversification Plan				
	1.1	Exploration of new and more significant approaches and outcomes for its Fund Development initiatives			
	1.2	Implementation of strategies to enhance fee for service income-based offerings and sources			

Priority	Tasks	Responsibility	Timeline	Approval Requirements	Metrics
1.3	Pursuing partnerships and other consolidation initiatives that have the potential to expand available resources and / or that achieve operational efficiencies that support current funding reallocations				
<b>2</b>	<b>To increase the investment in and utilization of technology in enhancing the lives and capabilities of the people supported, to improve the reach and effectiveness of all agency communications; and to increase operational efficiencies and capacities.</b>				

Priority	Tasks	Responsibility	Timeline	Approval Requirements	Metrics
<b>3</b>	<b>To continually improve the agency's marketing and communication programs through the increased use of differentiated and targeted audience channels and core messaging across all operational and functional areas.</b>				
<b>4</b>	<b>To foster an organizational culture that is more proactive in its actions; innovative in its programs and operations; and understanding of the changing needs of and opportunities for the people supported, e.g. Passport</b>				
	4.1	Fostering creativity and the permission to experiment			

Priority	Tasks	Responsibility	Timeline	Approval Requirements	Metrics
4.2	Being more agile with an enhanced ability to adapt and effectively and proactively manage change				
4.3	Investing in continuous learning and development of staff and volunteers to better serve and operate				
4.4	Ensuring effective succession planning processes in sustaining organizational knowledge, capacity and continuity				

Priority	Tasks	Responsibility	Timeline	Approval Requirements	Metrics
5	To develop a comprehensive organizational Performance Management Program that annually reports on Key Performance Indicators that provide evidence as to the outcomes achieved and the importance and value of the organization to the people supported, their families and the communities in which they live.				

# **APPENDIX I**

Strengths, Weaknesses, Opportunities and Threats

## **Strengths**

- Strong capital campaigns and community connections
- Willingness / openness to change as an organization
- The passion and commitment of staff and volunteers, our people, along with an engaged Board
- Real leaders / players in the developmental services sector and in the community served. Built around a long history, strong legacies.
- An innovative organization within the resources available.
- Quality programs and services that are highly valued.

## **Concerns / Issues / Weaknesses**

- Limited ability to meet wait list demands / needs
- Are we innovative enough going forward?
- Our technology capacities are not at the level that may be necessary.
- Need to become more outcomes-focused.
- Staff time to innovative and to support teams is too limited.
- Community profile and awareness needs to grow.
- There is a need to pursue more strategic partnerships and collaborative strategies.

## **Strategic Opportunities**

- Continue to pursue Holyday Village,
- Pursue opportunities for back of house and other more intensive partnerships.
- Explore new fund development strategies and how to deepen the emotional attachments to the work of the agency and the people supported.
- Actively pursuing Passport and fee for service initiatives.
- Building on our current opportunities / services, and not just to undertaking new initiatives.
- Continue to implement core capacities, ensuring the infusion of the unique skills and influences needed within the organizational culture.

## Threats

- Pay equity
- Competition that succeeds
- Future legislative and compliance considerations around amended minimum wages, training allowances, etc.
- A major negative event.
- Dependence on one primary funder.
- The ability to attract / retain effective volunteers and Board members.
- Not connecting to the differentiated needs and perspectives of the five generations in our community.
- 560 people on the children's wait list that is going to create increasing demand with limited resources, and the potential impact not serving them could have on the reputation and value held for the organization.