



# NEW AGE SERVICES INC.

## Strategic Planning Document

### Abstract

New Age Services Inc. Leadership has accessed strategic direction setting information from Leadership, staff, and caregivers to craft this Five Year Strategic Plan for the organization.

Lorie Gibson  
Lorie\_lynne@hotmail.com

# **New Age Services Inc. 2019 Strategic Plan**

## **Introduction**

New Age Services Inc. has been serving adults with developmental disabilities and mental health concerns (dually diagnosed and complex needs designations) and their families for 28 years. The **Vision** and **Mission** guide the work of the organization within all of its' service offerings in the community and is further supported and acted on by both the Organizational Values, Philosophy and Operating Principles.

**Vision:** An Inclusive Future for All

**Mission:** Adults with cognitive challenges live full and valued lives.

The current services and programs at New Age Services Inc. include: Individual/Community Living Supports; Community Access, Volunteer Opportunities and Employment; Group Living Options; and Residential Respite.

## **New Age Services Inc. Values**

**Respect:** We respect everyone equally. We value diverse life challenges, experiences, opinions, beliefs and faiths in a non-judgemental manner.

**Professionalism:** We represent New Age Services Inc. in a reliable and responsible manner. WE resolve work related issues in a constructive manner and manage conflicts of interest professionally.

**Altruism:** We believe in the spirit of giving with generosity. We act for the welfare of others with a thorough understanding of how our actions affect others.

**Ethical:** We strive for excellence by implementing best practice standards and adhering to all legislation that directs our work. We focus on providing the best services within a safe and health promoting environment.

**Integrity:** We act with honesty in our work and our daily encounters with others. We build trust and take ownership of our contractual commitments. Our actions are always taken in good faith.

## **Philosophy**

New Age Services Inc. strives to ensure the highest quality services for the individuals and their families that we support. We recognize that by supporting our staff, we strengthen the foundation upon which our services are built.

New Age Services Inc. believes every individual with a disability has the right to live, work and participate in the community of their choice. They are entitled to a high quality of life, where they are surrounded by caring, nurturing people who help to enhance their personal potential in all they do.

New Age Services Inc. encourages the individuals within our services to become involved in planning every aspect of their lives, supporting them to access the community resources they need that will enhance their lifestyle and quality of life.

## **Operating Principles**

New Age Services Inc. uses the following operating principles to guide the decisions and interactions that are necessary within the work, interactions with clients, guardians, staff, partners and other community stakeholders.

**Quality Service:** New Age Services Inc. strives to obtain quality in our services and activities by supporting individuals to live, work and participate in the community of their choice. We are learning organization that continuously strives to improve our services and to be leaders within our sector. We are proud to provide client-driven services and supports that enhance an individual's ability to follow their dreams.

**Accountability and Responsibility:** New Age Services Inc. fosters trust through by consistently acting on what we say we are going to act on and we do this with integrity. Integrity is the bedrock of all our actions and decisions designed to promote personal rights, freedoms and responsibilities.

**Teamwork:** New Age Services Inc. celebrates each other's gifts, effort, struggles and contributions. We believe that all people are equal, regardless of position or association and we act on this through the supports we give to individuals to pursue their educational and personal growth. All persons connected with the organization have a opportunities to voice their thoughts in routine and global decision making for the organization. We strive to provide a positive work environment where people can have fun and where clear boundaries and expectations are communicated clearly and professionally.

**Support and Respect:** New Age Services Inc. acknowledges and respects diversity and differing points of view. We work to be good listeners and supportive of all individuals we interface with through our work for the organization. We believe all individuals have contributions to make and strive to be supportive and accepting of everyone's unique abilities and contributions.

**Initiative:** New Age Services Inc. supports both staff and individuals to take action when there is something that needs to be done, they do not wait to be told to take action. We strive to do the little things that make life better, in doing this we empower people.

## Strategic Planning Process

New Age Services Inc. leadership introduced the new strategic planning cycle for the organization at the company's AGM on September 20, 2018. Helene DeKlerk, the Executive Director introduced the timeline and some of the tactics that will be utilized for this strategic plan. The plan: will be designed for the time period of 2019 to 2023; it will define clear and measurable goals/outcomes for each department and the organization; it will represent all the work the organization does and will seek input from all departments; and it will be a **living document**. A document that will guide the work and set the benchmarks of success for service provision over the next five years.

The strategic planning process will include:

- Responses given by staff to questions posed at the AGM
- Responses to the Strategic Planning survey that was circulated to staff and caregivers
- The portion of leadership and administration team interview responses completed by the business analyst that informed strategic direction
- Responses and feedback from the Executive Leadership team of the organization
- Development of a "strawman" strategic plan to support discussions at an organizational leadership team strategic planning session on Wednesday February 27, 2019.
- Submit a draft strategic plan to Executive Leadership that includes all the feedback and input collected to date
- Circulate the draft strategic plan to all staff teams in the organization for final review and sign-off
- Present the draft strategic plan to key stakeholders and community partners for review and feedback
- Final Strategic Plan will be presented to Executive Leadership for sign off
- Final Strategic Plan will be circulated to leaders of all teams with the intention to review and begin the process of developing team work plans to support the goals/outcomes articulated in the Strategic Plan
- Supervisors will also use the Strategic Plan to inform and define individual employee workplans that will be evaluated during supervisions and during annual employee reviews
- Teams will report annually on team progress to achieving stated strategic goals, and the leadership team will review the progress to date to evaluate success to date, as well as where goals may need to be modified or changed
- Reviews are captured annually in a Leadership Team meeting minutes that is designate annually for this work
- Proposed changes or modifications to the strategic plan goals/outcomes are either endorsed by the leadership team or by Executive Leadership, dependent upon the recommendation

- In the second quarter of 2023 the next strategic planning process will begin and will use all annual reviews, reports and recommendations as the initial data to inform the next strategic plan strawman

## **Strategic Planning Session-February 27, 2019**

On February 27, thirty-four members of New Age Services Inc. leadership team, frontline staff, and administration team members met to discuss, refine and set parameters for the organization's next Strategic Plan that will be written to guide the work of the organization for the next five years. A draft strategic plan crafted from the feedback and responses received at the AGM, one-on-one interviews, the employee/caregiver survey, Executive Team Meeting discussions and Leadership Team discussions was shared with all present on February 27 (Appendix #1)

Helene DeKlerk, New Age Services Inc., Executive Director opened the session with welcoming words to all participants, then leading the group through the review of the strategic outcome highlights and achievements from the last strategic plan. Lorie Gibson, session facilitator was introduced and she led the remainder of the strategic planning session with all present.

Continuing from the Executive Director's presentation the facilitator introduced the intent of the remainder of the strategic planning session and then led a process of review and validation of the New Age Services Inc.: Vision; Mission; Values and Beliefs; Philosophy; Operating Principles; and Therapeutic Models of practice. This review validated what was developed at the last strategic planning session as still holding true for the organization today, with only a few minor wording changes and adding a few new therapeutic models and practices to what had been identified in the last strategic plan. (Appendix # Strategic planning Session Power Point presentation).

Participants validated the proposed value proposition statements presented and discussed the opportunities that could be acted upon by the organization within this strategic plan. The facilitator described the process for group work discussions that will begin after the lunch break.

After the lunch break all participants reconvened to begin the work of reviewing proposed performance goals/outcomes for each of the service delivery departments within the organization. The goals that were set before the participants for discussion were drafted from feedback received from staff through the mechanisms articulated previously (AGM, Interviews, surveys, Executive team Meetings and Leadership Team Meetings). Goals/outcomes for five service delivery departments were presented for discussion, validation or modification.

An **Overarching Organizational Goal** was proposed to the whole group for discussion and validation: *Develop and implement a leadership, governance and operations framework that*

*will support organizational excellence and CET compliance in service delivery.* It was conditionally approved and will stand for purposes of the discussions held during this session.

Each table was asked to review the first set of draft goals/outcomes for the Service Delivery Department identified as Community Access and Residential Supports, which was renamed Individual/Community Living Supports. Draft goals were proposed for discussion and modification purposes in each of these service delivery departments, each table was directed to discuss /evaluate whether the goals fit, whether they needed to be modified and whether other goals were more representative of what they believe needs to happen in this department. Time was given to have these discussions and then each team presented their discussions to the rest of the participants present. The following are the goals that were validated and will be proposed forward to the organization for final sign-off. (Appendix #2 Goal Transcription from February 27 session)

### **Community Access: Expand Service Delivery**

**GOAL 1:** Increase the number of clients in volunteer or part-time paid employment by 10 clients each year.

**GOAL 2:** Increase the number of clients who can be served by the community access program by 10 clients each year.

**GOAL 3:** NAS Inc. Community Access program is recognized as the most frequent staff entry point to the organization and as such, timely onboarding and standardized transition practices for staff to other teams is essential. A transition process will be articulated by the team and presented to leadership in April of 2020.

### **Individual/Community Living Supports (changed from Residential Supports) Community Living Supports**

**GOAL 1:** Maximize the effective utilization of communication tools between caregivers, family and staff, with the implementation of ShareVision, measured by 85% active usage within two years.

**GOAL 2:** Create online training for residential support staff that is accessible on ShareVision and is self-directed, topics for training to be identified by staff and will be implemented within two years.

This process was repeated for the remaining three service delivery departments: Group Living; Operations (changed from Administration/Infrastructure); and Innovation.

### **Group Living: Expand Connection Between and Expand Delivery Sites/Services**

**GOAL 1:** Increase access to group living options currently offered by NAS Inc. by securing additional dollars/clients to scale current service delivery models by 10% in the first year of implementation (to be assessed each year after that for the full term of the strategic plan).

**\*GOAL 1A:** Create group living options for targeted consumers/populations: Seniors; adults with autism; developmentally disabled persons with addiction challenges.

**\*GOAL 1B:** Investigate group living options that would assist individuals to enhance their independent living skills---transitional housing strategies/models.

**GOAL 2:** Increase collaboration, resource sharing and standardize reporting requirements across all group living sites within the next three years, with the intention to increase consistency in services across locations and within the staffing teams.

### **Operations: Improve Organizational Effectiveness and Reduce Costs**

**GOAL 1:** Implement and beta test the Ceridian payroll system and other electronic operational solutions to decrease monthly administrative costs by 7% within the first year, to be reassessed each year after that.

**\*Goal 1A:** Implement IT software to assist with client reconciliations and evaluate the assignment of a staff role to client trust funds and reconciliations by April of 2020.

**GOAL 2:** Implement transparent and customer service focused accounting processes /practices for client and staff interfaces with the accounting team by September 2019.

**GOAL 3:** Develop program specific budgets that program managers will learn to manage (administer and reconcile monthly), ensuring appropriate provision of supports and services to clients within each program by September of 2019.

### **Innovation**

**GOAL 1:** NAS Inc. supports leadership development within all positions and within all aspects of the organization, through supporting staff members to define a leadership goal on their annual review. The organization anticipates 75% of staff will have crafted and acted upon a leadership goal within their annual review cycle.

**\*GOAL 1A:** NAS Inc. is recognized within the social services sector as an employer of choice decreasing staff turn over by 5% within the first two years of this plan and to be reassessed at the end of two years for further reductions if possible year over year.

**GOAL 2:** NAS Inc. is recognized as a leader in service provision and enters into a partnership with a community resource to implement a demonstration project that will create at least five

new subsidized and supported living spaces for episodically homeless individuals with PDD funding. The partnership identified and developed by September/October 2019 with spaces becoming available and utilized in September/October 2020.

**GOAL 3:** Investigate strategies for the development of other funding sources for programming including: grants; government contracts outside of PDD; earned revenue, through potential social enterprise activities/fees for services; donations; and fund raising.

\*GOALS marked with the Asterix are goals that were identified within strategic planning session that align/support the primary goal that precedes them in this document. They have been included in this part of the document to show the alignment and to ensure that they are included in the plans to achieve the primary goal they are attached to.

The goals presented above as endorsed at the February 27 session, will initially be reviewed by Executive team and then by the Leadership team prior to being shared with the remainder of the organization. Executive and leadership team members will determine the timelines and the indicators of success for each of the goals (the measures that will be used to determine successful goal completion) with their teams and these measures, tools and tactics will be identified in individual team/department work plans that are crafted annually. Individual staff work plans developed during annual reviews will also show how each individual staff member's work supports goal achievement within their department and within the organization.

Cascading the strategic plan goals onto each team's work plans and individual staff annual work plans ensures the ongoing review and continuous quality improvement of supports and services within NAS Inc. This process will provide a mechanism for ongoing organizational learning and enhanced ability to report on progress to identified targets of success.

### **Next Steps**

The goals presented above as endorsed at the February 27, 2019 session, will initially be reviewed by Executive team and then by the Leadership team prior to being shared with the remainder of the organization. Executive and leadership team members will determine the timelines and the indicators of success for each of the goals (the measures that will be used to determine successful goal completion) with their teams and these measures, tools and tactics will be identified in individual team/department work plans that are crafted annually. Individual staff work plans developed during annual reviews will also show how each individual staff member's work supports goal achievement within their department and within the organization.

Including the strategic plan goals onto each team's work plans and individual staff annual work plans ensures the ongoing review and continuous quality improvement of supports and services within NAS Inc. This process will provide a mechanism for ongoing organizational learning and enhanced ability to report on progress to identified targets of success.



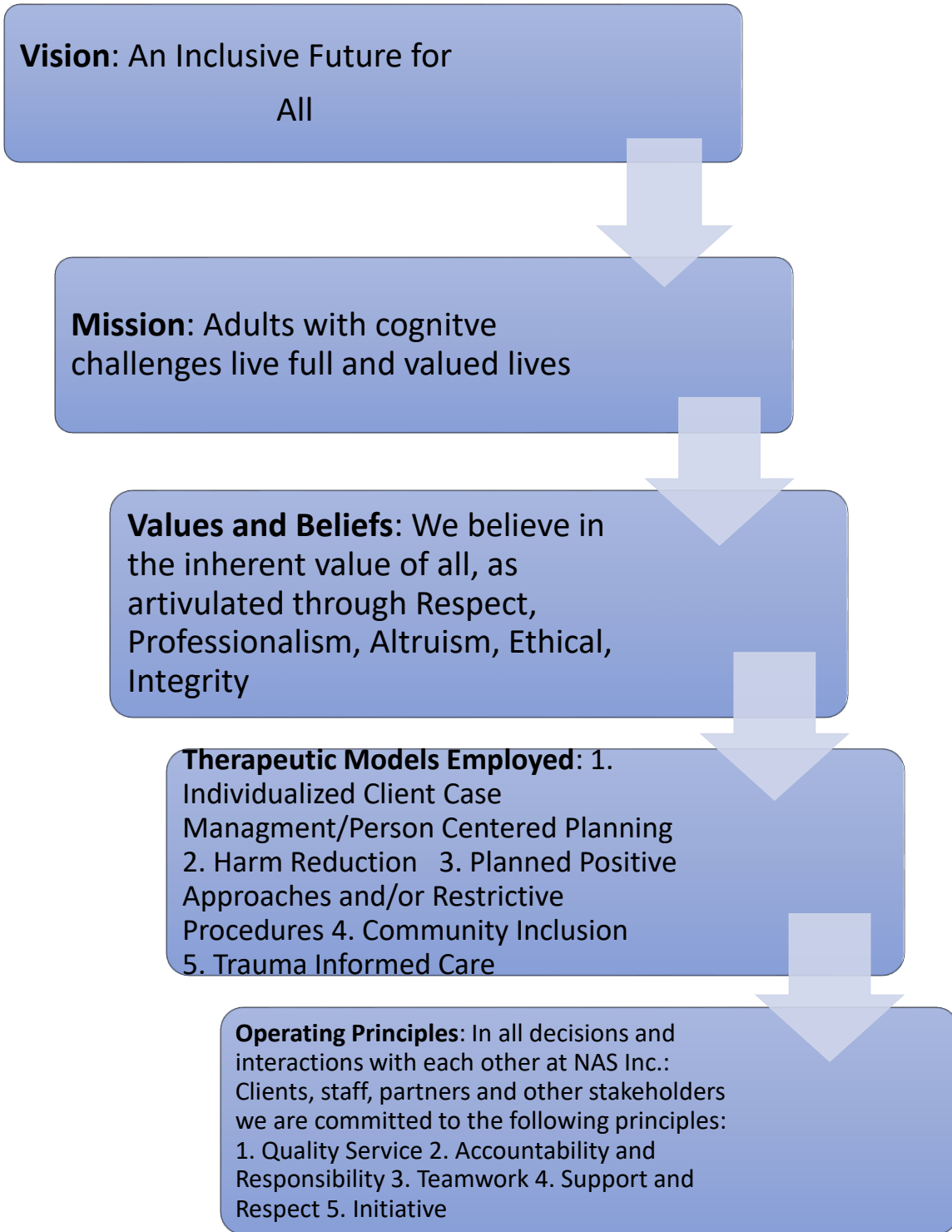
Once the Strategic Plan is final, work will begin in incorporating the goals for each program will be shared with staff to ensure program departments are in sync and have an understanding of how the goal is translated and how outcomes will be achieved per each program and operational level.

Setting of goals for the departments will include utilizing the SMART goal plan. Goals will be specific, measurable, achievable, relevant, and time-based. Once goals are established the organization and teams will have actionable plan for results. Refer to Appendix #4 for an example of what a team or department work plan could look like.

From the department and team plans individual staff will be tasked with individual goal development within their performance evaluations, goals that will align with the organizations vision, mission, goals and strategic direction.

Agency and departmental goals will be reviewed regularly as standing items in all agency meetings with a report on goals being made available to executive leadership annually on where departments are in achieving the outcomes established by the teams in each program area.

**Appendix #1- New Age Service Inc. Strategic Plan Graphic**



**New Age Services Inc. Performance Outcomes/Goals---Overarching Organizational Goal-** Develop and implement a leadership, governance and operations framework that will support organizational excellence and CET compliance in service delivery.

## Community Access

- Goal 1: Increase the number of clients in volunteer or part-time paid employment by 10 clients each year
- Goal 2: Increase the number of clients who can be served by scaling the community access program by 10 clients each year
- Goal: Develop a minimum of two new programs that could include social enterprise or fee for service to Community Access programming
- Goal 3: NAS Inc Community Access Program to be designed to be the organizational training ground for NAS staff, with a solid structure for onboarding and transitioning staff into other NAS programs, to be developed and implemented by April 2020.

## Individual/ Community Living Supports

- Goal 1: Maximize the effective utilization of communication tools between caregivers, family and staff with the implementation of ShareVision, measured by 85% active usage within two years
- Goal 2: Create online training for residential support staff that is accessible on ShareVision and is self-directed, topics for training to be identified by staff and will be implemented within two years.

## Group Living

- Goal 1: Increase access to the group living options currently employed by NAS Inc., by securing additional dollars/clients to scale current models for support by 10% in the first year of implementation (to be assessed annually)
- Goal 2: Increase collaboration, resource sharing and standardize reporting requirements across all group living sites, within the next three years, with the intention to increase consistency in services across locations and within staffing teams.

## Operations

- Goal 1: Implement and beta test the Ceridian payroll system and other electronic operational solutions to decrease monthly administrative costs by 7% within the first year, to be reassessed each year after that.
- Goal 2: Implement transparent and customer service focused accounting processes/ practices for client and staff interfaces with the accounting team by September 2019
- Goal: Incorporate IT software to assist with client reconciliations and assign a FTE to Client trust funds and reconciliations by April 2020.
- Goal 3: Develop program specific budgets that program managers will learn to manage (administer and reconcile monthly), ensuring appropriate provision of supports and services to clients within each program by September of 2019.

## Innovation

- Goal 1: NAS Inc. supports leadership development within all positions and within all aspects of the organization, through supporting staff members to define a leadership goal on their annual review with an anticipated 75% achievement of goals within the annual review cycle for each employee.
- Goal 2: NAS Inc. is recognized as a leader in service provision and enters into a partnership with a community resource to implement a demonstration project that will create at least five new subsidized and supported living spaces for episodically homeless individuals with PDD funding. the partnership identified and developed by September/October 2019 with spaces becoming available and utilized in September/October 2020.
- Goal 3: NAS Inc. will investigate strategies for the development of other funding sources for programming, including: grants; government contracts outside of PDD; earned revenue, through potential social enterprise activities/fees for service; donations; and fund raising.

## **Appendix #2**

### **New Age Services Inc.-Transcription of Proposed Strategic Planning Session Goals**

#### **Community Access:**

GOAL: To increase the number of clients in volunteer or part time paid employment by 10%, 20% in two years. (Endorsed by 5 groups) Measures--- ISP, tracking yearly

GOAL: Develop a minimum of two programs to support and develop clients' natural supports within three years.

GOAL: Increase the number of clients in volunteer or part time paid employment by 10 %(this is not supported currently in CA, outreach is included in CA))

GOAL: Increase the number of clients who can be served by the community access program by 10%, OR by 10 clients each year (Endorsed by 3 groups)

GOAL: Something about staff retention, as this team experiences the highest turn over. Decrease turn-over by 5-10%

GOAL: Develop the Community Access workforce capabilities through training and development. A mix of online training and improving and refining existing training processes. Measure by creating the process in the first year, implementing and practicing the process in year two, then in the third year evaluate and make adjustments (Load onto ShareVision).

GOAL: Create programs with purpose for the NAS clients and the potential community. (Measure by participation in this new program)

GOAL: 95% of reconciliations submitted to accounting by the specific deadline (by the 14<sup>th</sup> of each month)

GOAL: 80% of reconciliations processed and emailed on a monthly basis

GOAL: Increase the number of clients by researching and providing new programs---widening our available programs and resources.

GOAL: Marketing available programs and activities within the CA Program.

GOAL: Develop a goal to bring more community to NAS, invite training programs and other community programs to come to NAS.

#### **Individual/Community Living Supports:**

GOAL: Maximize the effective utilization of communication tools between caregivers, family and staff, with the implementation of ShareVision, measured by 85% active usage within two years. (Endorsed by 5 groups)

GOAL: Create online training for residential support staff that is accessible on ShareVision and is self-directed (this is what was suggested in the strawman, was endorsed and a two-year timeline was added), within two years. (Endorsed by 6 groups)

GOAL: Increase tools for communication between caregivers, family members and staff with the implementation of ShareVision, increasing consumer satisfaction by 15% or 20%. (Endorsed by 3 groups)

### **Group Living:**

GOAL: Increase sustainability of existing models by increasing operational resources and tools within the next two years.

GOAL: Implement “Off-Floor” supervisory positions in half of the locations within two years.

GOAL: Increase access to the group living options currently employed by NAS Inc., by securing additional dollars/clients to scale current models for support by 10% each year. (Endorsed by 5 groups)

GOAL: Focus on staffing that we currently have, enhancing training of the current staff to increase efficiency of the current model.

GOAL: Create group living options for specialized populations of clients (ie. Autism, Addictions, etc)

GOAL: Investigate group living options that could assist individuals to develop better independent living skills—transition housing plan.

GOAL: Support the development of groups living and independent living options for seniors using the current models of residential support the organization currently delivers.

GOAL: Secure residential partnerships with organizations like the Calgary Homeless Foundation and Habitat for Humanity for individuals who fit into CL and GL. Not to be a landlord/ tenant arrangement but a housing resource sharing arrangement. In the next two years.

GOAL: Increase collaboration between all the group living homes and find opportunities to share resources for staffing, events and programs.

GOAL: Streamline group living department to be a cohesive unit by cross-training and standardizing team processes within the next three years.

GOAL: Standardize processes for all group homes including client binders, programs and others.

### **Operations:**

GOAL: Implement and beta test the Ceridian payroll system and other electronic operational solutions to decrease monthly administrative costs by 7%, 10%, 20%. (Endorsed by 6 Groups)

GOAL: Implement transparent and customer service focused accounting practices for client and staff interfaces with the accounting team by September 2019. (Endorsed by 4 groups)

GOAL: Develop and implement two new Human Resource positions to support the organization within the next two years.

GOAL: Create an administration structure (team) that can take off the administration load from the team leaders, so the team leaders can become more client focused. (Endorsed by 2 groups)

GOAL: Reinforce the practice of having supervisions with direct reports where goals, succession planning, mentorship and evaluation is covered.

GOAL: Incorporate IT software (possibly reconciliation to ShareVision) to assist with client reconciliations and look to assign a position to take charge of client trust funds by April 2020.

GOAL: Develop budgets for each department and work with leaders to manage their budgets. (Endorsed by 2 groups)

GOAL: First step is to do a gap analysis with regard to where communication and accounting processes break down. Create some training for team leaders to increase their ability to complete accounting processes well.

**Innovation:**

GOAL: NAS Inc. is recognized within the Social Services Sector as an employer of choice decreasing staff turn over by 5%, 10% (Endorsed by 5 groups) %5 in the first year and then maybe increase over time.

GOAL: Developing and creating a community recognition program through a Brand Development strategy within the next five years.

GOAL: New Age services Inc. supports leadership development within all positions and within all aspects of the organization, through supporting staff members to define a leadership goal on their annual review. (Endorsed by 5 groups) Measure practicing leadership tools from Leadership trainings will assist in crafting these goals and implementing strategies to achieve goals.

GOAL: Establish a recognition process for staff to promote inclusion and retention within a year.

GOAL: NAS Inc. is recognized as a leader in service provision and enters into a partnership with a community resource o implement a demonstration project that will create at least five new subsidized and supported living spaces for individuals with PDD funding, who experience episodic homelessness. Partnership by Sept-Oct 2019, spaces by April 2020 OR Sept/Oct 2019 and Sept/Oct 2010(Endorsed by 3 groups)

GOAL: Consider creating a program or programs that will be either fee for service or social enterprises.

GOAL: Develop a pilot that utilizes technology that will support clients to live more successfully.

GOAL: Pilot transitional living skill training homes.

GOAL: Develop a process for job shadowing across departments to encourage team work and support across team functioning.

GOAL: Develop a plan for better offices, better integration and design of offices and consider sound proofing or sound containment.

GOAL: Develop strategies for the development of other funding sources, such as grants, donations and fundraising.

### **Appendix #3-Transcription of Parking Lot Items and Discussion Points Identified on February 27, 2019 and In Staff Surveys**

A flip chart was set-up during the strategic planning session to capture thoughts and ideas that were shared that did not have a direct link or immediate link to the goals being discussed but were important to remember for future goal planning and for context setting when considering implementation of the strategic plan. Below is the complete transcription of items that were identified for the parking lot on February 27, 2019.

As not all ideas and suggestions could be incorporated into the goals for the Strategic Plan, the following suggestions will be reported on, addressed through the course of our work and when able to be made into goals as other goals are accomplished. The following ideas and suggestions are a conglomeration of the ideas and suggestions given in staff surveys and interviews, guardian survey and leadership survey.

To ensure that those suggestions and ideas represented in surveys are also put on the parking lot list and include the following not part of any of the transposed goals:

- Is there an opportunity to access different employee markets while Calgary is experiencing this current prolonged economic down-turn. Could this enhance our current staff skill sets and enhance the organizational reach?
- Further discussion is required to address staff retention within the community access program.
- Is there an opportunity in this next strategic plan to consider new staffing designations/qualifications where some positions may be more specialized (ie. Employment Specialists in Community Access)
- There is a need to develop ShareVision Communication sharing guidelines as the technology is rolled out.
- As the organization looks to investigate, nurture and enter into new community partnerships, it would be a good first step to develop a partnership matrix for measuring compatibility and shared outcomes for any partnership work.
- With any goal that identifies the development of other funding sources we would be wise to investigate social enterprise models and fee for service models.
- As we discuss developing new programs for potential new populations we would be wise to complete a community needs/gap analysis for these potential new service offerings. We would also need to assess what staffing needs would be necessary to accommodate any new service offerings.
- We should always consider where technology can help us in our work and help our clients to achieve greater community access and independence.
- There is a significant opportunity within the group living department to share resources, training and administration, this is something that could happen fairly quickly without a great deal of work.



- Is there a way that NAS Inc. can invite the community into our services and locations better than we currently are?
- Transitional housing where clients learn skills to become more independent, is a needed service and may be fairly easy for the organization to implement.
- Increase the number of “off-floor” onsite supervisor roles.
- Look at the Calgary Homeless Foundation and Habitat for Humanity as potential housing resource partners.
- Identify current service delivery barriers and craft response or solutions to remediate barriers.
- Include succession planning in all annual staff reviews, will assist with career planning, coaching and mentoring.
- In all goals set be mindful of what is required within teams and between teams so that processes do not set teams at cross purposes.
- Is there an opportunity to consider job shadowing within the organization when requested by a staff member?
- Is there an opportunity to take a look at the layout and functionality of the main office space and office designations?
- Establishing an employee recognition program might be a good tactic for enhancing employee retention and leadership.
- Individual program budgets could definitely enhance program autonomy and might increase reporting process ownership.
- Could the organization look to share the leadership training program with the next level of leaders within the organization, and with the “up and coming” leaders?
- Develop an on-call position including an on-call supervisor to support all teams.
- Craft a plan to update and re-invigorate the website after ShareVision and Ceridian have been implemented, as the current website needs work.
- Consider an organizational restructure and evaluate who belongs in what role based on skill sets/abilities/knowledge. The restructure will be based on the work that needs to get done to keep the organization strong and move it forward positively.
- Begin the work of developing high performance teams to enhance accountability, support leadership development to ensure success with this way of working.
- Create a regular forum or platform for staff to share their ideas for company growth and improvement.
- Continue diversity and cultural awareness training/expectations.
- Continue organizational focus on community inclusion/
- Investigate the opportunities for higher wages and better benefits e.g. RSP’s option, more vacation for frontline, more flex, paid 2x’s per month.
- Ensure all departments recognize the importance of working together and being respectful, accepting and helpful.

- Begin tapping into social media for branding and agency visibility, can be implemented with the website upgrade.
- Create a process that supports guardians and trustees to work collaboratively with staff in developing goals and positive outcomes for individuals.
- Assist individuals in understanding their rights.
- Assist individuals to foster relationships.
- Have the proper resources for HR, accounting, and operations e.g. HR software, an accountant, more facilities support.
- Better project management needed across all departments of the organization.
- Give staff a mechanism to voice concerns and issues (similar to the platform for ideas and suggestions).
- Investigate the feasibility of getting charitable status for the organization.
- A clear interpretation of Policy & Procedures.
- New building site, is this a possibility?
- Intake position, is this something that could be considered in the restructuring?

**Appendix #4—Team/Department Workplan Example**

**Project Work Plan Template**

<b>Goal 1: Increase the number of clients in volunteer of part-time employment by 10 clients each year.</b>					
<b>Key Action Steps</b>	<b>Timeline</b>	<b>Expected Outcome</b>	<b>Data Source and Evaluation Methodology</b>	<b>Person/Area Responsible</b>	<b>Comments</b>
<ul style="list-style-type: none"> <li>-Assess the client needs and their goals.</li> <li>-Investigate potential opportunities</li> <li>-Craft individual goals for skill development to achieve employment or volunteer role</li> <li>-Secure role and supports necessary for role</li> <li>-Create individual success measures</li> </ul>	To be assessed at the end of each month	Ten Clients each year will enter into new volunteer or part-time paid employment opportunities.	Client monthly progress reports	Key worker and other front-line team members	Family and caregivers participate in this activity as well, suggesting and securing opportunities where possible
<ul style="list-style-type: none"> <li>-Report on the individual success measures</li> <li>-Review and assess further skill development</li> <li>-Confirm success measures will continue to work or redefine for the new year</li> </ul>	To be assessed annually	Ten clients each year will be successful in new volunteer or part-time employment opportunities.	Annual ISP reviews	Team Leader/ Key worker/ Guardian and Individual	The processes and practices for creating goals, for creating conditions for success and for assessing progress to stated goals is already developed and implemented within the program.

**Goal 2: Increase the number of clients who can be served by the community access program by 10 clients each year.**

Key Action Steps	Timeline	Expected Outcome	Data Source and Evaluation Methodology	Person/Area Responsible	Comments
<p>-Work with PDD and the Client Service Coordinators to identify 5 clients for potential intake in 2019</p> <p>-Develop the business to case support these clients coming into service</p> <p>-Create a calendar for intake for the five clients</p>	<p>5 new clients by December 31, 2019</p>	<p>-Five Clients will be identified</p> <p>-Funding for the five clients will be secured and implemented to provide program supports and services</p> <p>-Intake calendar will ensure that staff recruitment, onboarding/training can be completed and that other infrastructure is confirmed and available.</p>	<p>-Monthly client service Coordination meetings</p> <p>-PDD Business case template and client service request applications</p> <p>-Successful implementation of program funding and infrastructure funding for five new clients in the Community Access program.</p> <p>-Annual program report and review</p>	<p>-Executive Director</p> <p>-director of Programs and Services and the Director of Operations</p> <p>-Human Resources manager</p> <p>-Financial Coordinator</p> <p>-Community Access Program Coordinator and Team Leader</p>	<p>The number of clients can be reassessed by the leadership team as each year progresses, dependent on availability to funding and appropriate staff</p>
<p>Repeat what was implemented in 2019, assessing if there are modifications that can be made to make the intake and onboarding process work better and achieve better outcomes</p>	<p>10 new clients by December 31, 2020</p>	<p>-Ten Clients will be identified</p> <p>-Funding for the ten clients will be secured and implemented to provide program supports and services</p> <p>-Intake calendar will ensure that staff recruitment, onboarding/training can be completed and that other infrastructure is confirmed and available.</p>	<p>-Monthly client service Coordination meetings</p> <p>-PDD Business case template and client service request applications</p> <p>-Successful implementation of program funding and infrastructure funding for five new clients in the Community</p>	<p>Executive Director</p> <p>-director of Programs and Services and the Director of Operations</p> <p>-Human Resources manager</p> <p>-Financial Coordinator</p> <p>-Community Access Program Coordinator</p>	<p>The annual review and goal setting will begin to articulate the continuous quality improvement cycle for the program</p>

			Access program. -Annual program report and review	and Team Leader	
<b>Goal 3: NAS Inc. Community Access program to be designated as the organizational training ground for NAS staff, with a solid structure for onboarding and transitioning staff into other programs to be developed and implemented by April 2020.</b>					
<b>Key Action Steps</b>	<b>Timeline</b>	<b>Expected Outcome</b>	<b>Data Source and Evaluation Methodology</b>	<b>Person/Area Responsible</b>	<b>Comments</b>
-Complete a needs assessment for training within the organization  -Using the current job requirements articulated in job descriptions hire individuals with the qualifications needed to begin employment  -Support individual staff members to develop career plans that will support their career goals and enhance the skills they bring to the organization (in their current role and in future roles in other programs)	October 2019	-Onboarding of new hires within the community access program will be completed with the intention to assist them to develop skills for other roles within the organization and the sector.	-Recruitment, onboarding, monthly supervision and annual performance review	-Human Resource Manager  -Community Access Coordinator  -Community Access Team Leader  -Community Access staff member(s)	
-Within the current onboarding	April 2020	-Individuals will value the skills and expertise	--Track the number of staff who enter into	-Human Resource Manager	

<p>process, enhance its implementation, intentionally supporting the desire to have community access be the organizational training ground.</p> <p>-Add additional supports from human resources to facilitate this process</p>		<p>developed within roles in the Community Access program and will see that these skills will prepare them for career progression in the organization and the sector</p>	<p>the community access program and then move onto another role within the organization</p> <p>-Ask a question about skill development and career planning on the annual satisfaction survey</p>	<p>-Executive Director</p> <p>-Director of Operations and Director of Programs and Services</p> <p>-Coordinator and team Leader from Community Access program</p>	
---	--	--	--	---	--

**Goal 4: NAS Inc. supports leadership development within all positions and within all aspects of the organization, through supporting staff members to define a leadership goal on their annual review.**

<b>Key Action Steps</b>	<b>Timeline</b>	<b>Expected Outcome</b>	<b>Data Source and Evaluation Methodology</b>	<b>Person/Area Responsible</b>	<b>Comments</b>
<p>-Supervisors will assist their direct reports to articulate a measurable leadership goal.</p>	<p>Annually, dependent on Staff's review schedule</p>	<p>-75% Achievement of leadership goals completed annually</p> <p>-Enhancing organizational leadership will assist the future implementation of high performing teams</p>	<p>Annual Employee Reviews</p>	<p>Individual Staff and their immediate supervisor</p>	<p>Leadership and leadership development focus will assist the organization to act on intention to be a learning organization and a leader in the sector.</p>
<p>-Supervisors and staff will review progress to date for the articulated goal at each supervision</p> <p>-Identifying successes,</p>	<p>Annually, dependent on Staff's review schedule</p>	<p>-Review success to date and identify:</p> <ul style="list-style-type: none"> <li>• Successes</li> <li>• Barriers</li> <li>• Timelines</li> </ul>	<p>Monthly Supervisory sessions</p>	<p>Individual Staff and their immediate supervisor</p>	<p>-All Staff within the organization will begin to understand their leadership responsibilities within the organization</p>

barriers and any potential tweaks to goal completion timeline or measure of success					and how that supports their personal professional leadership development goals
---	--	--	--	--	--