



# NAS INC. STRATEGIC PLAN UPDATE 2014-2015

## Abstract

This document reviews the strategic plans made in the year 2012-2013 and provides an update as to whether the goals were met or not. It also includes the direction for year 2014-2015.

# New Age Services Inc., Strategic Plan

## Annual Report Review November 2014

### Overview:

New Age Services Inc. implemented an annual strategic planning process in September, 2012. This was reviewed in December 2013. The strategic plan includes goals and objectives for next 1-3 years. When deciding a strategic direction for NAS, the leadership team considered all internal and external stakeholders. However, there were no measurement tools in place to analyze whether we were getting closer to achieving our goals or not. Hence, the focus of this strategic planning session was to ensure that all the critical factors are highlighted, NAS strengths and weaknesses are reviewed, tasks are re-prioritized and tools are set in place to measure the implementation.

Prior to the strategic planning discussion, the leadership team was engaged to identify and assess all stakeholders in terms of priority, their current commitment towards NAS and the desired commitment from them. This was significant as the team also brainstormed on how these stakeholders can be engaged in an ongoing manner to increase or maintain a high level of commitment towards NAS. The Leadership team was also engaged in a discussion to revisit NAS values, mission and vision. After modifying these three important aspects, the strategic plan was also linked to the initiation of succession planning for NAS.

**SWOT Analysis:** The strengths, weaknesses, opportunities and threats related to NAS has been reviewed and the hope is that as we go through the last part of this review period that those areas we have seen as weaknesses and threats as areas we have put concentration on to change this to strengths.

### **Strengths:**

**Relationship based approach:** NAS believes in building and maintaining relationships with all stakeholders- clients, staff, community, guardians etc. Due to this belief, we also have strong partnerships and community relations with government bodies, educational institutes and other agencies in the sector.

**Passion:** Majority of our staff and all of our leadership team feel strongly towards making a difference and working for a cause. This passion drives them to deliver high quality services to our clients and provide advocacy for the independence and rights of individuals with developmental disabilities.

Goodwill: NAS has a strong reputation in sector due to which attracting clients has never been an issue.

Innovative approach: Thinking out-of-box and customizing services for our clients by providing different service models has been a key strength.

Strong employee relations: Majority of NAS staff are here with an intention to stay for a long term. NAS also provides many training programs for employees which is a competitive advantage over other agencies. NAS has re-affirmed that the staff are the pillars of our organization.

### **Weaknesses**

Systems and Processes: The Leadership team agreed that NAS needs to revisit the foundation of its systems and processes particularly those that are unclear, inaccurate and incomplete at the moment. Other issues were identified related to this category, such as: lack of proper time management, lack of effective communications, lack of planning regarding growth and how to do this effectively in the organization. As a result, both the administration and program department have evaluated the roles and responsibilities required to become an efficient organization. Funding has been put toward purchasing a new payroll system called PayDirt and once this is established there will be a new software for Time and Attendance through Scenerion. As well a portal is also being developed where staff can access and complete their monthly summary and invoices through this system and this will directly calculate into our outcome measures requirements. The teams have also been involved in developing Outcome measures tools which has involved revamping our monthly summaries in hopes of having staff utilize this document through a website portal to allow for efficiencies and a better reporting system than we presently have to our funder PDD.

Organizational Culture: A lot of time and energy has gone into ensuring that we are providing the training necessary to our staff and leadership. For our Complex homes we have ensured that training has occurred for all staff in mandatory requirements as well as complimenting this with the ASIST training in suicide and prevention as well as mental health workshops and Mental Health First Aid whenever the opportunity and resources allow. NAS Inc has also held its first agency orientation session in September 2014 with a good attendance and these will be held quarterly to ensure all staff understand our mission, vision, values and strategic directions of NAS. NAS has also continued with its monthly newsletter and there is thought that we may want to revamp this to be a more interactive document that we send out to our membership and networks.

Diversity: NAS is also involved in the Work Force project through ACDS in addressing Diversity and gaining competencies in this area to ensure we have a skilled workforce and an agency that is competent in addressing issues as it relates to culture.

Brand: After participating in many workshops and career fairs, the team reached a conclusion that there is low brand awareness of NAS in general public and we need to begin getting our name out there in the future.

### **Opportunities**

Partnerships: Since NAS partnership with Bow Valley College has worked so well during the last year, the team decided it is imperative to take advantage of this opportunity by leveraging similar partnerships with other educational institutions or agencies in the sector. Presently we are sitting at a provincial education framework table to address training needs for our sector.

Charitable Status: Acquiring charitable status will enable NAS to increase its funds through donations. It will also encourage volunteers to provide support. Presently there have been two individuals that are prepared to provide their expertise in getting this off the ground for NAS.

Fundraisers: Having events to engage public in contributing towards a good cause will enable NAS to not only increase funds but also brand awareness, awareness about adults with developmental disabilities and most importantly build stronger networks.

Mentorship program: NAS had launched mentorship program internally for all staff during the last year. However, the program did not gain momentum. Having the program will enable better quality of services, positive work environment and enable succession planning. Mentorship does still continue but more on an internal and informal basis extending a more formal training opportunity to our practicum students.

### **Threats**

Level of funding: NAS is constantly struggling with budget constraints.

Reduction in educations programs for the sector: The quality of education for workforce in the sector has reduced significantly. The programs offered are also reduced to a great extent limiting opportunities for workforce to grow and improve. This also affects NAS as we will have challenges attracting workforce with high level of education.

Low compensation: The sector has seen an increase to wages of 10% in 2013-2014 and in the fiscal year 2014-2015 the sector has received another wage enhancement with the 2015-2016 year seeing this amount rolled into a wage increase. There is discussion that another wage increase will occur in the 2015-2016 reporting year. This sector will not be at parity with the union wages but it is a start to bring staff to the sector. More work still needs to occur in ensuring the sector is qualified and skilled.

Constant change: The sector is such that there are always changes internally and externally. Constant changes arise in clients' needs, the way technology is used, change in legislations, change in funding etc.

## Review of Strategic Directions 2014

It was decided amongst the management team that below would be the strategic direction going into the year 2014-2015

### **Short-term Outcomes**

- (1) Increase ability to attract and retain quality staff through training and mentorship

### **Intermediate-term Outcomes**

- (2) Increase operational efficiency and programmatic individualization
- (3) Increase Public and institutional awareness of our services
- (4) Increased leadership team cohesion

### **Long-term Outcomes**

- (5) Increase scope of service delivery
- (6) Increase advocacy efforts for sector, organization and individual consumers

## 2014-2015 strategic direction

### **Employee attraction and Retention**

#### **Mentorship program:**

In the past year, NAS introduced mentorship program in the Day Program in 2014. The formalized component of this program failed to see a proper implementation. The management team identified

that even though the program hasn't been implemented, staff has mentors and advisors within the organization on an unofficial basis. The mentorship program is formalized with our practicum students and we have 4 students (1 from the U of C and 3 from the Bow Valley College Disabilities Certificate course,) we have also accepted internships for 2 people from the Women's Immigration center for our administration department.

#### Staff Training:

Our partnership with Bow Valley College has been beneficial as we now offer certificate training. We offer Foundations training through ACDS. NAS was also able to be a participant in a focus group with Mount Royal College to develop educational services for disabilities studies from a certificate to a diploma level. Our mandatory training continues to include: medication Administration, Positive behavior Supports, Abuse protocol, First Aid and CP and CPI. For Our Complex Needs programs ASIST (suicide and prevention) is mandatory.

#### Enhancement Training:

NAS also participated in the workshops arranged by PDD and ACDS for enhancement and Leadership skills (great supervision) training and continues to do so. A series of Mandatory Training modules has also been developed for our Team leaders to ensure they have the support they need to do their valued work.

#### Cross Training:

We have continued to provide cross training in terms of departments, caseloads, and roles: hierarchical and lateral training. We have done this in day program, group homes and continue to do the same in the leadership team.

#### Performance Evaluation:

A new performance evaluation tool and a supervisory tool has been rolled this year to assist supervisors with supervision and ensuring staff are meeting and gaining ground in having competencies and being competent in how they perform their job responsibilities.

**Trainings scheduled in 2014:** The great supervision training session is tentatively scheduled for February 2014. We are going into our third year with the certificate program at Bow Valley College. Because of the success of this program, the college is now exploring redesigning the educational

programs for the sector. We will also be starting our fourth session of Foundations training with ACDS starting in the beginning of 2014. To date we will have 22 staff graduate from Foundations and 12 staff will graduate from the Disabilities Certificate Program. Collective gatherings has been introduced to enhance sector issues as well as personal learnings. These occur monthly on the last Thursday of the month.

## Re-branding NAS

In 2012-2013, NAS changed its logo and website. By end of 2013, NAS also revisited the mission statement, vision and values. In doing so, the logo was changed again to reflect the revamped vision. NAS will continue developing NAS website in year 2013-2014. However, changing the name has been put on hold due to lack of research and funds.

## 2014-2015

### **Short-term/On-going Outcome:**

*Structure of programs:* The advisory positions in the Day Program is in place and working effectively. This position is also part of each group Living situation to ensure the running of each home is efficient and effective in how the individuals are best served. The Outreach program will be considered in the near future.

*Strategic reallocation of resources:* NAS would continue to look into opportunities in order to be more cost effective and use the funds for additional roles. With the wage increase and enhancement benefits have been distributed into benefits and salaries for staff.

### *Receiving feedback from stakeholders:*

We are working towards getting feedback on our services in an objective manner. This survey will be rolled out to guardians in 2015.

### **Intermediate Outcome:**

*Brand Awareness:* After launching the new website, NAS will continue to treat Communications plan as a live document in order to engage stakeholders. This will also increase the success of fundraising activities.

*Leadership Team Cohesion (Ongoing):* The mandatory training Modules for the team Leaders is a continued move to ensuring we are providing the best service for our individuals and supporting our staff in the way that reflects our and PDD policies.

*Staff Engagements:* NAS will re-introduce staff engagements such as agency retreat for all staff which would provide a platform to give updates to staff and allow them to have a sense of belonging. The collective gatherings have been well attended and the NAS Christmas party also provides opportunity for staff to engage.

### **Long-term Outcome:**

*Increase scope of service delivery:* NAS has 3 group home living situation running with a 4<sup>th</sup> in the process. A business plan provided to PDD to increase our registration for the day program has also been accepted and intake began in July 2014 for up to 15 individuals.

*Succession Planning:* In order to ensure that NAS leaders are aligned with the vision, NAS has initiated succession planning. This plan will be treated as a live document and will be tied in with performance evaluations of key staff.

*Internal Staff Surveys:* NAS implemented staff surveys in past which had positive effects on caregivers and other staff as they felt they were being heard. Conducting similar survey in future to measure where staff stands in terms of understanding NAS values and expectations, and what staff requires from NAS. These surveys will be rolled out to staff in 2015.

*Networking:* ACDS, PDD, Accessible Housing Working Group, United Way, Workforce Council, Calgary Service providers Council- have invited NAS Inc. to forums and focus groups on a regular basis. Workforce Council has provided NAS a huge opportunity to network and gather information about other agencies in the sector. NAS will look into formalizing partnerships with organizations where clients volunteer or have employment opportunities. Networking opportunities will also enable NAS to increase advocacy for the sector, organization and the individual consumers in the long run. Presently we are involved in a Diversity project which we hope will allow for us to be a culturally competent organization. The Accessible Housing Working group has folded but the relationships built within this forum will be long standing.

*Staff Recognition:* NAS will continue at the 2014 to recognize those staff that have gone beyond the call of duty at the annual Christmas Party for all staff. The objective is to recognize staff for longevity as per

their years of service in the agency. Staff who completed 5, 10, 15 or 20 years were recognized with a certificate of appreciation. The program will continue to introduce “Shining Stars” to recognize, appreciate and motivate staff who contributed above and beyond their duties. The nominations were submitted by line managers with a rationale to ensure fair consideration of everyone’s effort in their respective teams. NAS will continue to do so in staff engagements throughout the year

*Agency Orientation:* NAS will continue to invite new staff to the agency orientation provided on a quarterly basis with topics including history, corporate culture, programs and structure.

### **Intermediate Outcome:**

*IT proficiency:* NAS is in the process of implementing a new payroll system that will increase operational efficiency and programmatic individuation. Software has been purchased and a schedule of implementation is in the works. The rationale behind such a purchase is to ensure our administrative systems are efficient and effective as the agency grows.

As the agency grows we will develop and implement a communications plan to ensure engaging external stakeholders on a regular basis. This will enable partnerships with the educational institutions or third parties such as Alberta Health Services to provide more trainings and workshops in future.

### **Long-term Outcome:**

Restructuring organization

In order to achieve the outcomes we want as an agency, we reviewed the structure of NAS in our 2014 leadership retreat.

There were a number of changes made in Administration department to streamline roles in order to have efficient processes and systems including the purchase of Software .

We re-organized our budget in order to become more cost effective and avoiding over expenditure.