



NAS Inc.
An Inclusive Future for All

Strategic Plan

November 1, 2020 - March 31, 2023

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Section 1 Introduction

This strategic plan for New Age Services Inc. (NAS) consists of an overarching strategic goal for the agency, strategic goals for the operations and services areas, goals for each of the departments, and action plans to achieve each goal, which includes key activities, who is responsible, the desired results, and how success will be measured.

Duration of the plan

This strategic plan is in effect from November 1, 2020 to March 31, 2023.

Annual reviews

The senior leadership team will review the strategic plan annually, at a meeting in the first week of April, after the end of the agency's fiscal year and the contract renewal with funders. Progress will be reported on the team and updates made to the plan before NAS's annual general meeting (AGM), which is routinely scheduled for the third week of September each year. The progress and changes will be communicated to key stakeholders during the AGM.

Contributors

The following members of the senior leadership team contributed to the development of this strategic plan.

Name	Position	Area
Helene de Klerk	Executive Director	Executive Team
Norma Wisbling	Director	Operations, Executive Team
Kathryn Senio	Director	Services, Executive Team
Christie Schulze	Manager	Human Resources
Rai Mann	Controller	Finance
Kimberley Bamford	Coordinator	Community Access
Pamela Warenko	Coordinator	Group Living
Kathlene Tweel	Coordinator	Supported Living

The strategic plan was compiled by Paul Holmes and Lydia Holmes from Anthony & Holmes Consulting Ltd (A&H).

Process of development

A&H led the strategic planning process. The following approach was used to develop the strategic plan.

- **Step 1. Preparation**

On September 22, 2020, the seven members of the executive leadership team were sent two questions in preparation for the strategic planning session. Firstly, they were asked to identify one or two organizational goals that NAS should set as a priority to accomplish within three years. Secondly, they were asked to identify three to five departmental goals to accomplish within three years.

- **Step 2. Planning session**

On September 28, 2020, A&H led the strategic planning session between 9 a.m. and 12:00 p.m. Through the collaborative process, the team established an overall agency goal, strategic goals for the operations and services areas, and goals for each of the departments. The managers and coordinators were asked to develop draft action plans to achieve each goal, and to return these drafts to A&H by October 2, 2020. Each goal needed to include key activities, the person responsible, the desired results, and the success measures.

- **Step 3. Draft versions**

A&H reviewed the draft data and set it out in structured action plans for each department. The action plans were sent back with proposed changes to the leaders of the respective departments for review by October 28, 2020.

- **Step 4. Final version**

A&H submitted the final draft version to the executive leadership team on October 30, 2020.

Rationale for a new plan

NAS has undergone significant growth over the last few years. If we are to continue offering the exceptional quality services to clients, we need an organizational structure that is responsive to change, systems that make our work efficient and effective, and staff that are fully equipped to execute their responsibilities.

Therefore, over the last couple of years, we have prioritized revamping our organizational structure and building robust systems, particularly the digital systems through Sharevision and Ceridian. As we continue to implement these over the next several months, we need to orientate ourselves as an agency to empower our staff to establish a culture of high performance so that we can offer the best client services. We want to be known as an amazing agency to work for and to receive services from.

Section 2 Foundations

NAS has been serving adults with developmental disabilities and mental health concerns (dually diagnosed and complex needs designations) and their families for 30 years. We operate by following our vision, mission, and values.

Vision

NAS envisions an inclusive future for all.

Mission

The mission of NAS is to support adults with cognitive challenges to live full and valued lives.

Values

Our six core values inform how we think, behave, speak, and make decisions day to day.

- 1. Advocacy** We advocate passionately for those who are unable to speak up fully for themselves
- 2. Results** We set a standard of high performance
- 3. Caring** We go the extra mile to build caring and meaningful relationships
- 4. Empower** We empower employees to take initiative
- 5. Ownership** We expect everyone to take ownership and share the workload
- 6. Learning** We welcome new ways of thinking and better ways of acting

Our vision, mission, and values guide our work within all service offerings in the community, and are rooted in the philosophy of disability services.

Philosophy

NAS 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.

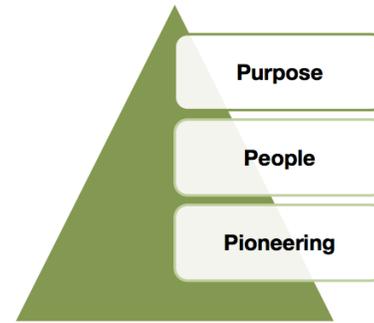
We encourage the individuals within our services to become involved in planning every aspect of their lives, while we support them to access the community resources they need that will enhance their lifestyle and quality of life. NAS promises the highest quality services for the individuals and their families that we support.

Our vision, mission, values, and philosophy inform the culture of NAS.

Culture

NAS is a purpose-driven, pioneering-minded, and people-oriented agency. We are united by our shared value to serve a purpose bigger than ourselves. We look beyond what we are doing well to see where we can still serve further. And we do this by caring deeply about each other, our clients, partners, and the community at large.

These 3Ps – purpose, people, and pioneering – are our cultural cornerstones. They guide how we think, speak, and act.



This is further supported through our professional expectations.

Professional expectations

Our foundational standards for professionalism are integrity, respect, diversity, inclusion, and collaboration. We expect everyone to practice them consistently.

- 1. Integrity** We are honest with each other. It means we can trust and depend on each other consistently.
- 2. Respect** We treat everyone with equal dignity and worth. It enables us to feel like we are working in support of each other to achieve our goals.
- 3. Diversity** We value the equal representation of human differences. It ensures people can believe there is equal opportunity for growth, advancement, and reward.
- 4. Inclusion** We work together to create a feeling of belonging. It increases everyone's sense of value, confidence to participate, and willingness to contribute.
- 5. Collaboration** We set our minds, wills, and emotions to work well together. Working as a team makes us more resilient, innovative, and efficient.

SWOT Analysis

The following SWOT analysis was conducted with Owen Stockden on February 3, 2020 for the Communications and Marketing Assessment. The SWOT has been included in this strategic plan as it is useful to emphasize and build on strengths, shore up weaknesses, engage with emerging opportunities, and mitigate threats.

Internal

Strengths

- Our people
- Innovativeness
- Passion and belief in our mission
- Persistence and dedication
- Proven, scalable model
- Proven continuum of service
- Client-centered approach
- Collaborative
- Compassionate
- Strong structure/departments
- Risk management
- Good at building and growing relationships
- Freedom to act and innovate due to our structure

External

Opportunities

- New and expanded partnerships
- Tapping into immigration and diversity organizations
- Get the marketing and messaging out
- Leveraging technology
- Potential to diversify with other businesses or spin-offs
- Government is looking for/willing to fund solutions, especially for complex needs
- Fee-for-service or social enterprise models

Weaknesses

- Lack of metrics and outcome tracking
- Too humble, not taking enough credit for what we do
- Lack of time to do all we want to
- Always going through growing pains
- Lack of business sense and approach
- Unwillingness to have difficult conversations
- Need to turn more policies into actionable state
- Difficult to communicate our benefits and secure buy-in
- Better change management structure and process needed
- Lack of formal knowledge-sharing process

Threats

- Must recognize and respond to funding trends
- At the mercy of political environment
- Workforce shortages in labour market
- Risk of not embracing and adapting to changing technology
- Wait times on government decisions
- Government approaches pits agencies against each other; we're up against those with 40+ year histories
- Uncertainty re: what other agencies are doing
- Locked into a funding ratio that may not be sustainable as organization grows

Section 3 Agency and Area Goals

Agency Goal

To empower staff to establish a culture of high performance to offer the best client services

Operations Goals

- Goal 1 To ensure the right systems are in place in every department to support quality program service delivery and agency expansion
- Goal 2 To build excellent communication skills to better equip, support, and enhance relationships in teams, across the agency, and all partners and other stakeholders

Department Goals

Human Resources

1. Complete the Ceridian implementation
2. Create a performance management system to increase positive motivation and behaviour
3. Develop and implement a succession plan for all levels of the agency
4. Develop leadership training
5. Identify and clarify job descriptions across the agency

Finance

1. Switch to the most effective payroll calendar system
2. Develop a processes and procedures manual (PPM)
3. Implement a 12-month cash flow budget
4. Monthly reporting and closures within 10 working days

Administration

1. Develop an internal communication strategy
2. Develop an external communication strategy
3. Bridge functional areas of expertise through strategic external partnerships
4. Develop a document management system

Facilities

1. Expand the use of the FIXX software for facilities and other agency needs

Information Technology

1. Create IT tracking and system

Program Services Goals

- Goal 1 To ensure all levels of staff in all program services are fully aware of, equipped, and confident to take ownership of their role expectations
- Goal 2 To build excellent communication skills to better equip, support, and enhance relationships in teams, across the agency, and all partners and other stakeholders
- Goal 3 To be responsive to needs and changes by being resourceful, innovative, and adaptable to new ideas and ways of providing quality services

Department Goals

Community Access

1. Develop and sustain valuable agency-led program sessions and activities
2. Build and publish a program procedural manual outlining staff processes
3. Formalize ongoing regular feedback mechanism for individuals receiving service to ensure quality services

Group Living

1. Establish consistent formalized practices across group living homes
2. To support teams to communicate and work effectively together based on their understanding of diversity in their workplace including the clients they support
3. Develop a program procedural manual outlying staff processes

Supportive Living

1. Maintain consistent use of communication tools by all contractors
2. Utilize the current payroll tools for contractor invoicing
3. Create a more objective evaluative process for independent contractors

Section 4 Action Plans for Operations

The strategic goals are listed below for the following departments: Human Resources, Finance, Administration, Facilities, and Information Technology (IT).

Human Resources Department

GOAL 1: Complete the Ceridian implementation

Activities	Timeline	Responsibility	Results	Measures
1. Implement the Performance Management module	By Mar 2021	HR Manager	PM module is set up in Ceridian for use throughout the organization	PM module is successfully tested by HR team 100% of supervisors are successfully trained on the use of the PM module
2. Transition training to online platform	By Jan 2021	HR Manager	All training is conducted and tracked through Ceridian	100% of mandatory trainings are completed through Ceridian
3. Develop resources for onboarding and online orientation	By Mar 2021	HR Manager	Employees are on-boarded online and attend an online orientation	All new hires attend an online orientation within 2 months of hiring
<p>Risks</p> <ul style="list-style-type: none"> Supervisors do not recall how to use some or all of PM module in Ceridian Converting in-person training to online format Developing materials for online platform. Technological level of new hires <p>Mitigation Strategies</p> <ul style="list-style-type: none"> User guide and one-on-one training are available Use different online tools including e-learning, video, and hosted webinars Develop tools slowly and thoughtfully over time; develop support materials for using Ceridian 				

GOAL 2: Create a performance management system to increase positive motivation and behaviour

Activities	Timeline	Responsibility	Results	Measures
1. Develop goal-setting ability that cascades from leadership to frontline staff	By Mar 2021	HR Manager	Staff at every level in the agency feel empowered to set individual performance goals in-line with departmental and organizational goals	100% of staff members have a performance goal
2. Operationalize values into measurable behaviours	By Nov 2020	HR Manager	A Likert scale of measurable behaviours that forms 40% of evaluation criteria	Feedback from supervisors that listed behaviours are measurable and reflective of expectations for employees
<p>Risks</p> <ul style="list-style-type: none"> Limited skill or understanding of how to set good goals Missing the mark if the list of behaviours are reflective of operational realities <p>Mitigation Strategies</p> <ul style="list-style-type: none"> Training on setting and measuring goals; strong communication around the strategic plan and departmental goals Frequent communication and feedback from a cross-section of staff members 				

GOAL 3: Develop and implement a succession plan for all levels of the agency

Activities	Timeline	Responsibility	Results	Measures
1. Identify the key differences between positions in terms of required skills, experience, and/or education to move from one level to another	By Mar 2022	HR Manager	A map of career advancement within the agency for staff	Feedback from staff confirm that the career progression is comprehensive and easy to understand
2. Establish succession plans for each key position in agency	By Mar 2022	HR Manager	Each position has a pool of internal candidates to draw from and those that don't have a plan for replacement, whether hiring externally or identifying and developing potential successors in the organization currently	Most leadership positions are filled internally
<p>Risk Buy-in from stakeholders (people feeling threatened by successors)</p> <p>Mitigation Strategy Clear communication, culture of mentorship and development i.e. we rise and fall together</p>				

GOAL 4: Develop leadership training

Activities	Timeline	Responsibility	Results	Measures
Develop in-house training program to train key leadership capacities for people moving into people leadership roles	By Mar 2022	HR Manager	A suite of training courses and materials to equip new people leaders with the skills they need to lead their teams	100% of new leaders complete program
Deliver leadership training program	By Mar 2022	HR Manager	All people leaders are effective, equipped, and confident in their ability to succeed in their role Teams are more effective	Program evaluations indicate staff feel empowered by leaders
<p>Risk Lengthy time commitment</p> <p>Mitigation Strategy Long lead times for rolling out the program</p>				

GOAL 5: Identify and clarify job descriptions across the agency

Activities	Timeline	Responsibility	Results	Measures
1. Evaluate and analyze functional needs for Facilities and Health & Safety department	By Nov 2020	HR Manager	Clear job description for each role in Facilities and H&S Decision is made as to whether Facilities and H&S are separate departments or not	Comprehensive lists of responsibilities
2. Determine departmental structure and key positions for Facilities and H&S	By Nov 2020	HR Manager	The Facilities and H&S roles are clearly defined and understood including level of authority and key accountabilities	Staff are able to fulfill their Facilities and H&S roles effectively
3. Complete job descriptions for key roles in Program Services	By Mar 2020	HR Manager	Clear job description for each role Performance appraisal forms more accurately reflect actual job tasks Better distribution of workloads	Job descriptions are provided to each employee for the new performance planning cycle
<p>Risk Identifying and implementing clarified job descriptions based on actual organizational need versus what is possible within budget constraints.</p> <p>Mitigation Strategy Assess proposed positions against existing FTEs in the department</p>				

Finance Department

GOAL 1: Switch to the most effective payroll calendar system

Activities	Timeline	Responsibility	Results	Measures
1. Choose a payroll calendar that will be beneficial for FD and staff: bi-weekly or semi-monthly	By Dec 2021	Controller	Decision made in order to move to implementation	Mutually beneficial for FD and staff
2. Set up a payroll calendar with new dates, including submission cut off times and deposit dates	By Dec 2021	Controller	New payroll calendar ready for roll out	Check in Ceridian to ensure all new pay rules are set and deposits made
3. Implement the new payroll calendar	By April 2022	Controller	Staff have a shorter time between pay periods	Payroll deposits made Accounting monthly reporting is accurate
<p>Risk Timesheets not authorized on time; changing to bi-weekly (from monthly) may result in extra pressure to ensure authorizations are made by cut-off in shorter time periods</p> <p>Mitigation Strategy Additional training and time in Ceridian for authorizers to ensure efficiency</p>				

GOAL 2: Develop a processes and procedures manual (PPM)

Activities	Timeline	Responsibility	Results	Measures
1. Identify and analyze the relevant duties within the finance department (FD)	By Oct 2021	Controller	Draft manual with responsibilities, processes, procedures	Draft PPM ready for review
2. Party external to FD reviews draft PPM	By Dec 2021	Party external to FD	New hires or external stakeholders have a resource to learn independently about each duty of the FD	PPM approved by the external party
3. Use content in the PPM to generate a resource guide for NAS leaders that gives a “high-level” overview of the main FD processes/procedures relevant to them	By Mar 2022	Controller	Stronger relationships between FD and other areas in NAS	Draft guide approved and positively received by all NAS areas
<p>Risk Some written processes might not be completed if staff turnaround during the development</p> <p>Mitigation Strategy FD management needs an overview of everything ASAP to ensure the understanding is there for each role and duty</p>				

GOAL 3: Implement a 12-month cash flow budget

Activities	Timeline	Responsibility	Results	Measures
1. Analyze the 3-year PDD contract for revenue, and gather yearly expense assumptions from each department within the agency	By Jan 2021	Controller	Data for revenue and anticipated expenses	Accurate and comprehensive data supplied from all departments
2. Create the 12-month cash flow budget	By Mar 2021	Controller	12-month cash flow budget for NAS	Approved by executive team
3. Implement the 12-month cash flow budget	By Apr 2021	Controller	Have a month by month cash flow forecast with anticipated payments and receivables	Review the yearly departmental budgets to ensure the forecast aligns with the budget
<p>Risk Reliance of other departments giving the accurate information</p> <p>Mitigation Strategy Forecast will have to be extensively crosschecked with the yearly budget</p>				

GOAL 4: Monthly reporting and closures within 10 working days

Activities	Timeline	Responsibility	Results	Measures
1. Get all departments on board and agree on receiving certain items such as receipts within a certain timeframe	By Apr 2021	Controller	FD can produce timely and relevant financial statements to the executive team to inform decision making	FD is consistently able to close off the financial month in QuickBooks on the 10 th working day between May and July 2021
<p>Risks</p> <ul style="list-style-type: none"> Some staff might not buy in or commit to making the external accounting deadlines The importance and details of the change to 10 days gets lost as it travels down the chain-of-command <p>Mitigation Strategies</p> <ul style="list-style-type: none"> Will have to provide persuasive reasons to all agency leaders to convince them of the benefits of having financial results distributed in 10 working days FD controller to drop in on team meetings and/or do 1-on-1s with some leaders or other staff to ensure buy in at all organizational levels 				

Administration Department

GOAL 1: Develop an internal communication strategy

Activities	Timeline	Responsibility	Results	Measures
1. Develop an internal communication plan for how we want to communicate with each other as an agency	By Dec 2021	Director of Operations	Draft internal communication plan	Plan is approved by internal advisory committee
2. Implement the plan agency wide	By Dec 2023	Director of Operations	Consistent communication practices and processes across the agency	Employee surveys indicate a quantifiable increase in the flow of timely and relevant information
<p>Risk Ineffective oral and written communication skills in some staff to act on communication plan</p> <p>Mitigation Strategy Targeted oral and written communication skills training and other development to build alignment</p>				

GOAL 2: Develop an external communication strategy

Activities	Timeline	Responsibility	Results	Measures
1. Develop an external communication plan for external and public relations, and maintenance of agency brand	2021	Director of Operations	Draft external communication plan	Plan is approved by the project's advisory committee
2. Execute the plan	2021-2023	Director of Operations	Clear and consistent NAS brand to the public and external stakeholders	Audit shows consistent internal and external agency messaging
<p>Risk Improper use of communication mechanisms such as social media platforms</p> <p>Mitigation Strategy Targeted training for all staff on expectations</p>				

GOAL 3: Bridge functional areas of expertise through strategic external partnerships

Activities	Timeline	Responsibility	Results	Measures
1. Identify preferred areas of functional expertise for partners	2021-2022	Director of Operations	Agreement on NAS executive team on preferred areas and partners	List of preferred areas of functional expertise and potential partners
2. Contact potential candidates to establish partnerships	2021-2022	Director of Operations	Establish agreed-upon process to utilize partnerships with clear expectations/guidelines for NAS and partners	3 formal partnerships
3. Partner actively on initiatives in areas of functional expertise	2021-2023	Director of Operations	NAS and partner achieve initiatives' objectives	Agreed-upon process is effective for NAS and partner
<p>Risk NAS will share “rights” to the project/information, potentially impacting reputation and public image</p> <p>Mitigation Strategy Establish clear boundaries and/or contracts with external partner with clear communication between parties</p>				

GOAL 4: Develop a document management system (DMS)

Activities	Timeline	Responsibility	Results	Measures
1. Develop DMS for clients	By June 2021	Director of Operations	Documented process and place within the ShareVision, Ceridian, NAS server, file room and data.net	100% of client filing will be digital
2. Develop DMS for personnel	By June 2021	Director of Operations	Documented process and place within the ShareVision, Ceridian, NAS server, file room and data.net	100% of personnel filing will be digital
3. Develop DMS for agency information	By Mar 2023	Director of Operations	Information is organized in a secure, effective, and efficient user-friendly system	Information is easily retrieved by users with the appropriate security access
<p>Risk May lose documents</p> <p>Mitigation Strategy Training all teams on their responsibility for processing client and personnel documents and information; create a document management manual and or map</p>				

Facilities Department

GOAL 1: Expand the use of the FIXX software for facilities and other agency needs

Activities	Timeline	Responsibility	Results	Measures
1. Add all assets to the FIXX software	By Dec 2021	Facilities manager	Assets are listed in the software	95% of assets will be in FIXX
2. Develop a written process and user guide for using FIXX software	By Mar 2022	Facilities manager	Users will know how and where to access FIXX systems (maintenance requests for frontline staff, asset for leadership personnel, etc.)	75% of users are able to use FIXX system with the user guide without additional support
<p>Risk Users might not know how to use the software</p> <p>Mitigation Strategy Provide training and/or one-on-one support to staff as needed</p>				

IT Department

GOAL 1: Create IT tracking and system

Activities	Timeline	Responsibility	Results	Measures
1. Put all IT assets on FIXX software	By Dec 2021	IT specialist	Assets are listed in the software	100% of the IT equipment owned will be tracked
2. Develop a written process and user guide for using the IT ticketing tool	By Dec 2021	IT specialist	Formal process for requesting IT purchases and maintenance	All staff will know how to request IT assistance
<p>Risk Users will not know how to access or use request feature</p> <p>Mitigation Strategy Provide training and/or one-on-one support to staff as needed</p>				

Section 5 Action Plans for Program Services

The strategic goals are listed below for the following departments: Community Access, Group Living, and Supportive Living.

Community Access Department

GOAL 1: Develop and sustain valuable agency-led program sessions and activities

Activities	Timeline	Responsibility	Results	Measures
Have transparent budget for spending of program expenses	Mar 2021	CA Coordinator in conjunction with finance dept.	Clear understanding of amount of incoming program expense dollars and expenditures	Annual statement of program expenses and expenditures available for posting to staff, individuals, trustees
Coordinate ongoing program opportunities using internal and external resources specific to client interests and needs	Oct 2021*	CA Coordinator	Ongoing scheduling of program opportunities for individuals receiving service developed or led by NAS	Minimally 3 agency-led programs available for individuals on a weekly basis
<p>Risks</p> <ul style="list-style-type: none"> • Availability of budget information being provided on ongoing basis to program staff • Availability of space and staffing personnel in order to lead sessions <p>Mitigation Strategies</p> <ul style="list-style-type: none"> • Clarified finance procedures that allow for this communication • Improved technology to make this information available in ongoing, real time manner • Community partnership for sharing of resources • Access to technology for additional attendance opportunities 				

*To be maintained at a minimum for the duration of the disruption to our normal means of programming (out in the community as opposed to onsite services) due to the pandemic, recognizing that our usual license and funding does not accommodate this indefinitely

GOAL 2: Build and publish a program procedural manual outlining staff processes

Activities	Timeline	Responsibility	Results	Measures
Clearly document the procedural steps included in ideal completion of regular program duties and processes	By 2022	CA Coordinator	Published manual for staff to access and review when completing regular program functions duties	Feedback from staff confirm that manual is comprehensive and easy to understand
<p>Risk Changing procedural needs to adapt to external drivers such as funding, community needs, or technology</p> <p>Mitigation Strategy Inclusion of review process for adjustments to be made as needed for established procedures with timelines for regular review</p>				

GOAL 3: Formalize ongoing regular feedback mechanism for individuals receiving service to ensure quality services

Activities	Timeline	Responsibility	Results	Measures
Develop plain language survey or interview that can be distributed to individuals receiving service on at least an annual basis	By Oct 2021	CA Coordinator	Annual submission of satisfaction survey from individuals receiving service	At least 60% of individuals complete survey annually
<p>Risks</p> <ul style="list-style-type: none"> Individual willingness to participate Ensuring mechanisms available for individuals of differing communication needs to complete the survey <p>Mitigation Strategies</p> <ul style="list-style-type: none"> Inclusion of trusted persons in process for individuals to consult with as needed Ensuring simplest formatting possible for distribution with alternative options for data collection 				

Group Living Department

GOAL 1: Establish consistent formalized practices across group living homes

Activities	Timeline	Responsibility	Results	Measures
1. Evaluate the current practices in the group homes	By Mar 2021	GL Coordinator	A clear list and understanding of what practices are standardized and non-standardized	Tls confirm lists
2. Determine which non-standardized practices need to be made consistent across group homes	By Aug 2021	GL Coordinator	List of practices that make the most sense to follow or adapt	Tls, supervisors, advisors and frontline staff representatives confirm the new standardized practices
3. Develop a manual that outlines best practices for staff to follow in group homes	By Apr 2022	GL Coordinator	Consistent best practices that all staff follow. Staff can go into any group home and work	All staff have signed off reading the manual Frontline staff are able to speak to the practices, orientate, and coach new staff coming to group homes regarding the practices
<p>Risks</p> <ul style="list-style-type: none"> Lack of buy in from supervisors, advisors, and staff who may believe that their practices are the correct ones to follow and be resistant to adopting other practices that make more sense to follow Delays due to varying opinions and challenges with getting agreement <p>Mitigation Strategies</p> <ul style="list-style-type: none"> Develop strong rationale for new standardized practices Having cross sections of representatives Clear process and focus on the clients supporting Emphasis that current practices are not necessarily “wrong” 				

GOAL 2: To support teams to communicate and work effectively together based on their understanding of diversity in their workplace including the clients they support

Activities	Timeline	Responsibility	Results	Measures
Staff participate in key training such as intercultural, anti-racism, and crucial conversations	By Mar 2022	GL Coordinator	More understanding, better performance, and effective communication within the group home teams	90% of group home staff have completed online training offerings
<p>Risk</p> <ul style="list-style-type: none"> Current conflicts that have not been named between staff and/or within teams are voiced in a way that creates more walls <p>Mitigation Strategies</p> <ul style="list-style-type: none"> Creating a safe environment for honest open communication with reminders to suspend judgment Ensure staff are supported to have crucial conversations Empower individuals to resolve issues amongst themselves with support 				

GOAL 3: Develop a program procedural manual outlying staff processes

Activities	Timeline	Responsibility	Results	Measures
1. Identify what needs to go in a manual	By Sept 2021	GL Coordinator	A description of the process involved for each portion of the manual such as ISP process, PA process, Reconciliation	TLs confirm proposed outline and content of manual
2. Develop manual	By Mar 2022	GL Coordinator	Staff have access to a clear outline of the program processes and their implementation	Staff consistently and efficiently implement processes
<p>Risks</p> <ul style="list-style-type: none"> Too many staff involved in the process so not efficient use of time Delays due to varying opinions and challenges with getting agreement <p>Mitigation Strategies</p> <ul style="list-style-type: none"> Have a small committee of stakeholder Strong rationale for consistent practices and to have those easily accessible to all involved in program Emphasize that manual will provide clear information to all stakeholders involved in program 				

Supportive Living Department

GOAL 1: Maintain consistent use of communication tools by all contractors

Activities	Timeline	Responsibility	Results	Measures
1. Allocate time for training contractors on how to use Sharevision	By Mar 2021	Team leaders	Increased goal reporting, behaviour tracking	Analysis verifies 100% of contractors are utilizing Sharevision
2. Ensure all information is updated regularly in Sharevision	By Mar 2021	Team leaders	Increased communication between home living and community access	Feedback from TLs indicate between 50 to 75% decrease in miscommunication
<p>Risks</p> <ul style="list-style-type: none"> Contractors inability to utilize the software Lack of technology within contractor homes <p>Mitigation Strategies</p> <ul style="list-style-type: none"> Training to occur More up-to-date manuals provided Technology to be provided with base rate charged 				

GOAL 2: Utilize the current payroll tools for contractor invoicing

Activities	Timeline	Responsibility	Results	Measures
Job assignment to be created within Ceridian	By Apr 2021	SL Coordinator in conjunction with Finance Dept.	<p>More streamlined process for payroll all across the agency</p> <p>Reduced risk of late invoicing</p> <p>Minimize payroll errors</p> <p>TLs do regular authorization</p>	Analysis verifies 100% of contractors are utilizing this
<p>Risks</p> <ul style="list-style-type: none"> Contractors inability to utilize the software Lack of technology within contractor homes <p>Mitigation Strategies</p> <ul style="list-style-type: none"> Training to occur both face-to-face by TL as well as via learning modules that will be reviewed by the contractor Learning modules reviewed by contractor Feedback to be given upon an error that occurs Technology to be provided with a base rate charged 				

GOAL 3: Create a more objective evaluative process for independent contractors

Activities	Timeline	Responsibility	Results	Measures
1. Evaluation tool to be created at the executive level	Aug 2021	SL Coordinator HR Manager	Objective evaluation tool	75% of contractors give feedback that new evaluation tool is less subjective
2. Evaluation tool implemented	Aug 2021	Team leaders	More objective evaluation of the work that is being completed by independent contractors Ensuring that contractors are provided with room for advancement within their rate of pay Fairness across the board when salary enhancement is being reviewed	When this is being utilized by 100% of all leaders required to do evaluations

Risk

- Potential push back from independent contractors, as they do not fall under the same category as staff

Mitigation Strategies

- Information sharing and conversations as to why this is being implemented
- Providing the positive and negative outcomes such as more opportunity for an increased rate of pay within the funded amount

Section 6 Considerations for Review in 2021

At the first review of this strategic plan in April 2021, A&H recommends the leadership team consider incorporating some or all of the following items from the Communications and Marketing Assessment (Owen Stockden, February 3, 2020). A&H has highlighted key action items from the assessment with the goals of sharpening the agency's internal and external profiles.

Goal 1 Sharpen agency's internal profile

1. Ramp up communication to drive employee engagement and performance

- Make the **newsletter** available on ShareVision if possible, to increase its visibility to employees
- Consider a “story of the week” or “idea of the week” bulletin on ShareVision for quick reading
- Expand newsletter to include more articles about company policy, best practices, and recommendations in a fun, engaging way, the better—for example, interviews with employees who model these behaviors
- Research and write an article for the newsletter and/or external sharing by interviewing a New Age Services staff member, leader, client, or client's family member
- Develop an internal message relating to an emerging issue, such as new organizational policy or an external factor that will affect NAS employees e.g. “best practices” or “tips and tricks”
- Write an article for the newsletter including five tips new staff members can use to engage clients based on advice from senior caregivers

Goal 2 Sharpen agency's external profile

1. Raise NAS profile among job seekers

- Create a corporate LinkedIn page to share job postings.
- Update NAS website careers page: Create a one-page brochure outlining the benefits of working at NAS for posting electronically online and printing to share at job fairs and hiring events.

2. Ramp up communication to job seekers

Update NAS website content and redesign layout (including images and video) with a focus on the following:

- Emphasize the careers page as a primary focus and add compelling content
- Create a short **video** featuring interviews with NAS employees and a message from the Executive Director outlining the benefits of working at the organization; this can be posted on the website
- Conduct an employee satisfaction **survey** and use the positive results to encourage jobseekers

3. Expand communication to alliances and partners

- Create a **comprehensive (8-12 page) document** outlining New Age Services' offering, value proposition, history of innovation, and testimonials, to share with government and agency partners (January 2021)
- **Brochure** that outlines NAS' offering and value proposition for external stakeholders or fee-for-service customers
- Develop a **whitepaper on an innovative aspect** of NAS' offering. This is an industry trade paper that includes data, analysis, and trade elements to show a novel approach; it is less rigorous than an academic paper but more rigorous than a typical marketing document, and widely used in industry and healthcare
- Create a **partnership strategy document** outlining key messages and desired outcomes for all leadership team members who are representing the organization externally and/or with potential partners. Then engage leadership team members in as many government and inter-agency meetings as possible in order to develop situational awareness and communicate it with the rest of the leadership group