

Community Living St. Marys

Strategic and Operational Plan, 2023-2026

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Community Living St. Marys

A strategic plan is essential for the purposeful direction of an organization. Within a strategic plan are the aspirations of its stakeholders and the levels and types of services provided to the people we support. The following strategic plan emphasizes the importance of focusing on supported people's unique abilities, their choice in decision making and having autonomy over their aspirations. There is further recognition within the strategic plan that it is the agency that must provide services that centre around people supported as opposed to their conformity to fixed structures within the agency. The importance of structural and cultural flexibility through the integration of support within our surrounding communities are prerequisites to individuals' living a *Meaningful Life [through] Relationships, Community, Happiness [and] Wellbeing*.

Traditionally, the use of strategic plans has been the exclusive domain of governance boards and senior leadership teams. The strategic plan must be viewed as an active and guiding resource that provides both a philosophical foundation for Community Living St. Marys as well as a *road map* for broadening and deepening the experiences of the people we support. Community Living St. Marys has a strong history of providing person-directed support to individuals and the strategic plan acknowledges the agency's history and its dedicated staff while moving the organization to new levels of exemplary and responsive service.

Community Living St. Marys' strategic plan gives direction to the continued development of the organization's structure, its culture, its use of technology, the operation of its human resources and its support teams. It's important to recognize that an organization and its culture are living and growing entities and that the quality of any agency cannot exceed the capacity of its employees. Continuous development of all employees and the further establishment of a learning culture is essential to Community Living St. Marys future success. In doing so, the strategic plan must have a direct presence within meetings, during performance evaluations and throughout onboarding of new employees and must be understood by all employees at every level of the agency in order to create alignment of practices.

It should also be clear to everyone involved with Community Living St. Marys that our growth requires a recognition of continuous improvement and a deep desire to explore and share new and innovative practices to provide service excellence for those we support.

Guiding Philosophy

From a person-directed approach, Community Living St. Marys is committed to the following:

- The focus is entirely on the person, never the system. It is all about how I as a unique individual want to live my life, how I am being supported to reach my goals, ensuring I have the right amount of support and no more and no less – *just enough*, listening to what I have to say, facilitate opportunities and experiences that enable me to make informed choices and recognize that I am not dependent on you and that I am empowered through my strengths and bolstered by your support
- Numerous mainstream and community resources are unearthed, considered, researched and used. These resources are the ones that would be utilized ahead of supports created within the agency
- System resources are considered after the person's dreams, interests and gifts have been discovered and only in relationship to how those resources can be used to support people in achieving their dreams and contributing their gifts
- The process asks, "How can we do this?" rather than finding reasons why we can't
- The process and participation in the process depends more on our heart connections with the person than on our professional connections to the person

Service Principles

Principle # 1

We believe everything starts with the person.

- We will help people plan for their good life
- All supports are tailor made together with the person and their family
- All budgets are individualized
- We will advocate for the Ontario government to individualize funding for disability supports

Principle # 2

We believe we are accountable to the person first while honouring relationships in the person's life.

- We will support the individual's right to call on family and friends for support and advocacy throughout his or her life
- We will support families to be active decision-makers in the lives of their children and youth

Principle # 3

We believe that a range of relationships are valuable and important to everyone.

- We will support people to explore and develop those relationships through intentional and natural opportunities

Principle # 4

We believe everybody has the right to self-determination.

- We will support people to be full citizens of their community
- We will support people to direct and monitor their services and budget
- We will support People First

Principle # 5

We believe that inclusive communities are created and strengthened by recognizing and acting on the belief that each person has unique gifts that are necessary contributions.

- We will help people discover their gifts, abilities and skills
- We will help people use/share/contribute their gifts

Principle # 6

We believe in our commitment to people with developmental disabilities from Community Living St. Marys

- We will walk with people through their journey
- We will find ways to support people currently not supported
- We will have a clear, transparent, equitable process for how decisions are made regarding who receives what service (including the allocation of funds, existing and new, human resources and assignments)

Principle # 7

We believe that being involved in your community leads to full citizenship.

- We will create inclusive supports
- We will not create or operate segregated and congregated supports

Principle # 8

We believe we have a role in grassroots community development.

- We will support people who use our service, families, board members and staff at every level to lead and take part in community initiatives
- We will support self-advocacy
- We will support family advocacy

Principle # 9

We believe it's important to plan for future needs of people living in our community.

- We see our role as an agent of change in the areas of education, seniors, transportation, housing, recreation and employment
- We will advocate for individual and system change to help people get supports they need

Principle # 10

We believe in an organizational culture that encourages learning, risking, evolving and innovating.

- We will learn together by continuing to question ourselves and each other
- We will stay connected to movements within human services including citizenship, human rights, advocacy and best practices
- We will share information and stories – team-to-team, general staff, newsletter and newspaper

Principle # 11

We believe in the honourable role that staff play in people's lives.

- We will recognize and appreciate staff, encourage leadership and mentoring opportunities, invest in training and advocate for good wages, benefits and employment opportunities

Principle # 12

We believe in planning that is separate and local and also, we believe there is a role for independent, unencumbered planning in Ontario's developmental service system.

- We will explore issues of further separating planning from services
- We will continue to act as a provincial resource while balancing local needs

Principle # 13

We believe that our organization is healthier when there is an active quality assurance process in place in every area of the organization.

- We will regularly ask people who use our service and their families about the quality of services they receive

Values, Mission and Vision Statements

Community Living St. Marys' *Core Values*

Individuality	We listen to the wishes and choices of people supported, understanding that we all learn and grow differently. We pay attention to people's unique gifts and support them to contribute.
Community	We seek out and discover opportunities within our community to help people we support build relationships.
Safety	We listen to people supported, family members, community members, volunteers and employees to ensure that risks associated with community participation are balanced with the benefits of inclusion.
Autonomy	We encourage people to define and choose what makes the "good life" that they want to pursue.
Respect	We support employees and volunteers to grow and we work to create a respectful and healthy work environment.
Inclusion	We look for ways to create inclusive and welcoming places and activities in our community.
Innovation	We look for creative, innovative responses to people and families who use services and in our partnerships with community agencies and groups.

Mission Statement

A mission statement describes an organization's reasons for existence. It defines the organization's identity and its approach to providing services. Community Living St. Marys' mission is:

"To nurture the ability and willingness in our community to welcome and support all people as valued and contributing citizens."

Vision Statement

A vision statement is a foundational document that looks to the future that is aligned with its Guiding Philosophy and establishes what an organization wants to be in the future by providing direction.

Community Living St. Marys' vision is:

"A community where everyone belongs."

Strategic Goals and Operational Strategies

In order to create meaningful change, strategic goals serve to connect the organization's values, mission and vision statements with actionable items that advance the former. It is important to note that goals drive the aforementioned through strategies and the latter cannot be goals in and of themselves. For example, technology is a strategy and cannot be a goal without its connection to Community Living St. Marys' values, mission and vision. Strategic goals and operational strategies must meet further criteria. They must be:

- Capable of serving different and multiple functions across Community Living St. Marys that are aligned with its values, mission and vision
- Identifiable with supporting actions by employees across every level of the agency

- Measurable and be regularly reviewed by senior management, their teams along with the board to determine progress and required changes
- Used as a basis for the evaluation of teams and tied to coaching, performance assessment and succession planning

Service Excellence Strategic Goal

Define and assess service excellence related to all areas of service delivery with supporting qualitative and empirical metrics that inform and support decision making, communication, processes and workloads.

An informative and an important question worthy of consideration is, “How do we know if what we are doing through our work is having a positive impact? In the absence of being able to meaningfully respond to this question, it is unlikely that we will be able to advance our practices or to align them with our values, vision or mission.

Collecting meaningful data that informs our successes and that identifies areas requiring change can be challenging, but it is necessary in order to continuously improve.

Operational Strategies

1. Define criteria to determine service excellence with respect to operational processes and service delivery that are aligned with Community Living St. Marys’ values, vision and mission. Criteria should include responsiveness, communication, follow through, and use of technology for people supported. This process could begin with discussions about what the highest levels of service would look like within the organization. **(Actionable Goal: Create a functional continuum/scorecard with which to assess service excellence.)**
2. Evaluate all operational and service delivery processes using the continuum/scorecard, and identify areas that can be enhanced. **(Actionable Goal: Create project plans and timelines for those areas, as well as a dashboard for all key metrics on a weekly, monthly, quarterly and annual basis.)**

3. This criteria of service excellence will also be utilized/applied to the remaining strategic goals: Quality of Life and the Employee Experience.

Quality of Life Strategic Goal

Understand and assess the “member experience” in conjunction with service excellence measures to continuously triangulate and strengthen practices that can be shared within the agency and across the sector.

Whereas operational and service delivery expectations can be quantified, taught and assessed, the *member experience* is subjective to each person supported. All aspects of process and delivery aspects of service excellence can enhance the *member* experience and not assure successful personal subjective outcomes. Therefore, it is necessary to separate the objective and subjective during assessment and reexamine them in relation to one another to determine best practices that will inform both areas of service excellence.

1. Utilize a combination of personal outcome measures/quality of life indicators alongside criteria of service excellence to develop questionnaires, anecdotal feedback templates and ‘look fors’ to be utilized with members to assess all areas of their experience. **(Actionable Goal: Quality Assurance Committee.)**

2. Identify criteria for person-directed planning documents and audit best practices from other agencies. **(Actionable Goal: Work with the Southwest Collaborative Community (SCC) to develop and enhance best practices for person-directed planning and provide intentional training for facilitators as well as support staff.)**

4. Prioritize and utilize software to create electronic templates around person centered planning that can be accessed by a remote workforce and that significantly reduces the use of paper.

Employee Experience Strategic Goal

Many employees in organizations in all sectors are re-evaluating their life's priorities post-pandemic, and in many instances are looking for meaningful, purpose-driven careers. Highlight the "employee experience" in order to strengthen engagement and further promote service excellence.

Operational Strategies

1. Develop an employee engagement survey to assess the employee experience.
(Actionable Goal: Distribute the employee engagement survey annually, and develop a subsequent action plan each year based on feedback acquired.)
2. Continue to emphasize professional development for all staff within Organizational Learning that includes curricula that is scaffolded and leads to career pathways.
3. Adopt criteria of service excellence continuum/scorecard with Collaborative Performance Management through which employees can be mentored and coached in the area of continuous improvement, service excellence and advocacy of full inclusion within the community. **(Actionable Goal: Enhance Performance Appraisal templates and Employee Coaching documents across the organization to include these indicators.)**
4. Prioritize formal/informal recognition of staff and increase staff interaction with direct supervisors.
6. Explore succession planning, the addition of technology, more balanced workloads, consistent training, siloed teams and access to HR resources with Southwest Collaborative Community (SCC) partnerships.

Appendix A:

Methodology used in creating our Strategic Plan

In building the strategic plan, significant emphasis was placed on consultation with Community Living St. Marys' board, its senior leadership team, with staff and with people supported. In each of these respective consultations, there were opportunities for open dialogue and for the submission of responses to questions posed at meetings. There were also extensive and enlightening discussions with Executive Director, Marg McLean, who provided context with respect to the agency's past as well as insights into the agency's current challenges and opportunities.

Community Living St. Marys' board was consulted on September 27th, 2021 and was followed by consultation with the agency's senior leadership team on October 20th, 2021. Meetings with staff took place on Dec 7th and Feb. 9th 2022 and consultation meetings with families and people supported on November 17th, 2021 and May 21st & 28th, 2022.

Staff shared meaningful sentiments about their work with the people they support. The underlying theme in all comments was related to the importance of the mutual relationships and value derived between employees and the people they support. When asked about the most rewarding aspect of their work, one employee commented, "the personal connections we make with each individual. Watching people do something they may not have done before and succeed and the joy it brings is wonderful." Another employee commented, "I love working here. It is rewarding and has made me a better and stronger person."

The analysis of all feedback and related documents were weighted, analyzed and were accordingly themed to ensure that all *voices* were recognized. Further consideration was given both to best practices in the areas of organizational development and to emerging practices within the Developmental Services sector.

The Strategic Plan was drafted beginning with an examination of the existing values, mission and vision statements in comparison to the feedback provided and documents received in preparation for the creation of the following strategic plan. Doing so enabled a better understanding of the agency's philosophical stance.

Finally, the strategic plan utilizes the Ministry of Children, Community and Social Services' (MCCSS) framework for change within the developmental services sector. It will

be necessary for organizations in the sector to create pertinent changes in order to become and remain successful within this new environment.

Sector Analysis

In June, 2021, the Ministry of Children, Community and Social Services (MCCSS) announced the *Journey to Belonging: Choice and Inclusion*, its framework for a long-term vision for developmental services in Ontario, “where people with developmental disabilities are supported to fully participate in their communities and live fulfilling lives. See <https://www.ontario.ca/page/journey-belonging-choice-and-inclusion>.

During the next eight to 10 years, MCCSS will embark on a plan for the future that focuses on people and how they can belong in their communities and live meaningful lives through person-centred and person-directed approaches. The following principles will help guide the Ministry’s reform agenda:

- **People receive support based on their needs** - Greater equity through individualized funding and budgets tied to people’s assessed needs.
- **Services build on the strengths of people and supports provided by families, support networks and communities** - Supports complement services available in the community and are culturally appropriate to reflect the needs of Indigenous people, Francophones and diversity within our communities, while also reflecting regional differences across the province.
- **Supports are person-directed and flexible** - People have more control over directing and managing their funding and supports.
- **Supports are proactive and responsive to people’s changing needs across the course of their lives** - Greater focus on early intervention and prevention for people, with supports that are better integrated with other sectors.
- **Services are driven by evidence, outcomes and continuous improvement** - More emphasis on outcomes and quality services that are responsive to feedback from people using them.
- **Services and supports promote health, well-being and safety** - Services promote positive health and wellness outcomes and a high quality and meaningful life experience. Supports help address systemic barriers (for example, discrimination, racism, ableism) that prevent people from accessing supports and fully participating in their communities.
- **System is sustainable** - Improving the ability of developmental services to help people now and into the future.

Key commitments related to the, *Journey to Belonging: Choice and Inclusion* are premised on three themes:

1. Putting people first
2. Improving service experience
3. Improving quality and accountability

Related action items include:

1. Putting people first

- Support people to pursue their goals through better planning and coordination across key sectors and programs
- Support individuals, families and support networks to make connections, get peer support and find information
- Address people's emerging needs and help prevent crises through early interventions and service coordination approaches

A new funding model focused on people

- Promote greater fairness and equity by providing funding based on people's assessed needs
- Give people more flexibility, choice and control by introducing options to direct their own supports
- Increase transparency for people and providers by allocating funding using an evidence-based funding model
- Provide people clear guidelines on the services and supports to be funded by the ministry
- Support people and agencies to adopt a new funding model

2. Improve service experience

- Improve the application process for people by making it simpler and easier to access
- Providing timely and clear information to reduce uncertainty for people and allow them to plan for their future

Improving how people's support needs are assessed

- Review different approaches to the application and intake process that are more responsive to people's circumstances, support needs and the service they are looking for
- Make it easier for people to understand the link between their assessed needs and funding and supports

- Improve how people's needs are re-assessed as things change in their lives and how supports may be adjusted based on those changes

Adopting best practices and supporting innovation

- Provide a platform that allows the sector to share best practices so ideas can be scaled-up and adopted across the province, including innovative technologies to support people to live more independently

Supporting technology and digital delivery

- Implement more convenient service options for people such as online forms, virtual delivery and self-serve options
- Use digital platforms to provide information and resources to people and families

3. Improve quality and accountability

- Support continuous improvement in services for people by introducing a performance measurement approach across the province over the next two years
- Help people better understand and choose quality services through a transparent quality framework
- Promote healthy competition among providers and reward innovators

Planning for a skilled workforce

- Support a skilled, diverse and professional workforce to help people participate meaningfully in their communities and live good lives
- Collaborate with the sector to develop a long-term workforce strategy so that people and their families have access to high-quality support staff

It is evident that Community Living St. Marys is considerably further ahead of other organizations in its development as being person-directed and in areas highlighted by MCCSS. This should not be surprising given the leadership role that Executive Director, Marg McLean has provided provincially as an ongoing resource to the ministry.

Key excerpts from the *Journey to Belonging: Choice and Inclusion* have informed the strategic plan. These include:

- People have more control over directing and managing their funding and supports
- More emphasis on outcomes and quality services that are responsive to feedback from people using them
- Increase transparency for people and providers by allocating funding using an evidence-based funding model

- Provide people clear guidelines on the services and supports to be funded by the ministry
- Improving the ability of developmental services to help people now and into the future
- Increase transparency for people and providers by allocating funding using an evidence-based
- Support people and agencies to adopt a new funding model
- Provide a platform that allows the sector to share best practices so ideas can be scaled-up and adopted across the province, including innovative technologies to support people to live more independently
- Implement more convenient service options for people such as online forms, virtual delivery and self-serve options
- Use digital platforms to provide information and resources to people and families
- Support continuous improvement in services for people by introducing a performance measurement approach across the province over the next two years
- Help people better understand and choose quality services through a transparent quality framework
- Promote healthy competition among providers and reward innovators

Given the proposed changes to the sector in the coming years, it is incumbent on Community Living St. Marys to:

- Define and assess service excellence related to all areas of service delivery with supporting qualitative and empirical metrics that inform and support decision making
- Understand and assess the “member experience” in conjunction with service excellence measures to continuously triangulate and strengthen practices that can be shared within the agency and across the sector
- Strengthen the “employee experience”
- Continue to build Community Living St. Marys’ reputation as a model of best practices that are aligned with the organization’s values, vision and mission
- Continue to augment government funding with alternative and innovative revenue sources

Key Drivers

Strategic plans are most effective when they have larger and overarching drivers that move goals and strategies forward. It was evident through consultations and an

examination of the *Journey to Belonging* that for Community Living St. Marys will be well served to:

1. Define and deliver Service Excellence in all aspects of its work
2. Become an employer of choice

