



# **Shuswap Association for Community Living**

***Shuswap Association  
For Community Living  
Strategic Plan  
2014 – 2017***

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## **Introduction**

The Board of Directors at Shuswap Association for Community Living (SACL) convened a strategic plan session on October 25<sup>th</sup> 2014. The purpose of this session was to review progress in achieving strategic goals from the previous strategic plan and to build on or revise the strategic goals so that they provide clear guidance for the next three years.

The planning session covered the following areas:

- Review of Successes and Challenges in Achieving Goals from the previous Strategic Plan
- Review of Other Organizational Planning Processes (e.g., Accessibility, Risk Management)
- Review of Organizational Strengths (what we do well, what we are exceptional at)
- Review of Organizational (internal) Weaknesses (what we struggle with, what we could do better)
- Review of External Challenges (what's happening around us, what are the trends)
- Review of Future Opportunities (where we could go, where the opportunities might lie)

This report documents the discussions in each area and the identified strategic priorities for the coming three years.

## **Strategic Planning Context**

### **Accreditation**

SACL is a CARF accredited provider of Employment & Community Services. CARF's accreditation standards require that organizations consider the following broad areas in the development of their strategic plan:

- The expectations of, and relationships with, the persons served and other stakeholders
- The competitive and legislative or regulatory environment that the organization operates in
- Financial opportunities and threats
- The organization's capabilities in relation to the needs in the service area
- The role of technology in supporting efficient and effective service delivery and operations
- Information from the analysis of performance improvement

(Source: CARF Employment & Community Services Standards Manual, 2014)

## **Agency Operational Planning Review**

The Strategic Planning Facilitator and SACL's Executive Director engaged in conversations prior to the planning session for the purposes of ensuring that various data sources that could be useful for planning were reviewed and analyzed. The specific data sources reviewed included;

- SACL's Previous Strategic Plan
- SACL's current Risk Management Plan
- SACL's current Accessibility Plan
- Most Recent Strategic Plan Monitoring Report

## **Input from SACL's Stakeholders**

The Strategic Planning Facilitator and SACL's Executive Director planned and implemented stakeholder input surveys and a focus group of individuals served in order to ensure that the strategic planning process was inclusive and reflect their voices, desires and expectations. The specific stakeholder input mechanisms included;

- A Family Member Input Survey (7 responses)
- A Community Stakeholder/Partner Input Survey (15 responses)
- A Staff Member Input Survey (19 responses)
- A Board Member Input Survey (3 responses)
- A Focus Group for Individuals Served (5 attended)

The results of the family member, community stakeholder/partner, and staff surveys are integrated in the environmental scan (below). Board members were present for the planning session and were able to confirm their feedback directly. Input from individuals served is described in the following section.

## **Privileging the Voices of Those We Serve**

It was important to ensure that the voices of those that SACL serves were at the forefront of the strategic planning process. In order to do this, SACL conducted a focus group with individuals. The results were reviewed and discussed prior to conducting the environmental scan. The highlights are as follows;

### What individuals enjoy the most about SACL:

- Recreation Program
- Recycling Program
- Shedding
- Activities (movies, Haney heritage park, You tube, exercise, reading, making onion rings)
- Respite at Dale's place
- Training, Support of staff
- Computers (Youtube)
- Field trips (Park, fun centre)
- Jobs (shovelling snow, A&W)

### What individuals enjoy least about SACL:

- Want to have more money to spend
- Wanting to be paid for more of the things they do

### New or different things that individuals think SACL should be doing:

- Activities (Cosmic bowling, Potluck parties, Gaming system, Cooking)
- Get pictures developed and share pictures
- Evening activities, swimming in the evening.
- Acting in the theatre, Shuswap Live Theatre

### Things SACL staff do that help make life easier for individuals:

- Help me to participate in programs
- Help job coaching
- Education
- Conversations around health and safety
- Social skills
- Dancing

## **Review of the Previous Strategic Priorities & Directions**

SACL established strategic directions in 2011. Progress on achieving these directions has been monitored on an ongoing basis, including through regular reports. The directions were again reviewed during the planning event to get a sense of overall achievement.

***1. Individuals with intellectual disabilities will experience safety, happiness, inclusion and the feeling of being valued. Our community will be more accepting, respectful and understanding of all individuals with intellectual disabilities.***

Progress: SACL's Executive Director reported that some of the individuals being served feel more inclusion and less segregation. This has been facilitated, in part, by the move in to town. Moving into town has also increased community acceptance. There is generally more awareness of persons with disabilities in the community because they are now much more visible. Funding continues to be the primary ongoing challenge in terms of meeting this objective. The Association would do more if it had more resources to devote to inclusion activities. Within current resources, staff roles have been changing as they are more involved in taking individuals out in the community and supporting them. There has also been a shift over time to working with more challenging individuals, an area of particular expertise for SACL.

***2. They will increase their financial independence as an increasing number of community employers hire our individuals through meaningful employment, including self-employment options.***

Progress: SACL has a contract to provide employment for up to 50 individuals. They have had substantial success in supporting individuals to find and maintain employment. The funder (CLBC) has described the program as one of the best in the Province. The ongoing challenge is one of capacity, both in terms of available jobs in the community and in terms of being able to take on new individuals without sacrificing support levels for those already being served. The Executive Director noted that SACL has not been as successful in the self-employment area.

***3. They will be safeguarded/ will have safeguards in place as needed.***

Progress: This particular goal area proved difficult to interpret and implement due to being very broad in scope. For practical purposes, it was interpreted as providing safety training and teaching. This training has been consistently provided to individuals and was noted in the feedback from them during the focus group session (above).

**4. They will be empowered to self-advocate.**

Progress: SACL responded to this strategic direction by attempting to set up a local self-advocates group. However, no funding was made available from CLBC to provide staff time to support getting the group up and running. The requirement to be accountable for delivery of hours for specific individuals has made it very difficult to carve off any staff time in the absence of additional funding. The agency has responded to this area by holding regular group meetings with individuals as well doing annual surveys. As one Board member noted, the challenge of “How do we create that community sense for these individuals” remains.

**5. The Association will facilitate families and caregivers being connected to appropriate resources if and when possible.**

Progress: This strategic direction is part of the ongoing work of SACL. The agency regularly provides information and reports to family members to keep them informed. They also conduct regular surveys that solicit their input. However the challenge remains one of engaging families that are already stretched and simply want services. From their perspective, they have little time for anything else.

**6. The Association will review and endeavor to develop a timeline to move from the present site into a downtown location.**

Progress: SACL has successfully completed the move to a new downtown location. However, the space has posed new challenges as is noted in the environmental scan below.

**Other Initiatives:**

As is often the case in organizations, new initiatives are undertaken that may not relate to a specific strategic objective. In the case of SACL, they purchased a home where individuals that they serve are currently being supported.

## **Review of Organizational Mission & Vision**

As part of the strategic planning process, the mission and vision of SACL were reviewed prior to completing the environmental scan and setting new directions. Although these statements of the Association's philosophical grounding were confirmed by the Board of Directors, the review was an opportunity to ensure that the planning process was grounded in the statements.

The following Mission Statement was confirmed:

***“Shuswap Association for Community Living creates opportunities and provides support to optimize the potential of individuals with intellectual disabilities.”***

The following Vision Statement was confirmed;

***“We envision a caring and supportive community where all people are valued.”***

It is worth noting that the Board engaged in an extensive conversation about the Mission statement and the degree to which it may or may not reflect future aspirations for the Association. The possibility of broadening the scope of services by taking out the word “intellectual” was discussed and may be considered further at future Board meetings.

## Environmental Scan

The following reflects the results of a comprehensive review of SACL's operating environment. This included a review of internal strengths and weaknesses as well as external challenges or threats. The review was directed towards identifying opportunities and identifying strategic directions for the coming three years.

### Strengths (What we do well... what makes us exceptional!)

Understanding and reflecting on areas of strength is critical to harnessing them for achieving strategic objectives. This review focused on overall organizational strengths in terms of what makes SACL exceptional. The approach reflects the belief that achieving strategic goals requires harnessing organizational capacities as well as the capacities of those who will provide leadership to specific objectives.

### What Makes Us Unique

The Executive Director and Board members present were asked to identify what they felt made SACL unique using single words. The following were their responses, organized around three themes;

#### How we are with our clients:

- Supportive
- Dedicated
- Committed
- Caring
- Compassionate
- Responsive

#### How we deliver our services:

- Excellence
- Leadership
- Staff
- Variety
- Tradition

#### What we do/Impact:

- Ability
- Employment
- Disabilities Met
- Service
- Community

### Stakeholder Perspective on Strengths

In addition to reviewing strengths from the perspective of those present at the planning session, the results of the various surveys were also reviewed to ensure that the perspective of staff, family members and external stakeholders/partners was also considered.

#### Parent Survey Highlights;

- The quality of care and service, having skilled and competent staff, and respectful relationships stood out as what characterized their best experiences with SACL.
- Flexibility was a key strength
- Good Employment Support was noted
- Staff care and take safety seriously
- Staff are very supportive – they go the extra mile.

### Staff Survey Highlights:

- “Delivers high quality services” – 95% gave the highest possible rating
- Clients have lots of input
- We are innovative in how we deliver services
- Staff support each other
- We make important contributions to the community
- We support inclusion
- Team Work
- Volunteering
- We get positive feedback from the community
- We are versatile
- We listen and respect

### Partner Survey Highlights:

- “Delivers high quality services” – 92% gave the highest possible rating
- “Well respected in the community” – 100% gave the highest possible rating
- “I would recommend the organization to someone seeking services for a person with disabilities” – 100% gave the highest possible rating

### **Strengths of the Organization as a Whole**

After review the survey information, Board members in attendance additionally noted the following strengths of SACL as a whole;

- Strong relationships with businesses in the community
- Best Employment program in the province (CLBC)
- An important part of the community/community life
- Longevity (Over 50 years in the community!)
- Flexibility

## **Internal Weaknesses (what we could do better at, what we struggle with)**

Identifying areas where the Association has struggled ensures that there is awareness of what hasn't worked or where growth or change is needed. The intent is to ensure that SACL avoids setting itself up for less than optimal performance by not acknowledging weakness or by missing opportunities for organizational growth.

As was done with the section on strengths (above) the results of the various surveys in regards to areas of weakness were also reviewed to ensure that the perspective of staff, family members and external stakeholders/partners was considered.

### Parent Survey Results:

- Lack of physical space in the new location
- Only 2 of 5 parents felt that staff went out of their way to a great or very great extent
- Need to improve communication with parents

### Staff Survey Results:

- While the results of the survey were generally quite positive, the questions with the least positive response were the following;
  - "Creates a positive work environment"
  - "Communicates clearly with staff and clients"
  - "I clearly know what is expected of me as an employee of this organization"
  - "I feel supported to go out of my way to make sure that individuals have a positive experience."

### Partner Survey Results:

- As with the staff survey, the feedback from partners and external stakeholders was quite positive overall. The questions with the least favourable responses were;
  - "Works well with community partners"
  - "Communicates clearly with community partners"
  - "I would recommend the organization as a good place to work"

In addition to the feedback from stakeholders, the following key areas of internal weakness were noted during the planning session;

- Resources – SACL continues to be challenged by having a lack of financial resources to achieve all it wants to achieve for the individuals it serves. The lack of financial resources translates into a lack of human resources. The Executive Director describes herself and her management team as being "stretched" due to the volume of work required to meet all standards of CLBC, CARF and legislative bodies.

- Capacity – Related to resources, general issues of capacity continue to be a challenge. Some staff lack skill sets in multiple areas, which make it difficult to share more of the work between positions. HR was noted as an area where the Executive Director plays a primary role, reducing her capacity to meet challenges in other areas.
- Board Capacity – Ongoing challenges with Board recruitment were noted as another area of internal weakness. While there have been recent additions to the Board along with some longstanding and devoted Board members, recruiting highly qualified individuals in a small community remains challenging.
- Physical Space constraints – While the move to downtown Salmon Arm has been generally positive for the Association and for those it serves, the new space has proved less than ideal. Issues with space were consistently noted in feedback from stakeholders as well. While the move to a smaller space was intentional, reflecting the belief that more and more of the work would happen in community, the facility continues to be a critical gathering point.
- Lack of public/community awareness of the Association – There was a general sense among those in attendance that there is a lack of awareness about the Association and what it does in the community. The conversation included reflection on what segments of the population might be important to target in terms of awareness given that general awareness of the Association might be less important than ensuring specific segments of the population were aware (e.g., parents of young children with disabilities, community employers).

## External Challenges/Trends (what's happening around us, what are the trends)

The group attending the planning day explored areas where the Association is experiencing some strain due to external pressures, trends or challenges. These may pose a threat to continued growth or to taking advantage of opportunities. External pressures, challenges and trends are acknowledged so that planning can effectively limit the potential negative impact of these contextual variables. The following external challenges were identified and reviewed:

- Competition – SACL is facing the potential of increased competition from service providers that are not local to Salmon Arm. An organization from the Vernon area currently provides home sharing services (not an area that SACL currently provides service) and recently set up a thrift shop. It is anticipated that any future Requests for Funding Proposals from CLBC will draw a number of proponents from outside the community. While there has been no specific loss of individuals served by SACL due to them choosing another service provider and the Association continues to get new referrals, it is unclear what information about service options is being provided or discussed with new individuals that are CLBC eligible entering the services system.
- Changing Demographics and Client Expectations – the changes in the service delivery systems and the market (or need) for services was discussed. This includes the reality that the service population is aging due to individuals with disabilities living longer and healthier lives than at any point in modern history. This is combined with the reality that those currently entering services at age 19 have lived different lives than their older counterparts and, as a result, have different expectations. They have experienced a high level of integration in school settings and their parents often take the view that their lives should be very much like that of their typical peers. While there doesn't seem to be any specific reduction in the need for services, the challenge discussed was one of maintaining traditional service models for those that are aging and have increasingly complex needs, while engaging youth who want services delivered differently.
- Lack of Awareness of Disabilities in the Community – Persons with disabilities continue to be somewhat invisible in community, and this impacts SACL's service delivery. While moving in to the downtown has increased visibility, there is still little awareness of the needs of these individuals in the broader community.
- Reliance on a Single Funder – the reality of having one main funder for all of the services that SACL delivers poses real limitations on the Association. CLBC continues to tightly manage its funding. This results in the resource and capacity strains noted in the section above on internal weaknesses. It was also noted that the funding model utilized by CLBC is highly inflexible, limiting the agency's ability to move resources to meet the needs of individuals. The agency has not engaged in fundraising and has not made any specific moves to diversify funding by seeking out opportunities to deliver services for other funding bodies (e.g., BC Housing, Interior Health).
- Downloading of Responsibilities from the Funder – In addition to the issues noted above with regards to reliance on a single funder, here are also issues with downloading of responsibilities from that funder on to its contractors. The specific example given was the downloading of responsibility to develop behavior support plans for individuals.
- Recruitment – SACL experiences ongoing challenges with recruitment, an issue that has been noted across the social services sector in BC. The work is generally low paying and can involve

personal care tasks that many are not willing to be involved with. While the agency has generally had a stable staff group and has not experienced high turnover, recruiting for vacancies is difficult.

- CLBC's shift towards measuring Quality of Life – CLBC has engaged in a process of measuring the quality of life of individuals receiving services across BC. Each service provider is provided with a report on how the individuals it serves are experiencing quality of life in eight unique domains. While it is being framed as a quality improvement tool, it is unclear how it might be used for contract management in the future. At the least, it results in an additional resource pressure as organizations are expected to facilitate individuals participating in the survey process.
- CLBC's shift towards employment services and away from group-based day services – CLBC has stated a clear preference for having individuals eligible for CLBC funding supported to have employment rather than being engaged in non-employment day services. While this has not resulted in a wholesale downsizing of traditional day service programs, it has had some impact on how services are provided. SACL has taken advantage of this trend by starting a very effective employment program.

## **Opportunities (where we could go, where future opportunities lie)**

Maintaining services to those currently participating in SACL's programs and looking for opportunities for sustainable growth will be key to future success. The discussions focused on identifying opportunities that capitalize on strengths and either avoid potential weaknesses/threats or support growth in areas of weakness.

As was done with the section on strengths and internal weaknesses (above) the results of the various surveys in regards to areas of opportunity were also reviewed to ensure that the perspective of staff, family members and external stakeholders/partners was considered.

### Parent Survey Results:

- Expanding Services – e.g., care aide services
- Developing/Delivering a Drop in Centre Downtown
- Seeking out Increased funding/New Funding
- Doing more night activities for individuals
- Providing more social opportunities for individuals, especially for those that are less disabled (i.e., matching activities with ability)

### Staff Survey Results:

- Providing affordable housing
- Increasing recreational opportunities for individuals
- More space
- More community involvement for clients/more events
- Improving staff morale
- More programming specifically for the ageing population
- Partnering with other Non-Profits
- More support for youth transitioning
- Fundraising
- Focus on skills for independence

### Partner Survey Results:

- Life skills teaching/more interaction between individuals
- Engaging younger demographic/transitions to adult services
- Employment/customized employment
- Working with aging individuals/seniors
- Community partnerships
- New Space
- Parent support options

- Developing a Thrift Store
- Social enterprise opportunities
- Low Cost Residential Housing
- Partnerships to reduce social isolation for individuals
- Dealing with mental health/behavioral issues

The areas of opportunity noted above were reviewed in detail by those in attendance at the planning session. The following specific areas of opportunity were then identified by the group.

- Growing Services – there were a number of potential opportunities for growth identified during the planning day. In addition to those already noted by stakeholders, the group discussed specific opportunities for SACL to provide;
  - Respite Services for Children/Youth
  - Residential Services for Adults
  - Services for Individuals with Autism
- Corporate Engagement – Stakeholders participating in surveys noted the importance of engaging the corporate sector. Several possible partnerships were specifically discussed during the planning session that could provide future job opportunities for individuals as well as raise the profile of the Association.
- Provider of Choice for Individuals with Higher Needs – SACL has started to establish a reputation of being able to provide services to those with the highest level of need. While there are recruitment challenges related to providing these services, it is an area of strength and an opportunity to provide more services and meet community need.
- Partnerships/Sponsorships – the group discussed several opportunities to partner with other non-profits around service delivery and opportunities to enhance community profile through sponsoring events or being sponsored. The marketing of the Association through sponsorships would raise awareness of the Association and possibly provide volunteer opportunities for individuals.

## Strategic Directions

Through the discussions, a number of specific strategic directions emerged and were identified as the planning day progressed. Rather than being the culmination of the day, these items were openly discussed throughout and helped to frame the conversations. The direction areas identified reflect current thinking within the Board of Directors and the Executive Director. They also reflect thoughtful consideration of current strengths, internal weaknesses, external challenges/trends, and current/future opportunities.

Along with specific strategic directions, tasks and indicators are suggested below so that progress will be measureable over the coming three years. The intention is for these tasks and indicators to be monitored by the Board and Executive Director and evolve or change over time as needed to support achievement of the strategic direction.

### **1) Strengthen Our Internal Operational Capacity**

Rationale: as was noted in the discussion above on internal weaknesses, operational capacity continues to be an issue. Senior leadership is stretched, which makes it difficult to take advantage of new opportunities. In particular, the agency needs to examine roles and responsibilities in current leadership positions, look at the potential use of volunteers to enhance administrative capacity, and consider partnership that could help to achieve operational efficiencies. As was noted by both those participating in the planning day and by stakeholder's participating in surveys, space continues to be a capacity issue. SACL needs to explore options for better use of existing space or alternative space. While all of these specific actions can build capacity, fundraising would also make a significant difference provided that it does not take away from existing administrative capacity. By strengthening internal capacity in these areas, SACL can better take advantage of opportunities for growth and service delivery improvement.

Activities/Tactics	Responsibility	Measurement/Indicator
Examine current leadership roles/responsibilities – propose and implement specific changes to leadership roles (as necessary) and/or short term investments in administrative or leadership capacity from existing finances	ED & Senior Leadership	Role changes identified/implemented and/or investment request made to Board
Investigate the use of volunteers to enhance administrative capacity or free up leadership time – implement use of volunteers to support enhanced admin capacity	ED & Senior Leadership	Volunteers engaged to support admin capacity (if feasible)
Initiate partnerships with other non-profits that could increase operational efficiencies (e.g., sharing costs of resources)	ED/ Board of Directors	New partnerships initiated (if identified)

Examine space issues and propose alternatives for review/approval by the Board (e.g., repurposing exiting space and/or developing new space)	Senior Leadership, Board of Directors	Space solutions proposed and approved by the Board
Explore opportunities for fundraising that will be designated for capacity building purposes (could include hiring fund development support)	ED, Board of Directors	Proposal for supporting fund development reviewed and approved by the Board

## ***2) Increase Our Visibility and Presence in the Community***

Rationale: While SACL has improved its visibility due to the move to downtown, more work needs to be done. Improving visibility supports the Association’s work to create job opportunities for individuals and to engage in meaningful partnerships that could enhance service capacity. It is important that the agency be seen as the provider of choice for individuals and families seeking services.

<b>Activities/Tactics</b>	<b>Responsibility</b>	<b>Measurement/Indicator</b>
Seek out/initiate partnerships or sponsorships with other community organizations (e.g., local theatre group)	ED, Board of Directors	At least one partnership or sponsorship initiated
Develop and implement a sticker campaign for “Disability Friendly Employers” to enhance visibility of those that choose to employ persons with disabilities	ED, Board of Directors	Sticker campaign initiated
Enhance relationships with existing community groups (e.g., non-profit service providers, service clubs, Chamber, Downtown improvement)	ED, Board of Directors	Increased activity/engagement with community groups
Enhance relationships with the Children’s Association and local Elementary Schools to increase visibility amongst parents of young children with disabilities	ED, Senior Leadership	Increased activity/engagement with Children’s Association and local schools

### 3) *Expand and Grow Our Services*

Rationale: Individuals with disabilities continue to need services and many will require even more service as they age. Individuals served noted their desire for access to more activities and more opportunities to earn money. As a local service provider with a 50 year history in the community, SACL is positioned to remain the primary provider of services, ensuring that services are completely oriented to local needs and that all of the economic spin off benefits of delivering those services remains in the community.

<b>Activities/Tactics</b>	<b>Responsibility</b>	<b>Measurement/Indicator</b>
Successfully apply to be a qualified supplier of group home services for CLBC	ED	Successful application
Explore provision of respite services for individuals with disabilities with MCFD/CLBC	ED	Opportunities for expanding into respite services reviewed with funders.
Expand service delivery funding from other funders within the agency's current scope (e.g., BC Housing, Interior Health)	Board, ED	Opportunities reviewed/identified – new funding for services sought
Explore funding arrangements or partnerships that could allow for increased evening activities for persons with disabilities	ED	Expanded evening services
Explore possible social enterprise opportunities	ED, Board of Directors	Review social enterprise opportunities with Board of Directors