

***Shuswap Association
For Community Living
Strategic Plan
2016 Plan Update***



Shuswap Association
for Community Living

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Introduction

The Board of Directors at Shuswap Association for Community Living (SACL) developed a strategic plan in October of 2014. As part of ongoing efforts to ensure the organization maintains a strong strategic focus, a planning session was conducted in November 2016 to update and revise the existing plan.

The planning session covered the following areas:

- Review of Mission & Vision
- Review of Successes and Challenges in Achieving Goals from the current Strategic Plan
- Review of Organizational Strengths (what we do well, what we are exceptional at)
- Review of Organizational Challenges (what we struggle with, what we could do better)
- 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 moving forward. No specific timeframe has been identified for these goals. The Board is committed to at least annual reviews of the plan and to updating the plan when required.

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, 2016)

Input from SACL's Stakeholders

SACL conducts surveys of those it serves and various other stakeholders annually as part of ongoing quality improvement efforts. This data was reviewed in order to ensure that the strategic planning process was inclusive and reflect their voices, desires and expectations. The specific stakeholder input mechanisms included;

- Surveys of individuals served in various programs
- A Community Stakeholder/Partner Input Survey
- A survey of employers involved with SACL's employment program

The results of the surveys were utilized throughout the conversations to review and update the strategic plan.

Review of Organizational Mission & Vision

As part of the strategic planning process, the current mission statement was reviewed by the Board of Directors;

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

The conversation about the current mission statement highlighted that the statement is generic and does not in any way associate the work as being grounded in community. It was suggested that the Board could revisit this statement and might revise it to read; **“Shuswap Association for Community Living creates opportunities and provides support to optimize the potential of individuals with intellectual disabilities in our community.”**

The current Vision Statement for SACL is;

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

Similar to the conversation regarding vision, the Board discussed a potential revision to make it more specific the work of the Society to support individuals with intellectual disabilities. The following revision was discussed; **“We envision our community as a caring and supportive place where people with intellectual disabilities are valued and included”.**

Follow-up: Discussion at Board future Board meetings regarding revision to the Mission and Vision.

Review of the Previous Strategic Priorities & Directions

SACL established strategic directions in 2014. Progress on achieving these directions has been monitored on an ongoing basis, including through regular reports to the Board of Directors. The directions were again reviewed during the planning event to get a sense of overall achievement.

1. Strengthen Our Internal Operational Capacity

Progress:

Objective	Progress	Achieved?
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	Leadership roles have been clarified and there is some added capacity with Gary currently working for the organization 3 days a week. However, leadership remains stretched due to capacity issues. The organization's size makes it difficult to achieve economy of scale with regard to funding administrative positions.	Partial
Investigate the use of volunteers to enhance administrative capacity or free up leadership time – implement use of volunteers to support enhanced admin capacity.	We approached Okanagan College and had one business student do her practicum with us to assist Melanie. We have requested that we get a practicum student every year.	Full
Initiate partnerships with other non-profits that could increase operational efficiencies (e.g., sharing costs of resources)	Several partnerships were explored, but none yielded significant benefits given the effort. Although partnerships may hold opportunities, the organization may need to be more focused in its efforts.	Partial
Examine space issues and propose alternatives for review/approval by the Board (e.g., repurposing existing space and/or developing new space)	The organization continues to examine space issue and opportunities. The current lease ends in 2017 and there may be opportunities to move into another space that is owned (instead of leased) by the agency.	Full
Explore opportunities for fundraising that will be designated for capacity building purposes (could include hiring fund development support)	The agency has an agreement with Value Village & Inclusion BC for the 3 bins across Salmon Arm and may also end up having bins for Inclusion BC in Vernon, Kelowna and Penticton as no non-profits have contracted for these services. There have also been used clothing drives and a gala. There are no	Full

	funds available to hire fund development support.	
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2. Increase Our Visibility and Presence in the Community

Progress:

Objective	Progress	Achieved?
Seek out/initiate partnerships or sponsorships with other community organizations (e.g., local theatre group)	<p>We have met with Louise Wallace of Salmon Arm Arts Centre – as of today’s date no partnership has been established.</p> <p>Through our Vancouver Foundation Grant we created partnerships with the Shuswap Settlement Society, Okanagan College (Aboriginal Advisor), and the “Community Connexions” Self-Advocate Group.</p> <p>The Clothing Bin program has resulted in the following partnerships/sponsorships: Askews (Salmon Arm & Armstrong), Salmon Arm ReMax, Gemm Diesel, Home Restaurant Sorrento, Real Estate Agency Jeff Stacer (ReMax); Warner Rentals and AAA Storage.</p> <p>SACL has also entered into a partnership with Community Connections in Revelstoke (as noted below).</p>	Partial
Develop and implement a sticker campaign for “Disability Friendly Employers” to enhance visibility of those that choose to employ persons with disabilities	The sticker has been created and has been distributed to all 37 employers.	Full
Enhance relationships with existing community groups (e.g., non-profit service providers, service clubs, Chamber, Downtown improvement)	<p>To date we have created a new relationship with ReMax (locally) and we are working with WHR (Orchard View) on doing some training for our staff.</p> <p>We have formed a relationship with Community Connections in Revelstoke. Our 2 agencies will work together to address the contracts for the transitioning youth in Sicamous.</p>	Full
Enhance relationships with the Children’s Association and local Elementary Schools to increase visibility amongst parents of young children with disabilities	<p>Our new position which will work with Transitioning Youth started in May.</p> <p>It has been slow to get this role better defined - but our next step will be to</p>	Full

	propose to the high schools to discuss presenting to parents & potential persons supported about the service.	
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3. Expand and Grow Our Services

Progress:

Objective	Progress	Achieved?
Successfully apply to be a qualified supplier of group home services for CLBC	We have received confirmation that we are now qualified to operate a Staffed Residential Facility (Group Home). We have been approved to provide Home Shares and have been awarded two contracts – as well two of our present contracts were reallocated as Home Share/Shared Living. Added a Home Share contract in Armstrong (June 1 st) and a Home Share contract in Enderby (September 1 st)	Full
Explore provision of respite services for individuals with disabilities with MCFD/CLBC	Both MCFD and CLBC and have been approached and have confirmed that there are no Respite opportunities available at this time.	Not Achieved
Expand service delivery funding from other funders within the agency's current scope (e.g., BC Housing, Interior Health)	We submitted a proposal at the end of April 2015 to the Ministry of Children and Family Development (MCFD) to operate a 2 bed Specialized Residential Services home for 2 youth with challenging behaviors. We were not successful applicants. An agency that has years of experience working with troubled youth were awarded the contract.	Not Achieved
Explore funding arrangements or partnerships that could allow for increased evening activities for persons with disabilities	We have been able to accommodate a couple of evening oriented activities with a couple of our individuals receiving one to one services. However staffing these types of activities continues to be a challenge.	Partial
Explore possible social enterprise opportunities	The clothing bins are currently the only social enterprise opportunity that the organization is involved in.	Full

Environmental Scan

The following reflects the results of a comprehensive review of SACL's operating environment. This included a review of strengths and challenges. The review was directed towards identifying opportunities and identifying strategic directions.

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.

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

Our People:

- An excellent Executive Director
- Dedicated Management Staff
- An engaged Board of Directors
- Committed front line staff group

Our Programs:

- Provincially recognized employment program
- Excellent day program
- Well run (new) Home Sharing program

Our Community:

- Community Visibility
- An engaged community
- Great relationship with CLBC!

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:

- Space – SACL continues to struggle with space issues. The current space, although located close to CLBC, is not ideal. There is also the potential to be able to provide more housing or provide group services. The current lease ends in November of 2017, so planning to move to another space would need to begin soon.
- Competition – SACL continues to facing aggressive competition from a service provider not local to Salmon Arm. It is anticipated that any future Requests for Funding Proposals from CLBC will draw a number of proponents from outside the community. CLBC provides each individual and their family with options for service providers, which means that competition will continue to be a challenge.

- Funding – the reality of having one main funder for all of the services that SACL delivers continues to pose real limitations on the Association. CLBC continues to tightly manage its funding. There is a possibility that even further cuts will be imposed through changes to funding formulas. As was noted in the previous plan, 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 continues to struggle to diversify funding sources even though it has had some success in fundraising.
- Internal Staffing Issues – Although the front line staff group is generally seen as a strength of the organization, HR issues have been time consuming and put strain on already stretched administrative resources. This is in addition to ongoing challenges of recruitment noted in the previous plan. The unionized work environment adds a further layer of complexity to managing HR issues.
- Increasingly Complex Service Needs – the dual challenge of an increased number of youth entering the service systems with autism and a population of existing individuals that is living longer than previous generations has resulted in increasingly complex service delivery needs.
- Succession Planning – The reality of stretched administrative resources and limited recruitment opportunities has meant that creating succession plans for senior positions is challenging. While the current Executive Director has no immediate retirement plans, her departure would leave a significant gap and there is no one currently identified as a potential internal successor.

Risks

The planning event included a discussion of possible risks based on the challenges identified above. The primary risks identified were;

- 1) Financial Distress – competition and the possibility of more funding cuts could slowly erode the organization’s financial position and eventually place it in jeopardy of insolvency.
- 2) Sudden Succession – should the current Executive Director exit the organization in an unplanned fashion, the organization would be severely hampered and would struggle to find a quality replacement with similar capabilities within their current budget.
- 3) Stagnant Market Share – increased competition, combined with staffing and space issues, may result in little or no growth which would continue to limit the organization’s ability to achieve its mission and vision.

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

Areas of opportunity were reviewed in detail by those in attendance at the planning session.

- Merging with or forming a strong strategic partnership with another similar organization
 - Explore mergers to build economy of scale
 - Consider a partnership with the Child Development Centre as a like-minded organization serving many of the same clients at a different age. Could create continuity for those individuals.

- Grow Services
 - Opportunities to expand into group care, add Home Shares, get more local business on-board for employment programming
 - More programming for younger participants
 - Expand our highly successful employment program into Vernon
 - Services to young adults with Autism and seniors with health care challenges
 - Explore possible opportunities in the agriculture sector to for employment and skill building

- Create New Program Space
 - Purchase a building
 - Purchase and create a new group home
 - Duplexes, apartment, retail

- Focus in Being the Best Provider
 - Creating excellence in all programming
 - Maintain high quality of services despite challenges
 - Build a strong administrative team with adequate access to training.

Strategic Directions

Through the discussions, a number of specific strategic directions emerged and were identified as the planning day progressed. The directions identified reflect current thinking within the Board of Directors and the Executive Director. They also reflect thoughtful consideration of current strengths, challenges, trends, risks, and current/future opportunities.

1) Acquire New Space for Programming and Administration

Rationale: as was noted in the discussion above, the current space does not meet organizational needs. There are also growth opportunities if the organization has space to accommodate group care or independent apartments for individuals served. This may create greater organizational stability over time through ownership rather than leasing.

Key Actions:

- Clearly Identify space/programming needs
- Consult with real estate professionals based on identified needs
- Implement action plan to achieve strategic direction

2) Explore and Initiate a Strategic Partnership to Enhance Sustainability

Rationale: Although organic growth through expanding programming will be important to pursue, the organization may be able to enter into a strategic partnership or relationship with an organization that would enhance stability and sustainability. This could include a merger. Increased size would provide greater economy of scale for administrative supports and may also allow for better succession planning.

Key Actions:

- Identify a priority list of potential partners
- Initiate discussions with the highest priority partner first, which may require Board to Board engagement
- Develop and formalize partnership/relationship based in mutual interests

3) *Expand/Grow Services*

Rationale: Individuals with disabilities continue to need services and many will require even more service as they age and there is a steady stream of individuals becoming eligible for CLBC services. SACL should capitalize on all legitimate and financial viable opportunities to expand services to those it is committed to serve.

Key Actions:

- Explore expansion of employment program to Vernon
- Submit response to RFP for group services
- Expand Home Sharing where possible
- Review feasibility of providing independent apartments for individuals

4) *Maintenance Goal: Continue to Deliver High Quality Services*

Rationale: Although space acquisitions, strategic partnership and growth are high priority goals, the organization must ensure that it continues to respond to its current consumer base and deliver the highest quality programs possible.

Key Actions:

- Successful re-accreditation
- Continued development/training for staff at all levels of society
- Capitalize on fundraising opportunities with low input requirements and high yield