



**Shuswap Association
for Community Living**

Strategic Plan 2022 - 2027

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Introduction

In May of 2022, the Shuswap Association for Community Living (SACL) initiated a comprehensive review and renewal of their strategic plan. A review of materials provided by the organization was completed in early May. This information informed preparations for a full day facilitated planning event that brought together staff and the Board of Directors of SACL. The planning event on May 14th 2022 resulted in the identification of strategic directions and specific associated objectives. In sum, the planning work covered the following areas:

- Organizational Foundations: Mission, Vision, Values
- Strengths, Achievements & Assets
- Challenges & Trends
- Opportunities & Risks
- Strategic Directions (themes) & Objectives

The Organization

The Association has been providing services and support for people with intellectual disabilities and their families since 1963 and started as a school in the basement of a local church. In 1967, the Salmon Arm school board took over the education of children with intellectual disabilities, and the association then provided services to adults. The organization currently offers a full range of services to adults with developmental disabilities in the Shuswap with funding provided primarily by Community Living British Columbia.

Planning Context

The Shuswap Association for Community Living is a CARF accredited provider of 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 organizations operate in
- Financial opportunities and threats
- The organization's capabilities in relation to the needs in their 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, 2022)

Activities & Data Sources that Informed the Strategic Plan

The process of gathering input to inform the plan involved:

- A review of the previous strategic plan and progress towards achieving the goals identified in that plan
- A review of survey results from persons served and other stakeholders that are gathered annually by the agency as part of their performance measurement process
- A full day facilitated planned event held on May 14th in Salmon Arm.

Mission, Vision, & Values

The mission, vision and values of the Shuswap Association for Community Living (SACL) grounds the work of the organization, including its future strategic direction.

SACL Mission:

Shuswap Association for Community Living creates opportunities and provides support to optimize the potential of individuals with diverse abilities in our community.

SACL Vision:

We envision our community as a caring and supportive place where people with diverse abilities are valued and included.

SACL Values:

- Friendships & Relationships
- Meaningful Activities
- Life Long Learning
- Having a Say
- Being Safe & Healthy
- A Welcoming Community
- Honouring the Past & Embracing the Future

Environmental Scan

The following reflects the high-level results of a comprehensive scan of the SACL's internal and external operating environment. The scan includes information gathered through document review and during the facilitated session.

Achievements

SACL has played a vital role in the provision of services to persons with disabilities in the Shuswap region for nearly 60 years. Although the organization has a long history of achievements, the following were identified during the facilitated session with a focus on the last several years:

Strong Leadership Through the Pandemic

- Excellent management team
- Strong leadership on the board of directors
- Grown the management team

Proactive Approach to Human Resources

- Strong HR, proactive
- Supporting people through the pandemic, talk to face to face
- Clarity of roles
- Diversity in hiring
- "Not myself today"
- Transition to working from home

Effective Technology

- Technology, new VPN, refurbished computers
- Move to paperless

Supporting Persons Served

- Staff support for challenging behaviors

Strengths

The following strengths emerged from an analysis of feedback from the facilitated session:

Excellent Leadership

- Management team works well together, supports each other
- Strong management team with diverse skills
- Dedicated managers
- Open board discussions
- A board of directors that are supportive
- Diverse and engaged leadership
- Strong ED

Safe & Positive Work Environment/Teams

- Super positive environment
- Safe and respectful working environment
- Good interpersonal communication
- Care about the happiness of staff
- Strong team
- Committed staff team
- Staff who feel valued
- Caring employees

Excellent Services

- Support of persons served
- Persons served included in community
- Provide wrap around services for people - home, CI, employment
- Commitment to person served
- Growth in all program areas
- Always see there is room to grow and improve

Opportunities for growth

- Professional development and advancement opportunities
- Front end training

Strong Connections to Community & CLBC

- Strong positive relationship with CLBC
- Strong connections to Salmon Arm

Assets

An inventory of assets was completed during the facilitated event, with the following identified as tangible and intangible assets:

Tangible Assets

- Tri-Plex
- Two story house
- Two vehicles
- Reserves
- Computers
- VPN

Intangible Assets

- Skilled committed board
- Good relationship with CLBC locally
- Relationship with CMHA
- Excellent stakeholder relationships
- Strong management team
- Long term employees, depth of experience
- Strong relationships with employers
- Relationship with clients, families, and community supports
- Only local service provider
- Strong brand amongst those needing services

Challenges

The facilitated session highlighted the following challenges that SACL currently faces:

Recruitment & Retention of Staff & Board Members

- Recruitment and retention
- Attracting & orienting new Board members
- Maintaining staff levels
- Jo-Anne retiring (managing the transition)

Inadequate Funding

- Inadequate funding from CLBC
- Low wages
- Small agency = few dollars for admin roles/support or to increase management
- Fundraising – hiring someone just to focus on initiatives
- Finding partners for growth

Ensuring that Services Meet the Range of Person Served Needs

- Services for young people – more responsive
- Appealing to the wide range of persons served in global programs
- Simplification of language on documents, website, etc.

Space for Programs/Persons Served and Administration

- Housing crisis impacting persons served
- Need to have more/better space for our services and admin
- Challenges of a facility purchase

Relationship with CLBC

- Trend towards micromanaging contracts and downloading onto agencies

Trends

A review of trends in the current operating environment impacting the Association utilizing PESTLE:

| | |
|---|---|
| <p><u>Political</u></p> <ul style="list-style-type: none"> • Funding changes for disabilities sector, more changes are likely as we emerge from the pandemic • Union Bargaining • Housing density in Salmon Arm | <p><u>Technological</u></p> <ul style="list-style-type: none"> • Pace of technological change • Lack of access for many in the community • Younger generation being absorbed in technology • Cost of technology, cybersecurity • Remote working • Technology needed to provide services |
| <p><u>Economic</u></p> <ul style="list-style-type: none"> • Inflation • Low unemployment • Cost of housing • PWD funding has stayed the same • Possible clawback from CLBC | <p><u>Legal</u></p> <ul style="list-style-type: none"> • Vaccine mandates, public health orders • Liability, increasingly litigious society • Privacy breaches |
| <p><u>Social</u></p> <ul style="list-style-type: none"> • Substance abuse, homelessness, and crime • Loss of MSDP volunteer stipend program • Trying to find inclusion opportunities – needs to be a more welcoming community • Transportation in the rural context • Community is not that diverse • Younger families moving back, ability to work from anywhere with internet access • Influx of people working elsewhere that choose to live here • Social divisions, polarization • Truth and Reconciliation Commission – ongoing to work to implement recommendations | <p><u>Environmental</u></p> <ul style="list-style-type: none"> • Climate change • Natural disasters • Managing changes to services |

Opportunities

The following themes for opportunities emerged from the facilitated event in priority order and aligned with the broad categories of services, technology, recruitment/retention, fundraising, and outcomes measurement:

Expanding Services

- Expand services to meet changing social needs
- Provide affordable housing for persons served, explore different housing models
- Social enterprise employment opportunities
- New space or building
- Partnering to provide more services

Leveraging Technology

- Developing plain language docs and website
- Using technology to provide support
- Technology could support merging with another small agency outside of our areas
- More use of online services for person served

Recruitment & Retention Strategies

- To put strategies in place to attract new staff and develop staff's potential
- Seek alternative hiring demographics
- Recruiting young board members from Okanagan College
- Bringing in a new ED

Increasing Fundraising

- Farm to Fork Fundraiser
- Large annual community fundraising event

Improving Outcomes/Performance Measurement Processes

- Experimenting with alternative forms of data collection
- Updating survey questions
- Change performance management objectives into more measurable ones

Risks

The facilitated session highlighted the following risks for the Association:

Loss of Funding

- Loss of any admin funding
- Funding reductions
- CLBC Cutbacks/clawbacks

Changes to Service Delivery Models

- CLBC changes their standards and focus and we need to adjust our service again
- Not being ready for any changes in services
- Changes to government agenda and focus of funding

Competition

- Increased competition of community
- Larger organisations getting new contracts because larger and more flexible
- Lack of adequate funding due to being outbid on contracts

Recruitment

- Risk not being able to grow due to being able to recruit
- Recruitment challenges and lack of space impact potential for growth

Strategic Themes & Objectives

Through the facilitated session, key strategic themes emerged. These themes reflect thoughtful consideration of all the topics reviewed through the day as well as the survey data. Most importantly, each is intended to support the Association in achieving its mission and vision by leveraging its strengths while addressing challenges and risks.

We will achieve our Mission by focusing on:

Strategic Theme One:

Growing Our Services

Objectives:

- Identify and implement opportunities to use technology to expand or diversify services
- Explore opportunities to create housing for persons served and staff
- Continue to act on opportunities to expand service delivery to CLBC
- Explore potential partnerships/mergers that would allow for expansion of services
- Acquire more space/different space to support future service delivery
- Actively gather and use feedback from persons served and other stakeholders on current and future service needs

Strategic Theme Two:

Investing in Staff/Team Growth & Development

Objectives:

- Experiment with different approaches or methods to recruit and retain staff
- Continue to invest in learning opportunities for staff
- Implement initiatives to ensure that the agency remains a supporting and positive work environment (staff appreciation, flexible work arrangements, etc.)
- Value/encourage innovation in how we support people (clients and staff)

Strategic Theme Three:

Diversifying our Funding Sources

Objectives:

- Identify and implement new Fundraising initiatives
- Explore social enterprise opportunities

Shuswap Association for Community Living Strategy Map



