



Community Living Thunder Bay

# Strategic Plan 2015 to 2019

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**Draft – June 2014**



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# 1 INTRODUCTION

Since 1954, Community Living Thunder Bay has been providing services and supports to people with developmental disabilities and their families throughout the Thunder Bay area. They are a leading service provider and advocacy organization, committed to enhancing the quality of life, citizenship and opportunities for the individuals that they support. They are also integral members of the Community Living Movement in Ontario, ensuring that people with developmental disabilities are fully included in all dimensions of community life.

Over the course of the last few years, the Community Living Thunder Bay has experienced significant changes in leadership and governance within the organization, as well as ongoing strategic changes occurring within the funding, policy and related operating environments. The introduction of the Passport Program and individualized funding; changing demographics, involving particularly the aging of the people supported; and a host of other perspectives are creating unique opportunities and challenges for the organization to engage in at a strategic level.

On Saturday June 7, 2014, seven members of the Board of Directors and four senior staff participated in a facilitated workshop to develop the next generation Strategic Plan for Community Living Thunder Bay. The workshop opened with a review of strategic trends, that could influence the organization's operating environment; a review of the survey responses provided by advocates, families and staff; and the development of a strengths, weaknesses, opportunities and threats assessment by the workshop participants that is available in Appendix I.

The Workshop then moved towards a discussion on the Vision, Mission and Principles of the organization. These discussions identified key words and phrases that were then developed via this document into some alternative wordings for the Vision and Mission that will be further discussed and developed by the Board of Directors. With this work completed, the Workshop participants then focused on the development of three Strategic Directions to drive the organization forward over the next three years, 2015 to 2017, plus two additional flexible years 2018 and 2019, along with aligned strategies for each of the Strategic Directions.

This document represents a draft Strategic Plan. It will be further developed and finalized by the Board of Directors and senior staff. Once this has been completed and the Strategic Plan is approved, the senior management team will be responsible for completing the Implementation Plan utilizing the implementation template charts that are available in this document.

## 2 VISION

A Vision is like a horizon. It has the capacity to galvanize the goodwill, energy and commitment of all stakeholders to move together towards a common goal with common cause. Like a horizon, as one moves towards it also moves further away which denotes the constant change perspectives that exist within the operating environment and which organizations need to work within.

The following Visions have been developed as a basis to facilitate further Board of Director and senior staff discussions.



The following points further help to understand the key themes within the Vision Statement.

- **Inclusive communities that are accepting** – communities are where people live, work and play. They are the basis by which people develop their capacities and realize their goals. Communities need to be inclusive, accepting and engaging of all their members in order to be fair and to ensure the community uses all the resources available to it.
- **Of all people** – every member of a community is equal, can contribute and must have an opportunity to grow and develop. Inclusion includes all people.
- **Support their full citizenship and engagement** - identifies the outcomes that Community Living Thunder Bay is dedicated to achieving through its Vision, which is every person realizing their potential, being full and contributing citizens to their community and being treated equally.

### 3 MISSION STATEMENT

A Mission Statement outlines the fundamentals and essence of an organization to the reader. It expresses the purpose and intent of the organization. In application terms, every strategic and operational decision an organization is making or contemplating, needs to align with its Mission. If that alignment is not evident, then the organization needs to ask why it would make such a decision or whether it needs to review its Mission Statement.

The following two Mission Statements have been developed to facilitate a discussion amongst the Board of Directors and senior staff on finalizing this component of the Strategic Plan.

Community Living Thunder Bay is committed to supporting people with developmental disabilities and their families to be fully participating and contributing members of their community through active engagement, positive relationships and achieving what is important to them.

Community Living Thunder Bay supports people with developmental disabilities to understand and realize their potential, to achieve wellness and contentment, and to be fully contributing members of their community.

The following material provides additional insights and perspectives on the key themes in the Mission Statement.

- **Support people with developmental disabilities and their families** – identifies the service population that Community Living Thunder Bay is dedicated to working with, supporting and in helping them to achieve their goals and aspirations, and to be included in community life.
- **To understand and realize their potential** - identifies that every person has potential, can contribute, and can meaningfully engage in community life. Community Living Thunder Bay is dedicated to helping people identify their potential in realizing their dreams and aspirations.
- **Wellness and contentment** – identifies a second key outcome of the work Community Living Thunder Bay, which is to support individuals to live healthy lifestyles, to be well emotionally and physically, to achieve inclusion, and to realize a sense of contentment.
- **Fully contributing members of the community** – represents the fact that every person can contribute, has the ability to add value and is important in building a community. Being included, contributing and having the rights and responsibilities of citizenship are fundamental to

the work Community Living Thunder Bay undertakes, and what needs to be achieved for people with developmental disabilities.

## 4 Principles

Principles have three roles within a Strategic Plan. First, they provide an opportunity for further understanding the Mission Statement. Second, Principles identify how the organization views and will interact with people on a relationship level. Third, they have the opportunity to identify key areas of organizational accountability.

The following Principles have been developed for Community Living Thunder Bay

### We believe...

<b>Dignity and Respect</b>	In the fundamental dignity of each person as an individual, and in building positive relationships based on trust and respect.
<b>Inclusion</b>	All people are to be included in the life of their community as full, active and accepted members and citizens.
<b>Service Excellence</b>	In delivering services and supports that are evidence-based, use best practices and meet the evolving needs of the people supported and their families.
<b>Dynamic Culture</b>	In developing an organizational culture that fosters innovation and flexibility, supports continuous improvement, uses team approaches and nurtures lifelong learning
<b>Staff and Volunteers</b>	In recognizing the vital contributions of staff and volunteers in meeting the needs of the people supported and the organization.
<b>Celebrating</b>	In celebrating the realization of the goals and success of the people supported and the organization.
<b>Partnerships and Voice</b>	In developing innovative and comprehensive partnerships and collaborative initiatives that enhance the overall resources available, improve the quality of services delivery and give voice to the people supported.
<b>Rights and Responsibilities</b>	In advocating for the rights of every person supported as both a citizen of their community, and their responsibilities as a citizen of that community.

**Accountability**

In being accountable for the decisions we make, the use of the resources provided to us, and acting with integrity and transparency in all that we do.

## **5 Strategic Directions**

Strategic directions identify the priorities the Board of Directors believes the organization needs to focus on in order to move towards the achievement of Community Living Thunder Bay's Vision and Mission. They represent the first step in operationalizing the Strategic Plan, providing management with the platform upon which to undertake implementation and ongoing decision-making.

The following three Strategic Directions and their aligned strategies have been identified for Community Living Thunder Bay for the 2015 to 2019 period.

### **1 Fostering a Culture of Excellence**

- .1 To develop strategies that continually empower staff and volunteers to meaningfully engage in the work of the organization and in supporting people with developmental disabilities through defining and practicing a shared leadership model for Community Living Thunder Bay.
- .2 To develop annual communications programs that are built around audience-based messages and formats that effectively reach all the segmented audiences engaged with Community Living Thunder Bay.
- .3 To further define and develop the Positive Approach Model to service delivery as the "cultural spine of the organization," or the foundation for services and supports delivery through education, training and modeling.
- .4 To develop staff and volunteer recognition and engagement strategies on an annualized basis that effectively increase staff and volunteer satisfaction and participation across the organization.
- .5 To integrate across the organization, a value for and a culture of listening to one another, to the people supported, to families and to the community as a basis to facilitate and enrich decision-making.
- .6 To implement an accountability framework within the organization that ensures timeliness in completing tasks, effective implementation of policies and procedures and the fulfilling of each person's roles and responsibilities.

## **2. Achieving Excellence In Services and Supports**

- .1 To complete a comprehensive supports and services review across the organization to ensure that each one fully integrates the core values of the organization, and is aligned with the differentiated needs of young people and their families, older families, the aging service population, multi-cultural communities and other service dimensions.
- .2 To actively foster innovation, use of best practices and evidence-informed approaches in the ongoing development, delivery and evaluation of programs and services.
- .3 To pursue strategies that build the needed capacity of the organization to be the effective and evident leader in the development and delivery of services and supports to people with developmental disabilities and their families in the service area.
- .4 To undertake the exploration, development and related steps needed to ensure that Community Living Thunder Bay is fully prepared, on a timely basis, to engage in individualized funding initiatives through Passport, fee for service and other emerging transitions and opportunities.
- .5 To develop a performance management program that effectively measures the achievement of the outcomes for the people supported as a basis to identify the value Community Living Thunder Bay delivers to the people it supports, families, the community and funders.

## **3 Leaders in Organizational Excellence**

- .1 To develop diversified strategies that enhance the financial sustainability and capacity of the organization through program funding; fund development, including planned-giving; and other net revenue generating opportunities, potentially including social entrepreneurship.
- .2 To actively pursue new and more dynamic and comprehensive partnerships and collaborative frameworks that move beyond what is being undertaken today to new levels of capacity building, resource sharing and positive results for the people supported.
- .3 To develop strategies that substantively increase the community development capacities, visibility and positive relationships of Community Living Thunder Bay within its community.
- .4 To continue to define, develop and implement the new governance model that is evolving for Community Living Thunder Bay.

- .5 To develop an organizational performance model using key performance indicators (KPIs) that demonstrate the achievements of the organization in meeting its mandate, goals and role in support of people with developmental disabilities, their families and the community.

**Strategic Direction No. 1**, focuses on one of the most important outcomes of the stakeholder surveys and the workshop discussions, that is a need to transform the culture of the Community Living Thunder Bay. The organization has had challenges, has undertaken strategic changes and now needs to build on the recent momentum that has been created in moving the organization towards a greater sense of common purpose, achievement and excellence.

The **first strategy** involves the need to develop a culture where staff and volunteers are empowered to do their work, to make decisions and to be fully engaged as key contributors in the work of Community Living Thunder Bay. This needs to be developed based on the defining and implementation of a shared leadership model and other approaches that allow individual staff and volunteers to realize their potential, to meaningfully contribute and to be seen as active participants in the work of the organization.

The **second strategy** is to move the organization from message-based communications to audience-based communications. This change is a significant generational transition that uses different messaging and formats / channels of communications to reach the distinct requirements of each audience involved with Community Living Thunder Bay. Communications can no longer be achieved through homogeneous approaches.

The **third strategy** involves positioning the Positive Approach service delivery model as the core service value of the organization. Achievement of this strategy will involve education, modelling, training and other strategies necessary to ensure that all services are driven by this approach and belief.

The **fourth strategy** focuses on developing the recognition and engagement strategies that will substantively enhance staff satisfaction and engagement. There has been wide identification that there are morale challenges and that there needs to be demonstrated and targeted tasks undertaken to build engagement, to build value, and ultimately to build satisfaction through meaningful participation by staff and volunteers as key stakeholders in the organization.

The **fifth strategy** involves enhancing the listening ability of the organization across all its relationships. From the workshop discussion and surveys, there has been identified a deficit in the organization's ability to listen well, strategically and to use the information from those who provide input effectively and meaningfully. The ability to listen is a key success factor for any organization, and this skill needs to be enhanced.

The **sixth strategy** involves the need to develop an accountability framework within the organization, that is a framework that indicates to all staff and volunteers that they need to complete their tasks on time and at the quality levels necessary; that key stakeholders have responsibilities; and that people need to meet their commitments and requirements in fulfilling their role within the organization and on behalf of the people they support.

**Strategic Direction No. 2.**, focuses on pursuing service excellence within the Community Living Thunder Bay. In an operating environment that is likely going to be more competitive and diverse, and where expectations and needs amongst people supported and their families is segmenting and changing, the need to offer services that are high quality, relevant and wanted by the people supported is a vital success factor.

The **first strategy** involves undertaking a comprehensive review of all services and supports offered by the organization, both directly and through partnerships, to ensure that they fully integrate the core values of the organization of inclusion, Positive Approaches, and that the people supported become full and contributing citizens. These services also need to align themselves with different audiences that are emerging, such as young families and their children, older families, the aging service population, multi-cultural communities, First Nations and others that have distinctively different needs, expectations and values.

The **second strategy** focuses on developing, delivering and evaluating programs and services based on their level of innovation, the use of best practices and being evidence-informed. Services and supports are becoming more dynamic, more targeted and there is more and more research available. In order to sustain and grow service quality, and to be increasingly relevant to the service population, it is vitally important to support innovation, best practices and evidence-informed initiatives.

The **third strategy** is intended to position Community Living Thunder Bay as a leader in its sector and the community. A strategy needs to be developed that builds this capacity across all levels of Community Living Thunder Bay, now and in the future.

The **fourth strategy** recognizes that individual funding, such as Passport, fee for services and other strategic changes is evolving in terms of how funding is moving forward and how families will be engaged. Community Living Thunder Bay needs to prepare itself for these strategic changes and not wait until they occur. Developing the capacities, the tools and the practices necessary to fully engage in these areas of service needs to start now through research, development, piloting and related techniques.

The **fifth strategy** identifies the need for Community Living Thunder Bay to develop a performance management model that is able to identify and report on what is being achieved for the people supported in terms of them realizing their goals, aspirations and outcomes. This initiative represents the basic value proposition that Community Living Thunder Bay offers as to the use of its resources and capabilities to achieve real outcomes for real people who have real needs.

**Strategic Direction No. 3**, involves the pursuit of organizational excellence, that is developing the organizational capacities, systems and processes of Community Living Thunder Bay that ensure that the resources, capabilities and structures are in place to facilitate the development of the dynamic culture of Strategic Direction No. 1, and that the quality and capacities of the services that are to emerge from Strategic Direction No. 2.

The **first strategy** involves the development of a multi-year financial sustainability program for Community Living Thunder Bay. This program needs to assess potential revenues and expenses, both

current and what emerges from the work within the Strategic Plan and whether new fund development techniques, such as planned-giving and other tools can be utilized to enhance the financial resources. Also, it needs to look at other types of income that could be available to the organization through social entrepreneurship or other emerging techniques.

The **second strategy** involves entering into, where feasible and viable, different forms of partnerships and collaborative initiatives that go beyond today's norms. Partnerships and collaboration that are deeper, more intense and may have higher risk in overcoming current partnership barriers in order to maximize the resources availability and the outcomes for people supported on a shared basis and outside the silos that often exist.

The **third strategy** involves substantively enhancing Community Living Thunder Bay's presence, visibility and community development capacities. There is a general perspective that the organization is not that well known or understood, has not realized its full potential across the community and needs to invest and work on broadening its outreach and community development activities, particularly related to developing strategic relationships.

The **fourth strategy** involves further developing and finalizing the governance model for Community Living Thunder Bay. The Board has identified that it is moving to a new model but there is considerable definition, policy, procedural and practice activities that need to be developed and further implemented before the model is finalized and in full bloom. The Board needs to work on this actively in order to create a strong governance foundation for the organization to move forward.

The **fifth strategy** involves developing an organizational performance model that clearly outlines what the Key Performance indicators are for Community Living Thunder Bay, and to develop the capacity to measure and report on them annually. This strategy needs to be integrated with the other two performance and accountability strategies identified in Strategic Directions 1 and 2. All three of these strategies are important to each of the individual Strategic Directions but also have a integrated reality in order for them to enhance overall organizational effectiveness.

## 6 Implementation

### 6.1 WORK PROGRAM

The following charts provide a framework for developing the implementation plan for Community Living Thunder Bay 2015 to 2019 Strategic Directions.

The implementation plan represents a roadmap that guides the specific activities undertaken in support of the Strategic Directions and their various strategies. However, this roadmap must also remain flexible as change continues to evolve within the operating environment and other impacts will occur that will adjust/amend priorities, methods and activities.

### 6.2 STRATEGIC PLAN REVIEW

A three-part Strategic Plan review process is identified for the Community Living Thunder Bay:

- Quarterly, the Board and senior staff should complete a review on the following:
  - Actions taken
  - Barriers occurring
  - Recommendations on revisions and new inputs
  - Other key information
- Every year, the Board and senior staff should allocate a block of time to review the Strategic Plan, the key inputs, changes in the operating environment and make appropriate adjustments to the timing, tasking and related dimensions of the Strategic Plan's implementation.
- Every three years, the Board and senior staff should engage in a full review process similar to their current initiative in order to ensure the relevancy, timeliness and scope of the Strategic Plan in moving the Community Living Thunder Bay towards the realization of its Vision and Mission.
- Also, the Board should report on the progress being made on the Strategic Plan at its Annual General Meeting, in its Annual Report and newsletters, and on its website.

## APPENDIX I

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Strengths, Weaknesses, Opportunities and Threats Assessment

## **Strengths**

- The strong core values of the organization, principally focusing on inclusion and person-centered approaches.
- The commitment and dedication of staff, and their desire to support people.
- The advocacy capacity of the organization, and the established relationships that Community Living Thunder Bay has developed.
- The renewed enthusiasm that is emerging amongst the membership as positive change evolves.
- The resilience of the organization after substantive changes and challenging times.
- The strength-based or Positive Approach strategy of the organization, and how it works with the people supported.
- The training that is provided across the organization.

## **Concerns / Issues / Weaknesses**

- The lack of follow-up within the organization and role accountability.
- Significant staffing challenges involving the number of part time positions and their availability, morale, buy-in to the Positive Approach, quality of work, frustration, and the divided perspectives around both change and no change that creates frustration.
- The challenges with the satisfaction engagement with staff
- An organizational culture that is not invitational, has challenges supporting change and innovation, and lacks empowerment due to more centralized decision-making and the acceptance of low quality outcomes.
- Finding a role for the members as their momentum builds.
- Board and volunteer recruitment.
- A lack of community development and the depth of community connectivity.
- The emerging competitive framework, especially around individualized funding and the gap that could be occurring in services and staffing.
- Communications overall.

## **Opportunities**

- The emerging excitement and potential for the organization with the sense of hope that is starting to prevail.
- The clinical approach, Positive Approaches, which is on the cusp of services delivery.
- The partnerships and collaborations that have been achieved.

- The directions and vision of the organization are aligned with those of MCSS, which is important and can be built on.
- The advocacy work with families is strong, improved relationships can occur and they now feel heard.
- The new leadership, and Board decision-making and commitment is growing.
- The recent human rights decision on minimum wage provides an opportunity to build on.

### **Threats**

- Loss of funding, or more restrictions on the use of funds.
- Centralized union negotiations that could reduce local opportunities and relationships.
- Any lack of staff buy-in, commitment.
- Any loss in the values and leadership of the organization.
- Not building an enhanced and more dynamic culture, and not sustaining the positive momentum that has been initiated.
- Ineffective change management strategies that undermine the gains made.
- Not responding to or adequately innovating within the transformation agenda. At the same time not effectively managing Community Living Thunder Bay's constituencies in terms of those who want change and those who do not.