

# STRATEGIC PLAN

## 1.0 INTRODUCTION

The Independent Living Centre of Waterloo Region is a unique service-providing agency that provides both supports to the cross-disability community, and attendant services for adults with physical disabilities throughout Waterloo Region. It is the only Independent Living Centre in Canada that has this dual capacity. The organization has been serving its consumers throughout the Region for many years.

The Independent Living Centre focuses on a services delivery model that supports self-direction and decision-making by consumers. Therefore, the role of the Centre and its staff is to provide the necessary supports that maximize the opportunity for consumers to achieve independence and freedom through self-determination.

In 1996, the Centre prepared a Strategic Plan. By 1999, the Board of Directors of the Centre identified a need to undertake a new strategic planning process. The reasons for this initiative were as follows:

- completion of the major Areas of Effort within the 1996 Strategic Plan;
- the significant policy and funding changes that have occurred within the operating environment of the Centre;
- the significant trends that are identifiable and will be impacting service delivery over the next number of years.

In support of the strategic planning process, nine focus groups and interviews were undertaken with consumers, caregivers, community representatives and staff as a basis to identify the strengths, weaknesses and opportunities of the organization. A summary document of these input sessions represented a resource package to the participants of the strategic planning retreat and is available under separate cover.

On the afternoon of Friday, October 29, 1999 and on Saturday morning, October 30, 1999, fourteen members of the Board of Directors and staff met at the Freeport Campus of the Grand River Hospital to develop the components of a Strategic Plan. These components involved a review of the current Vision, Purpose and Core Values of the organization as developed in 1996. The session further identified and developed a series of Areas of Effort to assist in operationalizing the Vision and Purpose of the organization over the next three to five years.

This document presents the results of the strategic planning session and a Strategic Plan for the Independent Living Centre of the Waterloo Region. Once reviewed by the participants and others, a final draft will be prepared and submitted to the Board of Directors for approval. Once the Board of Directors has given their approval, the Strategic Plan will proceed to implementation.

## 2.0 Vision

A Vision identifies the horizon that the organization is striving to reach. Like a horizon, it has the ability to galvanize the perspectives and purposes of all the stakeholders. Also like a horizon, it is constantly moving which reflects the nature of the operating environment. Therefore, a Vision sets a direction and allows all the stakeholders to connect to a common perspective and cause.

In light of the research undertaken in the focus groups and a review of the role and purpose of a Vision, the strategic planning participants undertook a review of the current Vision for the ILC. It was decided that this Vision was not reflective of what was needed and a new Vision was developed.

Together, freedom through access and choice.

Three key points are incorporated into the Vision. These are:

- Together - this represents the fact that ILC works collectively with the consumers, caregivers, the community, staff, volunteers and other service providers to meet the needs of consumers.
- Freedom - this single word is the foundation of the Vision, reflecting what each consumer is reaching for. Achieving freedom allows each consumer to live independently, and to maximize their potential and contributions as a full member of the community.
- Through Access and Choice - in the Vision, choice and access reflect the key elements by which freedom is achieved. When one has access, one has choice. When one has choice, one has freedom.

### 3.0 PURPOSE

The Purpose defines the intent, major thrusts and other key elements of the organization. In application terms, every strategic and operational decision undertaken by the organization needs to find its legitimacy and basis in the Purpose. If any decision is inconsistent with the Purpose, then either the Purpose must be redefined or the decision lacks congruency with the organization=s purpose.

In reviewing the current Purpose of the organization in the context of the extended discussion undertaken with respect to the focus groups and the development of the Vision, it was determined that the current Purpose strongly and accurately outlines the Mission of the organization. It was decided that this statement would continue as the Purpose of the organization.

#### PURPOSE

The purpose of ILCWR is to support persons with disabilities by:

- facilitating individual growth towards greater independence;
- creating greater opportunities to make informed choices; and
- assisting in the removal of barriers to full participation.

The key elements of the Purpose are as follows:

- Support Persons with Disabilities - the organization undertakes its work in a supportive format focussing on the needs of persons with disabilities. It is through supportive efforts that it facilitates access to and the delivery of a range of services that allows consumers to undertake self-directed approaches within their lives.
- Greater Independence - the primary intent of the organization is to maximize the independence of each consumer through facilitating access to and the availability of resources on a self-directed basis.
- Informed Choices - ILC works to create opportunities through information, education and supports that allow consumers to make informed choices within the self-directed

philosophy. It is through information that consumers can make the best choices for their own particular situations and needs.

- Removal of Barriers to Full Participation - One of the key strategies of the organization in reaching its Vision and Purpose is to constantly work at the removal of barriers, whether physical, perceived, systemic or whatever, that reduces the participation, therefore the choices of consumers and their ability to achieve the freedom and independence desired.

#### 4.0 CORE VALUES

Core values have three major considerations within any organization. First, they help further articulate key areas of the Purpose. Second, they identify the values by which the organization will operate. Third, they begin to identify key areas of accountability for the organization.

The strategic planning session participants reviewed the current Core Values statements of the organization. Based on this review, some modifications and additions were made. The following represents the Core Values for ILCWR.

#### CORE VALUES

Justice - fairness and objectivity

- equal and open opportunities for all

Dignity - showing respect towards others and expecting it in return

- a caring and considerate attitude

Team Work - working towards the good of the whole

- building an integrated community

- developing mutually beneficial partnerships

- creating an organizational culture that fosters innovation, humour,

flexibility and accountability.

The Core Values identify the three key value clusters / principles that are essential for the long term success of the organization in defining its relationship with consumers, staff and the community. These are justice, dignity and team work.

Within each cluster key elements are identified for that particular value theme. For justice, the emphasis is on fairness, objectivity and equal opportunity for all. This ensures that the ILC is inclusive, responsive and treats all people as equal in terms of their needs, backgrounds and their right to access opportunities that enhance their freedom and independence.

Relative to dignity, this involves the showing of respect, both in terms of respect to others and others being respectful of each person. This theme is also combined with the value of having a caring and considerate attitude with all stakeholders which is respectful of the relationships, the needs of consumers and the individuality of each person as a human being.

The third cluster, team work, defines in value terms, the key elements of how the organization needs to undertake its work and build its relationships. The organization is dedicated to working towards the good of the whole community and ensuring that the community is welcoming and integrated so that it is accepting of and values all its members. The ILCWR also values mutually beneficial partnerships as a way to maximize the opportunities for the freedom and independence of each consumer. Further, the ILCWR, in regards to its team work values, needs to foster an organizational culture that ensures that innovation, in terms of relationships and practises, is constantly evolving, that humour is introduced in order to build relationships and that flexibility is a fundamental belief in terms how services are provided and relationships are developed. Additionally, the culture needs to support and practise accountability, both in terms of individual relationships with consumers and for the consumers themselves, as well as the organization related to the programs its delivers and the resources that it utilizes.

## 5.0 INDEPENDENT LIVING PHILOSOPHY

One of the founders of the independent living philosophy, Gerben Dejong, believed that persons with disabilities should have the same opportunities and access to the same resources as others in society. Independent living is the right to: examine choices, make decisions, take risks, make mistakes, and take responsibility for one's own life.

## 6.0 AREAS OF EFFORT

Areas of Effort are the first level of operationalizing the achievement of the Vision, Purpose and Core Values of the organization. It is important for the organization to select a few Areas of Effort that it can actually achieve rather than a long list of initiatives that ultimately are not realized or which will overburden the organization in terms of its also needing to operate successfully on a day to day basis.

Based on the research and discussions, the strategic planning participants developed the following Areas of Effort for the ILCWR.

#### Area of Effort 1: Human Resources Plan

To develop, implement and evaluate on an ongoing basis, a Human Resources Plan that effectively responds to the vital staffing needs of the ILCWR with respect to:

- successfully recruiting competent new staff;
- retaining skilled and experienced staff;
- providing initial and ongoing orientation and training programs for current and new staff;
- clearly identifying the roles and responsibilities of staff;
- undertaking compensation strategies that support all the elements of the Human Resources Plan and Core Values of ILCWR;
- recognizing, on an ongoing basis, the contribution staff make to the organization
- developing coaching and mentoring opportunities that foster the growth and development of staff, as well as an annual staff performance appraisal system.

The input from the focus groups and other sources identified this Area of Effort as probably one of the most significant challenges for the ILCWR. An aging workforce, increased competition for the same staffing pool, consistency of roles and functions delivery and other considerations were strongly identified. Staffing is the key to the ILCWR being able to successfully deliver its programs and services and achieve its Vision and Purpose. A sustained effort is needed to overcome the challenges and to position the organization more strongly related to the recruitment, retention, orientation and training of its staff.

## Area of Effort 2: Communications Plan and Community Awareness Creation

To develop a Communications Plan and community awareness creation strategies that:

- effectively communicate the Vision, Purpose and Core Values of the organization;
- increase the awareness of the ILCWR and its contribution, both to consumers and the community at large;
- promote the Independent Living philosophy and consumer-directed model of service delivery;
- create stronger linkages to and awareness levels within the health care sector of the Waterloo region;
- better inform staff with respect to the changes and activities in the organization

What is identified in this Area of Effort is an ongoing major initiative for the ILCWR. Awareness creation, both generally in the community and specifically related to primary sectors such as health care, was widely identified as a key success factor. Also important was educating consumers, staff, service providers and members of the community at large on the benefits of consumer-directed programs and how they operate on a day to day basis.

An annual communications plan is seen as vital to effectively delivering, on an integrated basis, all the various communication, education and awareness creation requirements of the ILCWR, along with establishing key responsibilities in moving this Area of Effort forward in a methodical and active manner.

## Area of Effort 3: Program Development, Evaluation and Resourcing

To develop the program and service delivery capacities of the ILCWR to:

- broaden the current program evaluation model so that it is implemented annually, has defined outcomes, and effectively incorporates cost/benefit analysis;

- create the capacity within the organization to identify service gaps in the community and the changing needs of current consumers; evolve strategies that effectively respond to these gaps and needs;
- respond more effectively to the housing needs of consumers;
- locate adequate resources for ILCWR programs including partnerships, fundraising, new funding sources, the use of volunteers and related opportunities;
- undertake a volunteer development initiative that brings enhanced volunteer resources into the organization;
- educate consumers about their role and responsibilities in the self-directed model of service delivery and the opportunities that are available to them;
- develop a shared understanding of the services we provide by clearly interpreting and communicating the relationships and expectations between consumers, attendants and supervisors;
- ensure a strong consistency in how services are delivered across the organization

An aging population, changes in how services are being delivered and many other factors indicate that the program and service area needs ongoing attention and development as it evolves. This task ranges from consistency of interpretation and supports to consumers to creating an evaluation tool that identifies outcomes, determines the measures by which outcomes will be evaluated and how the reporting of the outcomes will be achieved. It also involves the ability to identify the needs of current consumers and gaps in service in the community, as well as developing diversified resourcing strategies that enhance ILCWR=s ability to increase its programs and services capacities.

#### Area of Effort 4: Organizational Development

To undertake and continually evaluate the organizational development needs of ILCWR related to:

- enhancing the effectiveness of the organizational structure and developing board, staff and volunteer roles that support the achievement of the Vision and Purpose of the organization;
- actively working to enrich the team building perspectives and capacities of the organization

- achieving an organizational culture that fosters innovation, creativity, a sense of belonging and purpose, and supports accountability in all dimensions of ILCWR;

Organizational development is an ongoing initiative within the ILCWR and all non-profit agencies. Based on the results of the research work and the other three Areas of Effort, a review of how the organization is structured and the roles and responsibilities of the various positions within the organization will need to be completed. The introduction of a more comprehensive volunteer development program was also identified, both in terms of being an organizational resource, as well as supporting opportunities for consumers to volunteer within the community.

Ongoing efforts to expand and enhance team building initiatives and to further develop the strong organizational cultural environment were identified. Part of this could be achieved through the development of coaching and mentoring strategies and the annual application of a staff performance appraisal system that builds on their strengths and supports individual staff growth and development.

## 7.0 IMPLEMENTATION

The strategic planning participants identified that a separate group of individuals will be needed to advance each of the four Areas of Effort. They undertook to profile a representation model that should occur for each of the Areas of Effort, and the initial leadership person responsible for organizing the initiative in its early stages and related considerations.

In support of moving each initiative forward, the following tasks have been identified and would be undertaken by each of the identified leaders in order to start up the particular Area of Effort Workgroup. These are:

- Development of a Terms of Reference that would be approved by the Board of Directors and the Executive Director
- Recruitment of the representatives to the Workgroup and their orientation to the Strategic Plan and the Terms of Reference for the Workgroup.
- Development of a work program by the Workgroup that identifies all the tasks that will be undertaken in developing the initiative, a schedule, resource requirements, subgroups that will be utilized, approvals that will be necessary and related considerations.  
(Template is provided)
- Develop a governance strategy for the leadership of the group once the work program has been developed.

The following member representation profiles were developed for each of the four Workgroups.

#### Human Resources Area of Effort

- Director, Human Resources - Chair
- Executive Director
- Director, Community Support Services
- Supervisor, Attendant Services
- Attendant
- Consumer
- Board member

#### Communications and Community Awareness Creation Area of Effort

- Director, Education and Promotion - Chair
- Executive Director
- Supervisor, Attendant Services
- Community representative
- Consumer
- Board member

#### Program and Service Development Area of Effort

- Director, Community Support Services - Co-Chair
- Supervisor, Attendant Services - Co-Chair

- Executive Director
- Attendant
- Consumer Coach
- Consumer
- Board member

Organizational Development Area of Effort

- Executive Director - Chair
- Director, Human Resources;
- Director, Community Support Services
- Director, Education and Promotions
- Supervisor, Attendant Services
- Attendant
- Board member