

# ILCWR Strategic Plan 2009–12

## Introduction

This document represents the efforts of a board/staff strategic planning process that began in November 2008 and was completed in March 2009. The details of the planning process are laid out in Appendix A.

## Vision

For many organizations, particularly in the private sector, visions commonly speak to self-improvement in some way or another, to be the best at what they're doing. When ILCWR developed a new vision in 1999, it described the leaders' dream for what the world should be like for persons with disabilities living in Waterloo Region.

*"Together, freedom through access and choice"* recognizes the two foundations (access and choice) necessary for independence, or freedom. It also speaks to our desire to do things collaboratively; in particular, working together with our consumers to help them achieve their preferred level of independence.

The ILCWR board and senior staff still consider this to be a noble vision to strive for, a horizon that we'll continue to approach as we develop and deliver services to our consumers in Waterloo Region.

## Mission

The mission or purpose of an organization articulates what role it will play in the community to realize its vision.

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

- facilitating individual growth towards greater independence
- creating opportunities to make informed choices
- assisting in the removal of barriers to full participation in the community
- improving the capacity of caregivers to assist and support them
- helping to increase the community's acceptance and integration of them

Our mandate is to help *individuals* — persons with disabilities — and their caregivers, but also to remove barriers in the community, including attitudinal ones.

## Values

Core values determine how people in the organization (board, staff, volunteers) operate; they inform the way decisions are made, how services are delivered, and what kind of relationships are important.

ILCWR has three core values: *justice, dignity and teamwork*. During some

work on culture

in 2006 (see below), employee groups were invited to add their own values to these three. As a result, those working at the main office embraced 'welcoming' as a fourth value; and both the supportive housing staff and the outreach staff independently picked 'respect' as a value that they would like to adopt.

### **The Independent Living Philosophy**

ILCWR is part of the Canadian independent living movement and has always embraced the Independent Living philosophy. The IL philosophy has many descriptions but the most common one, articulated by Gerben DeJong, states 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."

### **The ILCWR Philosophy**

In 2002, ILCWR further defined its own unique philosophy via six belief statements:

- ILCWR believes in and supports the rights and responsibilities of persons with disabilities and those persons working with them.
- ILCWR believes that accommodation, which embraces the diversity of persons with disabilities and is sensitive to unique needs, is essential to support persons with disabilities to exercise their rights and responsibilities.
- ILCWR believes that persons with disabilities are equal to their fellow citizens and must have access to the unique supports they need to be empowered to fully participate in their communities. ILCWR is also responsive to the needs of those who support persons with disabilities, such as staff, family members, friends and volunteers.
- ILCWR believes that the mandates and regulations of government and funders are minimum requirements that must be met.
- ILCWR believes in advocating for the elimination of barriers and in challenging public attitudes.
- ILCWR believes that clear, respectful and open communication among all parties is required to achieve its purpose and vision.

In addition, nine key terms were defined in terms of the ILCWR philosophy: accommodation, attendant, consumer, consumer-directed services, consumer-staff relationship, disability, empowerment, full participation and inclusion (See Appendix B).

### **ILCWR Culture**

Organizational or corporate culture is the combination of mission, philosophy and core values that make a place unique. For an organization to have and maintain a positive culture, each and every employee must know what it is, feel connected to it, and work to achieve it.

To be easily remembered, the essence of a culture must be short, so in 2007, ILCWR defined its culture as:

Mission: *helping people with disabilities achieve independence*

Philosophy: *consumer control*

Values: *justice, dignity, team work; trust and welcoming (see Appendix B)*

During the scope of this strategic plan, a communication plan will be developed and a process implemented to ensure that policies and procedures and service delivery are congruent with the ILCWR culture.

### **Target Populations – Attendant Services**

One of the main drivers in initiating a strategic planning process was the changing environment with the health care transformation in Ontario and the introduction of local health integration networks (LHINs). A key task was to review the ILCWR mandate and determine how it fits in a system focussed on keeping seniors at home and people out of hospitals.

The November sessions strongly affirmed the agency's intent to focus its resources on working with those who can direct their services, but did encourage a mild shift toward seniors with age-related disabilities.

As leadership staff began to explore how to operationalize this, they came to a realization that including frailty as an admissions criteria would open the gate too wide. The consensus was to remain where we are: adults with permanent physical disabilities, who require personal care, and who can direct their services (age *not* being a criterion).

There was also an openness expressed to consider, on a case-by-case basis, opportunities that will improve the system, but stretch the mandate of the agency. This, of course, would require board approval.

### **Target Populations – Community Support Services**

Outside of attendant services, our mandate is more inclusive. As the first independent living centre in Canada and now one of 28 across the country, we are a cross-disability organization. We exist to provide support and assistance to persons with any type of disability; consequently, programs like advocacy and peer support are available and used by a richer variety of consumers.

### **Strategic Directions**

During the November sessions, board and staff identified a number of strategic directions for the agency. Some were new, but most were already reflected in the current plan. These were fleshed out during a series of meetings with key staff and incorporated in the existing four areas of effort.

These 29 directions will inform staff over the next three years as they plan and prioritize their efforts to achieve the mission of the organization.

### **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 staff by:
  - exploring the possibility of collaborating with other agencies and connecting with other existing strategies such as Health Force Ontario
  - analyzing data of successful attendants, new hires and other stakeholders to develop a marketing plan for recruitment
  - continuing to advocate for fair compensation for attendant services within the health care system
  - developing strong relationships with educational institutions;
- retaining skilled and experienced staff by:
  - researching the possibility of creating full-time positions in Outreach and Respite
  - reviewing the physical demands of the job of an attendant and identifying possible job redesign initiatives to accommodate the older worker
  - further developing the staff section of the website to provide current information and online training opportunities
  - reviewing possible implementation of shift premiums and further changes to the mileage reimbursement program
  - offering more career development opportunities
  - enhancing staff recognition efforts
  - continuing to improve communication with community-based attendants;
- providing ongoing orientation and training programs for current and new staff;
- developing an annual staff performance appraisal system;
- ensuring health and safety policies and procedures are in place to minimize injuries to employees.

### **Area of Effort 2: Communications Plan**

**To develop a *Communications Plan* and create community awareness strategies that:**

- effectively communicate the Vision, Mission, Philosophy and Core Values of the organization;
- increase the awareness of the ILCWR and its contribution by:
  - developing a media relations strategy
  - regularly informing representatives from all levels of government
  - actively participating in community events including partnerships

- developing a more robust website
- expanding the distribution and placement of agency brochures
- creating opportunities to network with the business sector and influential community leaders
- planning and producing ACCESS 2010, a two-day consumer exhibit showcasing programs and services for persons with disabilities;
- better communicate with current and potential ILCWR consumers by:
  - increasing the content, functionality and accessibility of the website
  - improving the use of e-mail
  - developing a newsletter strategy that carries appropriate content, targets specific populations, and is delivered in a timely fashion
  - exploring a phone tree to distribute urgent information
  - enhancing the supervisor-consumer relationships;
- better communicate with ILCWR staff and volunteers by:
  - increasing the content, functionality and accessibility of the website
  - improving the use of e-mail
  - striking a social committee
  - evaluating and improving staff meeting frequency and formats
  - enhancing the supervisor-attendant relationships through positive telephone and face-to-face contact;
- maintain historical information about ILCWR;
- increase and involve the membership base.

**Area of Effort 3: Program Development, Evaluation and Resourcing  
To develop the program and service delivery capacities of the ILCWR  
to:**

- develop an ongoing, participatory and comprehensive evaluation model to ensure quality services;
- respond to appropriate service gaps identified by
  - the WWLHIN's Integrated Health Service Plan
  - other WWLHIN priorities
  - results from ILCWR program evaluations;
- expand consulting and training capacity by:
  - becoming experts on the standards developed by the Accessibility for Ontarians with Disabilities Act (AODA)
  - developing education and training programs on the five AODA standards
  - creating a marketing strategy;
- locate and maintain adequate funds through an annual fundraising plan;
  - pursue various funding sources e.g. governments, grants, service clubs
  - develop new fundraising initiatives e.g. box lunches, spaghetti dinner
  - develop a planned giving program
- nurture positive relationships with our major funders (WWLHIN, IL Canada-HRSD, United Way, Waterloo Region, etc.) to secure ongoing

- program funding;
- enhance our ability to respond to changing care needs;
- develop our capacity to engage and manage volunteers;
- support and educate consumers to direct their services;
- foster a healthy interdependent relationship between consumers and staff;
- ensure a strong consistency in how services are delivered across the organization;
  - examine the assessment process to ensure all eligibility criteria are met
    - e.g. ability to direct, need for personal care
  - develop protocols for transition planning for end of care situations
- refocus the in-home respite program;
- ensure that risks are managed.

**Area of Effort 4: Organizational Development**  
**To undertake and continually evaluate the organizational development needs of ILCWR by:**

- enhancing the effectiveness of the organizational structure;
- developing board, staff and volunteer roles that support the achievement of the Vision and Mission of the organization;
- actively working to enrich the team building perspectives and capacities of the organization;
- nurturing an organizational culture consistent with its Philosophy and Core Values;
  - develop an internal communication plan
    - effectively use stories to exemplify consistent practices
  - ensure congruence
    - policies and procedures align with ILCWR culture
    - service delivery is consistent with philosophy and values
  - expand opportunities for consumer involvement
  - improve consumer-staff relationships through increased emphasis on customer service
- recognizing, on an ongoing basis, the contribution stakeholders make to the organization;
- continually improving the administrative processes and technical/information capabilities to most effectively manage the agency.

**Next Step: Balanced Scorecard**

After board approval in March 2009, ILCWR will begin a process to adopt a Balanced Scorecard methodology and the strategic directions will be mapped into five areas (similar to the ones used by the Waterloo-Wellington Local Health Integration Network).

- Consumer Perspective

- High Quality Services
- Organizational Capacity
- Financial/Fiscal Health
- System Perspective

A reporting system will be devised to allow the board to monitor the progress of the strategic plan. Performance indicators will also be developed to report to our funders.

Work plans will be developed and maintained to ensure that the activities of staff are responding to the directions identified in the strategic plan.

## Appendix A: The Planning Process

<b>Date</b>	<b>Step</b>	<b>Who</b>	<b>Completed</b>
Dec 19	Update staff at staff meeting	Fred	
Dec 22 – Jan 13	Develop strategic plan framework	Fred	
Jan 12	Review and approve time line	Board Governance	
Jan 14	Review framework	Leadership Team	
Jan 15–21	Prep work for LT retreat	Fred	
Jan 22–23	Work on strategic direction issues/groups	LT (retreat)	
Jan 26	Review and approve direction	ILCWR Board	
Feb 2–27	Flesh out strategic directions	Board/staff meetings	
Mar 2–6	Write draft one of strategic plan	Fred	
Mar 11	Review draft one	LT	
Mar 12	Review draft one	Consumer focus group	
Mar 17	Review draft one	Board Governance	
Mar 17–19	Revise, prepare draft two	Fred	
Mar 25	Review draft two	LT	
Mar 27	Review draft two	Staff meeting	
Mar 30	Approve strategic plan	ILCWR Board	

## **Appendix B: Definition of Terms Used by ILCWR**

ILCWR believes in and subscribes to the ideas expressed in these key terms.

### **Accommodation**

Accommodation means providing the necessary supports for persons with disabilities to fully participate in a manner which is sensitive to their individual circumstances. Their needs are to be accommodated, wherever possible, in such a way that the privacy, comfort, autonomy and dignity of the person are respected.

Solutions are often unique to an individual's specific needs and might not be applicable to other similar situations. Equality is demonstrated not by standard solutions but by successfully responding to individual need. However, this does not preclude that certain accommodations will benefit a large number of persons. - e.g. curb cuts

### **Attendant**

An attendant is someone who is employed to work in partnership with an individual with physical disabilities to meet their personal support and homemaking needs, based on the instructions of the consumer and on a plan that is mutually agreed upon with the supervisor.

### **Consumer**

A consumer is a person with disabilities who uses the services of ILCWR. The term consumer is sometimes used more broadly to describe persons with disabilities in general.

### **Consumer Directed Services**

Consumers are considered the best judge of their own needs and interests and should, therefore, have a decisive voice in determining which services they should receive and how these services should be delivered. They also have the right to direct their services without being guided or pressured by the service provider. In a collaborative fashion, ILCWR commits itself to hearing and considering all service requests while ensuring that they fall within the resources and mandate of ILCWR and comply with relevant legislation.

Consumer direction and self direction are the same.

### **Consumer-Staff Relationship**

This is often a complex human relationship that involves a wide range of positive and negative emotions, feelings, conflicts and issues for both parties, especially in attendant services when two people work together very closely.

The ILCWR philosophy encourages both consumer and staff not to ignore but to address these issues as a part of a healthy relationship and, as equal partners, try to resolve them. The consumer and staff work as a team and are often interdependent; consequently, mutual respect, understanding and responsibility are required to ensure success.

### **Disability**

Disability is considered to be a restriction or lack of ability to perform an activity of daily living.

### **Empowerment**

Empowerment enables all persons to exercise their responsibilities and rights to examine options, to make choices, to take risks, and to make mistakes, unless such activities lessen the empowerment of others.

### **Full Participation**

Full participation means creating a barrier free, supported environment that enables individuals to participate in the community as much or as little as they want to. While full participation has been a core principle of the independent living movement, it is the individual who determines the level of involvement.

### **Inclusion**

Inclusion involves the creation of a climate of understanding and mutual respect for the dignity and worth of each person so that all feel a part of the community and are able to contribute to it. For ILCWR this includes the opportunity to participate in organizational decision-making and policy development, as well as consumer representation on the staff and board.

## **Expanding on our 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
- developing mutually beneficial partnerships

**Respect**

- courteous regard for people's feelings
- a sense of the worth of a person

**Welcoming**

- a warm and inviting atmosphere
- an inclusive and open approach