



5-Year Strategic Plan

Fiscal '20-'25

Executive Summary

Between May 2018 and February 2019, the management team at Community Living Hamilton (CLH) undertook a strategic review of the business to build a plan to improve performance for the 2019-20 fiscal year.

The processes started with clearly articulating the Mission or the core purpose of the organization; the Values that guide our decision making and actions; and the Vision, the long term view of success for the organization.

It was identified that the organization faces some key strategic issues including employee management, sub-optimal processes, brand recognition, and program level financial management.

A Balanced Score Card was designed which will be used to manage 5 dimensions of organizational performance – Employee Safety, Quality of Service, Employee Development, Engagement & Culture, Financial, and Operational Excellence. A total of 12 Key Performance Indicators (KPIs) were identified to assess performance of these 5 dimensions. Targets were developed for each KPI. Further 8 KPIs were given improvement targets over last year's performance.

Finally, each improvement target will be supported with a performance improvement initiative sponsored by a director or senior manager and with a timeline for completion.

The strategic plan is executed through a series of review meetings attended by the senior management team – daily morning meetings review short term issues; monthly Balanced Score Card review meetings review the performance of KPIs; weekly Master Plan meetings review progress of improvement initiatives.

The Foundational Elements

The Organization's Mission

An organization's mission is a statement of the organization's purpose, its fundamental reason for existing. The mission statement for Community Living Hamilton is an expression of this core purpose and outlines the services and facilities that customers can expect from the organization:

Dedicated to providing opportunities and support to help people with special needs build great lives

Community Living Hamilton serves people with special needs by providing them with opportunities and support so they can achieve their goals. We do this by offering programs where they learn new skills that prepare them to join the workforce. We also deliver and facilitate support services that ensure they are integrated into the community and able to build great lives.

Our Vision

The organization's Vision is a realistic, credible, concrete, attractive future that inspires its employees to aim towards. As the 'North Star' for the organization, this statement provides direction and guidance for strategic projects and everyday decisions:

All people with special needs achieve their full potential and are included in our community

Our vision celebrates diversity and honours human potential. We believe that everyone in our community should have the opportunity to build a great life – a life that is characterized by fulfillment and contentment. In particular, we believe that people with special needs should be empowered to make their own, unique contributions and that those contributions should be recognized and celebrated. We also believe our community is stronger when everyone is included and when individual needs are supported.

G-R-E-A-T Values

Values are the enduring, passionate and distinctive core beliefs that guide the actions, decisions, and are the pillars for the organization's culture.

Community Living Hamilton's values are captured in and are referenced by the word GREAT:

G - *Growth that exceeds expectations*

This value has three dimensions.

1. We value personal growth and support our clients and staff by offering them opportunities to have new experiences and expand their skills. At Community Living Hamilton, we are all life-long learners.
2. We are growing the scope and volume of services we provide. We're doing this by building capacity and pursuing excellence.
3. We are growing the number and range of partnerships we have – partnerships that enable us to do more for the clients we serve. Those partnerships are with government, other agencies, community organizations, funders and advocacy groups.

R - *Respect for all*

We have the greatest respect for the people we serve and the people we work with. That means honouring their abilities, qualities and achievements.

E - *Excellence and safety in everything we do*

We are committed to the pursuit of excellence in our work and are continually improving the way we serve our clients and their families. We also hold ourselves accountable for maintaining the highest standards of quality and safety in all our practices.

A - *Abilities first*

Above all else, we see people first – we see their abilities first. We believe everyone can make unique contributions to our community and we're dedicated to enabling and empowering them to do just that.

T - *Trust and integrity*

We are honoured that our clients and the community trust us, and we are committed to maintaining that trust by demonstrating integrity, transparency and compassion in everything we do.

Key Strategic Issues

A thorough assessment of the organization's human capital, resources and processes and an external assessment of the operating environment and market uncovered a number of strategic focus areas for the organization:

1. **Employee skills and culture of workforce:** the process of attracting, hiring, onboarding, training, goal setting, performance management, and support needs to be aligned to the technical and soft skills required to do the work for our clients. An engaging and highly motivated culture is required to do the work that clients depend on our employees to do.
2. **Organizational Processes:** Many core processes have not been optimized and need to be simplified, documented and standardized. Performance of many processes is suboptimal resulting in an unsafe work environment, and noncompliance of agreement requirements.
3. **Branding:** Despite a strong reputation, the organization is not well known in the community which impacts the ability to attracting funds, donations, and community support.
4. **Financial Management:** The financial health of the organization is strong and finances are well managed. However, financial knowledge and active management is limited to a few managers and profitability of programs has not been optimized. Further, a number of significant infrastructure and technology investments are required in the next few years which will likely put strain on the financials.

The Balanced Score Card – Our KPIs & Goals

To achieve the mission of Community Living Hamilton and keep it continuously moving towards the strategic vision, the organization has to meet the needs of a number of diverse stakeholders including our clients, our employees and the financial stakeholders. To effectively manage the often-conflicting needs of these groups, the management team has chosen to use a Balanced Scorecard to set targets, measure performance and track performance improvement. Within each of 5 dimensions, critical performance indicators (KPIs) have been identified with targets for performance to be set annually.

Health & Safety

The health and safety of our employees is the first responsibility and a core value of Community Living Hamilton.

- **Number of lost time injuries**
- **Number of workplace injuries not leading to lost time**

Our Quality

Our clients and their families depend on CLH to provide high quality care at all times. The sensitive condition of our clients makes it essential that we manage the quality of care and service provided.

- **Accuracy of medication administration**
- **Compliance with contracts and licensing**
- **Client goals achieved**

Our Employees

Employees are the single most important asset of our organization, and it is essential that our management system ensures that our employees have the appropriate skills, engagement and commitment to deliver the services that our clients depend on.

- **Skills matrix compliance score (maps the key skills required by each role within the organization).**
- **Absenteeism rate.**
- **Voluntary turnover**

Financial

A key area of responsibility for the management team is the prudent management of the organization's finances.

- **Budget variance for restricted programs**
- **Unrestricted program surplus**
- **Capital reserve**

Operational Excellence

Our aim is to continuously improve our core processes which will help deliver better service to clients and achieve the vision set forth for the organization.

- **Achievement of service targets**
- **Data management error reduction**