



Port Alberni Association for Community Living

**Port Alberni Association for Community Living
Strategic Plan
2017 – 2020**

Message from the President, Darcy Phipps

The board of the Port Alberni Association for Community Living is responsible for the governance of the organization. This means that the board is active in developing policy and direction while considering what is best for various stakeholder groups. A strategic plan is a necessity in making decisions and moving forward, and because this plan includes the voices of PAACL staff, self-advocates, and board members, it will support the board as we chart our course for the next three years.

Message from the Executive Director, Craig Summers

It was a real privilege working on this year's Strategic Plan as there was input, feedback, insights and opinions from all levels and areas of PAACL. I was impressed by the enthusiasm and engagement shown by everyone and this is truly a PAACL owned plan going forward; both in terms of development and accountability. Great job everyone!

Introductory Statement

This plan was developed by the board, employees, and self-advocates of PAACL. Developed over two months using small and large group sessions, this process saw more than 50 participants come together from across the organization with a unified aim: to develop an actionable plan that will guide decision making and priorities at PAACL in the next few years.

All who participated in this process recognized that there are many assets at PAACL, and that the organization is successful in serving its clients. That said, participants brought with them the mindset of continuous improvement, and were always curious about how their work could be more effective and impactful. The following plan reflects the desire of the PAACL board, staff, and self-advocates to further create a world that is inclusive, accessible, and respectful.

Vision

PAACL advocates with and for persons with diverse abilities to have choices and to live inclusively in the community.

Mission

We engage the community in including people with diverse abilities for the benefit of everyone.

Values

The following values are the backbone of the work that PAACL does:

<i>Person-centered</i>	Participants and their needs are the primary focus of PAACLs programs and services
<i>Inclusive</i>	Each individual's unique qualities are valued at PAACL; we actively create and maintain an environment that promotes diversity and inclusion
<i>Accessible</i>	PAACL is responsible for eliminating barriers to support by ensuring that all programs and services are accessible to all
<i>Respectful</i>	Board members, employees, and self-advocates behave in a manner that reflects the dignity and potential of all human beings
<i>Safe and Supportive</i>	All PAACL sites are safe, supportive, and caring environments for participants, staff, volunteers, and other stakeholders
<i>Collaborative</i>	PAACL works in partnership with agencies, stakeholders, and funders to meet the needs of the individuals that we serve

SWOT Analysis

Like all non-profit organizations, PAACL is influenced by internal and external factors. Some of these factors are beyond PAACLs control, but the organization needs to be aware of their potential impact. Similarly, many of the strengths, weaknesses, opportunities, and threats are leverage points for PAACL.

Strengths	Weaknesses
<ul style="list-style-type: none"> • Staff experience* • Opportunity for collaboration – in organization and community • Community reputation* • Fiscal responsibility and health • Diversity and number of programs • Capital assets (buildings and other assets owned) • Creative thinkers on PAACL team • Union = strong wages, benefits, participation • Geographic locations – PAACL has expanded programs to other communities 	<ul style="list-style-type: none"> • Reliance on government funding • Contract and RFP limitations* • Funding constraints – can't do everything with all funding types* • Systemic gaps in service around province (i.e. transitions) • Funding* • Relationship with CLBC staff due to turnover • Attracting new board members • Keeping staff – small pool; many positions • Union agreement re seniority • Waitlists for programs and CLBC referral process • Geographic challenge – buildings and municipalities
Opportunities	Threats
<ul style="list-style-type: none"> • Funding – potential grants • Staff desire for collaboration/communication • Social enterprise/fee-for-service model (not reliant on CLBC) • Expansion of services (closing the gap, transitions) • Recruitment and retention • 60th anniversary of PAACL • Home share program • Marketing – staff, board, clients, homeshare • Individualized funding – potential to pool clients/families • Growth – in programs and staff opportunities* 	<ul style="list-style-type: none"> • Longevity of staff and upcoming staff retirements • Recruiting and retaining staff • Funding* • Competition – 3 other local agencies vying for contracts CLBC contracts* • CLBC Family Preference protocol: families given choices of 3+ available service providers to choose from when obtaining services; may not know about the positive attributes of PAACL • Less housing opportunities • Funders lacking education on housing models for those with diverse abilities

*Indicates that these issues were raised in the previous plan.

PEST Analysis

Unlike the SWOT, which examines internal and external factors that affect PAACL, the PEST analysis looks only at external. Here are the political, economic, social, and technological forces affecting PAACL:

Political	Economic
<ul style="list-style-type: none">• Reliance on government funding• Election year – could be more funding or could be less, depending on who’s elected• Advocating to government (Ensuring affiliations such as InclusionBC, Board Voice and CEO Network are representing the needs of our agency and sector)• Changing political policies (ex. housing)	<ul style="list-style-type: none">• What we’re funded for and what PAACL pays for do not balance out• Many clients do not have enough money to get through the month (PWD rates low and stagnant)• Cost of living/housing has increased• Though Port Alberni’s job market is slow, jobs are available to PAACL clients because they aren’t looking for FT, year-round work
Social	Technological
<ul style="list-style-type: none">• Lots of accessible services in Port Alberni• Strong partnerships with other agencies and services (i.e. Chamber of Commerce; Special Olympics; Bulldogs)	<ul style="list-style-type: none">• PAACL website needs to be more user-friendly• Hard to find funds to upgrade/optimize use of technology

SWOT and PEST analyses are necessary before any strategic priorities are identified. Just as vision, mission, and values are a required foundation for an organization’s priorities and decision-making, SWOT and PEST analyses are needed to help strategic planning participants proactively leverage opportunities and mitigate threats.

Strategic Pillars

The five strategic pillars below are the functions of PAACL as an organization. Utilized in previous strategic plans, planning participants confirmed that consideration of these five pillars is essential in creating a holistic plan. The strategic pillars are linked to each other, and the strategic priorities that emerged may effect or be affected by more than one pillar.



Strategic Pillars and Priorities

Facilities

1. Optimize all facilities for service delivery.
2. Ensure stewardship of all facilities.

Finance

1. Increase revenue-generating activities.
2. Increase organizational understanding of funding and budgeting.

Human Resources

1. Market PAACL as the biggest and best local employer in its sector.
2. Understand and articulate future staffing needs.

Leadership

1. Increase communication across the organization.
2. Ensure consistent board development.
3. Create additional opportunities for staff and board to participate in professional development activities.

Programs and Services

1. Deliver quality programming across the lifespan.
2. Investigate transition programs.

Facilities

Strategy: Optimize all facilities for service delivery.

Goal: Create capital plan.

Tactics	Timeline	Budget implication	Measurement	Who to do
<ul style="list-style-type: none"> Inventory all buildings, vehicles, and other major assets that PAACL owns Assess above as needed Address currently deferred projects Identify upcoming capital improvements; create regular schedule for repair and replacement Create a policy to determine how to fund capital improvements Determine annual review date 	<p>Appraisals/ assessment costs – March 2018</p> <p>Assign budget lines to plan – Sept 2018</p> <p>Ongoing annual review</p>	<p>Staff time</p> <p>BCA Assessment fees for: Gilley; SCL; Admin; Huff; Connections</p>	<p>Plan written</p> <p>Plan actioned annually</p>	<p>Site managers – inventory</p> <p>Executive Director</p> <p>Finance Director</p>

Goal: Ensure that facilities are meeting the needs of clients and the organization.

Tactics	Timeline	Budget implication	Measurement	Who to do
<p>Gilley residence:</p> <ul style="list-style-type: none"> Assess each of the four options for Gilley (renovate; buy another home; build a new home; leave as is) Collect information regarding Resident impact, pros & cons, Solicit stakeholder feedback from residents, their families, and CLBC Collect feedback from Gilley staff and management Provide information and recommendation to Resource Development Committee (RDC) 	<p>May 2017</p> <p>September 2017</p> <p>September 2017</p> <p>March 2018</p>	<p>Staff time</p> <p>BC Housing assessment</p> <p>Bylaw and architect fees; inspection fees</p> <p>Equity in home</p>	<p>Needs assessment written</p> <p>Board decision made</p>	<p>Resource Development Committee, Gilley Manager, Gilley staff</p> <p>Exec. Director</p> <p>Stakeholders</p>

<p>Huff residence:</p> <ul style="list-style-type: none"> Issue internal RFP and ask each program to submit an idea, considering budget, ongoing funding, and best utilization of this building to the RDC. RDC provides information and recommendation to board Board chooses successful proposal <p>Nanaimo building:</p> <ul style="list-style-type: none"> Review current rental agreement, current and future programming needs, and current facility If current space does not meet needs, find another Request additional funding from CLBC <p>1st Avenue lots:</p> <ul style="list-style-type: none"> Review twice annually, in conjunction with strategic plan review Look for opportunities to sell, swap, or develop this land in partnership with other agency 	<p>Issued in June 2017; due September 2017</p>	<p>Staff time</p>		<p>Resource Development Committee; all program units; Board</p>
	<p>End of 2017</p>	<p>Funding for successful program</p>	<p>Number of responses</p>	
	<p>June 2017</p>	<p>Staff time</p>		<p>Executive Director; Nanaimo program staff and participants</p>
	<p>March 2017</p>	<p>ED Time</p>	<p>Brief needs assessment</p>	<p>Executive Director to review; all to bring forth opportunities Board</p>
	<p>Beginning May 2017</p>		<p>Number of opportunities to better utilize lots</p>	

Strategy: Ensure stewardship of all facilities.

Goal: All PAACL properties should be well maintained and easily identified.

Tactics	Timeline	Budget implication	Measurement	Who to do
<ul style="list-style-type: none"> Review current costs of all buildings requiring maintenance outside 	<p>Fall 2017</p>	<p>Current landscaping costs</p>	<p>Costs saved or lost</p>	<p>Executive Director, Finance</p>

<ul style="list-style-type: none"> • Create exterior maintenance schedule and budget • Assess costs if PAACL CEP participants were hired 	If switching to CEP participants, do so in Spring 2018	Potential costs, if CEP participants (include cost of purchasing equipment)		Director, Community Living Services Manager
<ul style="list-style-type: none"> • Purchase and mount PAACL signage on Administration and SCL Buildings 	May/June 2017	Funding from Capital Reserve fund	Signs mounted	Executive Director/ Finance Director

Finance

Strategy: Increase revenue-generating activities.

Goal: Seek new methods to fund PAACL programs and services, including Pathways and the ACL Foundation.

Tactics	Timeline	Budget implication	Measurement	Who to do
<ul style="list-style-type: none"> • Rent Dogwood basement for private events • Advertise and manage clothes drop bins • Obtain local business/corporate sponsorship for non-funded programs • Subscribe to Grant Connect 	Beginning in mid-2017; ongoing Beginning Feb 2017; ongoing Beginning in April 2017; ongoing Beginning in April 2017; ongoing	No cost; is rental ready No cost; utilize local news sources Staff time Annual subscription: \$200-\$500 from Operations budget	Revenue; % of time rented Revenue Number of sponsors; total sponsorship \$ Number of successful grants	Admin Support staff– rental agreement Exec. Director/ Pathways Mgr. Admin SS; CEP, Executive Director Executive Director, Pathways staff, other program staff
<ul style="list-style-type: none"> • Explore additional contracting opportunities to expand services 	Before June 2017	Staff time	Addition of new service(s)	Executive Director

Strategy: Increase organizational understanding of funding and budgeting.

Goal: PAACL staff have a better understanding of the organization’s finances and program area budgets.

Tactics	Timeline	Budget implication	Measurement	Who to do
<ul style="list-style-type: none"> Communicate each program area budget, including how programs are funded, how funding sources work with and against each other, and how to decide whether a financial request is or is not possible 	<p>March/April 2017</p> <p>Annual check-in at spring Manager’s meeting</p>	Staff time	Document in meeting minutes; managers sign off to acknowledge that they understand	<p>Finance Director</p> <p>Managers</p>

Human Resources

Strategy: Market PAACL as the biggest and best local employer in its sector.

Goal: Attract highly qualified candidates by reputation, word of mouth, and the endorsement of current staff.

Tactics	Timeline	Budget implication	Measurement	Who to do
<ul style="list-style-type: none"> Continue to promote the benefits that differentiate PAACL from other organizations offering similar programs (health care, pension, vacation) 	Ongoing	Staff time	Number of quality applicants per job/year	Human Resources Director; all employees
<ul style="list-style-type: none"> Utilize Facebook to share PAACL success stories regularly 	Re-launch Facebook page in Fall 2017; create editorial calendar	Staff time	Number of followers and likes	Admin Support staff; HR; ED
<ul style="list-style-type: none"> Review current Consent policies 				
<ul style="list-style-type: none"> Hire a professional web design firm to re-develop website; promote this to potential candidates 	Launch website in Fall 2017	\$1000 - \$5000: Operating budget	Web analytics	Executive Director/Admin

Leadership

Strategy: Increase communication across the organization.

Goal: Help employees, managers, and board members better understand the current work of PAACL.

Tactics	Timeline	Budget implication	Measurement	Who to do
<ul style="list-style-type: none"> Management staff and board to meet twice annually for increased communications and strategic plan review (once at AGM and once at plan midpoint) 	Beginning June 2017; every June and December annually	Staff and Board time	Meeting minutes and attendance	Executive Director and Board President to schedule
<ul style="list-style-type: none"> Incorporate quarterly board highlights and departmental updates into Craig's regular all-staff memo 	Beginning Spring 2017; quarterly updates annually	Staff time	Reports distributed and posted to all program areas	Executive Director; Managers; Admin support

Strategy: Ensure consistent board development.

Goal: Give board members the training and opportunities they need to be successful.

Tactics	Timeline	Budget implication	Measurement	Who to do
<ul style="list-style-type: none"> Develop board orientation process <ul style="list-style-type: none"> - Board training videos shown 	2018	Staff and Board time and commitment	Process developed	ED Board President or Designate
<ul style="list-style-type: none"> Develop a board succession plan 	2018-2019		Succession plan developed	
<ul style="list-style-type: none"> Create a board recruitment strategy that keeps in mind the needs of current boards <ul style="list-style-type: none"> - Currently, fundraising and public ambassadorship are sought skills 	Beginning in 2017 with recruitment for noted needs Process developed 2018-2019	Community Living Promotions CIP Grant application	Strategy developed; specific needs met	ED; Board; HR; Finance
<ul style="list-style-type: none"> Meet with other local non-profit boards 1x year Assess learning needs of board i.e. Finances 	Fall 2017; Annually		Participating organizations	

Strategy: Create structured opportunities for staff and board to participate in professional development activities.

Goal: Cultivate a culture of learning and continuous improvement.

Tactics	Timeline	Budget implication	Measurement	Who to do
<ul style="list-style-type: none"> Staff to watch one Conversations That Matter video per month, corresponding to a chosen theme and to be reviewed with program team. 	1 area/month starting March 2017	\$20 per employee per year (already being paid)	Review in training and development plan	Executive Director All managers to ensure staff participation
<ul style="list-style-type: none"> Management to watch one “Learning for Leaders” module per quarter; to be discussed at a management team meeting 	Quarterly starting June 2017	Staff time	Record completion of modules	Management team

Programs and Services

Strategy: Deliver quality programming across the lifespan.

Goals: Ensure that incoming participants are referred to the most beneficial programs and services.

Tactics	Timeline	Budget implication	Measurement	Who to do
<ul style="list-style-type: none"> Review Community Employment Program referral process; tighten if necessary Assess capacity and needs for % supported vs % customized 	April – June 2017	Staff time Increase cost for coverage	Majority of CEP referrals are engaged and employed	CEP Program Manager; CEP program staff
<ul style="list-style-type: none"> Assess Program needs during peak times 	May/June 2017; Annually		CLBC make appropriate referrals and expectations	
<ul style="list-style-type: none"> Further develop relationship with CLBC facilitator and analyst to ensure that incoming participants are referred to appropriate programs and services 	February 2017; ongoing	Staff time		Executive Director; Program Manager’s

<ul style="list-style-type: none"> Investigate Advancing New Support Options (ANSO) program as a value-added service to complement Connections Day Program Investigate opportunities for participants receiving individualized funding to pool funds (research needs, models, and feasibility. Feasibility includes admin support, staff, and profit and loss) 	June 2017	Staff time	Meet requirements for Request for Proposal (RFP) process if necessary	Exec. Director/ Program Mgr.
	June 2018 - 2019	Staff time		Executive Director; Finance Director; HR Director; staff

Strategy: Investigate Transition Program.

Goal: Proactively assist incoming participants to transition from current services to PAACL services.

Tactics	Timeline	Budget implication	Measurement	Who to do
<ul style="list-style-type: none"> Work with community partners to demonstrate need (SD70, Island Health, MCFD, CLBC, MSDSI) 	April 2017	Staff time	Needs assessment	Exec. Director; Program Mgrs.
<ul style="list-style-type: none"> Work with CLBC Facilitator and CYSN Social Worker to discuss collective needs and direction 	April 2017	Staff time	Outcome of meetings	Exec. Director; Program staff; Community Services Mgr.
<ul style="list-style-type: none"> Meet with SD70 to discuss youth employment, volunteer placement, and career fair 	May 2017	Staff time	Increased youth employment	Executive Director
<ul style="list-style-type: none"> Advertise PAACL services at High School transition fair 	May 2017		Increased family interest	Community Services Mgr.
<ul style="list-style-type: none"> Survey youth ages 14-17 re: transitions 	June 2017	Program supplies Staff time	40% of surveys returned	Exec. Director
<ul style="list-style-type: none"> Proposal to MCFD re: transition services: 1 FTE PAACL staff responsible for youth transition 	June 2017	Grant funding for pilot; Government	Successful proposal and funding!	

<ul style="list-style-type: none"> • Follow-up town hall to discuss survey results and how to best serve families • On-board transition program staff; evaluate position 	<p>September 2017; annual evaluation</p>	<p>funding for sustainability</p> <p>Supplies and food from operating budget</p>	<p>Attendance</p> <p>Client satisfaction survey</p>	<p>Exec. Director; Program Mgr.</p>
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