



New Leaf: Living and Learning Together Inc.

Strategic Plan

2012 - 2017

BACKGROUND:

Since 1984 New Leaf: Living and Learning Together Inc. has been providing services and supports in the community to persons who have an intellectual disability and a dual diagnosis (developmental disability and accompanying mental health or behavioural issue). New Leaf was originally founded by Stan Smith and a small group of dedicated individuals from Toronto. Stan was the agency's first Executive Director and remained in that leadership role until his retirement in 2006. Although officially retired, Stan remained very involved with New Leaf and provided important guidance and support to the agency up to the time of his death in 2009.

Under the leadership of Stan Smith, New Leaf developed its programming and expanded its services to meet the growing need for community based services for individuals with intellectual disabilities and complex needs. Much of this expansion happened as a response to the government of Ontario's decision to close the provincial institutions for individuals with intellectual disabilities.

New Leaf embraced the move to community based programming and is proud to have played a role in this significant historical event. Today New Leaf operates twelve residential homes in addition to an active day support program. The day support program is situated on a 112 acre farm at 19601 Leslie Street in Queensville. In addition to the active farm program, New Leaf also operates a large pool and recreation centre complete with an expressive arts department and an aquatics program. This site is also home to the green houses and woodworking programs.

Today New Leaf employs 214 full and part-time staff and provides services to approximately 100 individuals. New Leaf is an active and respected member of the developmental services sector in both Toronto and Central East Regions.

Stan Smith's original vision is today enshrined in New Leaf's mission statement and guiding principles.

MISSION STATEMENT:

New Leaf will offer an alternative to the endless pursuit of rehabilitation in an urban environment for individuals with a developmental disability and complex needs. New Leaf will endeavour to provide quality supports and services that offer a rural option to individuals with a developmental disability, dual-diagnosis, and/or other complex needs.

New Leaf will embrace the values of personal choice, dignity, social inclusion and self-actualization in all of our services and supports as we assist individuals to live, work and play as valued members of society and the community.

GUIDING PRINCIPLES:

The fundamental beliefs and guiding principles that are the motivating force behind all decisions of New Leaf: Living and Learning Together Inc. are as follows:

- **Citizenship Rights**
Individuals have all rights of full citizenship, regardless of their abilities or disabilities.
- **Respect for the Individual**
Individuals have unique needs, goals and desires and should be treated with respect and dignity for their personal choices.
- **Individualized Planning**
The personal goals and desires of an individual provide the direction for developing the services and supports provided by the organization.
- **Support for Families**
Families play an important role in the lives of their family member with a developmental disability and this relationship is recognized and supported.
- **Building an Inclusive Community**
Individuals are supported in their efforts to participate in the community and New Leaf: Living and Learning Together Inc. will continue to advocate and pursue opportunities for inclusion.
- **Collaboration**
Partnerships and collaborative ventures are essential to effectively and efficiently respond to the needs, goals and desires of individuals with a developmental disability.
- **Managing Change**
Change is a necessary part of living and therefore the outcomes of the supports and services provided by the organization will be continually evaluated to respond to the needs of individuals as well as the emerging directions in policy, research and best practices.

DEVELOPING THE STRATEGIC PLAN – THE PROCESS:

The developmental services sector is in the midst of significant change as the Ministry of Community and Social Services implements their Transformation agenda. These changes are profound and will dramatically impact the manner in which services will be funded and delivered across Ontario.

Furthermore, Ontario is in the midst of a significant and protracted economic downturn. The government of Ontario has strongly messaged that tackling the multi-million dollar provincial deficit is going to be their top priority over the coming years, and that they will be instituting austerity measures to deal with this problem. The message is clear that those sectors and agencies that rely upon government funding to deliver their programs and services will be in for challenging times fiscally.

For these reasons, and the fact that our previous planning documents are in need of refreshing, it was determined that the time was right to embark on a new strategic planning process.

Early in 2011 the New Leaf Board of Directors instructed the Executive Director to undertake a strategic planning process with the objective of providing the board with a draft strategic plan to guide and enable direction setting and decision making over the next four to five years.

A strategic planning committee was struck to oversee the process. The selection of committee members was deliberately designed to ensure representation from all key stakeholder groups. Represented on the committee were front line staff, senior and middle management staff, Board members, the union Chief Steward, a family member, and a resident. (See appendix for list of members).

The role of these committee members, in addition to advising on the process, was to serve as a stakeholder reference group. This group provided important insight and augmented the information that was collected through the environmental scan process.

The first meeting of the strategic planning committee was held on June 29, 2011. The first task before the committee was to select the information gathering tools and methods to be employed in the environmental scan process.

The environmental scan process involved the identification of key stakeholders who provided information regarding New Leaf's current mission, services and programs. The main stakeholder groups identified were New Leaf staff, residents, and families, other agencies

working in the developmental services sector, and the Ministry of Community and Social Services. Individuals were asked to comment on what they perceived to be the greatest challenges and opportunities facing New Leaf now and into the near future.

A set of questions and information gathering tools were developed for each of the above mentioned stakeholder groups. In order to ensure that everyone had an opportunity to participate in this process, a number of select focus group sessions were arranged for New Leaf front line staff, management and support staff. We also conducted focus groups for the people we support. Parents and family members were individually contacted and asked to participate in the process. Most parents or family members opted to fill out the questionnaire. The return rate on the family questionnaires was almost 100%. We also developed and sent out questionnaires to other selected agency Executive Directors. This information, together with a review of Ministry information regarding the MCSS Transformation process, formed the raw data that was analyzed and further refined by the Strategic Planning Committee.

This information was then sent back to staff in the form of a memo asking them to validate the information to ensure accuracy and understanding. Finally in March of 2012, the first draft of the Strategic Plan was written. The committee was then asked to meet to review and further revise the plan before its submission to the Board of Directors for their input and ultimate approval.

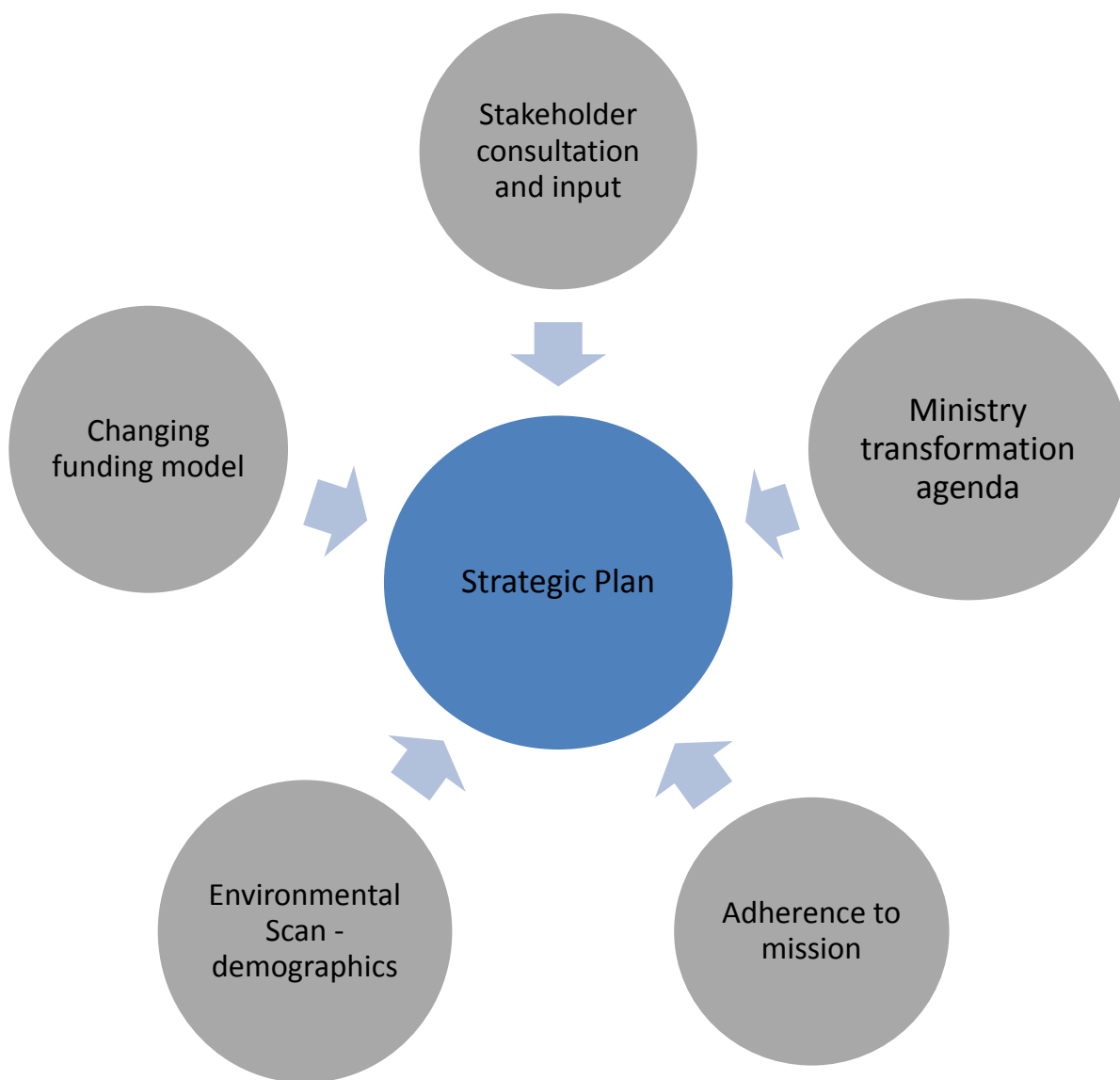
SUMMARY OF FEEDBACK:

What follows is a summary of the main recurring themes that we heard from the stakeholders:

- * New Leaf demonstrates an openness and willingness to serve people with complex needs.
- * New Leaf's training of staff and clients is a strength, especially around positive behavioural supports.
- * New Leaf demonstrates a flexible and varied approach to service delivery.
- * Individualized approach to supporting people is a strength.
- * New Leaf's rural setting is unique and a definite asset.
- * New Leaf's day supports and programs are unique and varied.
- * New Leaf has established strong collaborations with outside agencies.

- * New Leaf needs to do a much better job communicating internally with our staff. Staff feel they would benefit from more specific information about individuals and activities across and between all program sites, especially at Day Services. We need to find better ways to facilitate cross-program information sharing.
- * Staff require more information to better equip them to understand the larger picture and how New Leaf fits into, and is impacted by, the larger context. Information is needed to appreciate the impact of changes in the sector - legislatively, politically and economically.
- * New Leaf needs to do a better job of recognizing and appreciating the unique and important contributions that staff make to the agency each and every day.
- * New Leaf needs to find ways to ensure more continuity in staffing. We need to find a way to reduce our reliance on relief and outside agency staff.
- * We need to find more and different ways to integrate more fully into the larger community.
- * Reduced government funding, and the constraints posed by external economic factors are challenges New Leaf will continue to face.
- * The move away from block agency funding and toward individualized funding will pose challenges. The changing funding models will move the sector toward a more market based and competitive service delivery model.
- * Increased emphasis on demonstrated and documented outcomes will pose challenges to agencies with limited funding for central administration. Value for dollar audits, changing legislation, regulations and accountability requirements will result in the need for more exhaustive and complex reporting requirements.
- * Changing requirements of our aging population must be addressed. We need to develop alliances and collaborations with Health and Long-Term Care, Community Care Access Centres, and the Networks of Specialized Care.
- * New Leaf needs to do a better job of promoting our services, successes and specialization. The challenge and opportunity going forward is to strengthen what we do well and emphasize and promote our growing expertise in providing quality services and supports to individuals with a dual diagnosis and/or complex behavioural needs.

Change Factors



CHANGE FACTORS:

Stakeholder consultation/Ministry transformation agenda/Changing funding model/Adherence to mission/Changing needs

The process described above provided the planning committee with important insight that assisted in the identification of the key change factors that would ultimately determine the selection of the strategic priorities.

These change factors included:

- Information gleaned from MCSS published materials related to the ministry's Transformation agenda, including significant future changes to the funding model.
- Stakeholder consultation and input confirming New Leaf's vision as originally formulated under Stan Smith's leadership.
- Stakeholder input informing the group on a number of factors including the current and changing needs of the people we support, as well as important internal and external opportunities and challenges impacting the agency now and into the future.

STRATEGIC PRIORITIES:

1) Strengthen and promote the agency's role as a specialized provider of services and supports to individuals with a dual diagnosis and complex behavioural needs.

Discussion:

It is becoming evident that the Ministry is moving away from the funding of 24-hour, seven day a week, group living residential programs. One key reason for this move is the fact that these programs are amongst the most expensive of residential options. More and more these group living options are being reserved for those individuals with the most complex needs. Many of these individuals currently reside in hospital and community treatment beds. They cannot be successfully transferred to the community following treatment due to a lack of expertise in the community to deal with complex needs. The sector will be looking to service providers who are willing to enhance their capacity to serve individuals with complex needs. Agencies that are unable or unwilling to undertake this important work will eventually be required to abandon their group living options. New Leaf currently and successfully operates twelve 24/7 group

living residences. It has been our experience that appropriately resourced homes provide the best long-term residential supports to this hard-to-serve population. This is New Leaf's strength and by playing to this strength we will be able to protect and further develop this important community residential option. This is not meant to suggest in any way that New Leaf is not open to developing other appropriate residential and program options such as Supported Independent Living (SIL), and Enhanced SIL programs. We must always remain open to the full range of support options, and the selection of the appropriate service option must take into account the assessed needs and expressed interests of the individuals being served.

Objectives:

- Invest in staff training and development ensuring a high level of expertise is maintained in positive behaviour approaches based on accepted best practices.
- Conduct program audits to verify learning and ensure an acceptable level of competency is demonstrated and maintained.
- Leverage outside clinical services and resources through partnerships and collaborations with community clinical services, The Networks of Specialized Care, Centre for Mental Health and Addictions (CAMH), and the Local Health Integration Network (LHIN).
- Develop and refine how we message our services, expertise and successes to the above groups, current and potential funders, sponsors and supporters.

2) Address the changing service needs of our clientele:

Discussion:

As in the general population, the people we support are aging and are developing age-related diseases and disabilities that require the services and supports of the medical and long-term care sector. As these needs change we must ensure that the people we support are receiving the proper care they require from the appropriate source. It is incumbent upon us to ensure that the required services and supports are delivered seamlessly between sectors as appropriate, based on the assessed needs of the individual.

Objectives:

- Develop and strengthen alliances and partnership with the Long-Term Care sector including the local Community Care Access Centre, and Home Care services.

- Work with Aging and Developmental Disabilities Network to develop policies, procedures and transition planning based on accepted best practices across the sectors.

3) Position New Leaf to thrive within a rapidly changing service sector with changing funding structures.

Discussion:

The Ministry of Community and Social Services is well on the way to fully implementing their Transformation Agenda. Key elements of this plan are currently in place including a) new legislation, b) centralized regional access entities and mechanisms, and c) implementation of a standardized application and assessment process. Future plans will include new regional funding entities and a new funding formula based on an individualized funding model. The new funding model will move the sector away from block funding of agencies. The strategy is to create a market driven service delivery system where individuals will negotiate for services from the agencies that deliver these services. Government funding will be limited in scope and government will play a less direct role in the funding of programs and agencies.

Objectives:

- Create accounting and planning tools and service agreement templates to respond to individual funding model.
- Develop new performance indicators and criteria for success. E.g. consumer feedback systems.
- Develop strategy to reduce over-reliance on government funding.
- Develop fund raising plan and strategies
- Seek out sponsorships and partnerships with potential new supporters and funders.
- Develop and implement an externally focused marketing strategy.

4) Develop an internal staff targeted communication strategy.

Discussion:

In addition to the development and implementation of an externally directed marketing strategy, it is clear from feedback received through the environmental scan that there is a need to develop and implement better internal communication systems between staff and management, and between program sites.

Objectives:

- Develop and refine internal communication systems and better employ tools such as the newsletter, e-letter communications, and messaging.
- Develop a vehicle to facilitate effective and appropriate site specific information sharing.

Next Steps:

- Develop implementation plans for key strategic priorities.
- Establish committees and key individuals to develop and implement work plans and outcomes.
- Monitor and report on established outcomes.

On behalf of New Leaf: Living and Learning Together Inc. I would like to acknowledge and thank the many individuals and stakeholders who took the time to share their thoughts and ideas on this planning process. Thank you to the New Leaf staff, families, and residents for their insightful input. Thank you to those leaders outside of New Leaf who took time from their busy schedules to offer their much appreciated thoughts and observations regarding the challenges and opportunities facing this agency and the sector over the next few years. Finally I would like to sincerely thank the Strategic Planning Committee for their commitment and wisdom and for their openness to share freely from their unique perspectives on those important matters impacting New Leaf. Together we have generated valuable information that will be helpful as we chart our future course over what promises to be some turbulent times ahead.

Presented on Behalf of the Strategic planning committee,

Ron McCauley,
Executive director

APPENDIX

STRATEGIC PLANNING COMMITTEE MEMBERS

- **Dr. Ruth Bray**
- **Kyle Fisher**
- **Dean Johnson**
- **Ron McCauley**
- **Roger Partington**
- **Peter Phang You**
- **Bob Quinn**
- **Roger Romses**
- **James Thompson**
- **Anna Young**