



NEW LEAF

LIVING AND LEARNING TOGETHER INC.

**New Leaf: Living and Learning Inc.
Strategic Plan
November 2022**

About New Leaf's Strategic Planning Process & Environment

- Established in 1984, New Leaf is a longstanding organization in the health and social services sector targeted towards providing services and supports in the community to persons who have an intellectual disability and / or a dual diagnosis (developmental disability and accompanying mental health or behavioral issue).
- New Leaf is an active and respected member of the developmental services sector in both Toronto and Central East Regions.
- New Leaf's most recent strategic plan expired in 2017 and was therefore looking to **refresh its strategic outlook**.
- In March 2022, New Leaf enlisted the support of StrategyCorp to develop a comprehensive Strategic Plan.
- The goal of this project was to develop a three-year business strategy with a **clear and cohesive vision for the future of New Leaf** that would be understood, accepted, and championed by key stakeholders of the organization – including leadership, staff, funders, people supported, families, and sector partners.



Stan Smith
New Leaf Founder

Strategic Planning Project Overview & Background

The StrategyCorp team undertook a robust strategic planning process to support New Leaf in the development of its refreshed three-year strategic plan. The visual below summarizes the workplan overview and activities completed to-date by StrategyCorp.

Phase 1: Kick-Off	Phase 2: Current State Analysis	Phase 3: Draft and Refine	Phase 4: Finalize and Operationalize
<ul style="list-style-type: none"> • Hold Kick-Off meeting with New Leaf project team. • Finalize engagement objectives, approach / methodology, and timeline. • Create a stakeholder engagement plan and identify key data and documents to review. 	<ul style="list-style-type: none"> • Perform a comprehensive current-state analysis of the organization, leveraging insight from: <ul style="list-style-type: none"> • Internal staff interviews; • Document and data review; and, • Market research. • Compile analysis into a comprehensive current-state assessment, including capabilities, service expectations, strengths, areas for development / opportunity, and other key features. • Hold a review workshop to walk New Leaf through our findings. 	<ul style="list-style-type: none"> • Define the department’s draft strategic framework, including: <ul style="list-style-type: none"> • Alignment on mission, vision, and values; • Vision and / or values elements for the department, if necessary; • Key strategic goals / objectives; • Supporting initiatives and activities for each goal; • Key considerations for the annual operational plan development process. • Hold focus groups with key stakeholders to validate and refine the plan. 	<ul style="list-style-type: none"> • Finalize and codify the department’s new strategic plan based on the previous phase’s workshops. • Work with initiative owners / sponsors to establish high-level implementation plans. • Compile material into a complete strategic plan and review. • Support communication and dissemination of the plan.
<ul style="list-style-type: none"> ✓ Kick-off Meeting ✓ Stakeholder Engagement Plan ✓ Project Workplan Summary Memo 	<ul style="list-style-type: none"> • Internal Stakeholder Interview Findings • Current-State Assessment Report • Current-State Review Workshop 	<ul style="list-style-type: none"> • Strategic Planning Day: May 26th • Draft Strategic Framework 	<ul style="list-style-type: none"> • Strategic Plan Review • Final Strategic Plan (Plan, Infographic, Presentation) • Implementation Recommendations • Operational Plan Template

How the Strategic Plan was Developed – Committee Engagement

Below is a description of the process undertaken with the New Leaf Strategic Planning committee to develop the draft, which included a number of workshops with the Committee. In July 2022 and August, StrategyCorp also facilitated two validation meetings with the Board of Directors to present and review the draft plan.

	Workshop #1 – April 22, 2022	Workshop #2: Morning Session – May 26, 2022	Workshop #2: Afternoon Session – May 26, 2022
Objective	Introduce SCI’s strategic planning process, its value to an organization, and present the environmental scan efforts.	Update New Leaf’s Strategic Planning Committee on SCI work completed to-date and work with them to develop the core statements (vision, mission, values).	Work with the New Leaf Strategic Planning Committee to draft the strategic goals and initiatives required to support New Leaf in realizing its core statements.
Session Activities	<ul style="list-style-type: none"> ✓ Delivered a Strategic Planning 101 session, discussing purpose, process, core elements and structure of strategic plans. ✓ Presented current state findings and key themes from analysis conducted to-date. ✓ Walked through stakeholder value exchange exercise and preliminary SWOT analysis of New Leaf. 	<ul style="list-style-type: none"> ✓ Provided a brief recap and update on analysis conducted or refined since Workshop #1. ✓ Worked with the Strategic Planning Committee to design New Leaf’s refreshed core statements, based on organizational priorities. ✓ Developed draft core statements, including vision, mission and values to support the New Leaf Strategic Plan. 	<ul style="list-style-type: none"> ✓ Realigned on the organization’s core statements with the Strategic Planning Committee. ✓ Brainstormed ideas about the type of goals and initiatives that would help achieve the core statements. ✓ Developed feasible and effective draft strategic goals and initiatives, based on workshop discussions.
Outcomes	<ul style="list-style-type: none"> • Validated the current state assessment themes and findings, core business statement and SWOT analysis. 	<ul style="list-style-type: none"> • Defined core statements (mission, vision and values) within the draft strategic plan framework. 	<ul style="list-style-type: none"> • Defined relevant strategic goals and initiatives, in alignment with the core statements.

How the Strategic Plan was Developed – Stakeholder Participation

The work to-date included frequent consultation with a range of New Leaf’s stakeholders. StrategyCorp worked with New Leaf at the project outset to define the stakeholder environment, and identify individuals for consultation and surveying as part of this process. This consultation occurred in addition to the collaborative efforts between SCI and the Strategic Planning Committee described on the previous page.

SCI Stakeholder Consultation and Engagement Activities:

24

Consultations with New Leaf Leaders, Ministry Officials and Municipal Leaders

3

Focus Groups with New Leaf Managers, Supervisors and Frontline Staff

4

Focus Groups with People Living at New Leaf and their Family Members / Loved Ones

46

Staff Survey Responses

7

Sector Partners / Service Providers Survey Responses

11

Family Members / Loved Ones Survey Responses

Stakeholder Engagement Objectives:



To align New Leaf’s understanding of key stakeholders and stakeholder value exchange.



To discuss and understand New Leaf’s strengths, weaknesses, opportunities, and threats.



To review New Leaf’s mission and values, and define core strategic priorities, goals and associated initiatives.

New Leaf's Core Business, Strategic Environment and Primary Stakeholders

As part of the strategic planning project, SCI and New Leaf worked together to research and understand the strategic environment surrounding the organization, which must be considered as part of the Strategic Plan development process. Below is an overview of the strategic environment discussed and validated as part of this project. The detailed environmental scan is provided in the Appendix.

Core Business of New Leaf

Administer class-leading developmental services and care to individuals with complex needs and/or a dual-diagnosis.

Primary Stakeholders	New Leaf's Strategic Environment	
People Supported by New Leaf	Strengths	New Leaf's biggest strength is its unique history, purpose within the broader Ontario Developmental Services sector, which enable the organization to serve a highly unique base of people who live in a non-traditional DS environment.
Families of People Supported by New Leaf		Weaknesses
Provincial Ministries	Opportunities	
New Leaf Staff		Threats
Developmental Services Sector		
Local Community & Public		

New Leaf's S.W.O.T. Analysis

(Strengths, Weaknesses, Opportunities, Threats)

New Leaf S.W.O.T. Analysis

As part of the environmental scan, a SWOT (strengths, weaknesses, opportunities, threats) analysis was completed. It took into consideration the insights gathered through the consultations, market research, and scan of internal New Leaf documents.



Strengths: What are New Leaf's core internal strengths?

- Staff and leadership are passionate about the organization and the industry.
- Sector recognition and reputation of New Leaf for service delivery to accommodate different care needs. Has led to notable partnerships with organizations like Church Station.
- New Leaf is the owner of numerous valuable and unique assets: farm, animals, equipment, other properties within New Leaf portfolio, etc.



Weaknesses: what are New Leaf's core internal weaknesses?

- New Leaf is not flexible enough to align service delivery with emerging best practices.
- New Leaf has trouble recruiting and retaining talent: 25 vacancies, many persistent (6+ months). Insufficient employee engagement, career pathways, training, etc.
- The charges and ripple effect of the recent staff tragedy has had reputational impacts for New Leaf and has diminished trust between staff and management when it comes to health, safety and transparency.
- Low staff morale due to extreme workloads, insufficient policies/procedures, frequent transfers between sites, insufficient autonomy to make decisions, insufficient funding to deliver good 'on the ground services', low compensation levels.
- New Leaf must do more when it comes to diversity, equity and inclusion priorities and strategy.

New Leaf S.W.O.T. Analysis



Opportunities: What external opportunities can New Leaf leverage?

- New Leaf leadership and decisionmakers have strong industry and sector relationships that should be leveraged for partnerships, service delivery, funding, etc.
- New Leaf is the owner of natural assets that are unique to the area and have an expansive footprint that could present opportunities for partnership or revenue generation.
- Recently hired ED with unique experience, relationships, perspectives on delivery.
- Impending sector transformations as an opportunity to advocate.



Threats: What external threats does New Leaf face?

- Lack of funding diversity, coupled with recent funding allocation changes across multiple Ministries present potential funding challenges.
- Rural locations lack broadband infrastructure and foundations that would help with service delivery in the post-pandemic world (Family visits, programming for individuals being supported, appointments, etc.).
- Lack of trained / specialized talent local to the area of New Leaf, lack of affordable housing options for current out-of-town employees.

Environmental Scan: Themes Surrounding New Leaf

A detailed environmental scan was completed to support the development of the New Leaf Strategic Plan and included:

- (1) review of New Leaf data and documents;
- (2) reviewing findings from the stakeholder consultation activities; and
- (3) conducting market research to understand the strategic environments surrounding New Leaf.

The purpose of the environmental scan is to identify for New Leaf the key themes and concepts that must be considered as part of the development of the Strategic Plan.

Environmental Scan - Theme #1: History & Legacy

Theme Detail

- New Leaf has an impactful history and legacy within the developmental services realm of Ontario and Canada that must be preserved.
- The original purpose of New Leaf – specifically the desire to provide an alternative, rural setting for individuals – **remains an inspiration for the work that the organization hopes to continue to do today** but must be understood in the context of rapid change. New Leaf has stood out amongst peers in the sector to pursue a living environment that is not institutional in nature.
- The **“Living and Learning Together” element of New Leaf remains relevant** but has evolved at its core.
- The go-forward strategic direction for New Leaf must understand what this means in a contemporary context, and how we can create conditions for Living and Learning in this evolved environment.

Environmental Scan Theme #2: Transformation & Evolution

Theme Detail

- The sector surrounding New Leaf is on a path to transform significantly in the coming years, and there remains some uncertainty about how exactly New Leaf will navigate and adopt this change. This includes major changes to how DS funding is administered to clients and agencies, end-of-life operating agreements/changes in maintenance funding, changes in performance expectations of agencies against client outcomes, etc.
- The needs of clients have and continue to evolve to include more nuanced and complex needs, including emerging needs related to aging and geriatric care. New Leaf has some, but not all, the expertise and infrastructure it needs to navigate this evolution in an effective way.
 - There is also change in how clients and families will be engaged in a new system, introducing evolving questions for New Leaf about how to enable trust, autonomy and choice for residents in how they live.
- The diversity of employees, families and residents served continues to grow and New Leaf must aim to reflect that diversity more effectively in its governance structures, programs for residents, and programs to support current staff and attract new talent. Additionally, 60 percent of New Leaf's staff and 100 percent of the frontline staff coming from the agency into caregiving roles are visible minorities. The enhanced diversity among staff requires more emphasis on incorporating diversity, equity and inclusion within the governance and organizational make-up.

Environmental Scan Theme #3: Governance & Operations

Theme Detail

- The communications and collaboration infrastructure within the organization is inconsistent and often informal. Leads to inconsistent direction to staff across homes/programs (beyond what would be predicted to meet different client needs).
- New Leaf delivers a highly impactful, but highly sensitive type of service to many of the individuals involved with the organization. There are some gaps in the policies, processes and procedures that create an environment that is safe, transparent and consistent for staff and individuals being served.
- In recent years, staffing challenges and gaps have made quality service delivery challenging – insufficient staff ratios, overworked staff, persistent recruitment vacancies impact day-to-day working environment and overall morale. This is largely driven by Bill 124 as it continues to pose funding limitations and challenges that cut across the operations and governance of New Leaf, including capped wages and capped base funding for service provision.
- Organization policies and procedures are typically old and often out-of-date with new service requirements facing staff at New Leaf. Safety incidents in the past are an example of policy and procedure gaps that exist. In addition, service delivery approaches remain substantively the same over many years, missing the opportunity to continuously improve and/or innovate best practices (example: staff and resident transferring processes/approach). The policies, processes and procedures in place must be updated to incorporate consistent communication channels and more engagement between leadership, management and staff.
- Staff and leaders highlighted consistently an interest in engaging and gaining more direction from the Board of Directors on the direction and operations of New Leaf to signal their support and engagement with the work of the organization.
- COVID accelerated existing need for improved technology and back-office services for staff, individuals being served etc. Specifically, IT limitations have posed a service delivery challenge for several years that became unavoidable during COVID-19
- Updated procedures and processes can help ensure a more transparent and safer environment for staff.

Environmental Scan Theme #4: Fiscal Considerations & Pressures

Theme Detail

- Consultation and survey responses revealed concerns about the (1) current funding environment that New Leaf operates in; (2) the potential and expected decreases in funding in the coming years as a result of other system changes/factors.
 - Current: service delivery needs are increasingly complex, current funding/revenue sources are not diverse – primarily Ministry funding.
 - Potential: expected changes from the Ministry of varying types including how funding is allocated to service agencies like New Leaf and other imposed fiscal pressures
- Funding and related reporting/compliance requirements have had trickle-down impacts felt in operations and operational decisions. It became clear that some of these challenges are externally imposed on New Leaf through Ministry regulation and requirements for provider spending and reporting/compliance.
 - The wage-suppression legislation introduced in Bill 124 caps wages and base funding, leading to staffing challenges and lack of quality service delivery by New Leaf. Staff education on Bill 124 is required due to lack of awareness of the regulation and its impact.
 - Staff noted that in some cases they can't easily make purchases for the various New Leaf sites – costs have risen beyond budgets due to inflation, and the process to get approval for day-to-day expenditures is cumbersome and a deterrent.
- There have been recent promising government announcements that might shift over to operating agreements in designated supportive housing. This can have a substantive impact in relieving some of the fiscal challenges that New Leaf is facing with regards to its upcoming end-of-life operating agreements.
- The issue of lack of funding in the sector has persisted for the past 10-12 years, leading to ongoing staff retention and recruitment challenges.
- There is an urgent need to explore alternative funding / revenue streams

New Leaf's Strategic Plan: 2023 – 2028

Strategic Plan Overview

Vision

A home and community where people learn and experience life together.

Mission

Provide a safe home to, and enrich the lives of, individuals with developmental disabilities in a unique sensory and natural environment.

Values

Connections

Create meaningful connections within New Leaf, and with the broader community.

Diversity, Equity, and Inclusion (DEI)

Incorporate the principles of DEI in all New Leaf policies and programs.

Innovation

Continuously adapt to sector trends and develop innovative approaches to meet evolving needs of people we support.

Mutual Respect

Listen to and respect the individual choices and preferences of all New Leaf people.

Respect for the Environment

Respect the unique natural and physical environment surrounding New Leaf.

Safety

Enable a safe and protected environment for all the people living and working at New Leaf.

Strategic Goals and Initiatives

Building Our Organization and People

Continuously improve structures, practices, programs and service delivery to meet the evolving needs of people who live, work, and interact with New Leaf.

- Enhance the governance environment surrounding New Leaf in order to maintain compliance and alignment with leading practice.
- Work towards a flexible and sustainable organizational structure and service delivery environment that aligns with best practices.
- Enhance retention and recruitment efforts to build a reliable workforce, and enable current staff to grow, develop and evolve in New Leaf

Connecting, Learning and Evolving

Ensure that all New Leaf people work together to evolve our practices as we learn and grow as an organization.

- Leverage New Leaf's natural assets to build relationships, and potentially diversify revenue generation streams for New Leaf, with the aim of increasing own-source revenue sustainably and responsibly.
- Develop a strategy and approach to advocate and network with partners, decisionmakers and influencers to tell New Leaf's story proactively and in our own voice.

Growing and Diversifying our Offerings

Create and grow new service offerings and revenue sources to strengthen New Leaf's long-term sustainability.

- Identify, develop and implement updated policies, training, and risk management structures to enable a safe and welcoming environment for staff and people supported.
- Welcome & Introduce stakeholders, partners and the community back to New Leaf in a safe, healthy, and compliant way that improves the quality of life of people supported.

Strategic Plan Details – Vision

Vision Statement

“A home and community where people learn and experience life together.”

- The concept of ‘home’ is emphasized in the refreshed vision statement to depict the family oriented community, culture and environment provided to people living at New Leaf, as opposed to an institutional setting.
- The refreshed vision statement intends to highlight the importance of living, experiencing life, and learning together for people at New Leaf. This refers to two-way learning for people living at New Leaf and staff members who live and work at New Leaf.
- It also intends to encourage a more community oriented setting/culture at New Leaf wherein staff do not have to undergo frequent transfers and can truly provide a close-knit familial environment to people supported, through long term tenures.
- The term ‘community’ also focuses on opportunities to build connections for people supported within the New Leaf community as well as opportunities for broader community engagement.

Strategic Plan Details – Mission

Mission Statement

“Provide a safe home to, and enrich the lives of, individuals with developmental disabilities in a unique sensory and natural environment.”

- The refreshed mission statement highlights the unique attributes and elements of New Leaf’s environment and service offerings that it provides.
- It reemphasizes the concept of providing a ‘safe home’ to individuals with developmental disabilities, as articulated in the vision statement.
- The concept of ‘enrich the lives of individuals with developmental disabilities’ implies that New Leaf provides a safe and protected setting for these individuals to maximize their learning potential in a community setting.
- The provision of a ‘unique sensory and natural environment’ highlights the peaceful farm setting that New Leaf provides to the people living there. It articulates how the natural environment enables the people living at New Leaf to engage in productive and engaging day-to-day activities.

Strategic Plan Details – Values

Values

- ***Connections***
- ***Diversity, Equity and Inclusion***
- ***Innovation***
- ***Mutual Respect***
- ***Respect for the Environment***
- ***Safety***

- ***‘Connections’*** – New Leaf will aim to build connections within the organization and the broader community, to enable a family environment.
- ***‘Diversity, Equity and Inclusion’*** – In light of the increasingly diverse people living and working at the organization, New Leaf aims to consistently incorporate the principles of diversity, equity and inclusion in all programs, policies and procedures.
- ***‘Innovation’*** – New Leaf aspires to continuously innovate and expand its service offerings to develop novel opportunities to improve its overall environment, and enhance programming for people to achieve their goals at New Leaf.
- ***‘Mutual Respect’*** - New Leaf endeavors to listen to and respect the individual choices, preferences and contributions of all the people living and working at New Leaf.
- ***‘Respect for the Environment’*** - New Leaf highly values the unique rural, farm environment that it provides to the people supported. It recognizes that this setting differentiates its service offerings from other agencies in the region and intends to respect and preserve this environment, to the best of its abilities.
- ***‘Safety’*** - New Leaf is dedicated to preserving the safety of all people by ensuring a safe and productive working and living environment for everyone.

Strategic Plan Details – Strategic Goal #1 & Related Initiatives

Goal #1: Building Our Organization and People

Strategic Initiatives:

- Enhance the governance environment surrounding New Leaf in order to maintain compliance and alignment with leading practice.
- Work towards a flexible and sustainable organizational structure and service delivery environment that aligns with best practices.
- Enhance retention and recruitment efforts to build a reliable workforce, and enable current staff to grow, develop and evolve at the organization.

Relevant Details

Key Stakeholders	<ul style="list-style-type: none"> • New Leaf Leaders • New Leaf Staff • People Supported by New Leaf
Key Activities	<ul style="list-style-type: none"> • Align service delivery, organizational structure, and resourcing with emerging best practices and incorporate flexibility to adapt based on evolving needs. • Introduce a talent attraction, succession planning, and knowledge transfer strategy to enable consistent operations and attrition management. • Review the NL legal and governance framework in alignment with the Ontario Non-Profit Cooperation Act (ONCA) for by laws, diversity, succession planning, membership structure and transition planning. • Review Board Committee functions including schedule, frequency of presentations, capacity building initiatives and report framing.
Other Notes & Considerations	<ul style="list-style-type: none"> • This strategic goal and its associated initiatives will help address current state gaps in policies, processes and procedures across the organizational governance and operations layer of New Leaf.

Strategic Plan Details – Strategic Goal #2 & Related Initiatives

Goal #2: Connecting, Learning and Evolving

Strategic Initiatives:

- Identify, develop and implement updated policies, training, and risk management structures to enable a safe and welcoming environment for everyone at New Leaf.
- Welcome and introduce stakeholders, partners and the community back to New Leaf in a safe, healthy, and compliant way that improves the quality of life of people supported at New Leaf.

Relevant Details

Key Stakeholders	<ul style="list-style-type: none"> • New Leaf Leaders • New Leaf Staff • Sector Partners 	<ul style="list-style-type: none"> • Ministry Representatives • People Supported by New Leaf, and their family members
Key Activities	<ul style="list-style-type: none"> • Develop consistent two-way communications channels and structures with staff at all levels of the organization to support continuous improvement, issue management, and general relationship building. • Consider two-way communications channels and structure for people living at New Leaf to develop their sense of agency and choice. • Enhance marketing and communications to external stakeholders, people supported and their families so that its regular and informative. • Flexibly respond to changing public health, safety, compliance, and operational regulations leveraging what we learned during past incidents including the pandemic. 	
Other Notes & Considerations	<ul style="list-style-type: none"> • This strategic goal and its associated initiatives will improve the communications and collaboration infrastructure across the organization. • The proposed initiatives will allow New Leaf to update its regulations to ensure a safer and more transparent environment for all stakeholders. 	

Strategic Plan Details – Strategic Goal #3 & Related Initiatives

Goal #3: Growing and Diversifying our Offerings

Strategic Initiatives:

- Leverage New Leaf’s natural assets to build relationships, and potentially diversify revenue generation streams for the organization, and increase own-source revenue sustainably and responsibly.
- Develop a strategy and approach to advocate and network with partners, decisionmakers and influencers to tell New Leaf’s story proactively and in our own voice.

Relevant Details

Key Stakeholders	<ul style="list-style-type: none">• New Leaf Leaders• New Leaf Staff• Sector Partners• Municipal Leaders
Key Activities	<ul style="list-style-type: none">• Embrace diverse revenue sources through asset development and diversification, seeking ways to better leverage New Leaf’s physical and natural assets.• Map key stakeholders and develop advocacy messages and tactics that share New Leaf’s message in an effective way: government, donors, partners, extended networks, etc.• Explore the fundraising and partnership potential for New Leaf, and introduce infrastructure to strategically manage current pipeline of donations, funds, reserves, in the context of this goal.
Other Notes & Considerations	<ul style="list-style-type: none">• This goal and its associated strategic initiatives will enable New Leaf to mitigate the fiscal pressures it has been facing through more diversified and sustainable revenue streams.