

# Vision 2015: A Detailed Strategic Annual Plan.

April 23, 2014. (Revised June 16, 2014)

*The following plan is a more detailed version of the ISSI Vision 2015 document. A presentation regarding the renewed plan can be found on our [website](#). This plan is based on the FOCUS Accreditation 2014 Standards and 4 P's: the Person, People, our Practices, and Proof. Items high-lighted in red indicate the need to gather evidence based information and report annually to the organization on progress. This will help us to develop comprehensive reporting practices. Each area is preceded by an italicized statement in general terms in order to make the detailed version simpler to talk about and to FOCUS our efforts. Please note that the frequent use of punctuation marks is intended to make the document more intelligible to Screen-Readers.*

## **1. Ethical Practices, Rights and Responsibilities.**

*General: Our goal is to help people find their "voice." We will do this by engaging in a season of organizational learning regarding Rights for all members. This would include member training and education sessions, both for groups and for individuals. The work we need to do includes:*

- Review our Code of Ethics. (1.1).
- Review our policies on diversity. (1.2).
- Review our policy on Privacy. (1.3)
- Conduct Abuse Education. (1.4).
- Review our practices on how people understand and access their personal funds. (1.5)
- Create multiple information formats. (1.6).
- Engage in Rights Education (1.7) and Rights Training for staff (1.11).
- Develop a risk protocol and a personal risk assessment. (1.8).
- Conduct education on Citizenship (*see 1.7 above*). (1.10).
- Review our responses to complaints in **an aggregated annual report** (1.15).
- Develop a policy on Research. (1.16).

## **2. Planning and Achieving Outcomes.**

*General: We will help people be able to understand and tell others how they want their life to be — about their goals and plans. We will need to continue to develop our cycle of support planning and life-planning in order to help people direct their own lives and services.*

- Develop a tool to monitor, capture and evaluate **personal goal achievement globally across the organization**. (2.6).
- Produce **an annual report regarding goal achievement** based on personal plans. (2.7).
- Produce **a data roll-up on service stats** as part of the Annual Report. (2.9).
- Review our transition of services policy. (2.10).

## **3. Communication.**

*General: We will help people to better communicate with others. We need to add a futuristic learning plan for, and including, each person we support regarding their abilities and needs with respect to communication.*

- Develop evidence based practices that demonstrate a valuing of communication needs of people we support. (3.1).
- Involve people we support in developing communication plans. (3.2).

- Create communication documents and/or plan. (3.3)
- Create an individual “how-to” guide for staff to support communication in the present *and in the future*. (3.4).
- Communication training for staff. (3.6)
- French (or other) language contingency plan. (3.7/ and 3.8).

#### **4. Accessibility.**

*General: We will help people understand and overcome barriers to access. We need to develop an individual, organizational, and community assessment tool. It will measure both ISSI and community accessibility.*

- Revise our policy on orientation and training (across FOCUS access categories). (4.1).
- Develop a variety of formats for organizational information (*see 1.6 above*). (4.2).
- Service access (DSO) information developed. (4.3).
- Accessibility plan assessments (Personal). (4.4)
- **Organizational and community access assessment tool** developed. (4.5).
- Accessibility and rights input from people we support. (4.6).
- Community needs assessment and advocacy. (4.7).

#### **5. Governance and Leadership.**

*General: Leadership will develop a visionary plan for the agency — including a calendar for that plan, and a tangible way to report on, measure, and revise our progress.*

- Have the **mission reviewed annually by all stakeholders**. (5.1).
- Have the **Strategic Plan reviewed** with input from all stakeholders, including board approval. (5.3).
- Create an **Annual Organizational Report format** with a monthly board report component. (5.4).
- Have the Board review bylaws and charter documents annually. (5.6).
- Review board orientation and review Board member succession plan. (5.7).
- Develop board profile and strengths inventory. (5.8).
- Review terms of reference policy for committees. (5.9).
- Conduct an Annual Board performance review. (5.10).
- Conduct an annual/periodic E.D. performance appraisal. (5.13).
- Develop a management structure information document. (5.16).

#### **6. Financial Management.**

*General: We will continue to be good stewards of the organization's finances by aligning the budget to our values and vision. We will also align the budget to the Annual Plan while developing the ability to manage costs and create innovation.*

- Review financial policies and documents. (6.1).
- Evidence that the budget is aligned with the mission. (6.2).
- Have a Board budget approval (motion) prior to the fiscal year. (6.3).
- Conduct a variance analysis on spending trends. (6.5).
- Review our internal process control policies and practices. (6.6).

- Review the expense policy. (6.9).
- Develop an investment policy. (6.10).
- Review our fundraising policy. (6.11).

## **7. Risk Management.**

*General: We will identify, report on, and minimize risk for people and for the organization. This will be done by developing an enhanced risk assessment report for all of ISSI's interests.*

- Risk assessment tools adapted, reviewed, and used. (7.1).
- Develop **Risk Assessment report**. (7.2).
- Organizational insurance reviewed for adequacy. (7.3).
- Staff training aligned with risk assessment (see the FOCUS categories). (7.6).
- Review our purchasing process. (7.7).
- Update our IT plan. (7.8/7.9).
- Develop a specific social media policy. (7.11).
- Record policy review. (7.12).
- Documentation of periodic Record sampling as internal quality measure. (7.13).
- Review our media policy. (7.14).

## **8. Organizational Learning and Improvement.**

*General: Our members will learn to experience their life, their work, and their workplace as a continuous growth experience. We will develop a comprehensive ISSI Learning Plan and Report based on Plan, Do, Check, Act.*

- Develop **an organizational learning plan** across the FOCUS categories. (8.1).
- Create an input feedback mechanism for all processes. (8.2).
- Develop a **report on our quality of service plan**. (8.3).
- **Personal and organizational goals tabulated and evaluated regularly**. (8.4).
- Develop cross-agency knowledge sharing platforms. (8.5).
- **Complaints process evaluated for feedback** on both individual and annual complaints. (8.6).
- Develop **an organizational map of networking practices** leading to innovation and learning. (8.7).
- Develop an **Organizational performance report**. (8.8).

## **9. Human Resources.**

*General: We will develop our human resources — people. We will begin a cycle of growth opportunities known as GO for staff members. We will develop the notion of succession planning in all agency roles.*

- Revise job descriptions based on Core Competencies. (9.1).
- Involve people we support in the hiring process based on our policy review. (9.2).
- Review our orientation process. (9.4).
- Provide documented evidence of staff meetings and supervision meetings – including a supervision form. (9.7/9.9).

- Conduct evaluations including core competencies as a resource and develop individual GO (GrowOpp) plans. (9.8).
- Formalize a leadership development plan and process. (9.10).
- Review policies, practices, tools, and instances of discipline. (9.12).
- Review our Volunteer orientation. (9.13).
- Conduct or offer (by letter) an exit interview. (9.15).
- Develop comprehensive knowledge succession plans. (9.16).
- Develop an **Annual HR Assessment Report**. (9.17).

## **10. Relationships, Partnerships and Community Connections.**

*General: We will develop partnerships for a truly inclusive community that will assist all persons needing support services in our community. We can assist this by creating a map and inventory of all ISSI community relationships.*

- Review ISSI PR information available to the community. (10.2).
- Compile a list of connections as an organizational community map. (10.3).
- Compile a **community partners list** – develop further relationships. (10.4).
- Develop a **list of community involvement** and systems improvement in the specific FOCUS categories. (10.15).
- Create **social responsibility evidence** regarding influence in: environment, community, and sustainability. (10.6).

## **11. Health, Safety and Wellness.**

*General: We will create a positive design for Wellness in our community. This will view Wellness as a way of life for staff, people supported, our families and communities.*

- Review policy on hazardous material storage. (11.5).
- Evidence of vehicle and equipment maintenance records. (11.10).
- Review fire procedures in all areas operated by the agency. (11.11).
- Review service user safety assessment tool (11.12) and specifically people receiving less than 24-hour support. (1.13).
- Review our emergency plans and our record of responses. (11.14).
- Develop a specific personal care policy. (1.18).
- Create Safe Food handling training for staff (and service-users.) (11.19).
- Review and assess safety and accessibility of properties. (11.20).
- Provide training to service users regarding healthy living and wellness. (11.21).

## **(SPH) Services in a Person's Home.**

*General: We will create tools to measure people's satisfaction with their support, their lives, their and their home.*

- Develop information describing access to services. (SPH1).
- Conduct an annual review of personal satisfaction with room-mates and living arrangements. (SPH3).
- Provide safety training (see 11.21 above). (SPH4)

- Develop measures of evidence to demonstrate the ability for people to provide hospitality by inviting people to their homes. (SPH10).
- Develop evidence of community and neighborhood relationships. (SPH11).
- Develop evidence of community participation. (SPH12).

**(SOH) Services Outside of Home.**

*General: We will create processes to measure community engagement, relationships, and contributions to community by the people we support.*

- Maintain plans stating goals regarding community participation. (SOH2/SOH4).
- Show **evidence of people making a contribution to community.** (SOH5).

**(CS) Clinical standards.**

*General: We will assist people to find specialized help when needed. Conduct an annual review and report.*

- Review policy regarding affiliation with Clinical Service providers (CS1) including: consent (CS2), involvement in planning (CS4), rights (CS5), and reporting and review (CS13).
- Provide training to staff. (CS9/CS17).
- Conduct an **annual review of clinical services and report.** (CS19).