

## INSIGHT SUPPORT SERVICES INC. STRATEGIC PLAN – JULY 2021 TO JUNE 2022

Organizational Mandates	Solidification of Organizational Missions & Values
1. Place clients and families at the center of our work.	<ul style="list-style-type: none"> <li>• Promote independence.</li> <li>• Offer flexible service delivery.</li> <li>• Provide community services that strengthen families through engagement, education, information, support, and advocacy.</li> </ul>
2. Base our interventions on sound research and best practice standards. In addition to be cognizant of emerging approaches	<ul style="list-style-type: none"> <li>• Offer flexible service delivery.</li> <li>• Provide services that strengthen clients through engagement, education, information, support, and advocacy.</li> </ul>
3. Respect the unique differences in people’s culture, ethnicity, spiritual beliefs and sexual orientation and gender identification preferences of people.	<ul style="list-style-type: none"> <li>• Are respectful in our responses to clients, their families, our co-workers, and our community partners. Exposing stakeholders to positive images/representations of diversity</li> </ul>
4. Be fiscally responsible and accountable.	<ul style="list-style-type: none"> <li>• Maintain a system of effective financial management and resource allocation.</li> </ul>
5. Adhere to our Mission Statement, Organizational Philosophy, Values, Guiding Principles and Code of Ethics.	<ul style="list-style-type: none"> <li>• Create and develop services that promote the health of the people we serve and safeguard their rights and support their potential</li> </ul>
6. Share strategic plan, as relevant to the needs of the specific group, with: A) person served. B) Personnel. C) Other Stakeholders.	<ul style="list-style-type: none"> <li>• Open communication with all stakeholders</li> </ul>

### Assessment & Review of Barriers, Benefits & Opportunities - This review is achieved by considering the following:

#### **Service Delivery & Satisfaction Surveys**

- Clients, stakeholders, contractors, and employees are given the opportunity to review services through satisfaction surveys, focus groups, regular meetings, and ongoing direct feedback.
- Service delivery, relationships/activity with contractors, employees, community, and other agencies provide feedback on how existing services are delivered, received, implemented, and utilized and influence future services and plans.

#### **Planning**

- Directors and Program Coordinators continue to provide input into the creation and development of the strategic plan.
- Directors, employees, clients, and stakeholders meet annually to review current and ongoing strategic planning and create a documented annual review.
- Planning is communicated through the following channels: Directors and Program Coordinators with staff/Caregivers/Clients.

1. EXTERNAL	BARRIERS	BENEFITS & OPPORTUNITIES
<p>a) <i>Contractors:</i></p> <ul style="list-style-type: none"> <li>• MCFD</li> <li>• CLBC</li> <li>• Provincial Autism Funding Unit</li> <li>• School District 73</li> </ul>	<ul style="list-style-type: none"> <li>• Meeting increasing demands for expanding government and contractor requirements in contractual agreements.</li> </ul>	<p>Opportunities presented by funders (possible increase client base through all programs except CLBC)</p>
<p>b) <i>Community Members</i></p>	<ul style="list-style-type: none"> <li>• Lack of funding for Community Education</li> <li>• Existing myths regarding individuals with challenges</li> <li>• Limited positive role models.</li> </ul>	<ul style="list-style-type: none"> <li>• Opportunities presented by partnering with other agencies.</li> <li>• Community Education Workshops</li> <li>• Autism &amp; FASD Awareness Days</li> <li>• On-going education of existing clients</li> </ul>
<p>c) <i>Funding/financial</i></p>	<ul style="list-style-type: none"> <li>• Ongoing challenges of sufficient funding, and in some cases, secured funding.</li> <li>• Community Living British Columbia and the Ministry of Children and Family Development as the primary sources of organizational income.</li> <li>• Delay in Payment from AFU</li> </ul>	<ul style="list-style-type: none"> <li>• Increased contract base and funding through other government ministries.</li> <li>• Increase contracts with School District #73 (SD73)</li> <li>• Respond to stakeholders in rural communities with satellite programs to include Merritt and Ashcroft</li> </ul>
<p>d) <i>Location – Kamloops, BC</i></p>	<ul style="list-style-type: none"> <li>• High cost of real estate in Kamloops</li> <li>• Distance to travel to outlying clients.</li> <li>• Encouraging the City of Kamloops to place sidewalks on McGill Rd as the road is busy and TCC is frequently accessed by clients.</li> </ul>	<ul style="list-style-type: none"> <li>• Centrally located client access</li> <li>• Shared costs with community partners</li> <li>• Located close to several community assets.</li> <li>• Acquired outdoor play space – parents formed Fish in Tree Society</li> </ul>
<p>e) <i>Community / Other Agencies</i></p>	<ul style="list-style-type: none"> <li>• Having time to maintain established community connections and create new ones.</li> </ul>	<ul style="list-style-type: none"> <li>• Opportunity for collaboration and partnering in service delivery.</li> <li>• Opportunity for sharing and building.</li> </ul>

	<ul style="list-style-type: none"> <li>• Travelling distance between rural communities</li> <li>• Competitive bidding for Ministry dollars</li> </ul>	<p>Resources and knowledge base Sharing space in rural communities</p> <ul style="list-style-type: none"> <li>• Fluid referral between MCFD and service providers</li> </ul>
<i>f) Regulatory and Legislative</i>	<ul style="list-style-type: none"> <li>• Pandemic Protocols (Covid-19)</li> <li>• Lack of support for aging out individuals</li> </ul>	<ul style="list-style-type: none"> <li>• Continued adherence to all provincial and federal regulatory and legislative policies, procedures, guidelines, and expectations.</li> <li>• Maintaining accreditation standing</li> <li>• Following guidelines established by the Provincial Health Care Officer.</li> <li>• Advocating on behalf of those aging out without additional supports</li> </ul>

1. INTERNAL	BARRIERS	BENEFITS & OPPORTUNITIES
a) <i>Services</i>	<ul style="list-style-type: none"> <li>• Portable funding</li> <li>• Selected and lack of funding.</li> <li>• Waitlist for service and assessment</li> <li>• Services being diagnosis driven rather than needs driven.</li> <li>• Staff recruiting in rural communities</li> </ul>	<ul style="list-style-type: none"> <li>• Increasing need for alternative education delivery</li> <li>• Diversify services and expand.</li> <li>• Support small satellite program in rural community</li> </ul>
b) <i>Input from Clients, families &amp; Stakeholders</i> <ul style="list-style-type: none"> <li>• <i>Space and resources for family's involvement</i></li> </ul>	<ul style="list-style-type: none"> <li>• Collect information on a consistent base and in a manner that is understandable to clients, families, and stakeholders.</li> <li>• Needs identified continues to outweigh money available. Especially for children and youth with DD or FASD but have no ASD funding</li> </ul>	<ul style="list-style-type: none"> <li>• Information is used to support service review and development.</li> <li>• TRU students developing and implementing survey and data collection.</li> <li>• Peer reviews to be implemented December 2020.</li> <li>• Creation of action team for family and community involvement</li> </ul>
c) <i>Human Resources</i>	<ul style="list-style-type: none"> <li>• Contractor/Employee recruitment/retention - Limited amount of funding to hire qualified contractors/employees.</li> <li>• Limited pool of qualified individuals</li> <li>• Wages</li> <li>• Providing consecutive 8 hours of work/ split shift</li> <li>• A lot of support occurs after 3:00 pm</li> <li>• <b>Performance reviews lack input from peers.</b></li> </ul>	<ul style="list-style-type: none"> <li>• Opportunities to expand existing training structures to support and further develop contractor/ employee skill base.</li> <li>• Being a practicum placement for Human Service at Thompson Rivers University (TRU) and Social Worker Program</li> <li>• Including another TRU practicum placement expanding the number of students</li> <li>• Partnering with community to provide educational workshops.</li> <li>• <b>360 Review system under trial.</b></li> </ul>
d) <i>Health &amp; Safety</i>	<ul style="list-style-type: none"> <li>• Drill consistency.</li> <li>• Maintaining safety of homes (property damage repairs, plumbing, electrical).</li> <li>• Multiple sites/changeable staff and client shifts</li> <li>• Funding for unexpected costs</li> </ul>	<ul style="list-style-type: none"> <li>• Utilizing external resources (licensing and fire department) to assess and monitor.</li> <li>• Acquiring contract increases to support cost of making repairs when clients create property damage.</li> <li>• Multiple people trained in health &amp; safety</li> </ul>
e) <i>Financial Issues</i> e1) <i>Business function</i>	<ul style="list-style-type: none"> <li>• Ensuring budgets are followed and resources required to operate services</li> </ul>	<ul style="list-style-type: none"> <li>• Expanding service areas to support more opportunity and increased revenue.</li> </ul>

	<ul style="list-style-type: none"> <li>are available and are regularly reviewed.</li> <li>We struggle to find ways to work creatively and to benefit the whole with limited financial resources.</li> <li>Limits placed on us by Ministry funders.</li> <li>Space limiting number on on-site clients and staff</li> </ul>	<ul style="list-style-type: none"> <li>Increasing number of School District clients</li> <li>Decrease Community Inclusion Program</li> <li>Maintain number of Individual Autism clients by 10 to 15% in <b>2021/2022</b></li> <li>Increase private counselling clients.</li> <li>Providing SLP services through Speech Language Therapist</li> </ul>
<i>f) Information &amp; Communication</i>	<ul style="list-style-type: none"> <li>Identifying time for staff meetings when all staff are available.</li> <li>Ensuring staff read and respond to written correspondence.</li> <li>Training existing and new staff and clients in agency paradigm</li> <li>Funding for ProD Days</li> </ul>	<ul style="list-style-type: none"> <li>Internal shared drive</li> <li>More consistent staff meeting attendance.</li> <li>Improved circulation and shared drive</li> <li>Web site completed 2019.</li> <li>Add Strategic plan information to website for stakeholders.</li> <li>Twitter account created 2020.</li> </ul>
<i>g) Decision Making</i>	<ul style="list-style-type: none"> <li>Time required for all stakeholders to invest in consensus decision making.</li> </ul>	<ul style="list-style-type: none"> <li>Creates community – buy-in and understanding of decisions.</li> </ul>
<i>h) Technology</i>	<ul style="list-style-type: none"> <li>Reliance on computers generates data but does not advance human service delivery.</li> <li>Software expense and trainings expense.</li> <li>Confidentiality</li> <li>Technology Plan/Policy review/test for disaster recovery all re-written to standards in April 2020.</li> <li>IT more challenging to get more support</li> </ul>	<ul style="list-style-type: none"> <li>Portable accessibility</li> <li>Video conferencing reduces carbon footprint.</li> <li>ShareVision to reduce paper-goal to paperless Service Plans.</li> <li>New IT provider on site</li> <li>Increased use of Zoom &amp; Teams video conferencing</li> </ul>

<p><i>i) Cultural Diversity</i></p>	<ul style="list-style-type: none"> <li>• No funding available for specific training</li> <li>• Recruiting qualified men and ethnic minorities</li> <li>• Form partnerships with KIB, (Kamloops Indian Band) for cultural teaching and opportunities</li> <li>• Staff to read BC Reconciliation recommendations</li> </ul>	<ul style="list-style-type: none"> <li>• Inclusion and richness of office and program culture</li> <li>• Staff to read BC Reconciliation recommendations opportunities for discussion during professional development and/or staff meetings.</li> </ul>
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\*\*Need to add social determinants of health and accessibility budget to this doc.

STRATEGIC ISSUES AND PRIORITY RATING 1 or 2	ACTION TAKEN	WHO WILL BE RESPONSIBLE	WHO WILL MONITOR PROGRESS	HOW WILL PROGRESS BE MEASURED	WHAT IS THE DESIRED OUTCOME	REVIEW DATE
<p><i>1. Maintaining existing globally funded contracts with MCFD and CLBC and school districts i.e. residential adult, CI, funded clients</i> <b>#1 Priority</b></p>	<p>Ensuring compliance with contracted outcomes. Ongoing communication with CLBC and MCFD for feedback on services provided. Renewed partnership with SD73. Funding based on a per student basis.</p>	<p>Directors and Program Coordinators</p>	<p>Directors</p>	<p>Monthly liaison meetings with funders. In-house monitoring of outcomes and contract compliance. Client and family feedback through surveys and interviews</p>	<p>Maintain current # of CLBC contracts. Increase Ind. Funded clients by 10% Increase Ed. programs by 10% Until we have more space IED #'s will be maintained. Program numbers due to Covid-19 restrictions. Maintain students attending from 12:30 to 2:30 due to Covid-19 restrictions</p>	<p>August 2020</p> <p>Achieved Aug 2013 IF ↑ by 10 %</p> <p>Achieved Nov. 2013 Sept. 2014</p> <p>Additional space acquired July 2019.</p> <p>September 2020</p>
<p><i>2. Financial</i> <b>#1 Priority</b></p>	<p>Reviewing budgets monthly and holding to budget lines. Look for alternate funding/donations etc. Fish in the Tree has identified ISS as the recipient of a % of their fundraising efforts for 2020/21</p>	<p>Directors Office Manager Independent contractor</p>	<p>Directors</p>	<p>Regular review of financial records with accountant. Semi-annually, bookkeeper monthly Review of program budgets with coordinators. No liabilities beyond 60 days. Meet payroll obligations. Operate individual programs at no</p>	<p>Solid and sound understanding of financial stability and needs required to meet overall agency planning - monitored regularly.</p>	<p>May 2011 Achieved June 2012 Dec 2013 Sept 2014</p> <p>On-going March 2018</p>

				less than 5% profit.		
<i>Bank account will be in black every month</i>	Ensure contracts are up to date.	Directors Office Manager	Directors	Statements demonstrating working in black.	To meet our goal and to increase revenue 10% annually.	Year end.
<b>3. Human Resources #1 Priority</b>	Recruiting and retaining skilled, qualified staff. Advocate with government funders for increase in contracted amounts for wages. RRSP/Retirement Plan being discussed.	Directors and ISS staff team	Directors and staff team as well as Family partners.	Monthly meeting with program coordinators to review waitlists and staffing capacity. Staff feedback on job satisfaction.	Have a solid team of qualified experienced staff to meet demand. of diverse client base.	June 2011 Dec. 2013  Recruiting on-going
<b>4. Maintaining number of Clients # 2 Priority Education program clients</b>	Indicate to school districts the capacity to take on more clients.  Consider exploring services to satellite locations in rural areas	Directors/Staff Team  and contractors	Directors/Staff Team	Review end of school year (June). Identification of new clients for September.  Manage waitlist <i>Ongoing</i>	Decrease in number of Community Inclusion clients by 25 %  Identify a new location for the program.  Maintain SD73s registration 2021	Achieved August 2014  Sept 2015  Ashcroft FSW  Merritt IF
<b>5. Provide Provincial Conference on Neurodiversity</b>	Partnering with TRU and other agencies. Identify and recruit speakers	Directors FASD Key Workers	Directors with Monitor	Progress will be monitored by Directors and committee	Increase knowledge and capacity within Kamloops community	Canceled in 2020 due to Covid-19 Aiming for 2022



<p>6. Find locations in rural community for satellite of ISS programs. # 2 Priority</p>	<p>Discussion with rural community clients and existing service providers</p>	<p>Directors and program coordinators</p>	<p>Directors and program coordinators</p>	<p>Number of locations identified. Number of clients identified</p>	<p>We will obtain space, staff, and clients for 2 small rural satellite programs. Merritt (on-going mentoring but with program independence) and running with goal of 15% client increase. Penticton running with some mentoring</p>	<p>March 2015 FSW Ashcroft</p>
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<p>Strategic Plan Completed: Date:</p>	<p>Director Name:</p>	<p>Signature of Director:</p>
	<p>Director Name:</p>	<p>Signature of Director:</p>

Rating Legend: 1 - high priority: requires immediate attention 2 - medium priority: within 3 months, ongoing 3 - low priority: within 6 months, ongoing.