

## CLS Operational Plan—CLS Key Directions and Goals (2009-2012)

	Objectives / Tasks	Yr	Performance Measures	Status	Key Contact	Complete
<b>Key Direction 1: Leadership Goals (5)</b>						
<b>1-1. Re-establish the organization as a recognized leader in community living.</b>	1-1.(a)	Identify a topic and submit a 'winning' application to present at a 2010 conference.	1	Opportunities identified.  Proposals written.  Proposal accepted.	<b>Complete</b>	<a href="#">Theresa Huntly</a>  BC Association of Community Living (BCACL) Fall Conference. Proposal written for BCACL Fall 2010 Conference.  BCACL Fall 2010 Conference application accepted.
	1-1.(b)	Increase participation on external committees that support the CLS strategic plan and increases agency visibility.	1	Increased number of senior employees participating on external committees	<b>Complete</b>	<a href="#">Ross Chilton</a>  Senior employees participating in CLAN, CLBC Community Council, Housing Needs for People with Disability and Homesharing Committees.  Ross Chilton represented CLS as part of a panel discussion on housing options for people with disability at the 2009 BC Non-Profit Housing Association Conference.
	1-1.(c)	Develop a 'CLS product' that can be offered sector-wide.	2	Identification of CLS products that could be offered sector wide.  Sector-wide needs/gap analysis conducted.  CLS product matched with sector need.	<b>Deferred</b>	<a href="#">Jeane Rogers</a>  .
	1-1.(d)	Identify the unique attributes of CLS and develop a 'brand' for the agency.	3	CLS 'brand identity' in place.  Brand marketed internally and externally	<b>Complete</b>	<a href="#">Vicky Pascoe</a>  CA Design chosen to work with CLS. Identified our "Big Idea" and "Brand Experience Statement". Working on logo.  New brand unveiled at AGM in June 2011
	1-1.(e)	Develop comprehensive information packages.	2	Plan developed for information packages.  Initial piece completed.  Information package includes profiles on new initiatives including home sharing, semi-independent living and revitalized vocational services.	<b>Complete</b>	<a href="#">Theresa Huntly</a>  Completed – move to ongoing work.

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	1-1.(f)	Develop a strategy to increase CLS community profile.	2	Community identified to pilot strategy.  Pilot evaluated.  Strategy to expand community awareness developed and approved.	Deferred	<a href="#">Theresa Huntly</a>	.
	1-1.(g)	Contribute towards an improved working relationship between service provides and CLBC.	2	Mentoring/training on funding guidelines provided to small agencies.  Agreements negotiated between CLAN and CLBC.	Complete	<a href="#">Senior Team</a>	Initial training provided to CLAN BC members at their AGM.  Agreement finalized between CLAN & CLBC which includes consideration for CLS and all non-union providers.
<b>1-2. Support the leadership potential within all persons-served.</b>	1-2.(a)	Include 'persons-served' as contributors to the revised training for new employees.	1	A minimum of six individuals available to contribute to the training.	Complete	<a href="#">Lucie McKiernan</a>	Two supported persons participated in January 2010 Values training.  Four more have been approached for ongoing involvement.
	1-2.(b)	Involve 'persons-served' in the personal goal setting training.	1	A minimum of three individuals available to contribute to the training.	Complete	<a href="#">Theresa Huntly</a>	"People Planning Together" self-advocate training - March 2010.  Those self-advocates who are interested will be supported to participate in the training of employees about goal planning.
	1-2.(c)	Identify other opportunities to involve 'persons-served' in the work of CLS.	1	Opportunities identified and brought forward to year 2 operational planning	Complete	<a href="#">Diane Zalasky</a>	Persons served currently sit on CLS committees such as Home sharing, Development and Greening; need representation on Information Management committee.  Person served participated in the hiring of the Family Support Worker.
	1-2.(d)	Support persons-served participation in person-centre planning projects.	3	Persons-served participate in person-centred planning training.  Persons-served are employed to deliver presentations to community employers.	Complete	<a href="#">Operations</a>	Both projects ("People Planning Together" and "Advancing Employment 1st") are completed. Involving persons served in person-centred planning training and any training for community employers are now moved to ongoing work.
			2	CLS Self Advocates are employed as interviewers for the Quality of Life project.	Complete	<a href="#">Operations</a>	2 CLS applicants were chosen in training for Quality of Life.
1-2.(e)	Implement TYZE pilot project.	3	Consider and make a recommendation on how to proceed	New Progress	<a href="#">Operations</a>	50% complete. PSI is concluded. Awaiting recommendation from CLBC.	

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	Objectives / Tasks	Yr	Performance Measures	Status	Key Contact	Complete			
<b>1-3. Strengthen family leadership, engagement and support for the organization.</b>	1-3.(a)	1	Expand the diversity and number of families contributing to the revised training of new employees.	1	A minimum of 2 new families involved in the training.	<b>Complete</b>	<a href="#">Lucie McKiernan</a>	Two new family members committed to the training in 2010 with a potential 3rd family member.	
	1-3.(b)	2	Increase the range of opportunities and the number of families participating in internal and external conferences, workshops, committees and working groups.	2	Interested families identified. Interested families connected to opportunities. Fair distribution of opportunities among interested families.	<b>Complete</b>	<a href="#">Ross Chilton</a>	Interested families identified. Interested families connected to opportunities. Fair distribution of opportunities among interested families.	
		3	3	Explore and make recommendations on how family leadership can remain integral to the organization.					
	1-3.(c)	Identify family input and information-sharing requirements.	1	A representative number of families identify their input and information needs.	1	A representative number of families identify their input and information needs.	<b>Complete</b>	<a href="#">Diane Zalasky</a>	Family interviews conducted which include a question about what they require from CLS (information, support, resources, etc.)
				Mechanisms for effective family input identified and consistently implemented.	<b>Complete</b>		ISQLP agenda ensures inclusion of family input		
	1-3.(d)	Increase the number and type of communication approaches for engagement with families.	1	Family page established in the Communicator.	1	Family page established in the Communicator.	<b>Complete</b>	<a href="#">Diane Zalasky</a>	Family Connections article regular feature in Communicator
				Families offered option of receiving mail-outs.	<b>Complete</b>		Families receive mail-outs on request – we are also establishing an email list at the request of families		
			2	Family page on website.	<b>Deferred</b>	<a href="#">Diane Zalasky</a>	.		
	1-3.(e)	Encourage the work of 'Family Link' by identifying and furthering the work on mutual objectives.	2	One collaborative project identified and begun.	2	One collaborative project identified and begun.	<b>Complete</b>	<a href="#">Debra Smith</a>	Partnered with Family Link on Woodlands settlement information meetings for families.
	1-3.(f)	Work with families to create resources and support networks for families to do succession support planning.	2	Set of resources for families doing succession planning. Family leadership in developing resources.	2	Set of resources for families doing succession planning. Family leadership in developing resources.	<b>Complete</b>	<a href="#">Operations</a>	Resource guide "Passing the Torch: Transitioning Family Support to the Next Generation" written and available to family/support networks. Guide was developed with family involvement. Family members are featured in video portion of conference PowerPoint presentation.

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<b>1-4. Strengthen the leadership capacity of the employee team to participate in the success of the strategic plan.</b>	1-4.(a)	Provide employees with on-line access to the strategic and operational plans and ability to provide operational input directly to the key persons responsible.	1	Strategic and operational plans communicated to all employees.  Employees received regular updates on the strategic and operational plans.  Online link to key person responsible provided on each objective.	Complete	<a href="#">Vicky Pascoe</a>	Strategic Plan is posted on website.  Operational Plan is posted on website with email links to person responsible for each objective.
			2	Input from employees on operational plan on each strategic goal brought to senior team meetings.	Complete	<a href="#">Operations Pam Cambiazo</a>	Employees have access and some feedback has been provided.
			3	Communication strategy developed for information sharing between employees and senior team around strategic and operational plans.	Complete	<a href="#">Pete Stone</a>	Plan available on website and employees can give feedback Employees reported in 2011 Employee Survey that they know where to find information and how to get their suggestions in (85%)
	1-4.(b)	Create mechanism for on-line dialogue on strategic and operational issues.	3		Complete	<a href="#">Vicky Pascoe</a>	.
	1-4.(c)	Link the interview process to the strategic and operational plans.	2	Interview questions reflect strategic and operational priorities.	Complete	<a href="#">Lucie McKiernan</a>	.
	1-4.(d)	Link the annual employee performance planning process to the strategic and operational plans.	2	Performance plans developed for all employees including relief, full time and part time.	Complete	<a href="#">Lucie McKiernan</a>	.
				Performance plan template provides a link to the strategic and operational plan.	.		.
	1-4.(e)	Provide updates on the strategic and operational plans at regularly-planned employees meetings at all levels of the organization.	2	Operational planning established as a standing item on standardized agendas.	Complete	<a href="#">Operations</a>	.
				Awareness of strategic and operational plans included on employee surveys.	Complete	<a href="#">Lucie McKiernan</a>	A question has been included in the 2011 survey under the heading "Communication": "I know where to find information about CLS's Strategic Plan and Operational Plan."  Town Hall meetings regularly include dialogue on strategic and operational plans.
				Review of strategic and operational plans included on the new employee checklist.	Complete	<a href="#">Lucie McKiernan</a>	.

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<b>1-5. Continue to revitalize and strengthen the capacity of the Board and senior team to lead the strategic plan.</b>	1-5.(a)	Develop and implement new policies in respect of Board Governance.	1	Policies comply with CARF requirements.	Complete	<a href="#">Diana Hynes</a>	Governance report completed by board governance committee – policies comply with CARF requirements.
			1	Board conducts business in accordance with Governance policies.	Complete	<a href="#">Diana Hynes</a>	Governance report has been reviewed by the board.
			1	Job descriptions in place for Board members.	Complete	<a href="#">Diana Hynes</a>	New job descriptions are part of the governance report.
			2	Board is oriented in new Governance policies.	Complete	<a href="#">Diana Hynes</a>	Board orientation implemented September 2010
			3	Board evaluates performance and incorporates results into planning.	Complete	<a href="#">Diana Hynes</a>	Completed – move to ongoing work.
	1-5.(b)	Support an active on-going nomination committee to ensure Board skill and expertise to support the work of the agency.	1	Board skill set is aligned with organizational requirements.	Complete	<a href="#">Ross Chilton</a>	Governance committee is identifying optimal skill set requirements.  All board committees, including the nomination committee submit written reports at every Board meeting.
	1-5.(c)	Develop, implement and evaluate annual operational plan.	2	Senior management team performance plans linked to operational plans.	Complete	<a href="#">Ross Chilton</a>	Implemented in the fall of 2010
	1-5.(d)	Develop individual professional development plans with each senior team member.	2	Senior management team members identify coaching and performance development opportunities for the coming year.	Complete	<a href="#">Ross Chilton</a>	Incorporated into performance review process and now is an ongoing expectation,

### Key Direction: 2-Recognize Service Excellence and Innovation

#### Goals (6)

<b>2-1. Develop options to support the needs and interests of the aging population and their families.</b>	2-1.(a)	Develop a proposal to support 'retirement planning' for persons-served, enabling them to age according to their wishes.	2	Board approves recommendations.	Complete	<a href="#">Barb Robinson</a>	Board approved recommendations in Needs Assessment.
	2-1.(b)	Identify housing to support people to age with dignity.	2	New housing identified.	Complete	<a href="#">Barb Robinson</a>	Criteria created for assessing a home as a potential purchase that includes Accessibility, Adaptability and Adjustability.

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	2-1.(c)	Identify and implement support strategies to help people with age-related interests and issues.	1	Number of people supported to remain in a CLS residence.  Transition plan in place for individuals facing age-related issues and for all people over the age of 50.  Flexible schedules in place to support the changing interests and needs of the elderly.	Complete	<a href="#">Barb Robinson</a>	See 2-1.(d) & 2-1.(e) (incorporated below)
	2-1.(d)	Develop a proposal to support retirement planning for person's served enabling them to age according to their wishes.	2	Needs assessment complete.  Board approves recommendations on retirement planning implementation strategy.	Complete	<a href="#">Aging with Dignity Committee</a>	Needs assessment completed – presented to Board November 2010.
	2-1.(e)	Complete transition plans for all person's served over 50 years of age.	3	Transition plans piloted on 5-10 person-served over the age of 50.	.	<a href="#">Aging with Dignity Committee</a>	
<b>2-2. Develop options to support the needs and interests of young people and their families.</b>	2-2.(a)	Increase organizational understanding of the needs of younger adults.	2	Working group in place.  'Informants' identified  Meeting with 'informants' to identify needs and trends.	Deferred	<a href="#">Theresa Huntly</a>	.
Apr 22/10 goal reworded to: <i>Increase the number of young people and their families choosing CLS as their service provider.</i>	2-2.(b)	Develop a proposal on adapting CLS services to better meet the needs and interests of young adults.	2	Proposal developed and approved by the Board.  Proposal informs the revitalization of vocational and residential services	Deferred	<a href="#">Theresa Huntly</a>	.
	2-2.(c)	Develop communication strategy and material that brands CLS as an agency that provides customized and flexible options for young adults.	2	Needs of young people are targeted in communication and branding material.	Complete	<a href="#">Branding Team</a>	Completed – move to ongoing work.

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<b>2-3. Revitalize vocational options focusing on an employment-first, individualized, community-based approach.</b>	2-3.(a)	Develop the workplan, consistent with best practices, and guide the vocational revitalization process over the next three years.	3	Meaningful input will be sought and incorporated from persons-served, family, board and employees.  Workplan presented to vocational teams and available on the website.		<a href="#">Elke Tilgner</a> <a href="#">Pete Stone</a>	Plan to be brought forward at June 1, 2011 Board meeting.  Plan presented at Coordinator meetings  Plan presented at Vocational staff meetings
	2-3.(b)	Seek additional funding to support the revitalization of vocational services.	2	Commitment to fund revitalization of vocational services	<b>Complete</b>	<a href="#">Ross Chilton</a>	Request made but declined due to tight fiscal environment. Removed from plan for 2011/12.
	2-3.(c)	Develop a plan to prioritize and build on existing meaningful community-based options that include work, volunteer and recreation/leisure activities.	3	Day options and work/volunteer schedules are coordinated to meet a range of needs.	<b>Complete</b>	<a href="#">Elke Tilgner</a>	Incorporated as part of 2-3.(a)
			3	Families and young people report greater independence through increased utilization on natural community supports.	<b>Deferred</b>	<a href="#">Elke Tilgner</a>	Deferred to year 4 for re-evaluation.
			1	Increased number of young adult CLS clients.	<b>Complete</b>	<a href="#">Elke Tilgner</a>	Young adult CLS-served individuals increased (TEAM for Life, 19 of the 20 person programme individuals; young deaf individuals)
			1	Day options for young people optimize integration and independence.	<b>Complete</b>	<a href="#">Elke Tilgner</a>	TEAM for Life community-based employment and lifeskills model; 20-person independence skill-building programme
	2-3.(d)	Increase networking with traditional and non-traditional community partners to develop more opportunities for individuals to participate inclusively.	2	Community employers supporting CLS individuals recognized	<b>Complete</b>	<a href="#">Elke Tilgner</a>	Completed – move to ongoing work.
			1	Success stories in local papers	<b>Complete</b>	<a href="#">Elke Tilgner</a>	TEAM for Life success story featured in New Westminster paper, November 2009
	2-3.(e)	Plans in place for Glassworks and PotteryWorks.	3		<b>New Progress</b>	<a href="#">Operations</a>	Incorporated into Vocational Revitalization Plan

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2-4. Expand the existing continuum of residential options, in response to the unique and individual needs of people currently served and new people coming into the organization.	2-4.(a)	2	Housing options included as defined component in each ISQLP	Complete	<a href="#">Barb Robinson</a>	Incorporated into ISQLP agenda to discuss.	
		3	Information package on residential options available	Complete	<a href="#">Barb Robinson</a>	Completed – move to ongoing work.	
			Coordinators trained and evaluated on their ability to explore options and choice with individuals and families	New Progress		Coordinators working with Director of Residential Initiatives, matching housing to needs. Director providing training location by location on housing options. Preparing for the future. Part of Annual Review.	
	2-4.(b)	Develop a workplan, consistent with best practices, to guide the expansion of the 'home sharing' initiative.	1	Advisory committee in place with representation from persons-served, family, board and employee. Project goals identified. Committee workplan in place and available on the website. Risks identified and mitigation plan in place.	Complete	<a href="#">Diane Zalasky</a>	Committee in place with family, board and employee representation.  Workplan in place.
	2-4.(c)	Seek additional funding to support the expansion of home sharing.	1	Commitment to fund expansion of home sharing	Complete	<a href="#">Ross Chilton</a>	Funder is funding 1/2 FTE Home Share Coordinator.
	2-4.(d)	Expand the home sharing initiative.	1	Part-time coordinator in place.  Prospective home share providers identified and approved	Complete	<a href="#">Diane Zalasky</a>	Full time coordinator hired.
	2-4.(e)	Develop a plan to expand the number of semi-independent housing units.	1	Plan developed and approved by the Board	Deferred	<a href="#">Barb Robinson</a>	.
2-4.(f)	Secure adequate funding to purchase units for semi-independent living.	1	BC Housing contributes to the purchase of the units.  CLBC has committed to funding supports for semi-independent living	Deferred	<a href="#">Ross Chilton</a>	.	



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<i>Strengthen the person-centred culture within the agency to guide short and long-term decision making.</i>		3	Person-centred planning best practices identified.  Quarterly reports demonstrate person-centredness.	<b>Complete</b>	<a href="#">Operations</a>	Completed – move to ongoing work.	
	2-5.(b)	Complete ISQLP training for coordinators and employees.	1	Employees understand that supporting the goals of persons-served is part of best practices and part of their individual performance plans.	<b>Complete</b>	<a href="#">Lucie McKiernan</a>	Introduction to ISQLP now included in Values training for all new employees
			2	All coordinators are fully competent in the development and implementation of the ISQLP	<b>Complete</b>	<a href="#">Theresa Huntly</a>	Training in 1/4ly reports completed by end of March 2011.
			3	Employees report in the 2011 employee survey feeling involved in the development and implementation of personal plans for individuals.	<b>Complete</b>	<a href="#">Lucie McKiernan</a>	Completed training. 2011 Employee Survey feedback indicated 64.7% agreed and 18.2% somewhat agreed they are involved in development and implementation of ISQLPs.
	2-5.(c)	Evaluate the effectiveness of the ISQLP	3		<b>Complete</b>	<a href="#">Theresa Huntly</a>	This evaluation has led to the decision to implement "Quality of Life" indicators as outcomes.
<b>2-6. Continuously improve quality and consistency of residential and vocational outcomes through the development and implementation of monitoring and reporting mechanisms.</b>	2-6.(a)	Identify and implement an information management system to support the collection and summary of outcome data.	1	Agency statistics on individual progress towards goals are compiled and reported on annually.  Trends in residential and vocational services identified	<b>Deferred</b>	<a href="#">Theresa Huntly</a>	.
	2-6.(b)	Develop a workplan, consistent with best practices, to guide the CQI initiative.	2	Advisory committee in place with representation from persons-served, family, board and employee.  Project goals identified.  Annual committee workplan in place, approved by the Board and available on the website.  CQI process meets Accreditation Standards.  CQI processes throughout the agency are	<b>Complete</b>	<a href="#">Operations</a>	.

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				consolidated into one framework.  CQI processes contribute to enhancing the person-centred culture of CLS.			
	2-6.(c)	Implement a Continuous Quality Improvement (CQI) process for residential and vocational services.	3	Quality improvement initiatives identified and tracked.  Individuals and families report increased satisfaction with employees engagement and involvement in their work with individuals.	Complete	<a href="#">Theresa Huntly</a>	.
	2-6.(d)	Implement the Quality of Life Indicator project.	2	Target number of interviews achieved.  Survey results returned to agency.	Complete	<a href="#">Operations</a>	Scheduled to complete 62 by the end of March 2011. Survey results expected June 2011.
	2-6.(e)	Client Information System: decision made, project costed financially and for HR needs, and implementation plan created.	3			<a href="#">Operations</a>	
	2-6.(f)	Align organizational performance outcomes with Quality of Life domains.	3			<a href="#">Operations</a>	

### Key Direction: 3-Engaging Employees Through Progressive Employment Experiences

#### Goals (5)

<b>3-1. Maintain the status as a distinctive and flexible employer through excellence in human resources practices.</b>	3-1(a)	Identify practices for improvement arising from the 2009 Employee Survey.	1	Survey results available to employees on-line.  Plan to enhance practices communicated to employees and available on-line.	Complete	<a href="#">Ross Chilton</a>	.
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	3-1(b) Conduct employee survey bi-annually.	3	60% employee response rate achieved.  Sample is representative of the overall employee group.  A minimum of three issues identified by the survey are addressed.  Reports have capacity to track changes and trends over time.	Complete	<a href="#">Lucie McKiernan</a>	43.75% response received. Robust and representative sample. Ongoing work with Liaison Committee, Employee Services and Senior Management. Confirms reports have the capacity to track changes and trends over time.
	3-1(c) Continue to work with the Liaison Committee to identify employee priorities.	2	Information provided by the Liaison Committee is brought forward to Senior Management Team and informs decision making.  Three key issues addressed.	Complete	<a href="#">Lucie McKiernan</a>	Monthly meetings have continued and new members of Liaison Committee elected.  Four key issues addressed: 1 - Annual performance plans redesigned and outstanding numbers dropped. 2 - Town Hall meetings to improve communication implemented. 3 - Job descriptions updated. 4 - Long Term Disability plan adjusted to reflect the majority of employees.
	3-1.(d) Develop a mechanism that ensures each decision is examined through the lens of organizational uniqueness and flexibility.	1	Any changes to benefits are analyzed through the lens of flexibility and uniqueness.  Any compliancy requirements are analyzed through the lens of flexibility and uniqueness.	Complete	<a href="#">Ross Chilton</a>	Flexibility with negotiations with Licensing
	3-1.(e) Defend CLS's right as an independent service provider to define employee compensation guidelines.	2	CLS continues to define wages and benefits.	Complete	<a href="#">Ross Chilton</a>	In negotiations with funders we have clarified our right to apply compensation in a way that fits our unique culture (as wage increases for example), and apply funding in alignment with our values and culture.
<b>3-2. Attract and retain an engaged workforce.</b>	3-2.(a) Develop mechanisms to identify and showcase internal expertise and creativity in community living practices.	1	Employees showcased in the 'Communicator'.	Deferred	<a href="#">Theresa Huntly</a>	.
	3-2.(b) Utilize findings from employee engagement survey to improve recruitment and retention of employees.	3		Deferred	<a href="#">Lucie McKiernan</a>	Revisit objective in Strategic Planning.
	3-2.(c) Increase engagement in the work of the organization by enhancing the competency of coordinators and front-line employees to	1	Employees performance plans accurately reflect job descriptions.	Complete	<a href="#">Lucie McKiernan</a>	.

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	develop employee performance plans and engage in a meaningful mentoring and feedback process.					
		3	Employees report clear expectations.  Employees report that they understand their roles and responsibilities.  Employees report that their supervisor provides helpful feedback.	Complete	<a href="#">Lucie McKiernan</a>	2011 Employee Survey was positive in all 3 performance measures.
	3-2.(d) Identify skill sets to meet new/revised program requirements.	3	Profiles of CLS skill requirements developed.	Complete	<a href="#">Employee Services Operations</a>	Complete – move to ongoing work.
	3-2.(e) Develop and implement a Service Review Human Resources plan to manage the transitional issues.	1	Board approves HR plan.	Complete	<a href="#">Lucie McKiernan</a>	.
		2	HR plan mitigates employee issues resulting from Service Review.	Complete	<a href="#">Lucie McKiernan</a>	Completed for residential review. No employees lost their status or job due to Service Review.
<b>3-3. Foster a culture of open communication, support, recognition and respect for each other.</b>	3-3.(a) Increase accessibility of electronic information available to employees.	3	Increase in the information available to employees on the website.	Complete	<a href="#">Vicky Pascoe</a>	More than 60% of the workforce have provided email addresses which are used for surveys, newsletters, etc.
	3-3.(b) Communicate how employee input is documented, considered and incorporated into decision making.	2	Employees are provided with examples of how employee input has influenced/affected decision making.	Complete	<a href="#">Ross Chilton</a>	Letters sent to employees indicating how their input influenced the decision around the Municipal Pension Plan and the Long Term Disability benefit.
	3-3.(c) Develop electronic capacity that allows employees to profile expertise that they are willing to share internally.	3	Project parameters defined.  Project embedded in the larger information management system.  IT infrastructure identified and costed for project.	.	<a href="#">Jeane Rogers</a>	.
	3-3.(d) Based on survey results and additional input from employees develop a plan to better align formal recognition of employees with their stated preferences.	3	Employees report an increased feeling of being acknowledged and appreciated in the bi-annual survey.	Complete	<a href="#">Lucie McKiernan</a>	Completed, move to ongoing work with Liaison Committee.

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	3-3.(e)	Develop a set of workplace norms that promote a respectful workplace, communicate the expectations to all employees and provide training and coaching to create success.	2	Individuals and families report that the workplace is respectful.  Majority of employees report in the 2011 employee survey that their work environment is respectful.  Majority of employees report in the 2011 employee survey report that the practice of addressing disrespectful behaviour is appropriate, timely and consistent.	Deferred	<a href="#">Lucie McKiernan</a>	.
	3-3.(f)	Survey coordinator communication best practices and, identify those practices for agency-wide application.	3	Survey of best practices complete.  Mechanism to implement best practices in place.	Deferred	<a href="#">Employee Services</a>	Revisit objective in Strategic Planning.
<b>3-4. Support training and development promoting individual and sector-wide professionalism and excellence.</b>	3-4.(a)	Develop a cost-effective process for sharing information from provincial and national conferences and workshops.	1	Information from workshops and conferences available electronically	Deferred	<a href="#">Wanda McDonald</a>	.
	3-4.(b)	Design and develop coordinator training in accordance with the needs analysis.	3	Coordinators believe they have the training to fulfill their role.	.	<a href="#">Lucie McKiernan</a>	.
				Coordinators report that their staff are engaged in the work of the agency.	.		.
				Coordinators report that they are engaged in the work of the agency.	.		.
	3-4.(c)	Over the next three years, expand new employee training to five days.	1	New employee training increased to 4 days.  New employee training increased to 5 days.	Complete	<a href="#">Lucie McKiernan</a>	3 day training program redesigned incorporating additional curriculum.
	3-4.(d)	Conduct an organization-wide training needs analysis and develop a training plan specific to meeting the needs of persons-served and prioritize training development for Year 2.	3	Priority training needs identified.  Priority training needs costed.  Cost-effective delivery methods identified.  Training evaluation process identified.	Deferred	<a href="#">Lucie McKiernan</a>	Revisit objective in Strategic Planning.
	3-4.(e)	Implement technology and ComVida (EMS) training.	2	The Employee Management System (EMS) goes live by September 31, 2010.	Deferred	<a href="#">Jeane Rogers</a>	Update objective in Strategic Planning.

## CLS Operational Plan—CLS Key Directions and Goals (2009-2012)

	Objectives / Tasks	Yr	Performance Measures	Status	Key Contact	Complete
	3-4.(f)	2	Five employees complete intensive person centred training.	Complete	<a href="#">Employee Services Operations</a>	5 employees completed "Optimal Individual Service Design" course with Michael Kendrick in October 2010.
		3	Internal capacity to deliver person-centred training developed.	Complete	<a href="#">Employee Services Operations</a>	
		3	Plan to make use of the 5 employees trained in OISD developed and implemented supporting vocational & residential re-design.	Complete	<a href="#">Employee Services Operations</a>	Ongoing, these employees will work on vocational revitalization.
	3-4.(g)	2	Enhance communication to employees on training available through the agency.	Complete	<a href="#">Employee Services</a>	First time question "I am aware of training opportunities as they arise" – 83% Agree
	3-4.(h)	3	Explore feasibility of a plan for MANDT training for all employees every year within existing training budget.		<a href="#">Employee Services</a>	
<b>3-5. Continue to make every effort to provide employees with competitive compensation.</b>	3-5.(a)	1	Enhanced pension plan in place.  Equitable funding increase is achieved	Complete	<a href="#">Lucie McKiernan</a>	MPP implemented 8 July 2010.  CLAN BC/CLBC deal negotiated to address non-union/union wage gap.
		1	Competitive benefit package.	Complete	<a href="#">Jeane Rogers</a>	Pointbreak conducted review on value for dollars.
		3	Employees report satisfaction with benefits in the 2011 employee survey.	Complete	<a href="#">Employee Services</a>	Survey distributed in March 2011. Expect results in April 2011.

### Key Direction: 4-Long-Term Sustainability Goals (7)

## CLS Operational Plan—CLS Key Directions and Goals (2009-2012)

	Objectives / Tasks	Yr	Performance Measures	Status	Key Contact	Complete	
<b>4-1. Pursue opportunities in new areas where CLS can effectively respond to requests for services and build organizational capacity for excellence.</b>	4-1.(a)	Identify the new opportunities, evaluate agency potential to respond and develop a proposal to expand agency mandate.	2	Proposal developed and approved by the Board	<b>Complete</b>	<a href="#">Theresa Huntly</a>	PSI (Personalized Supports Initiative) RFQ (Request for Qualifications) completed and approved. CLS qualified to provide service in all CLBC regions. New services, including Home Sharing now being provided in a new CLBC region (Upper Fraser).
	4-1.(b)	Engage with new families and individuals to explore how CLS can help.	1	Data gathered informs business development. Part time position established to support families	<b>Complete</b>	<a href="#">Theresa Huntly</a>	Family interviews completed; information gathered about what CLS can be doing to help families; results shared with Family Support Worker.  Deb Smith hired.
			2	Outreach plan developed to connect with families and individuals experiencing transition and needing new services	<b>Complete</b>	<a href="#">Theresa Huntly</a>	Moved to ongoing work. Bring forward to Strategic Planning in year 4.
	4-1.(c)	Establish a respite program to support home sharing initiative.	2	Capacity to provide respite for CLS home share providers.	<b>Complete</b>	<a href="#">Home Share Coordinator</a>	Respite process in place. Currently managed by Home Share Coordinator.
	4-1.(d)	Establish a respite program to support respite services to children.	3	Project plan outlining feasibility for children's respite completed.	<b>Deferred</b>	<a href="#">Operations</a>	.
	4-1.(e)	Create a plan for how respite services will be provided for adults served, or potentially served, by CLS and others.	3			<a href="#">Operations</a>	
<b>4-2. Develop relationships and partnerships with funders and other stakeholders at</b>	4-2.(a)	Identify potential areas for 'innovation' involving partnerships and joint funding.	3	Two to three 'innovation projects' identified, approved by the Board and brought forward to the funder for discussion	<b>Deferred</b>	<a href="#">Ross Chilton</a>	.

## CLS Operational Plan—CLS Key Directions and Goals (2009-2012)

	Objectives / Tasks	Yr	Performance Measures	Status	Key Contact	Complete	
the provincial and local levels and create innovative approaches to meeting needs and opportunities for joint funding.							
	Review Asset Strategy recommendations and identify three opportunities that will enable CLS to lever assets to maximize social good.	2	Development consultant identified and retained.	Complete	<a href="#">Development Committee</a>	.	
		3	Asset Strategy report completed.		<a href="#">Development Committee</a>	Asset Strategy expected in April 2011.	
4-3. Expand capacity of the organization to offer home sharing and semi-independent living options to individuals and home sharing oversight services to the funder.	4-3.(a)	See Service Excellence and Innovation Goal #4		Complete		.	
	4-3.(b)	Explore the potential to provide extended home sharing oversight service.	2	Proposal developed as part of the work of the Home Sharing Committee	Complete	<a href="#">Diane Zalasky</a>	.
4-4. Establish CLS as a host agency for Individualized Funding.	4-4.(a)	Develop the infrastructure to efficiently manage host agency agreements.	1	Key elements and responsibilities for Human Resources and Finance are defined and operationalized	Complete	<a href="#">Ross Chilton</a>	Contracts begun.
	4-4.(b)	Promote the ability of CLS as a host agency with families and the funder.	3	Print and web-based information on the services CLS can provide as a host agency is available.	Complete	<a href="#">Ross Chilton</a>	Completed – move to ongoing work.

## CLS Operational Plan—CLS Key Directions and Goals (2009-2012)

	Objectives / Tasks	Yr	Performance Measures	Status	Key Contact	Complete	
		1	CLBC analysts are aware of CLS competence as a host agency.	Complete	<a href="#">Ross Chilton</a>	Contracts awarded from three CLBC regions.	
<b>4-5. Continue to operate a financially effective, efficient and responsible agency.</b>	4-5.(a)	1	Identify and implement a minimum of 3 cost efficiencies per year	Complete	<a href="#">Jeane Rogers</a>	Reported to the Board as part of the Financial Plan.	
	4-5.(b)	1	Increase revenue opportunities for agency	Complete	<a href="#">Jeane Rogers</a>	Significant increased revenues realized in F0910.	
	4-5.(c)	1	Purposeful purchasing (socially responsible) practices utilized	Complete	<a href="#">Jeane Rogers</a>	Part of procurement process.	
		3	Engagement process developed and implemented.  'Found savings' to support identified projects.  Environmentally sensitive practices in place	Complete	<a href="#">Jeane Rogers</a>	Completed – move to ongoing work.	
	4-5.(d)	2	Successes shared agency-wide and published in Communicator and the website	Complete	<a href="#">Jeane Rogers</a>	Memos to employees, Friday email highlight successes.	
	4-5.(e)	Provide coordinators with reports on actual and budgeted expenses.	4	Coordinators trained in understanding financial reports	Deferred	<a href="#">Jeane Rogers</a>	.
				Individuals and staff accrue benefit from savings initiatives	.		.
4-5.(f)	Identify and implement cost efficiencies.	2	Minimum of three efficiencies identified and strategies implemented.	Complete	<a href="#">Finance Department</a>	Efficiencies realized (yearly savings \$52k): Property/Liability Insurance Photocopier Lease Tax exemptions Cellular phone plan Risk Management Consultant Contractor discounts	

## CLS Operational Plan—CLS Key Directions and Goals (2009-2012)

	Objectives / Tasks	Yr	Performance Measures	Status	Key Contact	Complete
	4-5.(g)	2	Agreements reflect services purchased and associated funding.	Complete	<a href="#">Finance Department</a>	Contracts updated fiscal 2010-2011.
		3	Actual hours worked tracked and reported against agreed service levels.		<a href="#">Finance Department</a>	
<b>4-6. Ensure effective risk management and financial protection of all CLS assets.</b>	4-6.(a)	1	Upgrades identified, costed and implemented	Complete	<a href="#">Barb Robinson</a>	.
	4-6.(b)	1	Vehicles are regularly maintained and replaced as required.  Vehicle maintenance included in coordinators performance plans.  Fuel efficient vehicles purchased.	Complete	<a href="#">Barb Robinson</a>	.
	4-6.(c)	1	All vehicles receive regular maintenance in a timely way.  Increase utilization of HandiDart and Transit.  Reduce fuel and vehicle costs.  Accessibility to transit a consideration in all new home purchases	Complete	<a href="#">Barb Robinson</a>	.
	4-6.(d)	3	Build on accomplishments of year 2.	New Progress	<a href="#">Barb Robinson</a>	- Each vehicle replacement evaluated - options identified. - Kilometre challenge - 2010. - Staff awareness - Communicator articles. - Mileage monitoring. - Survey on transit use and advocating for Handy Dart improvement.
	4-6.(e)	1	Adequate insurance in place to manage risk.	Complete	<a href="#">Barb Robinson</a>	.
	4-6.(f)	3			<a href="#">Barb Robinson</a>	

## CLS Operational Plan—CLS Key Directions and Goals (2009-2012)

	Objectives / Tasks	Yr	Performance Measures	Status	Key Contact	Complete	
<b>4-7. Diversify the funding base.</b>	4-7.(a)	Create a business development plan that evaluates the potential in the market and the resources required to succeed.	4	Plan developed and approved by the Board	<b>Deferred</b>	<a href="#">Ross Chilton</a>	Revisit.
				Plan is aligned with current vision, mission and values	.		.
				Growth targets established for underutilized revenue streams	.		.
	4-7.(b)	Develop a proposal to increase revenue from individual and corporate donors.	4	Preliminary plan developed and approved by the Board	<b>Deferred</b>	<a href="#">Jeane Rogers</a>	.
				Plan reviewed after one year in light of economic update	.		.
				Plan is aligned with the current vision, mission and values	.		.
	4-7.(c)	Develop a plan for funder and donor recognition.	1	Funders and donors recognized on website	<b>Complete</b>	<a href="#">Vicky Pascoe</a>	Funders and donors are recognized at AGM.  Check box added to donation form for permission to publicly recognize donation
	4-7.(d)	Obtain a CLBC Personalized Supports Initiative (PSI) contract.	2	One to three contracts in place.	<b>Complete</b>	<a href="#">Operations</a>	Over 10 contracts in place 3 CLBC regions. CLS qualified to support delivery model.

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