

## posAbilities' Strategic Plan 2018–2021

### Executive Summary

This new three-year strategic plan is the output of a process that engaged a broad diversity of *posAbilities*' employees and stakeholders. Input from the board of directors, senior leadership, management, employees and persons served informed a two-day planning workshop for 25 participants in October 2018.

The 2028 vision and the milestones *posAbilities* intends to achieve along the way give an inspirational look at how the Association will play a pivotal role in a transition to a future where resilient and inclusive communities work with *posAbilities* to care for each other, rather than defaulting to an assumed duty of care that rests mostly with *posAbilities* or other agencies.

*posAbilities* must respond to significant contextual challenges/trends/changes at this time, including:

- a) most notably the labour market shortage, which is nation-wide, and the affordability crisis in Metro Vancouver.
- b) the erosion of public services and the social safety net—and community bonds more generally. This includes funding precarity for several sectors and not just social services.
- c) changes in expectations from the public and persons served around what services look like, and what the role is in society of people with disabilities (some of this under the banner of 'disability pride'). This is in some ways the natural result of successful efforts across the sector, over the past 10-20 years, to promote and foster inclusion, and has been accelerated by social media and other information and communication technologies.

The challenges of labour shortage and funding precarity will place significant strain on *posAbilities*' operating model in the next three years with challenges expected in recruitment, staffing, and retention.

The plan is built around a single vision: "Good and Full Lives." For everyone. Although there are many definitions of "good lives" and "full lives," and although their definitions overlap, we take them to mean the following:

- A *good life* is fundamentally about one's level of happiness and well-being. It includes things like one's physical and mental health, relationships, financial security, and living a virtuous life.
- A *full life* is about being truly alive. It includes things like having a breadth and depth of life experience, overcoming fears, introspection, gratitude, positivity and self-realization.

The pillars that will advance this vision are drawn from the manuscript going to publishing in 2019, and which refer to twelve “stretches” that are designed to produce better outcomes in social services.

## Good and Full Lives

*posAbilities* is very strong in its delivery of high quality services and has several processes in place that continually improve them. However, continued service improvement is not aspirational enough because there is already organizational resolve and obligation to provide the best services possible. Nor is growing services, because this is something it already does, when it makes sense to do so. What matters most is that the people receiving services are leading *good and full lives*. This consideration must also be extended to include the employees and families with whom it interacts because *posAbilities* is in relationship with them, and this relationship comes with a sense of personal and moral responsibility.

The three pillars recognize the critical functions that *posAbilities* currently provides and suggests it experiment with some additional functions in specific areas. The first term in the lists below refers to what *posAbilities* already does well, the underlined term is what it wants to “stretch” more towards in order to achieve its ambition of advancing *Good and Full Lives*. A description of each follows further below.

### Pillar 1: Intention

1. Safety + Flourishing
2. Body + Soul
3. Behaviour + Identity
4. Individuals + Circles

### Pillar 2: Roles

1. Helpers + Brokers
2. Experts + Community Catalysts
3. Teachers + Coaches

### Pillar 3: Frameworks

1. Rights + Culture
2. Triage + Prevention
3. Worker + People
4. Programs + Platforms
5. Delivery + Development

## Context Analysis

### Strengths

*posAbilities* is fortunate to have a strong internal culture that fosters a healthy spirit of competition and a strong commitment to achievement and excellence in whatever tasks are taken on. This strength in culture is an overarching asset that ties together the other strengths described here. Despite these strengths, and the pride that ensues from them, *posAbilities* remains humble. It does not seek aggrandizement but strives only to be its very best.

A good strategic plan leads from a place of strength, while taking some ambitious risks that stretch the organization's current capabilities. This section summarizes the strengths at *posAbilities* that will be the foundation for carrying out the priority initiatives in the plan.

### Structures

- Planning / policy / management structures
  - Strong leadership team with diverse skills and experience
  - Designation of specific senior roles responsible for impact and innovation
  - Many employees report a clear sense of direction, with adequate flexibility and autonomy
- Size
  - Multi-regional service presence (e.g. LBSS, PES, BCC) opens possibilities
  - Capacity and flexibility to develop new and innovative services
  - Capacity to partner with other service providers to adopt innovations and extend their impact
- Reputation, relationships and influence
  - Belong to and actively participate in community organizations (e.g. CEO network, Federation of Social Service Associations)
  - Strong, trusting relationships with funders and regulatory bodies
  - Profile within an international community of people and organizations involved in social innovation and social research and development

### People

- Employee engagement
  - Supporting organization's overall direction
  - Seeing *posAbilities* as a great place to work
  - Working well with co-workers, feeling treated as an equal team member
  - Would recommend *posAbilities* services to friends or family
  - Feeling well treated, supported and recognized by their manager

### Processes

- Effective planning meetings and communications
  - Stakeholders (e.g. community, board, family members) are included in planning conversations
  - Communication happens regularly (e.g. Pods, employees, leadership)
  - Open communication on barriers or gaps is encouraged
  - Conversations are person-centred
  - Planning is "big picture" oriented, decisions aren't rushed (when possible)

- Measurement and accountability to persons served, families/caregivers, employees, board, service providers, funders, partners/collaborators, community/neighbours. Not just soliciting feedback but acting on it and responding in a timely manner.
  - Measures of service satisfaction integrated in service delivery funders invite *posAbilities* to bid on projects because of track record
- Communications to immediate stakeholders
  - Consistent in generating and sharing content to social media: rhythm of weekly blog posts, capturing photos of important moments, profiling stories of success for public relations and media
  - Frequently invited to present or participate in interviews/stories about proven service models
  - Asked to conduct external trainings (e.g. Diversability)
  - Present and visible at professional events (conferences, networking events, info booths) and community events (art shows, block parties, festivals)
- Commitment to ongoing and purposeful employee training (e.g. PBS & PCD, MANDT, Documentation, Medication, First Aid...)

## Systems

- Strategic plan is operationalized, transparent and communicated—Share Vision helps employees to prioritize, manage workload, meet accountability goals
- Strong feedback and QA systems (performance evaluations, uSPEQ®, Quality Improvement Plan (QIP), quality assurance) support efficient and timely use of feedback
- Well-developed systems to create a safe and healthy environment (ie: OHS Program, COR audit, attention to mental health and wellness as well as personal development)

## Summary of Functional Strengths

- **Planning and goal-setting.** The leadership team is diverse and skilled. There is a good balance between “big picture” thinking and a detail-oriented management approach that allows the whole team to feel excited about making progress to an inspiring future vision, even if it’s not always expressed in exactly the same way. Management processes are appropriately balanced between being transparent and predictable, and affording flexibility for new situations. Internal communication is valued and there are many robust systems in place to gather and act on feedback about management and service delivery performance.
- **Pursuing impact.** The commitment to R&D and the agency’s leadership role in sector associations are distinctive aspects of *posAbilities*’ commitment to increasing impact within the sector. There is a strong commitment to investing in employee training and support so that outcomes for persons served will be optimal. *posAbilities* has the size, reputation, relationships and influence to create and scale services to new audiences and communities, some of which might otherwise struggle to access services.
  - *posAbilities* is good at measuring impact with things that can be seen and documented; there is more work to do on measuring impact when the results are more intangible or qualitative.
  - *posAbilities* is developing new suites of services that provide new opportunities and outcomes for people served (e.g. Explore, Kudoz, BCC, etc.)
- **Being accountable.** There is a strong commitment to living up to all of the core values, and there are strong control systems in place to support this—in communication, oversight, standards, policy and procedure—that contribute to consistent high-quality service delivery, fiscal transparency and responsibility, and overall good responsiveness to stakeholder concerns.

## Opportunities

One of the exercises in the planning workshop was to answer the question: “What are others doing well to which we should pay attention?”—as a way to look for inspiration outside of our immediate way of doing things. Some specific ideas flagged for further investigation included:

### Communications

- **Building on communications material and online presence.** *posAbilities* currently uses insights reports from Facebook, Twitter, and Instagram, and 3rd party tools including Followerwonk, and is implementing recommendations on SEO. Using a social listening platform like Hootsuite or HowSociable to measure influence and sentiment is an option to explore for better engaging people in meaningful conversations. There are opportunities to extend its stories to wider circles, such as the broader community, and in leveraging the diversity of voices of *posAbilities*’ team members, persons served, and families, all of whom have important parts of the story to tell.

### Operations and Finance

- **The intersection of social enterprise, social spaces, and real estate.** There are many examples of organizations taking novel or innovative approaches that bring together social spaces, service delivery, residences, and programs through a variety of business models. More targeted research is required to understand which exemplars may be the best opportunities for *posAbilities* to learn more about or partner with. ‘Creative Agitator’ Donovan Woollard shared his observation that diversifying revenue is difficult, and that a struggling non-profit rarely benefits by creating a struggling for-profit to manage at the same time. While *posAbilities* has experimented with social enterprises in the past, to limited success, there may be new models for the future that will be worthy of investigation.
- **Revenue Diversification.** About 99% of *posAbilities*’ funding comes from government. This funding is likely to see contractions and/or restrictions over time that will constrain *posAbilities*’ ability to continue researching, creating new exemplars, practices, or services for the social sector, and undertaking important partnerships and projects that will advance outcomes for persons served and their families. It may be time to become more intentional about planning for this eventuality through the creation of a fund-development strategy, perhaps in collaboration with its partners.

### Research and Development

- **International influences and networks.** There are active social innovation and social R&D organizations and communities both within and outside of Canada. *posAbilities* should continue to grow its connections with them in order for knowledge transfer to occur and to strengthen its efforts in this area.

## Aspirations

### *The 10 Year Vision: posAbilities in 2028*

#### **Persons served:**

- Have the resources, opportunities and relationships to live a full and meaningful life of their choosing—with purpose, passion and love. Circles are part of that undertaking such that parents no longer wish to outlive their children with developmental disabilities.
- Are meaningfully connected to others and have reciprocal relationships in community
- Experience agency and are visible and successful in community. They don't hear "where's your worker" as a first question at a service counter at the store anymore.

#### **Neighbourhoods and communities where *posAbilities* operates are:**

- Connected, vibrant and create spaces of belonging for everyone
- Characterized by interdependence, cooperation, and self-direction

#### **Employees:**

- Experience joy, meaning and beauty at work
- Have more opportunities to be creative and autonomous
- Have their basic needs met (e.g, income, housing)

#### **Social/cultural norms and expectations have shifted to:**

- Curiosity, leading to the celebration of uniqueness and welcoming of diversity
- Belonging, leading to connected and cooperative neighbourhoods and communities, and the creation of welcoming and hospitable spaces for everyone
- Engagement, consisting of the expectation that everyone contribute to community life
- Trust, in the fundamental goodwill of others
- Compassion, for those who are in pain, and the courage and discernment to act

## Risks

### *“Permanent austerity” in funding*

Funding is precarious, and is expected to remain so. This puts *posAbilities*' ability to deliver its plan at risk. A related issue is the risk that a strong focus on quality/excellence in care may “over serve” or “over preserve” tenure in care for persons served. *posAbilities*' ambition is to serve as a catalyzer and facilitator of new solutions that could reduce dependency on some services while increasing positive outcomes for persons served and their families. This could put it at odds with advocacy trends and proponents aiming to increase the availability of existing services. It also threatens social research and development efforts which are costly.

### *Labour shortages and “the baby bust”*

Labour market shortages across sectors including health and social care are a North American issue with no clear or quick solution. As the Boomer generation moves into retirement and care, a smaller generational cohort will be available to replace them at work and to support them as unpaid caregivers in their daily lives as they age. Other issues like housing affordability are specific to BC's urban areas and affect most organizations—there is no “magic bullet” for staffing in any sector. *posAbilities* must keep paying attention to the effects this is having on the whole community.

Recruitment of skilled employees is an ongoing challenge. *posAbilities* may look to engage more new immigrants and other growing populations such as Indigenous youth, at the risk of failing to adequately adapt systems to foster their success. *posAbilities* may adapt job requirements (e.g. credentials or language) but at the risk of incurring significant additional training costs. *posAbilities* may be more flexible on work hours and schedules to accommodate lifestyle-oriented younger workers, but redistribution of labour can be slow and challenging to work through.

Retention is an equal challenge—“change burnout/fatigue” is a real risk for employees. The pace of rolling out changes, and mental health of teams, should be attended to closely. Even though 40% of staff are Boomers, and Boomers are working longer and retiring later, there is a significant turnover expected over the next 10 years. The potential of losing talent, skills and corporate memory from an organization while being challenged to replace them, poses a significant risk.

### *Brave new world of technology*

The ongoing rapid pace of technological change (and pressure for adoption and uptake) presents opportunities for connection and engagement, but significant risks to privacy, information security, and mental health.

**Open data:** The freer flow and availability of information has led to high and rising employee and public expectations for transparent and timely access to data. There is reputational risk to not manage and meet these expectations.

**Hacks:** As *posAbilities* increases its use of technology, it also increases its exposure to malicious codes that could breach confidential information or cause the destruction of data.

**Artificial Intelligence and automation of labour:** Adopting new technologies can help us attract new recruits to train, and help them with developing skills in social care. New technologies can also assist with lowering costs and can support independence for persons served (e.g. automated home safety features, driverless cars, new communications technologies). However, it may also remove some of the current community safeguards we rely on: the bus drivers, grocery store clerks, medical professionals, etc. who provide “eyes” on persons served. These citizens also offer a sense of connection and belonging.

## Strategic Goal

*posAbilities* has declared for itself a single and ambitious strategic goal: **Good and Full lives**. It has chosen this goal because it believes that the strategic emphasis should be on the ends, on a broad vision, not the means, which will be addressed through operational planning. That is to say, services and administrative systems will apply themselves to meeting the ambition. They will also continue to naturally develop, grow and improve because there are cultures and processes in place that will ensure it. The risk of focusing on service or infrastructure objectives in strategic planning is that *posAbilities* could become disconnected from its *raison d'être*. This strategic goal keeps it front and centre.

This ambition, while focused on persons served by the organization, is not restricted to them. *posAbilities* acknowledges that it has a role in attending to the well-being of families, its employees, and the neighbourhoods and communities where it operates. This elevation of purpose is a recognition that *posAbilities'* social mission is more pragmatically addressed, and its moral obligations are more deeply fulfilled, when it contemplates all people as worthy ends, and when it attends to the connectedness, vibrancy and resiliency of the whole.

*posAbilities*, in its collaboration with Degrees of Change, will be supporting the publication of a manuscript in 2019 that summarizes important learning from their last several years of enquiry, innovation, and social research and development. It consists of 12 “stretches,” or organizational adjustments, that will better achieve the disability sector’s vision of “good lives in welcoming communities.” These stretches are grouped into three basic themes that form the pillars to *posAbilities'* strategic goal, and that will supply options for ensuing operational and administrative objectives and action items.

These pillars and available stretches are as follows:

### Pillar 1: Stretching our Intentions

1. **Safety ← - → Flourishing:** Safety is important, but it isn't enough. Nor is just getting by. That is not what we mean by a good life. How do we help people to flourish and to thrive? How do we help them to lead full lives—connected to others, participating in community life, and resilient?
2. **Body ← - → Soul:** Social services typically focus on physical needs like shelter, income, clothing, and food. But the needs of the soul are just as important—things like beauty, meaning, purpose, love, soul/spirit, reflection, laughter, and hope. The former are necessary for survival; the latter are essential for living.
3. **Behaviours ← - → Identity:** Much of our focus is on visible things: bodies and behaviours—behaviours, goals, tasks, activities, procedures, training, skills, scheduling, reporting, planning, and so on. While these are things we can see and tweak, it is also important to focus on one's sense of self and identity. “Who am I?”—how one answers this question determines everything. Changing the story of “me” changes the future of “me”.
4. **Individuals ← - → Circles:** Programs and services to adults tend to be person-centric. Organizations typically struggle to involve circle members, whether families, friends, neighbours or acquaintances, in a meaningful way. Yet we know that ones' circles often play crucial roles. Beyond working with individuals, we need to engage circles; beyond being person-centric, we need to be network-centric.



## Pillar 2: Stretching our Roles

5. **Helpers ← - → Brokers:** Supplying persons served with help, support and assistance is valuable work. That said, as much as possible, we should be channelling people through our services so that they become part of community life to the greatest extent possible. This means having meaningful employment, friends, places where they experience belonging, activities, and the opportunity to pursue a life of meaning outside of programs and services. How do we get better at being brokers and facilitators of this?
6. **Experts ← - → Community Catalysts:** There aren't enough staff or resources within the social services sectors to meet everyone's needs. Nor is it desirable to have social services meet everyone's needs, even where practicable. We need to get better at sparking and activating the natural capacities and passions of people in community, and to learn how to grow and thicken the ties of connection within neighbourhoods and community. How do we learn to identify and realize the potential for community connection, contribution and care in everyday people, places and associations?
7. **Teachers ← - → Coaches:** Life is complex and sometimes requires more than teaching skills or lessons. Coaches do more than teach, they inspire. They stir motivation while dismantling stoppages caused by fear, anxiety and low self-esteem. They empower others to take the steps in the world that they want to take but for whatever reasons, they haven't. Coaches build competency in particular areas of interest while also reinforcing characteristics that lead to personal growth and resilience.

## Pillar 3: Stretching our Frameworks

8. **Triage ← - → Prevention:** The disability sector typically serves people and families who are in greatest need. Providing resources for this is important, but we also need to invest in things that reduce the intensity and frequency of services. This could include things like building family capacity, shifting social norms/perceptions around disability and inclusion, growing and thickening the ties of connection in neighbourhoods and community, and so on.
9. **Workers ← - → People:** Employees are essential to everything we do and it is therefore important to provide training and support so that they can develop in their careers. But they are more than professionals and employees—they are people. The relationship between employers and employees is mostly a transactional one, based in labour law, collective agreements and employment contracts. Can we expand that relationship so that it includes both a moral duty and a drive to promote human flourishing, resilience and meaning for our employees?
10. **Programs ← - → Platforms:** Programs tend to be highly structured, consisting of things like eligibility criteria, referrals, assessments, entry procedures, scheduled hours and activities, policies, plans, curricula, and so on. A platform is a much looser structure that is about growing and leveraging the power of everyday people. Platforms are not necessarily digital in nature, though they can be. Platforms network people so that they can share their passions, find solutions to shared problems, or realize opportunities. A platform brings people together and creates the conditions by which they can create and own new solutions. A program is delivered by professionals and is ultimately "owned" by organizations and funders.
11. **Delivery ← - → Development:** Services are the core of what we do, but without research and development, we tend to do the same things over and over, with only minor adjustments. Not much will change. Yes, we need to get better at what we do, but we must also get better at generating new and disruptive approaches to our work.
12. **Rights ← - → Culture:** Seeking social change through rights, advocacy and public education is important. It has gotten us to where we are today. But we need to get better at influencing social norms and culture through things like popular media and the arts. More than just advocating for inclusion, how do we popularize disability so that it is truly valued and celebrated?