



2020/2021

Operational Plan

About Surrey Place

At Surrey Place, we provide an inclusive, interdisciplinary approach to support infants, children, youth and adults living with developmental disabilities, autism spectrum disorders and blind-low vision.

This Year's Operational Plan

Surrey Place's 2020-2022 Strategic Plan outlines four priority areas:

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To make inroads in these areas, we have outlined high-level tactics we will implement in the 2020/2021 fiscal year.

1 DELIVERING HIGH-QUALITY, CLIENT-CENTRED CARE



At Surrey Place, our focus is on providing clients and families who we support to lead healthy, socially inclusive lives. To do this, we must ensure that they help to guide us to determine their needs. We will use research and evidence to ensure we are providing the best possible clinical outcomes. To meet our commitment to our 2020-2022 Strategic Plan, we will focus on reducing barriers to service while increasing our collaboration both internally and externally.

High-Level Tactics

FOCUS AREA

LEADERSHIP

Strengthening our position as a leader in specialized clinical services and complex care for individuals across the lifespan. We will do this by leveraging our research and engaging in evidence-based and promising practices.

BY MARCH 31, 2021 WE WILL:

- Actively engage in strategic provincial and local committees focused on leading service design, establishing standards, and promoting evidence-based practice.
- Provide increased access to professional development, learning opportunities and evidence-based information on autism and developmental disabilities.
- Collaborate in and lead research with community partners across the province and Canada.
- Increase our service delivery models in areas designed to address service and system gaps such as fetal alcohol spectrum disorder services and transition support.

FOCUS AREA

RECONCILIATION

We are committed to increasing Indigenous inclusivity, indigenizing our practices, and including Indigenous partnerships, to better work with, and serve, Indigenous people and communities. We recognize that it is important for this commitment to be led and self-determined by Indigenous people.

BY MARCH 31, 2021 WE WILL:

- Examine our internal practices and our ongoing work with clients, families and professionals to gain awareness of biases and improve our services and engagement.
- Partner with indigenous service providers and continue to work with indigenous health and education authorities in rural and remote areas to fill the gaps in clinical services.
- Include indigenous perspectives into program development and evaluation projects.

FOCUS AREA

CLINICAL SERVICE MAPPING

Mapping the clinical pathways across the organization to reduce internal structural barriers, increase collaboration and efficiency, identify synergies, and improve the client experience.

BY MARCH 31, 2021 WE WILL:

- Integrate the Wellness service delivery system across all program areas to increase service offerings, training, and engagement while reducing wait times for clients and families.
- Clarify and create single eligibility language and tools across program areas.
- Continue to refine our intake processes to improve client experience by reducing the need to repeat their stories.
- Refine tandem clinical services to offer seamless delivery of integrated clinical services.

FOCUS AREA

CLIENT ENGAGEMENT

Considering the client-experience in the design of programs and services. We will regularly engage with clients and families to ensure responsive, client-focused systems and supports.

BY MARCH 31, 2021 WE WILL:

- Grow, engage and consult with our Client Advocacy Council and Family Advisory Council to continually improve our service delivery and family interactions.
- Utilize the Lived Experience Accelerator Program (LEAP) workers to provide user experience information and enhance self-advocacy in the sector.
- Utilize systematically collected client and caregiver feedback to identify responsive improvement opportunities.
- Engage youth in the design and development of peer-to-peer support and mentorship opportunities.

FOCUS AREA

TOOLS AND LANGUAGE

Continuing to create and deploy standard tools and language from across the organization to support internal communication, consistency and reduce risks.

BY MARCH 31, 2021 WE WILL:

- Develop and expand CRM as a useful and interactive communication tool and repository for all programs.
- Improve staff fluency and utilization of Microsoft Teams.

FOCUS AREA

EVIDENCE AND DATA

Further developing quality of care indicators that reflect evidence-based practice and outcomes. We will focus on what clients truly value and measure and improve the experience of both accessing and receiving services at Surrey Place.

BY MARCH 31, 2021 WE WILL:

- Refine and integrate key systems and key performance indicators across the organization as part of continued evaluation.
- Identify and implement an improved and refined client satisfaction feedback process to enable ongoing improvement.
- Ensure data strategies and data quality are in place to support high-quality business strategies and decisions.
- Use our quality framework to organize our approach to continuous quality improvement.

**Measure & Evaluate**

Surrey Place Clinical Service teams in conjunction with the Research and Evaluation team will evaluate progress by a combination of quantitative and qualitative methods, including:

- Continuing to conduct service process and outcome evaluations.
- Collect data on client population characteristics for trends analysis.
- Collect and analyze user satisfaction data.
- Engage family and self-advocates in providing feedback on services.
- Monitor the number of evaluation and quality projects and assess project outcomes.
- Use evaluation, client population, satisfaction and engagement data to guide service improvements.

2 ENSURING A SUSTAINABLE ORGANIZATION



To be able to ensure that Surrey Place can continue to offer expert services to those who need them, we should not rely solely on single funding sources. We need to examine gaps in service delivery in which we will be able to bring our expertise and grow our resources. With this growth in clinical capacity must also come a growth in administrative, financial, and technical support. Developing and creating business partnerships will be a necessary step in creating a sustainable future.

High-Level Tactics

FOCUS AREA

DIVERSIFIED FUNDING

Exploring opportunities for a more diversified funding base. We will design a process to explore philanthropy as one potential strategy and create clarity around the future role of the Foundation. Additionally, we commit to developing and sharing long-term revenue goals and resource targets.

BY MARCH 31, 2021 WE WILL:

- Increase collaboration with internal staff to determine business development project fits, prepare applications and activate projects once funding has been confirmed.
- Secure MOU's or contracts to purchase our service from other sectors such as the Ministry of Health, Education and Justice.
- Continue managing and develop a healthy pipeline of proposals to support our programs and services.
- Building relationships with funders and better recognize funders through our communication channels to ensure alignment with our programs.
- Work towards establishing a framework for building the foundation by conducting environmental scans of other foundations and revamping the Client Needs Funds with clear processes and procedures.
- Ensure the alternative payment plan with the Ministry of Health is well mapped and implemented to showcase the three-year project's success.

FOCUS AREA

PAID SERVICES

Implementing strategy, structure, and clarity around our paid services options to ensure there is a sound business model that can be easily communicated, and clear direction for staff and clients.

BY MARCH 31, 2021 WE WILL:

- Identify gaps and increased needs for clinical services in Toronto and other regions to create partnerships and collaborations.
- Work towards securing Transition Team contracts within the education sector.
- Develop reports to track the utilization of paid services and analyze product offerings.
- Enhance the client management system with paid services functionality to automate quotes, invoices, and electronic payment.
- Participate in Ontario Health Teams to strengthen our community partnerships, build a sustainable community and health service collaboration that meets our population's unique needs.

FOCUS AREA

BUSINESS ETHICS

Building an ethical decision-making framework to guide staff through ethical considerations implicit in changing funding models and for timely and transparent decision-making.

BY MARCH 31, 2021 WE WILL:

- Work with the bioethicist and the Clinical Ethics Committee to ensure that processes are put into place to ensure all paid services meet ethical guidelines.
- Address any concerns regarding paid services, such as the concern of families purchasing services and running out of funds prior to their services being completed.
- Develop a business ethics framework to ensure that any paid services are developed using an ethics lens.

FOCUS AREA

STRATEGIC STEWARDSHIP

Exploring changes to our governance and management structures to ensure we have the right competencies, capacity, policies, and processes to support future business model transformation.

BY MARCH 31, 2021 WE WILL:

- › Develop a reorganization process that ensures appropriate support for paid services.
- › Internal procedures will be put into place to ensure that paid services have a process flow.
- › Review and update our policies to ensure they meet the needs of all services, funded or paid.

FOCUS AREA

PARTNERSHIPS AND INTEGRATIONS

Exploring the spectrum of partnerships– from collaboration to integrations to mergers and acquisitions – and developing a framework and strategy to inform future decision making. We will broaden and deepen our partnerships, employing modern and emerging partnership principles that are empowering, respectful, inclusive, and facilitate self-determination.

BY MARCH 31, 2021 WE WILL:

- › Increase our partnerships within the health care sector, education sector and the justice system to bridge our expertise across various service sectors.
- › Assess the current social service landscape and explore potential mergers, acquisitions, or partnerships.
- › Work in collaboration with our provincial partners to develop workshops on fetal alcohol spectrum disorder that will be utilized across the province.

Measure & Evaluate

Surrey Place project teams, management and leadership teams will evaluate progress by a combination of quantitative and qualitative measurements, including:

- › Utilize project management to identify gaps in organizational sustainability to plan, identify, implement, monitor and communicate improvements.
- › Engage with community stakeholders to get feedback, recommendations and input regarding planning and development of projects.
- › Utilize project portfolio management to manage project team capacity and priorities and so that the correct projects are allocated resources.
- › Engage staff and the board members in ethics framework development and implementation.
- › Use feedback and satisfaction measures for ongoing improvement.

3 INVESTING IN OUR TEAM



At Surrey Place, our greatest strength is our dedicated, knowledgeable and professional employees. To ensure we continue to provide the highest quality services to our clients and families, we need to continue to invest in our staff. We will do this by ensuring we provide a workplace environment where everyone feels supported, comfortable, motivated and respected. We commit to developing our employees, so we are ready to meet the challenges of the future.

High-Level Tactics

FOCUS AREA

EQUITY, DIVERSITY AND INCLUSION

Reviewing our human resources and organizational practices through the lens of equity, diversity, and inclusion. We commit to providing support for the diverse populations that access Surrey Place and updating any practices that may unintentionally create barriers.

BY MARCH 31, 2021 WE WILL:

- › Engage a third party to conduct an organizational review of equity, diversity, and inclusion.
- › Create a work plan to address any identified areas as outlined in the organizational review.
- › Develop an action and communication plan for anti-black racism training and advocacy.

FOCUS AREA

INTERNAL COMMUNICATIONS

Building stronger connections between departments and levels of the organization, ensuring processes are in place for smoother, more consistent communications.

BY MARCH 31, 2021 WE WILL:

- Implement new or enhanced communication platforms and review staff feedback on internal communications from the 2020 Employee Experience Pulse Survey.

FOCUS AREA

TALENT MANAGEMENT

Investing in existing and future leaders to support career growth and professional competencies, and to create an internal talent pipeline for the future. We will implement a professional development program and ensure modernized pathways for employee creativity and innovation.

BY MARCH 31, 2021 WE WILL:

- Create an organizational development strategy with a focus on internal staff development.

FOCUS AREA

HUMAN RESOURCE SYSTEMS

Strengthening our Human Resources processes and systems, including performance appraisal compliance, staff orientation processes, and a staff recognition program.

BY MARCH 31, 2021 WE WILL:

- Trial one to three new performance review documents and processes.
- Move the day-one human resources orientation to online.
- Review our employee recognition program with our Employee Recognition Committee.

FOCUS AREA

EMPLOYEE ENGAGEMENT

Proactively engaging staff in contributing to our present and our future. We will employ modern staff engagement practices characterized by transparency and consistency.

BY MARCH 31, 2021 WE WILL:

- Conduct a third-party employee engagement survey of staff.
- Enhance our employee wellness program.
- Communicate the results of the survey to staff.
- Create an action plan from the survey results.
- Continue to implement staff ideas from the 2020 Workplace Improvement Plan.

FOCUS AREA

PROCESSES AND SYSTEMS

Ensuring staff have what they need to do their work efficiently and effectively, including access to technology, standardized processes, and a clear organizational structure.

BY MARCH 31, 2021 WE WILL:

- Conduct an organization design review and create a work plan for changes.
- Define and document project management process, tools, roles, and governance to manage a set of key strategic and operational projects.
- Develop project management skills in the existing project managers and administrative coordinators to support the key projects.
- Review the organization's Lean Six Sigma strategy and recommend the next phase.
- Develop tools that provide the Executive and Leadership Team with insight into the status and progress of projects.



Measure & Evaluate

We will evaluate progress by a combination of quantitative and qualitative measurements, including:

- › Compare our third-party employee experience survey results to the benchmarks and our previous results.
- › Review key performance human resources indicators every quarter.
- › Seek and review feedback from employees on internal communications, the pilot performance review process, new employee online orientation, and the employee wellness program.

4 COMMUNICATING WITH PURPOSE



At Surrey Place, we need to re-invent internally and re-invigorate externally. To re-invent internally, we need to define the importance and value of marketing and communications at Surrey Place. To re-invent externally, we need to support Surrey Place in reclaiming the organization's leadership role within the developmental disabilities sector. Externally our focus will be to increase awareness of Surrey Place's programs and services, using clear, consistent messages. Our external target audiences will vary from activity to activity, but our focus will also be on our clients, families and caregivers. Internally, to reach our 450+ employees across multiple locations and program areas, Surrey Place Communications will use various internal communications channels to keep staff informed and empowered.

High-Level Tactics

FOCUS AREA

COMMUNITY ENGAGEMENT

Creating, sharing and spreading new knowledge and innovations to strengthen the sector by telling our story, furthering our social media presence, communicating with our partners, highlighting our research and engaging in thought leadership.

BY MARCH 31, 2021 WE WILL:

- › Develop cost-effective, compelling digital media content to engage with stakeholders, highlight our clients' voices, and share thought leadership.
- › Increase collaboration with internal staff to share Surrey Place news on social media.
- › Work towards positioning Surrey Place as a media source for developmental disabilities-related comments.

FOCUS AREA

BRANDING

Leveraging our brand in a more powerful, proactive, consistent manner, ensuring clarity in how we describe ourselves, what we offer, and how we are different; and increasing how we build and deepen ongoing connections.

BY MARCH 31, 2021 WE WILL:

- Broaden our brand toolkit with additional colours, typography, imagery, and guidelines to better represent our offerings.
- Implement and support a cohesive, unified visual identity to ensure consistent, strong brand awareness by controlling all external-facing communications.
- Further enhance and expand Surrey Place's website (www.surreyplace.ca) to deliver services, resources, tools and information.
- Maintain a close working relationship with the programs and services, to integrate marketing and communications expertise earlier in the planning and execution of new initiatives, plans, and materials.

FOCUS AREA

CUSTOMER SERVICE

Aligning branding, communications and marketing with new business model development to attract and retain clients.

BY MARCH 31, 2021 WE WILL:

- Improve the client experience, understanding and access to Surrey Place programs and services and resources with increased usability, ease of access and responsiveness.
- Provide high-quality customer service by providing timely responses to emails and comments; or connecting existing and prospective clients with the appropriate staff member.
- Invest in paid media campaigns to increase awareness of our programming and attract new clients.

FOCUS AREA

ADVOCACY

Evaluating how Surrey Place will play a role in ensuring client voices are being heard, and advocating for clients and families, and leveraging our relationships with government and policymakers to shape policy and systems.

BY MARCH 31, 2021 WE WILL:

- Explore and develop new internal channels to generate new relevant stories about the lived experiences.
- Increase the frequency of capturing and sharing client and caregiver stories in digital media (social, emails, website).

- Engage and consult with persons with developmental disabilities in developing marketing and communication materials.
- Maintain relations with elected officials to grow support and understanding of the developmental disabilities sector.
- Seek opportunities for collaboration with other partner organizations to support our shared goals.

FOCUS AREA

ADVISORY COUNCILS

Investing in and lifting parent and client advisory councils and ensuring their voices are amplified at decision-making tables. We will ensure the councils are supported but self-led.

BY MARCH 31, 2021 WE WILL:

- Coach advisory members on how to utilize social media channels to grow their families and caregivers' network and build an online community.
- Advise councils on how to best share their work with the organization using the monthly internal newsletter.



Measure & Evaluate

Surrey Place Marketing and Communications will evaluate progress by a combination of quantitative and qualitative measurements, including:

- Reach, impressions and engagement rates on social and traditional media platforms.
- Web analytics to determine effectiveness and impact.
- Growth in followers on digital platforms (social media, newsletter distribution list).
- Click through rates and open rates on email campaigns.
- Engaging directly with clients and families.
- Identify barriers to accessible communications to improve access.
- Reviewing communications plans to ensure activities align with priorities.