



2023/24

Operational Plan



2023/2024 Operational Plan

What is the purpose?

At Surrey Place, our annual operational plan is a roadmap that aligns our fiscal year priorities to the 2023-2026 Strategic Plan and helps achieve short-term goals with a long-term vision. It serves as our compass, reflecting a shared understanding of our mission, vision, values and guiding principles.

As our first year into our three-year strategic plan, we are focused on building the foundations which will enable us to improve and enhance our services and work. This includes developing new strategies and models for our infrastructure, implementing leadership and staff training, as well as undertaking continuous evaluation of our services. We have a clear goal of turning ideas into tangible impact.

We look forward to working together with our staff and partners towards the priorities outlined in this plan to solidify Surrey Place's position over the three years as a resilient and innovative organization that puts clients' experience at the forefront.

Our Guiding principles

At the heart of our work are five guiding principles that serve as the foundation for our annual operational plan. The principles are woven into the

fabric of our plan, with each principle contributing actionable and measurable inputs to achieving our strategic directions.

- › Collaboration and Partnership
- › Communications
- › Equity, Diversity, Inclusion and Accessibility
- › Leading Change
- › Quality

2023-2026 Strategic Directions

Our overarching three-year strategic plan focuses on three strategic directions that define our path forward:

1. Sustainability through change
2. Accessible and exceptional service
3. Culture of resiliency

These strategic directions guide our work, turning purpose into action, our vision into reality, and our plans into meaningful progress for the clients we serve.



Sustainability Through Change

Surrey Place will solidify business models that effectively respond to the changes in service delivery and enhance our long-term sustainability and adaptability as an innovative organization.

Leveraging Autism paid services models into sustainable not-for-profit revenue generation.

By March 31, 2024	Success Measures
Streamline and align autism paid services model and staffing model.	<ul style="list-style-type: none">› Development and implementation of service and financial models.› Services operating at 90% capacity.› Achieve revenue required for sustainability of autism services.
Enhance our financial adaptability by developing and implementing a Marketing and Communications strategy for paid services.	<ul style="list-style-type: none">› Development and implementation of Marketing and Communication strategy for paid services.› Services operating at 90% capacity.› Tracking of website, digital analytics and referrals.

Expanding business-to-business (B2B) not-for-profit revenue opportunities to build capacity across the sector.

By March 31, 2024	Success Measures
Develop and implement business-to-business service and financial models to leverage our extensive knowledge and experience with fellow service providers.	<ul style="list-style-type: none">➤ Development and implementation of business-to-business service streams and financial model, including dashboard for tracking and monitoring.

Building our capacity for fund development.

By March 31, 2024	Success Measures
Explore new opportunities with public and private sector.	<ul style="list-style-type: none">➤ Tracking of grants and proposals in management system.➤ Development of Charitable Foundation Revitalization Plan.
Build a long-term financial plan to ensure financial sustainability.	<ul style="list-style-type: none">➤ Complete 30% of framework and general principles of long-term financial plan.
Revise financial statement model that aligns revenue and expenses with operations.	<ul style="list-style-type: none">➤ Establish baselines for financial plan.➤ Development and approval of revised financial statement model.

Investing in people, technology, systems upgrade, and creating infrastructure.

By March 31, 2024	Success Measures
Develop a roadmap for Information Communications and Technology (ICT).	<ul style="list-style-type: none">➤ Completion of ICT roadmap
Assess Information and Communication Technology and provide recommendations on modernization and funding plan.	<ul style="list-style-type: none">➤ Development and approval of recommendations on ICT modernization and funding plan.
Evaluate the three-year CRM journey to identify its effectiveness and needs for improvements.	<ul style="list-style-type: none">➤ Completion of CRM evaluation report with recommendations.
Implement new performance management system to enhance staff experience during assessments.	<ul style="list-style-type: none">➤ Pilot new performance management system.



Accessible and Exceptional Service

Surrey Place will bolster its reputation for delivering quality, evidence-informed and impactful services. We will continue our commitment to co-design and client engagement, increasing the integration of lived experience into how we develop and deliver our services and support clients as they navigate their journey.

Continuously improving system and service navigation.

By March 31, 2024	Success Measures
Develop client journey mapping plan for the organization.	<ul style="list-style-type: none">› Development of clinical pathways based on client profiles.› Approval of project plan for client journey map for the organization to be implemented.
Develop an overall systems infrastructure change management plan to meet challenges introduced by multiple departmental initiatives.	<ul style="list-style-type: none">› Approved project plans for the development of a data management system for Urgent Response Service and Smart Start Hub to be implemented.› Development and approval of systems infrastructure change management plan.

Increasing client and family engagement in program co-design.

By March 31, 2024	Success Measures
Evaluate two-year co-design journey alongside the Quality Assurance Measures, Accreditation Canada, and Journey to Belonging standards and best practices.	➤ Completion of evaluation report with recommendations.
Develop and train a cohort of people with lived experience to participate in co-design projects and committees.	➤ Set benchmark of 75% of new initiatives, including participation from clients and families. ➤ Increase cohort of people with lived experience by 50%.
Expand the membership of the Peer Mentorship Program.	➤ Evaluation of pilot project. ➤ Increase enrollment of mentees by 50%.

Cultivating academic affiliations and continuing clinical research.

By March 31, 2024	Success Measures
Develop our research and knowledge translation framework.	➤ Completion of approved framework.
Partner with graduate programs to enhance program development.	➤ Meet with existing academic affiliates and secure another agreement.

Fostering a stronger sector through leadership, partnership, and education.

By March 31, 2024	Success Measures
Increase engagement at various local, national and internal plat-forms to advocate for our popu-lation.	➤ Increase presentations to knowledge users by 25%.
Lead dialogues with various stakeholders on shared concerns to address and meet priority needs.	➤ Increase advocacy-related meetings by 25%.



Culture of Resilience

Surrey Place will enable a resilient and healthy workplace that can reliably staff and support excellent service delivery. We will continually empower our staff to grow into leadership roles and expanded our succession planning efforts with an eye toward long-term sustainability.

Advancing our commitment to EDIA, anti-racism, and reconciliation journey.

By March 31, 2024	Success Measures
Integrate Equity, Diversity, Inclusion and Accessibility (EDIA), quality and safety into organizational operations and culture.	<ul style="list-style-type: none">➤ Complete 30% of the EDIA, anti-racism and reconciliation journey action plans by the Board of Directors, Executive Team and Leadership Team.➤ 80% of staff to be EDIA trained.➤ Completion of quality visioning exercise.
Develop and implement a client satisfaction survey	<ul style="list-style-type: none">➤ Implementation of client satisfaction survey.

Developing pathways for growth and succession.

By March 31, 2024	Success Measures
Develop leadership curriculum for new leaders and high-potential successors to uphold effective internal knowledge transfer and staff success.	➤ Development of leadership curriculum based on core competencies.
Continue and enhance our talent management and succession planning strategy.	➤ Formal succession planning in place.

Enabling a resilient environment where change is well supported.

By March 31, 2024	Success Measures
Embed change management methodology and practice to ensure staff feel secure and can meaningfully and productively engage with change.	➤ Development of organizational change management implementation plan. ➤ Executive Team to be certified on Kotter Change Management model. ➤ Evaluation of Change Champion Network.
Develop a long-term Employee Wellness Program.	➤ Continue to develop and evaluate our Employee Wellness Program, to meet employee needs.

Exploring innovative ways to be competitive in the hiring market.

By March 31, 2024	Success Measures
Develop a recruitment strategy for hard-to-fill positions.	➤ Approval of recruitment strategy and action plan for implementation.
Develop a Total Rewards Strategy.	➤ Leverage HR consultant's report on the market analyses of various roles related to the sector.
Test a pilot program to design positions with input from clients and families.	➤ Review and revise 2-3 client-facing roles with input from clients and families.