

# **ANNUAL OPERATING PLAN**

April 1, 2025 – March 31, 2026

Our 2023-2026 Strategic Plan

# Sustainability Through Change

By March 31, 2026, Surrey Place will have solidified business models that effectively respond to the changes in service delivery and enhance our long-term sustainability and adaptability as an innovative organization.

At Surrey Place, we know that innovation, adaptability, and resiliency must be present to best serve our communities through the ever-changing landscape. Our foundation is strong, and we will leverage our experience to realize sustainable, healthy organizational growth.

As service models evolve, the needs of those we serve, the increase in complexity, and our team grows, we will prioritize creatively diversifying our sources of funds, exploring strategic partnerships, and building capacity across the sector.

Focusing on a strong, sustainable organization will ensure that people continue to receive the exceptional care and service they need.

## OUR COMMITMENTS:

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

We will further our understanding of evolving funding models, enhancing our adaptability and ability to apply new revenue, increasing sustainable and accessible service delivery.

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

We will leverage our extensive knowledge and experience, partnering with fellow service providers to build service capacity through skills training and knowledge and resource sharing.

**Building our capacity for fund development.**

We will continue to explore opportunities to leverage Surrey Place's strong reputation to generate new revenue sources and funding support, from both the public and private sectors, such as accessing grants, raising funds, and engaging in corporate investments.

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

We will commit resources to ensure that, as an organization, we have the tools, technology, and workforce to deliver excellent services, building systems and efficiencies as we go.



# Sustainability Through Change

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

What do we want to achieve by March 31, 2026?	What are the milestones and deliverables that indicate progress toward our goal?	What is our success measure?
Achieve the revenue target for all paid services.	<ul style="list-style-type: none"><li>• Establish a comprehensive system to track and analyze revenue streams, ensuring targets are consistently met.</li><li>• Move from early-stage model to growth-and-maturity-stage in paid services.</li><li>• Completion of the process for capturing paid services satisfaction.</li><li>• Develop and integrate comprehensive respite and in-home ABA programs.</li></ul>	<ul style="list-style-type: none"><li>• Client satisfaction and revenue target achieved.</li></ul>

# Sustainability Through Change

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

What do we want to achieve by March 31, 2026?	What are the milestones and deliverables that indicate progress toward our goal?	What is our success measure?
Develop a comprehensive business development strategy and roadmap to expand B2B partnerships, fostering high-value collaborations that significantly enhance the financial sustainability and impact.	<ul style="list-style-type: none"><li>• Comprehensive report identifying potential B2B partners and sectoral trends.</li><li>• Finalization of the business development strategy and roadmap.</li><li>• Signed agreement with a high-value B2B partner.</li></ul>	<ul style="list-style-type: none"><li>• Revenue generated from B2B partnerships</li><li>• Percentage increase in B2B partnerships revenue year-over-year</li></ul>

# Sustainability Through Change

Building our capacity for fund development.

What do we want to achieve by March 31, 2026?	What are the milestones/ deliverables that indicate progress toward our goals?	What is our success measure?
Ensure the effective execution of the fund development strategy, leading to increase donor engagement, fund development opportunities, and strengthened organizational capacity.	<ul style="list-style-type: none"><li>• <i>Development of a comprehensive Fund Development Strategy.</i></li><li>• <i>Development of a Case for Support.</i></li><li>• <i>Development of an Annual Prioritization Process - developed in tandem with the Board, Executive Leadership, Finance and the Development Team, based on a careful review of budgetary needs.</i></li><li>• <i>Implement Fund Development Team Focus &amp; Role Clarity.</i></li></ul>	<ul style="list-style-type: none"><li>• Number of new funding opportunities</li><li>• Secured grant funds and fundraising donations</li></ul>



# Sustainability Through Change

Investing in people, technology, systems upgrade and creating infrastructure.		
What do we want to achieve by March 31, 2026?	What are the milestones/ deliverables that indicate progress toward our goals?	What is our success measure?
Enhance organizational capacity and service delivery by modernizing technology platforms, strengthening digital infrastructure, and upskilling staff.	<ul style="list-style-type: none"><li>• Complete IT Infrastructure Modernization Plan.</li><li>• Implement Phase 1 of EHR Transition.</li><li>• Securing our network and hardening our environment.</li><li>• Modernize Client Digital experience - rebuild digital presence to secure and improve user experience.</li><li>• Develop operational data modernization strategy.</li></ul>	<ul style="list-style-type: none"><li>• % of environment hardened</li><li>• % of IT Infrastructure Modernized</li><li>• % of staff trained on EHR and number of programs and services available on EHR</li><li>• % of website redeveloped</li></ul>

## Our 2023-2026 Strategic Plan

# Accessible and Exceptional Service

By March 31, 2026, Surrey Place will have bolstered its reputation for delivering quality, evidence-informed and impactful services. We will have continued 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.

At our core, Surrey Place exists to partner with those who need us and to co-create a path that provides access to high-quality services to help improve their lives. It is where our conversations begin and is the cornerstone for measuring our impact and success.

We value the lived experiences and unique circumstances of the individuals who work

with us. We are committed to increasing engagement in program co-design while applying our expertise, skills, and leading research. Where we cannot deliver the services ourselves, we will leverage the expertise of fellow service providers.

We meet change and challenge with curiosity and interest and strive to learn and improve together.



## OUR COMMITMENTS:

### Continuously improving system and service navigation.

We will support people as they navigate services for their evolving needs, facilitating care journey's that are responsive and accommodating by collaboration with other service providers.

### Increasing client and family engagement in program co-design.

We will further integrate lived experiences and unique perspectives in our approach to service by proactively engaging those we work with to inform and create future offerings.

### Cultivating academic affiliations and continuing clinical research.

We will nurture academic and research partnerships that enable us to contribute to clinical best practices and methodologies that are the foundation of our excellent clinical care.

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

We will support the sectors' collective ability to serve clients by developing partnerships and training relationships that create capacity, develop skills, and are rooted in transparency and collaboration.

# Exceptional and Accessible Service

Continuously improving system and service navigation.

<i>What do we want to achieve by March 31, 2026?</i>	<i>What are the milestones/ deliverables that indicate progress toward our goals?</i>	<i>What is our success measure?</i>
Integrate and streamline all services within funded service program, ensuring alignment with the Leading Innovation for Transformation (LIFT) guidelines to enhance quality, accessibility of services, and create increased clinical capacity.	<ul style="list-style-type: none"><li>• <i>Develop a comprehensive strategy for unifying services across different levels, incorporating standardized procedures and pathways.</i></li><li>• <i>Increase ratio of group services to individual services.</i></li><li>• <i>Increase the group service offerings.</i></li><li>• <i>Alignment with central intake/ DSO/ SSH and internal referral pathways.</i></li></ul>	<ul style="list-style-type: none"><li>• Milestone completion: Establish % baseline for group service delivery in clinical funded services</li></ul>



# Exceptional and Accessible Service

Continuously improving system and service navigation.

<i>What do we want to achieve by March 31, 2026?</i>	<i>What are the milestones/ deliverables that indicate progress toward our goals?</i>	<i>What is our success measure?</i>
Build an omni-channel “navigation toolkit”. Families get plain language next steps where they look for autism services (print, web, social).	<ul style="list-style-type: none"><li>• <i>Seasonal service brochures with QR codes in centres.</i></li><li>• <i>Develop blog services and service comparison tables (e.g., which autism program is right for my child).</i></li><li>• <i>Create 6 short videos/reels with captions to explain service stream.</i></li><li>• <i>SEO-optimized FAQs on each product page.</i></li></ul>	<ul style="list-style-type: none"><li>• Track volume of brochure readers who use QR codes</li><li>• Blog readers click “Learn More” CTA</li></ul>

# Exceptional and Accessible Service

Continuously improving system and service navigation.

What do we want to achieve by March 31, 2026?	What are the milestones/ deliverables that indicate progress toward our goals?	What is our success measure?
Complete redevelopment of the public website to create an improved user experience that supports client engagement and registration.	<ul style="list-style-type: none"><li>• Complete a website UX audit and user testing.</li><li>• Develop an improved user flow from product pages to checkout.</li><li>• Rewrite priority pages using plain language, brand voice, and SEO guidelines.</li><li>• Develop and deploy new technology infrastructure that is secure and enables easier development updates.</li></ul>	<ul style="list-style-type: none"><li>• Increased conversions</li><li>• Website usage on mobile devices increases</li><li>• Feedback from clients and families</li></ul>

# Exceptional and Accessible Service

Increasing client and family engagement in program co-design.

What do we want to achieve by March 31, 2026?	What are the milestones/ deliverables that indicate progress toward our goals?	What is our success measure?
Kickstart a client experience portfolio that seamlessly integrates client and family engagement and co-design to elevate satisfaction, with preliminary efforts wrapping up by end of fiscal year.	<ul style="list-style-type: none"><li>• <i>Assessment Report of Surrey Place Human Experience Index.</i></li><li>• <i>Approval of the Terms of Reference of the client experience committee.</i></li><li>• <i>Roll-out and pilot of the co-design toolkit with the Family Advisory Council, Self-Advocates, and stakeholders co-leading the design of the client experience portfolio.</i></li></ul>	<ul style="list-style-type: none"><li>• Human Experience Survey Results</li><li>• Co-design satisfaction survey</li></ul>

# Exceptional and Accessible Service

Cultivating academic affiliations and continuing clinical research.

What do we want to achieve by March 31, 2026?	What are the milestones/ deliverables that indicate progress toward our goals?	What is our success measure?
Develop a strategy to leverage brand awareness through academic relationships.	<ul style="list-style-type: none"><li>• Establish partnerships with at least five leading academic and healthcare institutions (local and international).</li><li>• Lead or co-lead organization of events for knowledge sharing – ensure these events are platforms for showcasing research findings and business opportunities.</li><li>• Develop a knowledge translation strategy.</li><li>• Align business development and research efforts to drive revenue generation and foster innovation – develop and implement initiatives that translate research outcomes into commercially viable products and services.</li></ul>	<ul style="list-style-type: none"><li>• Secure five new academic and healthcare institution partnerships</li><li>• Milestone completion: Knowledge Translation Strategy</li></ul>



# Exceptional and Accessible Service

Fostering a stronger sector through advocacy, leadership, partnership, and education.		
What do we want to achieve by March 31, 2026?	What are the milestones/ deliverables that indicate progress toward our goals?	What is our success measure?
Actively engage in strategic federal, provincial, and local committees to lead service design, set standards, promote evidence-based practices, and advocate for the integration of Intellectual and Developmental Disabilities (IDD) into primary care strategies.	<ul style="list-style-type: none"><li>Identify key federal, provincial, and local committees focused on primary care reform and health equity.</li><li>Build coalitions with other organizations advocating for vulnerable populations in primary care.</li><li>Establish the criteria for prioritizing the top two regions of underserved populations.</li></ul>	<ul style="list-style-type: none"><li>Partnership impact assessment</li><li>Increased involvement in strategic leadership committees at the local, provincial and federal level</li><li>Position paper developed</li></ul>

## Culture of Resilience

By March 31, 2026, Surrey Place will have enabled a resilient and healthy workplace that can reliably staff and support excellent service delivery. Over the next three years, we will have continually empowered our staff to grow into leadership roles and expanded our succession planning efforts with an eye toward long-term sustainability.

We know that delivering responsive, effective, and coordinated service starts with equipping staff with the tools they need to succeed and offering an environment that enables them to do so. We also know these factors are critical in ensuring we can approach change, one of the few constants in our work with openness and curiosity.

We are committed to providing a

healthy and safe workplace culture that continues to nurture our staff's skills, commitment, and professional growth while finding new ways to attract qualified staff in an evolving labour market.

We will continue to improve processes and pathways for internal cohesion and knowledge transfer that forms the foundation of an agile organization.



### OUR COMMITMENTS:

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

We will continue to evaluate our organizational practices, ensuring that our services are representative, welcoming and barrier-free. In relationship with Indigenous organizations, racialized communities and peoples, we will deepen our journey of reconciliation and anti-racism.

#### **Developing pathways for growth and succession.**

We will invest in our staff development while establishing growth pathways to encourage advancing their expertise and opportunities for leadership. We will prioritize effective internal knowledge transfer and ensure every department takes steps toward succession planning for all critical roles and leadership.

#### **Enabling a resilient environment where change is well supported.**

We will think critically about implementing new and different initiatives and their potential impacts, communicate consistently and equip management and staff with tools to feel secure and engage with change meaningfully and productively.

#### **Exploring innovative ways to be competitive in the hiring market.**

We will refine our profile as a desirable employer in line with the current labour market, compensation and hiring trends by engaging our presence in growing service areas, clinical specializations, and with academic and accreditation partners.

# Culture of Resilience

Advancing our commitment to Equity, Diversity, Inclusion and Accessibility (EDIA), anti-racism, and Reconciliation journey.

<i>What do we want to achieve by March 31, 2026?</i>	<i>What are the milestones/ deliverables that indicate progress toward our goals?</i>	<i>What is our success measure?</i>
Continue to foster a more inclusive and equitable workplace by enhancing recruitment strategies, training programs, and policy frameworks to better reflect and support diverse communities.	<ul style="list-style-type: none"><li>• Collaborate with EDIA department to implement equity self-identifying questionnaire for all SP staff and new hires.</li><li>• Review and implement the current attraction, selection, and onboarding process.</li><li>• Complete the evaluation of health, safety and wellness policies for inclusivity and accessibility.</li><li>• Redevelop the organizational policy management framework to ensure clarity, compliance, and accessibility.</li><li>• Meet the 50-30 challenge.</li></ul>	<ul style="list-style-type: none"><li>• Training completion rate</li><li>• Milestone completion: Policy review completed</li></ul>

# Culture of Resilience

Advancing our commitment to Equity, Diversity, Inclusion and Accessibility (EDIA), anti-racism, and Reconciliation journey.

What do we want to achieve by March 31, 2025?	What are the milestones/ deliverables that indicate progress toward our goals?	What is our success measure?
Secure international approval and collaboration to adopt Quality 3.0 ISQUA approved co-creation roadmap to build a sustainable integrated quality management system.	<ul style="list-style-type: none"><li>• Connect with Quality 3.0 global thought leaders on the adoption of Quality 3.0 to a community-based, social services sector.</li><li>• Develop a consortium to review and validate the adoption of the Quality 3.0.</li><li>• Accreditation self-assessment and action plan completed by Directors.</li></ul>	<ul style="list-style-type: none"><li>• Quality 3.0 Maturity Matrix Score</li><li>• % completion of accreditation self-assessment vs action plan</li><li>• Touch points with international, local, and international partners on quality</li></ul>



# Culture of Resilience

## Developing pathways for growth and succession.

What do we want to achieve by March 31, 2026?	What are the milestones/ deliverables that indicate progress toward our goals?	What is our success measure?
Implement talent and succession strategy and plan.	<ul style="list-style-type: none"><li>• <i>Implement plan for career growth and development for internal staff.</i></li><li>• <i>Update job descriptions and evaluate roles for internal staff.</i></li><li>• <i>Launch the internal Leadership Development Program for People Leaders.</i></li></ul>	<ul style="list-style-type: none"><li>• Milestone completion: Mission-critical positions with identified successors</li><li>• Milestone completion: Evaluation of roles</li><li>• Satisfaction rate of mentor/ mentee participation in the mentorship program</li></ul>

# Culture of Resilience

Enabling a resilient environment where change is well-supported.

What do we want to achieve by March 31, 2026?	What are the milestones/ deliverables that indicate progress toward our goals?	What is our success measure?
Ensure the effective and sustainable operationalization of the change management strategy across all projects, embedding new processes and behaviors into daily operations to drive long-term success.	<ul style="list-style-type: none"><li>• <i>Develop process/criteria to determine change support plan requirements for organizational projects with PMO.</i></li><li>• <i>Completion of Phase 3 of the Change Management Strategy.</i></li><li>• <i>Build awareness of and strengthen governance structure of projects.</i></li><li>• <i>Roll-out implementation plan to ensure robust operationalization.</i></li></ul>	<ul style="list-style-type: none"><li>• Milestone completion: phase 3 of the Change Management Strategy completed</li></ul>

# Culture of Resilience

Enabling a resilient environment where change is well-supported.		
What do we want to achieve by March 31, 2026?	What are the milestones/ deliverables that indicate progress toward our goals?	What is our success measure?
Establish a foundational understanding of current facility conditions, usage patterns, and strategic alignment across all remaining sites to inform future planning and investment decisions.	<ul style="list-style-type: none"><li>• Launch and train facilities personnel on the new automated system.</li><li>• Finalize site assessments and identify strategic priorities.</li><li>• Gain leadership alignment and feedback before moving into detailed planning or budgeting for the remaining sites.</li></ul>	<ul style="list-style-type: none"><li>• % of facilities personnel trained on the new system and optimized process</li></ul>

# Culture of Resilience

Exploring innovative ways to be competitive in the hiring market.

<i>What do we want to achieve by March 31, 2026?</i>	<i>What are the milestones/ deliverables that indicate progress toward our goals?</i>	<i>What is our success measure?</i>
Enhance the attraction and retention of regulated health professionals through innovative hiring practices, competitive total rewards, and targeted wellness branding.	<ul style="list-style-type: none"><li>• <i>Develop and implement sourcing strategy and plan for regulated health professional roles.</i></li><li>• <i>Total Reward market review of regulated health professional roles to ensure competitiveness.</i></li><li>• <i>Update and market wellness program offerings for external candidates.</i></li></ul>	<ul style="list-style-type: none"><li>• Vacancy rate for hard to fill positions</li></ul>