

OUR DIRECTION FORWARD

2020 - 2022

Strategic Plan

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Helen Wojcinski



Terri Hewitt

Message from the Board President and CEO

In October 2019, the Surrey Place Board of Directors began the process of developing a new set of strategic priorities for the organization. A dedicated group of volunteers, the Board is responsible for the governance and stewardship of Surrey Place. We recognize – and are committed to sustaining and enhancing – the important role Surrey Place plays in our community. We are dedicated to helping children and adults living with developmental disabilities, autism spectrum disorder, and visual impairments reach their full potential.

Surrey Place exists within a changing environment that requires adaptation, proactive strategies, and leadership – all the while keeping our mission, vision and values at the centre of all we do. Our organization has recently experienced significant growth, adjustment, and uncertainty, with changes to sector funding, and organizational transitions. Additionally, there are the global and local impacts of the COVID-19 pandemic. Indeed, there are many challenges and opportunities that stand before the organization.

The following plan, therefore, is a bridge between our current circumstances and a subsequent multi-year plan. It provides direction to the Surrey Place team for the next 24 months, setting the foundation for a visionary and sustainable future.

From the outset, our Board believed it was essential to gather input directly

from Surrey Place’s broad community of stakeholders—and our plan needed to reflect and respond to the needs of those we serve. We were inspired by the level of commitment and engagement from the Surrey Place community, including staff, clients and their family members, partner organizations, donors, funders, and the general public. Thank you for taking the time to share your thoughts, ideas, concerns, and critiques – for being open and vulnerable in a way that will help us to move our organization forward.

We are committed to pursuing these four interim strategic priorities. At the end of these 24 months, by May 2022, we will be strongly positioned to further set a bold, visionary course forward and to ensure a deliberate, focused pursuit of our mission and vision.

Sincerely,

Helen Wojcinski,
Board President

Terri Hewitt,
Chief Executive Officer

Our Foundation

MISSION

We help people of all ages with developmental disabilities and autism spectrum disorder to lead healthy and socially inclusive lives using our exemplary skills in interdisciplinary clinical services, education and research. We provide many of our clinical services in both official languages, and where we do not, we refer to a French-language service provider.

VISION

Living your potential – All your Life!

VALUES

With a passionate commitment to improving the lives of people with developmental disabilities and autism spectrum disorder and their families, we believe in:

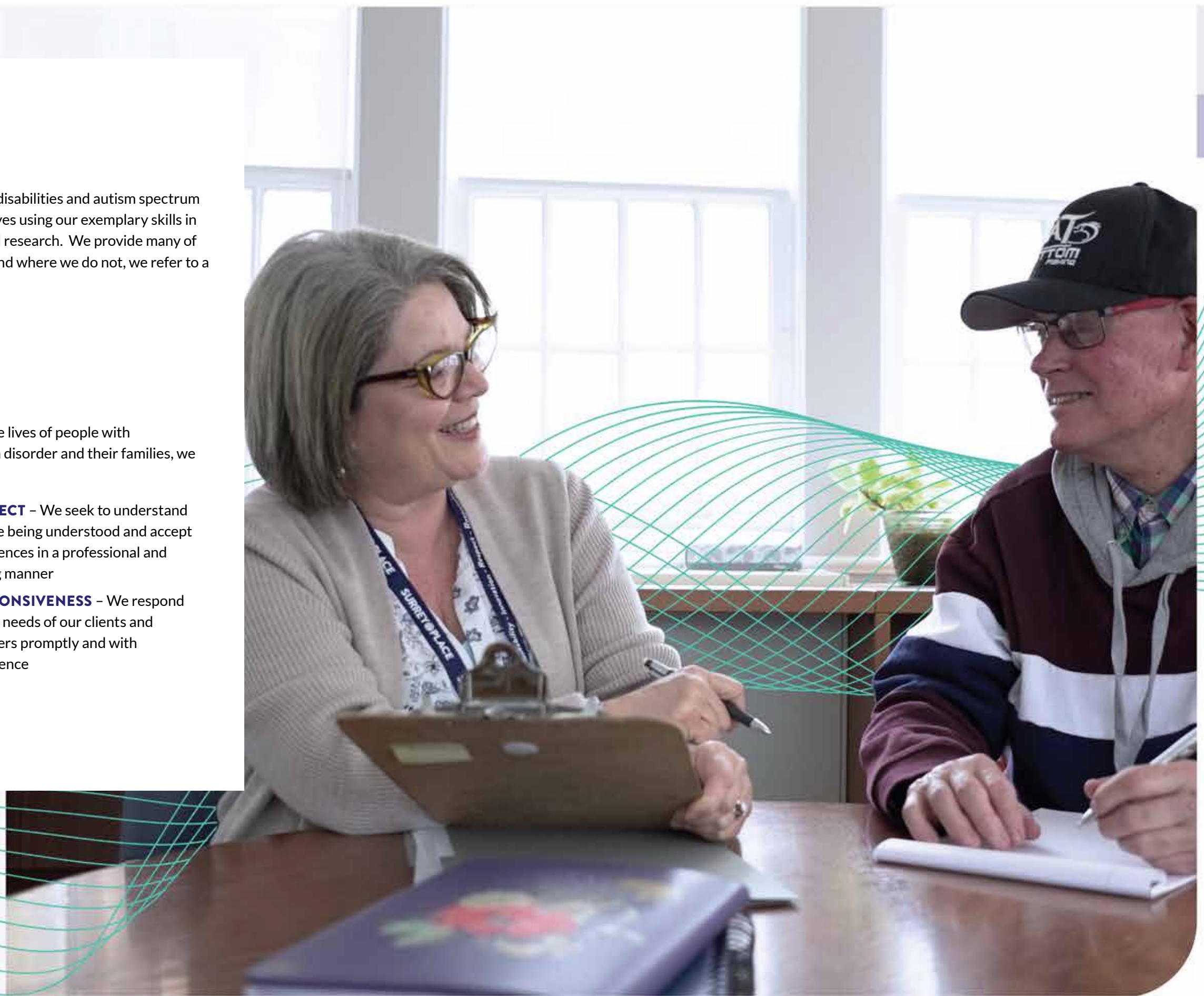
COLLABORATION – We succeed by working together with our clients, families and community and government partners

ACCOUNTABILITY – We do what we say we will do and deliver the best possible results for the people we serve

INNOVATION – We develop new ideas and approaches to share with the world

RESPECT – We seek to understand before being understood and accept differences in a professional and caring manner

RESPONSIVENESS – We respond to the needs of our clients and partners promptly and with excellence





Our Story

For over 50 years, Surrey Place has been providing specialized clinical services that are responsive to individuals' needs and that promote health and well-being.

With an inclusive, interdisciplinary approach, Surrey Place supports infants, children, youth, and adults living with developmental disabilities, autism spectrum disorders, and blind-low vision. Through a comprehensive set of programs and specialized clinical services, provided by a broad network of clinicians and professionals, alongside extensive education and consultation services to community agencies, and groups and workshops for clients, families, and caregivers, Surrey Place helps individuals to reach their full potential. We provide many of our clinical services in both official languages, and where we do not, we refer to a French-language service provider.

Our five office locations across the Toronto region offer a welcoming, inclusive, and safe space where the community is nourished and sustained. We also work

within the community in schools, homes and residences to provide services and supports. With over 450 staff, we are often the first point of contact for many.

Surrey Place is a non-profit organization, and it receives in public funds from the provincial and federal government, as well as grants and its paid services.

Our Charitable Foundation helps sustain our programs and support clients that face barriers to service. Together we can make sure that all clients, from infants, children, youth to adults, reach their full potential. Learn more www.surreyplace.ca/foundation.

"At Surrey Place, we believe that every individual deserves access to services that help them learn, grow and thrive."

Executive Summary

Surrey Place developed a set of strategic priorities for the next 24 months. These priorities have been designed to be a bridge between the current set of fluctuating circumstances and when the organization is best-positioned to launch a visionary, bold, and innovative multi-year plan.

The planning process involved significant stakeholder engagement. Before making any decisions, the Board of Directors engaged with and listened to Surrey Place's community of stakeholders. Their feedback served to strengthen and shape the conversations that followed. By engaging stakeholders, Surrey Place is ensuring that this plan is informed by experience, evidence, and broadest-held perceptions.

513

RESPONDENTS

102

PARTICIPANTS

12

FOCUS GROUPS

Throughout the engagement phase, from November 27, 2019, and January 25, 2020, input and feedback were gathered from 513 respondents to the online survey; 102 participants in 12 focus groups; and 11 participants in seven key informant interviews.

The engagement phase was used to engage stakeholders by gathering input and including them in the planning process in a meaningful way; and to educate stakeholders about and promote the work of Surrey Place.

Through the engagement process, the following themes emerged (listed alphabetically):

- External Communications and Branding
- Paid Services
- Fund Development and Finances
- Human Resources and Workplace Culture

- Internal Communications
- Leadership (Board and staff)
- Mission and Vision
- Northern and Indigenous Services
- Partnerships and Integrations
- Service Delivery
- Systems and Processes
- Transformation and Change

From the perspective of Surrey Place's most valued stakeholders, these themes represent areas where the organization has excelled, and/or where the organization can potentially see growth and improvement with the direction of the newly developed strategic plan.

By engaging stakeholders, Surrey Place is ensuring that this plan is informed by experience, evidence, and broadest-held perceptions.



Our Priorities

Surrey Place is committing to a 24-month strategic plan. This allows flexibility for Surrey Place to respond and adapt as circumstances evolve, while also providing clear focus and direction.

At the core of our new priorities is a commitment to those we serve – the infants, children, youth, and adults living with developmental disabilities, autism spectrum disorders, and blind-low vision, and their families. We know Surrey Place is relied upon by clients and their family members, the community, and partners to provide high-quality, specialized care and sector leadership. We are there for them each and every day. The priorities outlined in this plan will be embedded into our operational plans, and we will report on them annually to all of our supporters and our Board of Directors.

In direct response to what we heard from our community of stakeholders, in addition to the internal and external considerations that shape the planning process.

THE FOLLOWING ARE OUR FOUR PRIORITIES:

- 1 Delivering High-Quality, Client-Centred Care
- 2 Ensuring a Sustainable Organization
- 3 Investing in Our Team
- 4 Communicating with Purpose

We know Surrey Place is relied upon by clients and their family members, the community, and partners to provide high-quality, specialized care and sector leadership. We are there for them each and every day.



1 Delivering High-Quality, Client-Centred Care

At Surrey Place, we are focused on ensuring that our clients continue to have access to high-quality, responsive, and collaborative care. We are proud of our specialized clinical services and the difference we make in the lives of our clients and their families.

We commit to amplifying the impact of our diverse wealth of knowledge and staff skillsets by creating even stronger connections across the organization and increasing collaboration and engagement. To support the continued delivery of quality care, and to lead the sector with innovation and creativity, we commit to mapping our programs and services to increase synergies, connections, and knowledge-sharing. We commit to ensuring that the client continues to remain at the centre of our work and our decision making. Client-centred care is a journey of continuous learning and adjustment that will extend far beyond the horizon of this plan.



OUR COMMITMENTS

Over the next 24 months, we commit to *Delivering High-Quality, Client-Centred Care* by focusing on:

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.

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.

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.

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.

TOOLS AND LANGUAGE: Continuing to create and deploy common tools and language from across the organization to support internal communication and consistency, and reduce risks.

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.

2

Ensuring a Sustainable Organization

At Surrey Place, we understand the importance of creating an agile and nimble organization by diversifying our revenue base to meet the changing needs of our clients, their families and our community.

We will articulate a responsible, transparent, long-term roadmap, so the organization is agile enough to navigate an unpredictable environment. We are committed to creating a more sustainable organization that remains responsive to the people we serve. Over the next 24 months, we will pursue new opportunities to ensure we are strong and sustainable for years to come.

OUR COMMITMENTS

Over the next 24 months, we commit to *Ensuring a Sustainable Organization* by focusing on:

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.

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.

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.

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

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.



3

Investing in Our Team

At Surrey Place, we have a deeply-committed, talented, and passionate team of staff and volunteers who work diligently to ensure clients are provided with high-quality care that meets their individual needs. We recognize that our staff are the lifeblood of our organization.

They are the lens through which our clients see us and are connected with Surrey Place. As an organization, we are committed to listening to and investing in our people in ways that are mutually valuable and supportive. We will strengthen our existing processes, further what we are already doing and do them better. We will continue to provide all staff, volunteers, and Board members with what they need to be successful, to strengthen our collective capacity and organizational sustainability,

amplify our culture of innovation and high quality, and ensure we work together as an effective team.



OUR COMMITMENTS

Over the next 24 months, we commit to *Investing in Our Team* by focusing on:

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.

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.

INTERNAL COMMUNICATIONS:

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

HUMAN RESOURCES SYSTEMS:

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

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.

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.

Communicating with Purpose

At Surrey Place, we will continue to invest in and promote the voice of our clients, parents, caregivers, and community stakeholders. As leaders, we understand the importance of clear, consistent communication.

By improving how we tell the story of our work, increasing our presence and visibility in the community, and sharing our knowledge across the sector, we will raise awareness and understanding of the clients we serve. We will actively engage with our community, continuing to expand communications beyond those who currently access service. We commit to building stronger, more consistent communication channels and become more active in engaging thought leadership while facilitating learning and community building opportunities. We commit to listening and sharing in a trusting and transparent manner.



OUR COMMITMENTS

Over the next 24 months, we commit to *Communicating with Purpose* by focusing on:

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.

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.

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

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.

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.

Next Steps

Our new priorities provide Surrey Place with strategic focus and a clear framework to drive change and progress. The Board has committed to the following next steps:

- 1 Board and management continue the process of clarifying the principles and frameworks needed to implement the commitments within “Ensuring a Sustainable Organization;”
- 2 Organizational goals and objectives will then be developed that align with and move forward each interim strategic priority;
- 3 The priorities will be communicated internally and externally;
- 4 Progress updates will be provided at the one-year mark; and
- 5 Feedback will be sought regularly as the priorities are implemented.



Conclusion

The Board of Directors and Executive Team are proud of the success of Surrey Place. Through our new plan, we will ensure those we serve remain our priority, and these priorities will help to keep us focused as new opportunities arise and our landscape shifts over the next 24 months.

We are committed to using resources to ensure we are efficient, effective, and accountable through all our initiatives.

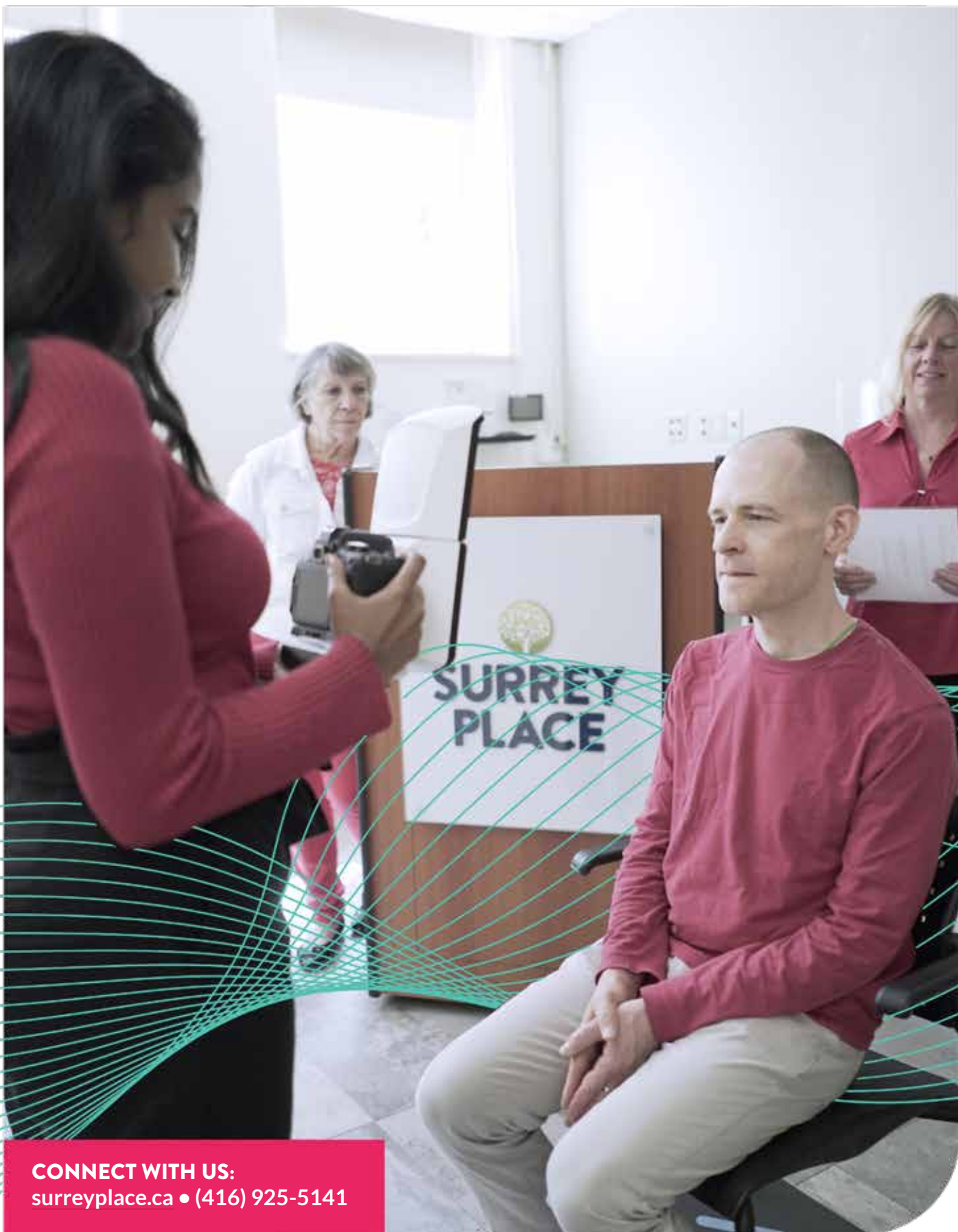
We thank all those who added their voices by contributing thoughts and feedback. Please know: we have listened.

The Board of Directors looks forward to reporting back on our progress and to building a strong foundation for future success.

Acknowledgment

The development of this Strategic Plan would not have been possible without the leadership of our Executive Team, the guidance of Laridae, as well as the input from our staff and the clients and families we serve. We are always open to feedback, and we are grateful for their contributions to this plan. Finally, the Board of Directors has shown consistent support in this strategic planning process. It is our hope that this Strategic Plan will contribute to Surrey Place's continued success.





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