



# **Strategic Plan**

## **2018 - 2020**

**Wellspring Support**  
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## Strategic Plan 2018 - 2020

### Strategic Planning Purpose and Process

This document is designed to function as a systematic management tool for long-term planning. It establishes a foundation for success through a planning process that focuses on taking advantage of Wellspring's strengths and opportunities and addressing identified weaknesses and threats. Through an extensive assessment of Wellspring's internal and external operating environment the planning team has developed a high-level roadmap laying out the steps required for us to achieve, sustain, and advance Wellspring's mission. The end result is a strategic plan that translates salient environmental factors into tangible planning assumptions, sets goals and priorities, and globally aligns resources to achieve Wellspring's performance targets.

The strategic planning process will be revisited at the end of each year in the plan period to review the achievement of stated goals. A new strategic plan, based on the outcome of the current plan, will be developed for Wellspring in 2021.

### Our Organization and Structure

#### Wellspring Mission

Wellspring's mission and philosophy is to treat every individual, their family, and their caregivers with respect, individual consideration, and integrity in order to provide them with the best service possible.

#### Wellspring's Values

- To provide the highest quality and most diverse programming for our participants;
- To maintain the highest level of health and safety standards;
- To maintain clear, open and transparent communication with participants, their families, caregivers, and their support network;

- To recognize the right of all individuals to be respected, to make choices and be listened to.

Wellspring's mission and core values are reinforced daily through innovative, individualized programming with an emphasis on supporting participants in making choices that will make their time spent with us more meaningful, satisfying, and successful. Staff model inclusive and respectful interaction for themselves, their peers, and our participants. The success of our program is in a large part due to our "person-first" philosophy.



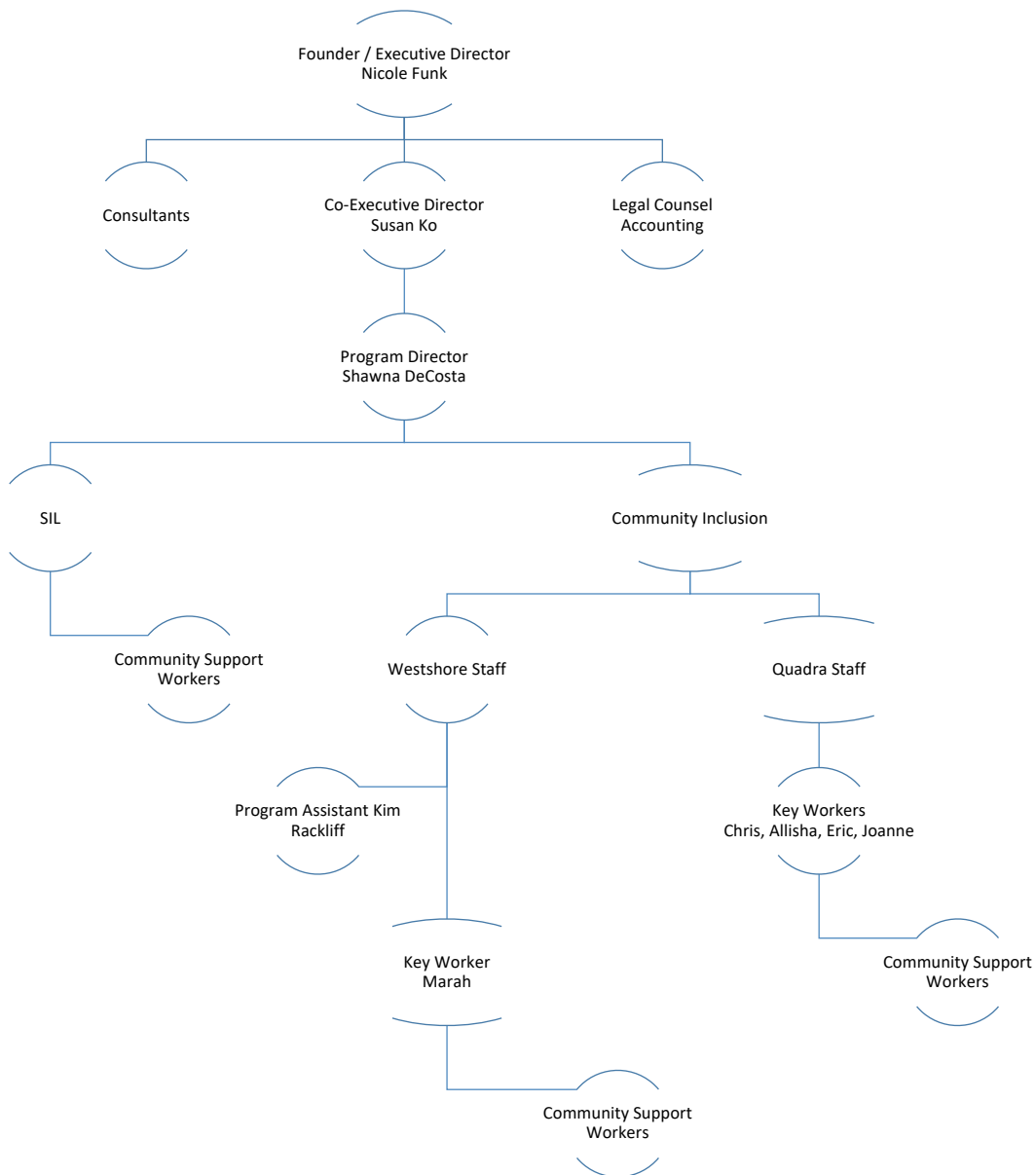
## **Our Promise**

Wellspring is committed to delivering service in the community and our centres in a way that lets our participants feel safe, and which increases opportunities to be part of the Victoria community.

- We strive to provide a broad array of services for adults with diverse abilities as valued members of the larger Victoria community.
- Our services will be of exemplary quality, and we intend for our supports to be transformational for the persons served.
- Our staff will demonstrate integrity, dedication, and creativity;
- Staff will be well-trained, and committed to teamwork in a work environment that will be both challenging and rewarding.
- Wellspring will be financially healthy, allowing us to be flexible and responsive to the needs of current and potential participants.

- Wellspring will work in partnerships with others and provide consultation to groups and individuals as required to provide consistent level of service for our participants.

## Organizational Structure



## Our Services

Wellspring Support, Inc. is a comprehensive, community-oriented agency offering community inclusion, supported independent living, as well as extended before and after hours services for adults with diverse abilities.

### **Community Inclusion Services**

Wellspring's Community Inclusion services are provided through two sites – a smaller space in the Westshore, and larger one in Victoria's Quadra neighbourhood – and both are open to our participants weekdays from 9:30 am to 3:30 pm, excluding holidays. Wellspring can also provide limited before and after-hours services to help to facilitate the schedule needs of our participants, their families and caregivers.

While our flexible service delivery is highly customizable to each individual's strengths, needs, and capabilities, we also believe that sharing common interests is an important way to enhance social opportunities for our participants. Our focus is on participation, learning, and enjoyment through a wide range of centre-based as well as community-based activities. Our ramp-equipped excursion vehicle has allowed us to expand the geographical horizons of our activities and has removed the time constraints imposed on us by inflexible public transit schedules.

### **Supported Independent Living**

Wellspring's Supported Independent Living activities focus on supporting our participants in developing their independent living skills and improving their day-to-day decision-making strategies. Some of the areas that we assist with are finding and retaining employment, budgeting, interpersonal skills, leisure and peer group support activities, fitness, health and medical needs, shopping and meal preparation, problem solving, and conflict resolution.

Wellspring strives to provide services that are responsive to participants' and their families'/caregivers' needs, which are safe, and which are accommodating of their individual health needs.

## Environment Scan

### Internal Input/Analysis:

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>Participant accessibility (hours &amp; days)</li> <li>Excursion vehicle expands scope, range of potential activities, and maximizes efficiency of service delivery</li> <li>Highly experienced and skilled management team and staff</li> <li>Participant focused and driven</li> <li>Sites are well-located in the hearts of two large service communities</li> <li>Able to provide an array of services that fit the needs of the persons served</li> <li>Ability to communicate needs/barriers and services gaps</li> <li>Good reputation within our community and with stakeholders</li> <li>Open to new ideas</li> <li>Teamwork</li> <li>A wellness approach to persons served</li> <li>Able to provide services to participants with unique communication and mobility needs</li> <li>Open to feedback from stakeholders</li> </ul>	<ul style="list-style-type: none"> <li>Single funding source dependence</li> <li>Temporary space has had several impacts including loss of local community (e.g. paper routes, connections with neighbours); this is being re-built over time as we settle into the Quadra neighbourhood</li> <li>Costs of moving and constructing new accessible space is a drain on resources</li> <li>Smaller space (relative to School Board locations) limits on-site growth potential at Quadra location</li> <li>Smaller space creates inherent challenges in operating safely under pandemic conditions</li> <li>Moves have been hard on staff and participants, sense of stability and comfort take time to re-build</li> <li>With large numbers of participants, meeting the needs of participants requiring behavioural support is a challenge</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>Continue developing sensory room</li> <li>Possible new partnerships</li> <li>Continue improvement of administrative and service delivery systems to meet new CARF standards</li> <li>Stabilize and consolidate changes in a new permanent space</li> <li>Maintenance of qualified staff</li> <li>Solidify sustainability in a new space</li> <li>Specialization of programming for specific groups of participants;</li> <li>Increased vacancies due to the pandemic may, represent opportunities for expansion</li> <li>Expand service to individuals who can largely be served in the community</li> </ul>	<ul style="list-style-type: none"> <li>Moving to new community has meant less local integration of programs, which reduces appeal</li> <li>Workforce demographics – recruitment challenges with small labour pool of appropriately experienced workers</li> <li>Increased costs of space, moving and leasehold improvements make finding the perfect space more challenging</li> <li>Funding levels frequently do not keep step with increased costs in other areas; inflation as a pandemic after-effect is a concern</li> <li>Future waves of COVID-19, or other similar threats</li> </ul>

## INPUT FROM STAFF, PARTICIPANTS, CAREGIVERS, & STAKEHOLDERS

Wellspring values the input of participants, staff, caregivers and families, and stakeholders. Wellspring provided surveys to all of these groups respectively to ensure that their voices were heard during the strategic planning process.

### **Home Share Providers and Caregivers Survey Results 2019**

#### **Response Rate**

There were 9 respondents to the survey in 2019. This is nearly exactly the same as the response rate of 2018. Of these 66.7% were members of the client's family, 25% were from an unrelated family home care provider while 8.3% were from a group home.

#### **Feedback on Services**

Of the 9 questions regarding Wellspring services, 100% respondents agreed that services; meet the needs of the individual, staff are courteous and helpful, feel comfortable asking questions, and would recommend Wellspring services to a friend.

As with previous years, a strong majority (87%), agreed or strongly agreed that staff are open to feedback and that they feel comfortable raising concerns with the remainder neutral. This is an improvement over previous years.

While there was an overall positive response to all questions, the areas where one or two caregivers had concerns included; respecting cultural values, obtaining information regarding service options and providing transportation that meets the client and caregiver's needs. Wellspring staff has been open about hearing and addressing these concerns.

#### **Impact of Wellspring Services**

As per other years, caregivers gave very positive feedback on the impact of the programs and services for clients. All caregivers agreed or strongly agreed that clients have more positive social interactions with peers while 92% and 83% agreed or strongly agreed (with the remaining neutral), that clients are more able to cope with challenges and more confident in the community respectively.



## **Overall Satisfaction**

Similar to previous years, 100% of respondents agreed (33%) or strongly agreed (67%) that they are satisfied with services provided by Wellspring.

## **Strengths**

Strengths included ensuring the care, support and goals of the participant are met; the staff described as caring, knowledgeable, caring and flexible, community inclusion; being willing to explore approaches to benefit participants; being able to work, and the variety in activities.

## **Areas of Improvement**

Caregivers would like to have better communication, closer attention to individual's personal supplies, fewer changes with staff, and a stronger commitment to individualized programs.

## **Final Comments**

Most caregivers were not in favour of the goals and tracking the goal process. However, similar to previous years the final comments were very positive and further highlighted that Wellspring staff are flexible, supportive and an appreciation of Wellspring services.

Helpful suggestions included a specific approach to a participant and finding more volunteers with specific skills and publishing the survey results and comments.

## **Stakeholder's Survey Results 2019**

### **Response Rate**

There were 4 responses this year to the Stakeholder's Survey, which is an increase of 300% from the previous year. All of the responses were very positive with appreciation for the level of staff training singled out in the comments.

## **Employee Survey Results 2019**

The Wellspring Management team continues to address feedback from the 2018 and 2019 surveys. Staff changes included formalizing more leadership positions to improve resources and training for the front-line workers. However, 2019 was a



year of change while moving out location for Wellspring's Victoria Day Program and there was consequently significant staff turn-over due to the new location (size, distance for staff to travel and the "old guard" moving on)

Concerns centred on rate of pay, sick pay and staff morale.

### **Response Rate**

Overall, 19 employees responded to the survey which is a small increase from previous years. Of these 12 worked in the Day Program while 7 of these also worked in providing respite and/or supported community living programs.

### **General Highlights**

Similar to previous years, 94% agreed or strongly agreed that they like their job and the work that they do, while 89% feel that they make a difference effecting the lives of others and that their work is valued.

There has been a trend over the last couple of years of dissatisfaction over some of the job elements with the staff. When management changed in 2018, there were a group that did not like the "new style" of management, which was more involved. With a large turnover after we moved to the new site, that has turned around, (with the exception of one staff person) and staff satisfaction is now reported as much higher.

### **Working Conditions**

The responses to having a reasonable workload, being adequately trained and oriented to their positions were very positive, and an increase from 2019 with 92% agree/strongly agree with these statements. There was a comment about staff needing to care more about the details, as well as one about having enough funding for participants to have better staff ratios (this was at Westshore).

### **Safety**

In an increase to 2018, 100% of staff felt safe in their work areas and in the parking lot, and while working with participants. This is a great increase from a few years ago where safety was a concern among the staff. 82% of staff agreed or strongly agreed that they felt safe while in the community.

### **Current Supervisor**



Management changes in 2018, and so 2019 was a year for management and staff to establish working relationships. The good news is that 100% of staff felt that their supervisor was knowledgeable, that they were inspiring and that with management their opinion counted. Where we fell down was in “regularly scheduled supervision meetings” which only had a 50% agreement rate. However, 100% of staff agreed that the supervisor had adequate time for them when they needed. Regularly scheduled meeting are actually difficult to build into the schedule, and so supervision has remained informal. Give that in 2018, only 50% of staff felt that they were provided adequate time, we have shown a huge improvement.

### **Salary and Benefits**

Salary has always been an area where staff have concerns. In 2018 23% felt their pay was competitive, while we had a 25% agreement in 2019. However, satisfaction with benefits moved from 28% in 2018 to 58%, which is a huge increase in satisfaction.

Interestingly, 92% of staff felt that their hours of work met their lifestyle needs. Perhaps lifestyle needs ultimately mean to our staff than a competitive wage.

### **Policies and Procedures**

Responses to the statements regarding policies and procedures were generally positive with an increase in satisfaction from previous years, with 100% agree/strongly agree that they can get assistance to clarify policies when they had a question. Additionally, 92% of staff knew how policies and procedures related to their job, and 75% agreed that they felt comfortable to discuss a policy that is not being followed or is not helpful.

### **Relationship with Peers**

Team building and acceptance of diversity continued to be a focus over the past year. Staff had an increase of 14% in the answer to the question “I feel respected by my co-workers”, over the previous survey. Additionally, the response to “I have a positive working relationship with my co-workers” is similar to last year.

### **Overall Satisfaction**

There was a fabulous increase in satisfaction at Wellspring, with 100% of staff agreeing that they liked working at Wellspring, up from 78% agree/strongly agree in



2019 (it was at 96% in 2016). Hopefully this reflects the changes implemented at Wellspring in the last year.

### **Strengths of Wellspring**

Strengths included:

everyone is very supportive

managers are accessible and easy to talk to

fun environment, team feel, welcoming and inclusive

### **Suggestions for Improvement**

“more funding for Westshore so more clients could participate” , “To have more open communication for new staff regarding clients schedules, day plans” ” job expectations being clearly defined” , “Nothing really” , “Better vetting of qualified CSWs who are well rounded in various aspects of providing service – more people who are good at attending/caring about the details” “more sick days – we work with vulnerable clients” .

### **Summary**

The 2019 staff survey this year really reflects a team that has adjusted to the move, and is generally satisfied with their jobs.

## Achievements 2014 – 2017 (from last strategic plan)

Goal	Achieve 3 year CARF accreditation in 2015	Responsible	Management Team & Staff
	Policy review and obtaining input from participants, caregivers, stakeholders, staff		2014
	Update policies		2014/15
	Communication strategy/staff training		2014/15
	Mock Survey		2015
	Final Survey		2015
Objectives and Deliverables	Staff orientation packages, creation of teams, training, participant packages and handbook		
Resources	Consultants to assist Wellspring to meet goals		
Status June 2018	Completed 2015		

Goal	Develop a Solid Infrastructure for Growth Expansion	Responsible	Management Team
	Update and organize facilities (complete West Shore renovation, update Victoria storage)		2014
	Review and develop health and safety policies and training		2014+
	Address funding needs (such as a vehicle needs etc.) in contract negotiations with CLBC		2014
	Continue to develop positive relationships with Stakeholders		2014+
	Develop new organizational structure to expand leadership roles and structure		2015
Objectives and Deliverables	Develop new communication materials reflecting changes		
Resources	Allocated Program Director and Consultant hours		
Status June 2018	Completed 2015		

Goal	Develop Additional Funding Streams	Responsible	Management Team
	Increase number of participants in Day Program by 3 per year and other programs by 2 per year		2014+
	Develop workshops and training for workers and public - offer 2 per year		2014+
	Develop communication strategy with referral sources		2014
	Develop formal communication strategies such as update brochures and participant packages		2015
	Develop internal strategies to involve staff		2015
Objectives and Deliverables	As above		
Resources	Advisory Team, Program Director hours towards training, ED Negotiations		
Status June 2018	Programs are at capacity; communications updates are underway; workshop development is considered impractical and therefore tabled at this time;		

Goal	Build a Solid Financial and Human Resource Management System	Responsible	Management Team
	Update management systems for CARF		2014
	Explore new technology to build an online management system		2014+
	Formalize budget process and reporting system		2014
	Develop and provide training for staff on new systems		2014+
	Address any funding shortfalls during contract negotiations		2015
Objectives and Deliverables	As above		
Resources	Executive Director hours allocated to this goal		
Status June 2018	Implemented Relias to fulfill obligations for increased / improved training; Xero on-line bookkeeping system has been implemented, and increased coordination with Bookkeeper has occurred throughout 2017-2018;		

Goal	Explore Growth and Service Expansion Opportunities	Responsible	Management Team & Staff
	Refine and expand Respite and Community Integration programs		2015
	Explore opportunity to offer behavioural consultations		2015
	Explore opportunity for new training workshops		2014
	Develop communications strategies for programs and training workshops		2014+
	Additional participants for Day Program to bring to capacity by 2016		2016
Objectives and Deliverables	As above		
Resources	Wellspring has allocated consultant and Program Director hours towards this goal		
Status June 2018	Achieved - reached capacity in 2016; Respite activities will be reduced to offering limited before and after-hours service to existing clients		

Goal	Human Resources - Wellspring becomes the Employer of Choice	Responsible	Management Team & Staff
	Organization of Teams and Team Leaders at facilities		2014
	Provide additional training to staff paid by Wellspring (Employee development)		2015
	Update West Shore facility and address facility concerns		2014+
	Develop and Implement change management strategies		2014+
	Formalize supervision and employee management strategies		2014
	Improve job security feedback from staff		2015, 2016
Objectives and Deliverables	Change management strategies will be ongoing		
Resources	Management Team, Consultant		
Status June 2018	Achieved 2016		

## Strategic Issues and Goals for 2018 - 2020

While the last Strategic Plan focussed on growth, over the next three years the priority of Wellspring will be to focus on consolidation, and stabilization. Finding a new and permanent space is a top priority which would allow participants and staff to integrate into a new community.

### Key Strategic Goals

- 1) Three year CARF accreditation
- 2) New and permanent space for Victoria Community Inclusion Site
- 3) Focus on consolidation of changes and stabilization
- 4) Enhancing family and caregiver input by establishing a Family and Caregiver Council to meet at least once a year.
- 5) Continued implementation of management and training systems and efficient use of resources
- 6) Develop and implement enhanced evaluation and accountability systems

Goal #1	Achieve 3 year CARF accreditation in 2018	Responsible	Management Team & Staff
	Policy review and obtaining input from participants, caregivers, stakeholders, staff		2017/18
	Update policies		2017/18
	Communication strategy/staff training		2017/18
	Mock Survey		2018
	Final Survey		2018
Objectives and Deliverables	Establish working team of staff/consultants. Achieve accreditation.		
Resources	Management Team and Consultants to assist		
Status 2020	Achieved with no recommendations		

Goal #2	New and Permanent Space for Victoria Community Inclusion Program	Responsible	Executive Director
Work with realtor to find possible space within budget		2018	
Ensure current capacity for clients is maintained over move		2018	
Negotiate offer and lease hold improvements		2018	
Address funding needs with CLBC		2018	
Set a timeline for renovations and move		2018	
Move to new space and update policies and procedures		2018/2019	
Objectives and Deliverables	Move to new space by June 2019 deadline		
Resources	Executive Director, Management Team, Realtor		
Status 2020	Achieved. Negotiated lease and improvements in late 2018, signed new lease in early 2019, and relocated the Victoria site to 3939 Quadra St.		

Goal #3	Focus on Consolidation of Changes and Stabilization	Responsible	Executive Director and Management Team
Maintain capacity and number of participants served		2018/19	
Consolidate before and after program supports for participants and caregivers needing more flexible hours		2018/19	
Update policies and procedures		2018/19	
Implement new IPP process		2019	
Update communication materials		2018/19	
Address feedback from surveys to ensure space and changes meet participant and caregiver needs		2018-21	
Further develop and implement new on-line training program		2018-21	
Reduce staff turnover		2018-21	
Objectives and Deliverables	Positive feedback from surveys and informal input. Increased use of on-line training. Updated communication materials, staff turnover rate.		
Resources	Executive Director(s), Management Team, staff, consultants		
Status 2020	Achieved. A new Program Director was brought on-board in 2018, and a co-Executive Director was also hired – these management changes successfully addressed many of the concerns highlighted in previous years’ surveys and internal assessments. 2019 was indeed a successful year of stabilization and consolidation, policies and procedures were updated, a new IPP process was implemented, we fine-tuned and enhanced our online training systems, and many other positive changes were welcomed, including our beautiful new Victoria site. Analyzing staff turnover is difficult in light of the pandemic up-ending our business		



	<p>operations – we feel as if we made significant progress in addressing the internal concerns which contributed to higher staff turnover in the past, however these have been largely overshadowed by the enormous ongoing impact (and the temporary complete shut-down) of the pandemic. Although operations have re-opened in a more recognizable format, we are still unable to offer the working conditions, shifts, and atmosphere that we had created by 2019.</p>
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Goal #4	<b>Establish a Family and Caregiver Council</b>	Responsible	Executive Director and Management Team										
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Hold at least one council meeting per year	2019-21												
Communicate information from council in annual reports and on-line	2019-21												
Evaluate council and modify approach as needed	2019-21												
Objectives and Deliverables	One Family and Caregiver Council meeting a year 2019-2021												
Resources	Executive Director, Management Team												
Status 2020	<p>Partially Achieved. Due to the timing of our move and the ‘settling in’ period that followed, we did not have time before pandemic restrictions were introduced to ramp up visitation as much as we would have liked. The family and caregiver council idea was tabled during the emergency response to the pandemic. Interestingly, the pandemic response has led to much more – and much more comprehensive – communication between ourselves and our participants’ families and caregivers. In some ways the quality and the amount of communication and transparency that we have achieved as a by-product of our pandemic response has met some of the desired outcomes of the council. The idea of the family and caregiver council will be revisited during the 2021-2024 strategic planning exercise.</p>												

Goal #5	<b>Continued Implementation of Management and Training Systems and Efficient Use of Resources</b>	Responsible	Executive Director Management Team Leaders												
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Ongoing evaluation of system utilization and monthly reports to track progress.	2018/2019														
Objectives and Deliverables	Increased usage of Relias, One Voice. Update website and track use of van monthly.														
Resources	Executive Director(s), Management Team														
Status 2020	Achieved.														

<b>Goal #6</b>	<b>Enhance Evaluation and Accountability Systems</b>	<b>Responsible</b>	Executive Director Management Team Leaders and Staff
Develop and implement monthly reporting systems that includes reports from: H&S, Management Team, and progress on strategic goals to Executive Director			2018/19
Enhance tracking of service levels and reporting on program numbers and status in monthly report to Executive Director			2018/19
Conduct quarterly audit of files to ensure information is up to date			Fall 2018
Update process and track performance reviews – add to monthly report to ED			Fall 2018
Develop professional development training process and track progress of staff			Fall 2018
<b>Objectives and Deliverables</b>	Monthly and quarterly reports to ED and Management Team. Evaluation of content and efficiency and modification as needed.		
<b>Resources</b>	Executive Director(s), Management Team, and Staff		
<b>Status 2020</b>	Partially achieved. Due to the timing of both the move to the new site and the pandemic, it made more sense to conduct Health and Safety reporting quarterly, and to review Health and Safety topics on a monthly basis during team meetings. Service level reporting is conducted every two weeks with payroll runs and is up to date. Files (both participant and employee are also monitored quarterly for any deficits. Performance reviews are conducted annually in March and April. IPP reviews are conducted in June and July. The implementation of a regular schedule for these reports helps keep the files organized. Professional development is tracked both internally via an excel document and externally via Relias training systems.		