



CASS

Sustainability Plan

2022-2024





CASS

CASS Purpose Statement

Facilitating connections and opportunities that promote personal value, engagement, and inclusive communities.

CASS Values

As part of the strategic planning for the 2022-2024 time frame the CASS Senior Leadership Team has developed a new set of values which we feel represents agency's priorities and the work that we do.

CASS' new values are:

Determination of Self

Integrity

Grace

Natural Supports

Inclusion

Trauma Informed

You Matter



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Organizational Health Pillars

The five organizational pillars will help CASS ensure balance between strategy and annual required actions. These pillars reflect the most critical aspects of CASS' overall ongoing health and sustainability. Our annual planning and intentional work throughout the organization will encompass each of these pillars and the desired outcomes within.





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Annual Required Outcomes

The following outcomes serve as a foundational framework for ongoing organizational health, success, and sustainability. They are the minimum expected by CASS to ensure the agency’s ongoing viability.

Health Pillar	Annual/Ongoing Required Outcomes
Supported Individuals (and support networks)	<ol style="list-style-type: none"> 1. Individuals have a strong sense of wellbeing, choice/independence and community. 2. Families/guardians are actively involved in the life of their family member, as appropriate. 3. Individuals have the right/choice to have a family/or other natural support person as a designated person(s) to support them, as appropriate. 4. CASS is Accreditation certified (within required programs) with systems in place to ensure ongoing best practices. 5. Consistent rotating annual surveys demonstrate a high level of satisfaction for supported individuals and families/guardians. 6. Evidence exists to demonstrate individuals have a quality of life. 7. Services provided meet or exceed the levels for which an individual is funded to receive. 8. Service delivery limitations are minimized. 9. Service standards meet basic health, safety and security requirements on an ongoing basis. 10. Individuals chose to receive CASS supports due to service quality provided. 11. Individuals are supported through entire Intake to Service process. 12. Facilities (common areas, administration and exteriors) are well-maintained and allow for a accessible, safe, secure and healthy environment for all (where possible). 13. Systems to monitor services are established, measured, monitored, and reported on. 14. CASS-managed homes are functional, safe, and personalized. 15. Preparation and service of meals and snacks meets food handling and nutritional requirements (where applicable). 16. Social/leisure services support physical, mental, spiritual and emotional health; and are community-based where appropriate. 17. Individuals/families are aware of and have access to applicable policies and procedures. 18. Individuals participate in service planning & regular review of their plans.



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Financial	<ol style="list-style-type: none">1. Operating costs fall within approved budgets; and a process exists to approve overages.2. Department leaders are actively engaged in the development and monitoring of their department budgets.3. An equipment/facility capital maintenance/replacement plan is in place for those we own/lease.4. A positive ratio of assets over liabilities exists.5. A responsible spending approval plan is in place to ensure ongoing efficiencies and is understood/followed by all staff members.6. Revenues exceed expenditures on a consolidated basis.7. Investments are performed ethically, and focused on conservative, secure rates of return.8. Access to financial resources to support minimum cash flow for 2 months.9. Financial reporting is timely within 30 days of end of month and accurate.10. Conditional spending/services aligns to the requirements of funders.11. Relationships with funders are transparent and professional.12. Grants are researched, and applications made to support and enhance program/operational initiatives where possible.13. Strong internal controls exist to protect agency funds and assets.14. Financial statements are externally audited on an annual basis.
Mastery	<ol style="list-style-type: none">1. All individuals in service have access to staff with skills and competencies to meet their needs.2. Skills, competencies, and numbers of staff meet the support needs of the organization.3. Leadership of the organization is united on organizational health & sustainability.4. Funds are available for required (<i>mandatory & designated mandatory</i>) staff training.5. Opportunities and funds are accessible for elective and relevant training.6. Staff follow a mandatory training program.7. The agency engages in ongoing succession planning initiatives.8. Department & frontline leaders have basic levels of financial literacy, organizational due diligence, and supervisory skills.



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	<p>9. Skills and competencies of Leadership effectively deliver targeted annual objectives.</p>
Culture & Structure	<ol style="list-style-type: none">1. Culture and morale across the organization is positive.2. Communication, alignment and connectivity exists throughout the organization.3. Staff turnover is at or lower than provincial sector average.4. Staff are retained because of the positive impact they have on the agency and the individuals we support.5. Agency structure is as efficient as possible and optimizes use of staffing funds.6. Clear roles, responsibilities and accountabilities are in place.7. Staff across the organization are aware of, and consistently practice policies and procedures/processes.8. Capacity exists within the mid and senior level management to accommodate growth of the organization.9. A performance review and accountability system exists and is implemented across the organization for all staff.10. Continuous improvement across all agency pillars is regularly pursued and implemented.11. Risk management is effectively evaluated to identify and mitigate risks.12. Staff and leaders act in alignment with the agency Values (see agency values: 'DIGNITY').13. Opportunities exist for staff to be engaged/participate in the development of policies, procedures and overall health and direction of CASS.
Partnerships	<ol style="list-style-type: none">1. Resources and services are enhanced through collaboration with community partners.2. Mutually beneficial relationships with new partnerships are sought/developed.3. CASS' image in our community and relative circles is positive and reputable.4. CASS is an engaged participant in sector related groups.

Strategic Sustainability 2022-2024 Plan One Page Summary

PURPOSE: Facilitating connections and opportunities that promote personal value, engagement and inclusive communities.

Values	The Ideal CASS	Pillars & Filters	Sustainability Priorities	Strategic Priorities
<p>D Determination of Self</p> <p>I Integrity</p> <p>G Grace</p> <p>N Natural Supports</p> <p>I Inclusion</p> <p>T Trauma Informed</p> <p>Y You Matter</p>	<ul style="list-style-type: none"> Admin team capacity is representative of service demands Growth & change management capability Succession –people able & ready to assume increased levels of accountability Prefer to grow in PDD Want to be the 1st agency funders think about when services are needed Want to be pliable (diverse) in our services and in the needs of members Leaders capable of emergent response, coverage Maintain integrity and philosophy of our program demands All programs & staff aligned to a central philosophy Staff truly engaged in direction of CASS (or be truly engaged with the individual they serve) Employer of choice – staff wellbeing (CASS to be an organization staff want to work and like working for Total compensation is attractive Staff are rewarded and recognized for their work and when going above and beyond The agency builds diverse and inclusive communities Trauma informed – appreciative of how people are impacted and how we can support 	<p>ORGANIZATIONAL HEALTH PILLARS:</p> <ol style="list-style-type: none"> SUPPORTED INDIVIDUALS FINANCIAL MASTERY CULTURE & STRUCTURE PARTNERSHIPS <p>OPERATIONAL DECISION FILTERS:</p> <p>Will it:</p> <ol style="list-style-type: none"> Contribute to enhanced services? Positively effect the needs of our people and/or CASS? Lead to increased effectiveness or efficiency? Fit with our values? Ensure risks can be mitigated? Be sustainable? 	<p>SUPPORTED INDIVIDUALS PRIORITIES:</p> <ol style="list-style-type: none"> Consistent annual rotating surveys demonstrate high satisfaction. Individuals are supported from intake through to service period. Facilities are accessible, well-maintained, safe, and healthy. Systems are in place to monitor services. <p>FINANCIAL PRIORITIES:</p> <ol style="list-style-type: none"> Department leaders engaged in dept. budgets. Facility/equipment, capital maintenance/replacement plan. Spending approval plan understood by all staff. Minimum cash flow for 2 months or more. Financial reporting within 30 days. Internal controls exist to protect agency assets. Conditional spending aligns with funder requirements. <p>MASTERY PRIORITIES:</p> <ol style="list-style-type: none"> Individuals have access to staff with skills to meet their specific needs. Staff follow a mandatory training program. Leaders take advantage of training opportunities. Dept & front-line leaders have financial literacy, org due diligence and supervisory skills. Leaders effectively achieve targeted annual objectives. <p>CULTURE/STRUCTURE PRIORITIES:</p> <ol style="list-style-type: none"> Staff turnover is at or lower than provincial average. Clear roles, responsibilities & accountabilities are in place. Staff consistently practice policies and procedures. Capacity exists at senior and mid leadership to accommodate growth. Performance review system exists across CASS. 	<p>FINANCIAL PRIORITIES:</p> <ol style="list-style-type: none"> Payroll & HR system implementation Finance, expense & mileage platform implementation <p>CULTURE/STRUCTURE PRIORITIES:</p> <ol style="list-style-type: none"> Trauma informed organization Office relocation