



CASS

Sustainability Plan 2024-2026



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CASS Purpose Statement

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

CASS Values

Determination of Self

Everyone has the right to make their own choices, set their own goals, and the path they take to get there.

Integrity

Operating with honesty, consistency, and equity while adhering to established values.

Grace

Being considerate and respectful of the needs of others.

Natural Supports

Fostering independence through community connections.

Inclusion

Intentionally supporting people to have meaningful participation and input in the groups of their choosing.

Trauma Informed

The guiding principles of; Safety, Choice, Collaboration, Trustworthiness & Empowerment create an environment where people feel understood, supported, and empowered to thrive.

You Matter

Appreciating the unique skills, insights, perspectives and intrinsic value of all people so that we may benefit from them.



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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 Stability	<ol style="list-style-type: none">1. Operating costs fall within approved budgets; and processes exist to approve expenditures and 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 or match expenditures on a consolidated basis.7. Investments are performed ethically, and focused on conservative, secure rates of return.8. Access to financial resources exist to support minimum cash flow for two 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. Skills, competencies, and numbers of staff meet the support needs of the organization.2. Leadership of the organization is united on organizational health & sustainability.3. Funds are available for required (<i>mandatory & designated mandatory</i>) staff training.4. Opportunities and funds are available for elective and relevant training.5. Staff meet and maintain all mandatory training and employment requirements.6. The agency engages in ongoing succession planning initiatives.7. Senior & Department leaders have basic levels of financial literacy, organizational due diligence, and supervisory skills.8. Opportunities for new learnings are secured, for leadership development at the Executive, Program Manager, Coordinator, and Team Leader level.9. Skills and competencies of Leadership effectively deliver targeted annual objectives.



CASS

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. Recruitment and development strategies contribute to the growth and capacity of effective employees meeting the needs of individuals and the organization.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, manage, 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.14. Staff feel safe physically, emotionally, mentally.
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.



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2024-2026 Strategic Sustainability 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
D Determination of Self I Integrity G Grace N Natural Supports I Inclusion T Trauma Informed Y You Matter	<ul style="list-style-type: none"> Admin team capacity is representative of service needs Demonstrates excellence in growth & change management Resilient with robust business continuity and succession planning—people able & ready to assume increased levels of responsibility Pursues growth and new funding opportunities Agency of choice for clients, employees, and funders Provides diverse, flexible, and innovative services Maintain integrity and philosophy of agency and programs All programs & staff aligned to CASS’ philosophy, purpose, & strategic objectives Staff truly engaged in direction of CASS and with the client(s) they serve Values people over process Total compensation is competitive and attractive Staff are rewarded and recognized for their work and when going above and beyond Is a diverse and inclusive agency where everyone feels safe and valued for their authentic selves Is fully 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 Stability 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 clients, staff, and/or CASS? Lead to increased effectiveness or efficiency? Fit with our values and purpose? Mitigate or manage risks? Be sustainable? 	<p>SUPPORTED INDIVIDUALS PRIORITIES:</p> <ol style="list-style-type: none"> Clients and stakeholders are actively involved in informing service delivery. Systems are in place to monitor services. Facilities are accessible, well-maintained, safe, and healthy. <p>FINANCIAL STABILITY PRIORITIES:</p> <ol style="list-style-type: none"> Processes in place to safeguard financial viability of CASS (Budgets, expense reporting & approval system, reports & forecasting). Organization maintains financial resources to support minimum cash flow for two months. <p>MASTERY PRIORITIES:</p> <ol style="list-style-type: none"> CASS is accredited with ongoing best practices in place. CASS supports and promotes a culture of continuous learning and improvement. <p>CULTURE/STRUCTURE PRIORITIES:</p> <ol style="list-style-type: none"> Communication, alignment, and connectivity exist throughout the organization. Structure is as efficient as possible and optimizes use of funds for staffing. Capacity exists within the mid and senior level mgmt. to accommodate growth of the organization. A consistent performance review and accountability system exist and is implemented across the organization. 	<p>FINANCIAL STABILITY PRIORITIES:</p> <ol style="list-style-type: none"> Pursue banking solutions that better support CASS’ needs. <p>CULTURE/STRUCTURE PRIORITIES:</p> <ol style="list-style-type: none"> Enhance staff engagement & connectivity within and across teams and programs. Improve agency resilience through documentation of critical tasks, implementation of organization wide succession plan, and backup of key roles. Enhance staff physical, emotional, and psychological safety.