

# Lethbridge Family Services Strategic Plan 2017-2020



A connected and inclusive community

where people thrive.



**You are vital and play an important role in improving the well-being and quality of life for many people.**

**Dear Staff and Board at Lethbridge Family Services,**

In our work to help individuals and families in Southwestern Alberta thrive, you are vital and play an important role in improving the well-being and quality of life for many people.

We are pleased to present you with this Strategic Plan which outlines our Strategic Priorities and objectives for 2017 - 2020. The plan is grounded in the evidence documented through the environmental scan and the input provided by staff members and external stakeholders. The scan was completed within the context of our current internal strengths and weaknesses, and the external opportunities and threats before us.

Lethbridge Family Services strives to be a high-performing organization, and we hold ourselves accountable to the individuals and families we serve, as well as to the donors, partners, volunteers and supporters who value our work. We are also accountable to each other, and this plan will be monitored and regularly evaluated to make certain we are on the right path to achieving success.

This is an exciting period for Lethbridge Family Services. Our four main program areas; Counselling, Outreach and Education, DaCapo Disability Services, Home Services, and Immigrant Services continue to be leaders in their areas of practice. These services strengthen our community, and the individuals and families within it. The recent additions of Advancement and Community Relations, and Business Development will support the organization as we grow and plan for addressing changing community needs.

Thank you for your leadership and continued commitment to Lethbridge Family Services' priorities. This Strategic Plan is a map of our shared success, and we look forward to celebrating and charting our future achievements with you.

Sincerely,



**Sandra Mintz**  
Chief Executive Officer  
*Lethbridge Family Services*



**Doug McLaughlin**  
Consultant, Investors Group  
*Board Chair, Lethbridge Family Services*

**Because family is important.**

**Vision**

A connected and inclusive community where people thrive.

**Mission**

Lethbridge Family Services is a highly-accredited, charitable human services organization that improves the well-being and quality of life for individuals and families in Southwestern Alberta.

**Values**

Respect, Integrity, Compassion



Lethbridge Family Services  
[www.lfsfamily.ca](http://www.lfsfamily.ca)

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# Executive Summary

## A solid strategic plan acts as a map and compass.

It helps an organization navigate change, allowing it to be more intentional and proactive, and encouraging it to think past immediate threats and changes in the environment, aiming it towards bigger goals.

A strategic plan obliges an organization, its leaders and its team to look more closely at what and who they are and are not, and clarifies what they are meant to do.

The best plans also help an organization and its people see what strengths they bring to the journey, and how they might turn obstacles into opportunities for growth and for clarification of purpose.

Lethbridge Family Services used this process as an opportunity to provide new and updated information on factors that influence the organization in order to guide our staff in achieving our mission and vision and to align with our guiding values.

A **strategic plan** obliges an organization, its leaders and its team to look more closely at **what and who they are and are not**, and clarifies what they are meant to do.

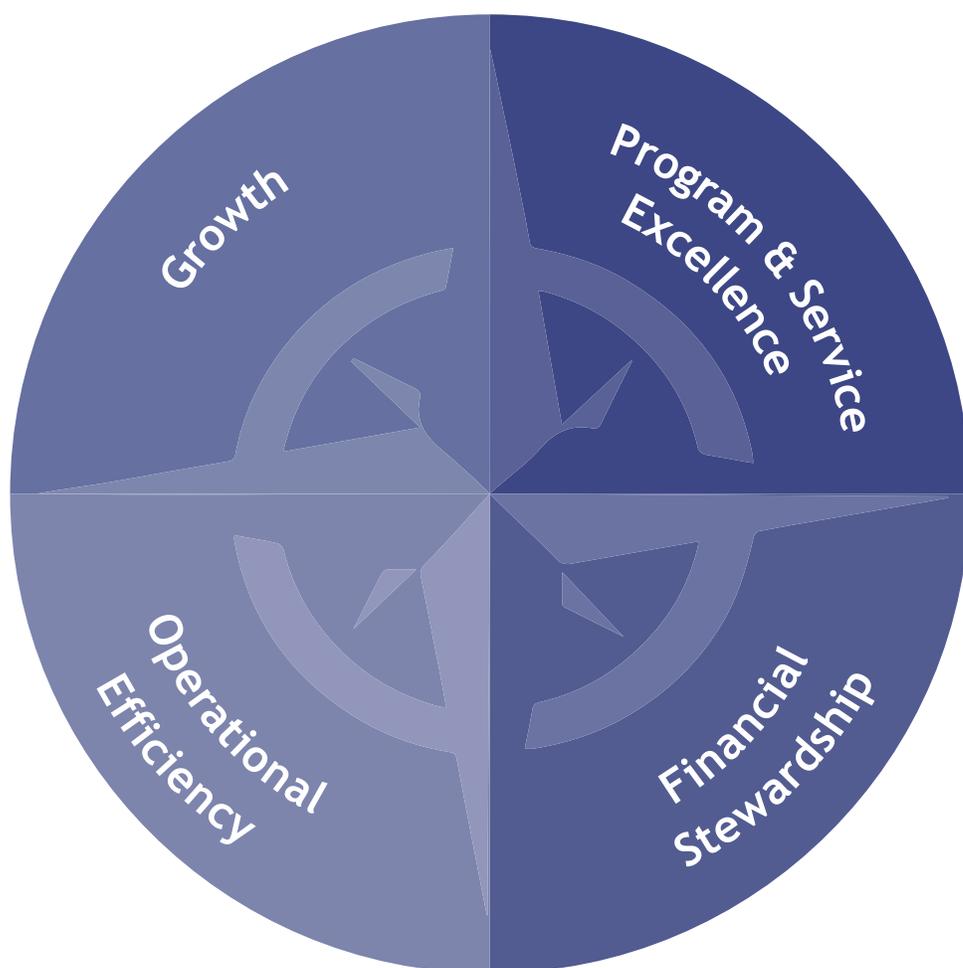
We included the diverse voices of individuals and families within our community, our partner agencies, our funders, our clients, our staff, our management and our Board to ensure that we have an inspiring and focused plan.

Furthermore, Lethbridge Family Services adheres to best-practice standards as laid out by the Council on Accreditation of Services for Children and Families Inc. (COA).

This accreditation ensures services are well-coordinated, evidence-based, outcomes-oriented and provided by a skilled and supported workforce. Our robust strategic planning provided another opportunity to benchmark our processes against the best practices laid out through COA.

This plan ensures that we are moving toward a stronger community, connected and inclusive for all.





Four strategic priorities

In pursuing our vision and mission over the next four years, we are concentrating on the following four main areas of priority:

- Lethbridge Family Services will intentionally grow our workforce, client base and supporters to best serve our community and achieve our vision.
- Lethbridge Family Services will continue to excel in our program service delivery in order to meet, respond, and anticipate the needs of our diverse client base.
- Lethbridge Family Services is committed to using our resources efficiently and continually improving on best practices and technologies to increase our ability to serve the families and individuals of Southwestern Alberta.
- Lethbridge Family Services will make sound strategic financial decisions and grow our revenue to accelerate the impact of our program areas in the community.

# Who We Are

**Lethbridge Family Services is inspired each day by the individuals and families we serve.**

Our vision and mission statements, in addition to our values, provide a sense of purpose and encourage our culture of continuous improvement.



## VISION

A connected and inclusive community where people thrive.



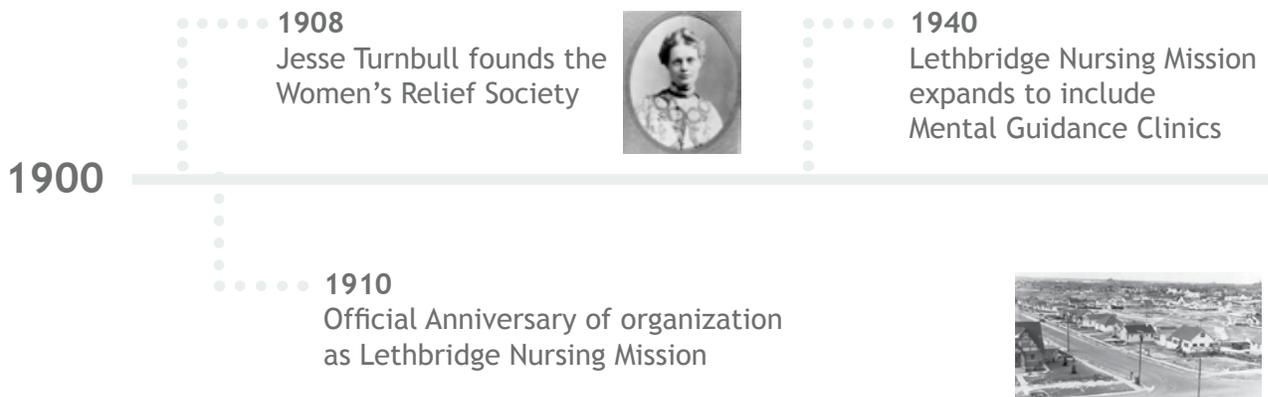
## MISSION

Lethbridge Family Services is a highly-accredited, charitable human services organization that improves the well-being and quality of life for individuals and families in Southwestern Alberta.



## VALUES

Respect, Integrity, Compassion



## History

Lethbridge Family Services has a history of service extending back to the Lethbridge Nursing Mission established in 1910.

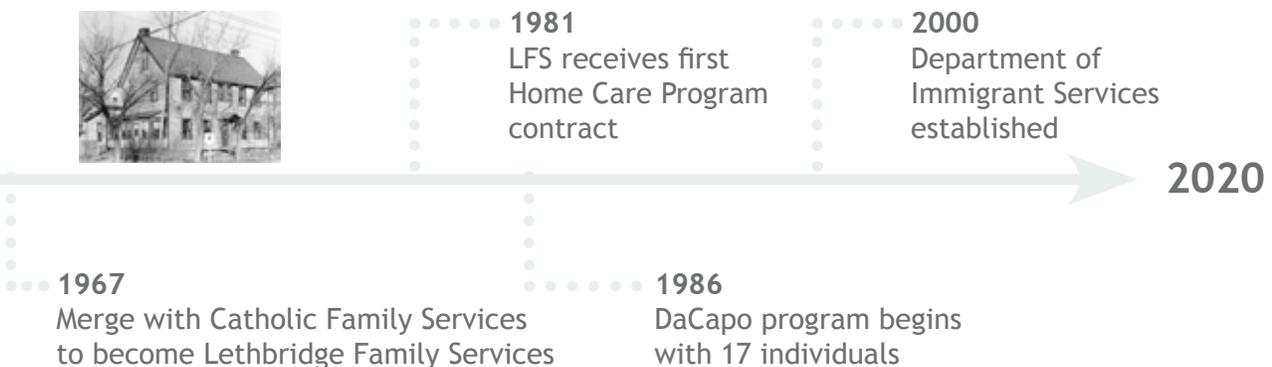
In 1967 the organization merged with Catholic Family Services to become Lethbridge Family Services. Throughout its history, Lethbridge Family Services has played a major role in the identification and development of new services within the community.

## Organizational Profile

Today, Lethbridge Family Services is a highly accredited charitable organization helping nearly 7,000 people annually to improve their quality of life. Our organization is dedicated to providing services to those in need, regardless of socioeconomic status, ethnicity, language, religion, gender identity, and family structures. We offer community-based support to facilitate human potential, choice, and independence.

Through advocacy, public education, prevention, intervention, and community development, Lethbridge Family Services responds to emerging family needs.

These family needs are supported through four main program areas. Home Services provides home care in the community, supporting well over 1,000 individuals to be able to live each day independently, in their own home/independent setting. The DaCapo programs serve persons with disabilities, brain injuries, or FASD, helping them develop the skills and relationships to enhance their well-being, independence, and connectivity to the community. The Immigrant Services department delivers a spectrum of settlement services to newly arrived immigrants, including refugees, and our Counselling, Outreach and Education program offers individuals, couples and families the opportunity to process trauma, grief and other psychological issues through therapeutic groups, individuals and couples sessions, personal growth groups, presentations and other services that meet the needs of our community members.



# Overview

## The Planning Process

Success of the overall plan relies heavily on information gathered to inform the strategic priorities and objectives. Lethbridge Family Services carried out a comprehensive review of internal and external data through the following channels:

### LETHBRIDGE FAMILY SERVICES BOARD OF DIRECTORS STRATEGIC PLANNING COMMITTEE

Leslie Gardner	Consultant, Program Evaluation and Research
Rachel Hopf	Partner, MacLachlan McNab Hembroff LLP
Doug McLaughlin	Consultant, Investors Group
Richard Perlow	Professor, University of Lethbridge

### INTERNAL STAFF FOCUS GROUP: JANUARY 2017

Staff members from Lethbridge Family Services team met in a facilitated session and were asked to identify conditions and relationships that had to be in place for the strategic plan to be successful. This input was critical in providing direction and grounding the plan.

Kala Beers	COE	Najib Mangal	IS
Brenda Bell	DaCapo	Amanda Matthews	COE
Laura Branner	IS	Jordanne Moses	IS
Amanda Carpenter	HS	Myrium Mul	HS
Karen Charlton	DaCapo	Tyler Ramsay	IS
Jackie Cossette	DaCapo	Mackenzie Renner	COE
Rosie Digout Ford	Advancement and Community Relations	Tribikram (Vic) Rizal	IS
Katie Ford-Hofer	HS	Shannon Ryant	DaCapo
Ashlea Golding	IS	Janice Sheppard	DaCapo
Tanya Jans	DaCapo	Kayla Silsbe	Central Administration
Tami Keiver	DaCapo	Lynette Taal	DaCapo
Martin Kuhn	HS	Elise Tiffany	IS
Kristina Larkin	IS	Nickolej Villiger	IS
Marc Leblanc	Central Administration	Mary Ann Waldner	DaCapo
Tannia Los	COE	Micheal Ward	IS

**COE** - Counselling, Outreach & Education

**DaCapo** - DaCapo Disability Services

**HS** - Home Services

**IS** - Immigrant Services

## SENIOR LEADERSHIP TEAM AND BOARD OF DIRECTORS INPUT: MARCH 2017

The Senior Leadership Team gathered to identify current challenges and future possibilities and started the process of isolating specific targets for strategic development.

<b>Sarah Amies</b>	Director, IS	<b>Andrea Hlady</b>	Director, Business Development
<b>Lanie Fisher</b>	Director, HR	<b>Dianne Kotkas</b>	Director, DaCapo
<b>Michelle Gallucci</b>	Director, Advancement and Community Relations	<b>Lisa Lewis</b>	Director, COE
<b>Leslie Gardner</b>	Consultant, Program Evaluation and Research	<b>Doug McLaughlin</b>	Consultant, Investors Group CEO
<b>Tracey Hanson</b>	Director, HS	<b>Sandra Mintz</b>	Director, Finance
		<b>Sonny Zgurski</b>	

## EXTERNAL STAKEHOLDERS SURVEY AND INTERVIEWS: APRIL 2017

Lethbridge Family Services contacted external stakeholders to help fill in the environmental scan. Their insights were valuable and helped make this plan robust and relevant. Although you will remain anonymous we thank you for your time and insights.



## **Critical success factors are key areas where an organization must perform well on a consistent basis to achieve its mission.**

The technique of identifying critical success factors augments strategic planning efforts by illuminating the necessary ingredients for success in the organization's present situation and potential future. The critical success factors as derived from the Senior Leadership Team through synthesis of our strengths, weaknesses, opportunities and threats are:



# Situation Assessment

High level environmental factors identified in the organization's 2017-2020 Strategic Plan will continue to guide Lethbridge Family Services' annual business planning for the duration of this plan. Notably some factors that will influence our work are:

- Federal and provincial governments' budgets as they relate to our program areas;
- Deeper relationships with the private sector to diversify our funding;
- The changing demographics of Southwestern Alberta;
- The accelerating pace of change in advances in technology.

A detailed analysis of our Strengths, Weaknesses, Opportunities and Threats (SWOT) was completed in the planning process.

## Social Outlook

The Government of Canada is maintaining its commitment to a strong immigration program and will welcome 300,000 immigrants or refugees in 2017. Though planned admissions of resettled refugees will decrease when compared to the extraordinary target in 2016, they will continue to remain among the highest in Canada's history and will be more than double the target in 2015. These admissions include resettled refugees (government assisted and privately sponsored) as well as protected persons who become permanent residents. In 2017 this represents 40,000 people.<sup>(1)</sup>

Our city had the **fastest annual population growth** of any mid to large-sized Alberta city in 2016 at 2.1%.

The population of the city of Lethbridge is approaching 100,000 (96,860 in the 2016 City of Lethbridge Census Report) with the highest proportions of our population in the 30-39 (23.5%) and 60-69 (23.4%) year-old cohorts. Our city had the fastest annual population growth of any mid to large-sized Alberta city in 2016 at 2.1%, significantly more than Red Deer, a city of similar size, who witnessed a negative growth at -1.0%.<sup>(2)</sup>

This changing age demographic will be Alberta wide. By 2031, seniors will account for 20% of the province's population leading to economic and social implications, and opportunities and challenges across a wide range of areas.<sup>(3)</sup>

Living and working on the traditional lands of the Treaty 7 Indigenous people, our region is steeped in historical knowledge and value. Our closest neighbours are members of the Piikani Nation and the Blood Tribe and our organization, in service to those neighbours, plays a role in carrying out appropriate recommendations of the Truth and Reconciliation Commission.<sup>(4)</sup>

## Economic Outlook

The 2017 provincial budget presented in March 2017 maintains spending on front-line public services, as indicated in public announcements leading up to budget day. The projected \$10.3 billion deficit, though lower than in 2016, should remain a concern for the sector. If government revenues do not improve immediately, we have concern that funding cuts may happen in an effort to balance the budget or reduce the debt. This has the potential to have an impact on our organization.<sup>(5)</sup>

Although Alberta is in the third year of an economic downturn, the provincial economy is showing signs of recovery. The government did not make direct cuts to funding agreements for mandated programs and other programs that provide significant revenue for Lethbridge Family Services. This includes Persons with Developmental Disabilities (PDD), Family & Community Support Services (FCSS), and the Community Initiative Program (CIP). However, we are concerned about the cumulative impact of several years of limited funding increases. We will need to continue to monitor our operational costs and service demand increases if program funding is not keeping pace with these costs. Furthermore, \$2 billion, out of a \$21.4 billion total pegged for long-term health care, was committed for home care and community care so seniors and Albertans with disabilities can access services such as nursing and personal assistance, day programs, respite relief, palliative care and wound care.<sup>(6)</sup>

Fortunately, the regional economy has remained stable during Alberta's economic downturn. It is anticipated that Lethbridge will continue to outperform the wider provincial economy in terms of Gross Domestic Product (GDP).<sup>(7)</sup> Employment in the region remains strong with 20% of the workforce contributing to the public sector; specifically, in the areas of health, education and government services.<sup>(8)</sup>

Lethbridge Family Services also plays an important role in our community and our contribution is not to be overlooked. Our organization is one of the largest non-profit organizations in the area employing 375 staff members and ranking as the 16th largest employer in Lethbridge overall.

We will need to **continue to monitor our operational costs and service demand increases** to ensure that program funding is keeping pace with these costs.

# Internal Outlook

## Program Outlook

Lethbridge Family Services has a strong reputation in the community as a credible and effective leader. Our recent past success has been due, in part, to a readiness to be responsive to emerging community needs and fill those gaps.

Specifically, Lethbridge Family Services' Immigrant Services department has led the country in settlement best practices and the department is called upon for guidance and aid for other areas working with refugees and immigrants.

Regionally, DaCapo is the only program in Southwestern Alberta contracted to provide supports in the following areas; Community Access for People in Continuing Care (CAPCC), Cross Disability Support and Services (CDSS) and Fetal Alcohol Spectrum Disorder (FASD) Assessment and Diagnostic Services.

The counsellors within the Counselling, Outreach and Education department are highly educated professionals working with a vulnerable population in treating trauma; and Outreach and Education are leaders in creating and delivering curriculum and community programs in regards to suicide intervention.

Finally, Home Services has successfully built their workforce to serve a greater client base as the demand for in-home care and aging-in-place services increase.

This expertise and experience comes with responsibility. Both our own internal stakeholders and our external stakeholders agree that we are well-positioned to lead intentional and impactful collaborations and influence advocacy efforts as opportunities arise.

## Technology

While technology advances in both software and hardware enable an improvement in workplace productivity they also give rise to new challenges for Lethbridge Family Services. We have already identified prior to this strategic plan the need to invest in and improve upon our IT infrastructure. This current strategic plan's focus on technology will increase our operational efficiency, refine our current methods of managing data, and reduce our dependency on paper.

Lethbridge Family Services has a **strong reputation** in the community as a **credible and effective leader**.

The strategic plan will guide us to **increase** our operational efficiency, **refine** our current methods of managing data, and **reduce** our dependency on paper.

## Philanthropic Outlook

Philanthropy is undergoing significant transformation. These changes are bringing both challenges and opportunities for Lethbridge Family Services to recalibrate our approach to engaging, stewarding, and retaining donors, as well as structuring overall revenue generation.<sup>(9)</sup>

Geographic and generational factors continue to shape our thinking around diversification of funding sources, specifically pertaining to the millennial cohort who demonstrate a clear preference to be actively involved and engaged in their own philanthropic endeavors.

Similarly, developing new partnerships and collaborations with other organizations of varying types from corporate partners to other non-profits, will broaden internal diversity and strengthen support networks in achieving our goals. These areas of influence pose effective engagement tools to reach a diverse range of donors while strengthening our revenue structure.

Our well-researched marketing and communications platforms will also help us increase our brand awareness to ultimately serve more people and increase our impact in the community.

Our future lies in **local relevancy, cultural resonance, and continued networking.**

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### Acknowledgements

**1** Government of Canada (2017). Key Highlights 2017 Immigration Levels Plan. Available from <http://news.gc.ca/web/article-en.do?nid=1145319>

**2** Economic Development Lethbridge (2016). Economic Trends and Indicators Fall 2016 Report. Pg. 8

**3** Aging Population Policy Framework (2010). Presented by Kindy Joseph, Executive Director, Seniors Strategic Planning, Alberta Seniors, and Sheree Kwong See, Seniors Advocate

**4** Truth and Reconciliation Commission of Canada (2015). Truth and Reconciliation Commission of Canada: Calls to Action. Available from [http://www.trc.ca/websites/trcinstitution/File/2015/Findings/Calls\\_to\\_Action\\_English2.pdf](http://www.trc.ca/websites/trcinstitution/File/2015/Findings/Calls_to_Action_English2.pdf)

**5** Calgary Chamber of Voluntary Organizations (2017). Alberta Budget 2017-CCVO Extended Analysis. Available from [https://www.calgarycvo.org/wp-content/uploads/2017/04/Budget\\_Analysis\\_2017.pdf](https://www.calgarycvo.org/wp-content/uploads/2017/04/Budget_Analysis_2017.pdf)

**6** Government of Alberta (2017). Budget Highlights. Available from <https://www.alberta.ca/budget-highlights.aspx>

**7** Economic Development Lethbridge (2016). Economic Trends and Indicators Fall 2016 Report. Pg. 3

**8** Choose Lethbridge (2017). Embracing Tradition and Innovation. Available from <https://business.chooselethbridge.ca/industries>

**9** The Philanthropy Outlook 2016 & 2017 (2016). Presented by Marts and Lundy. Researched and written by Indiana University Lilly Family School of Philanthropy. Pg. 4.

# Strategic Priorities and Objectives

This strategic plan clarifies and prioritizes the steps that Lethbridge Family Services will take to achieve its mission between 2017 and 2020. The priorities and objectives are ambitious commitments to address needs in the structure, function and relationships of our organization.

Each of our strategic priorities has a number of objectives and tactics identified that will ensure success in each of the areas. Our annual operational plans over the next four years will provide the more detailed approaches that will be undertaken in implementing our Strategic Plan.

**Strategic Priorities** are what we are intending to achieve. The priorities require us to integrate and activate all of our considerable strengths, connections and resources to make significant gains and demonstrate the value of Lethbridge Family Services.

**Objectives** are the check points that we use along the way or the means by which we accomplish the strategic priorities.

**Tactics** are the activities and actions to accomplish these objectives.

## VISION

A connected and inclusive community where people thrive.

## MISSION

Lethbridge Family Services is a highly-accredited, charitable human services organization that improves the well-being and quality of life for individuals and families in Southwestern Alberta.

## VALUES

Respect, Integrity, Compassion

## STRATEGIC PRIORITIES

GROWTH

PROGRAM AND SERVICE EXCELLENCE

OPERATIONAL EFFICIENCY

FINANCIAL STEWARDSHIP

## GROWTH

Lethbridge Family Services will intentionally grow our workforce, client base and supporters to best serve our community and achieve our vision.

### OBJECTIVES

- 1A** To support growth of the organization, we will enhance employee satisfaction, commitment and retention, through nurturing a positive workplace culture.
- 1B** To grow our position in the community, Lethbridge Family Services will be a leader of positive social change in the community.
- 1C** To increase awareness of the organization, and build brand equity in Southwestern Alberta, we will develop marketing and communications plans that speak to all stakeholders in a way each group understands.
- 1D** To meet the changing needs of the individuals we serve and the staff we support, Lethbridge Family Services is committed to exploring strategies to pursue intentional and strategic growth.

## PROGRAM AND SERVICE EXCELLENCE

Lethbridge Family Services will continue to excel in our program service delivery in order to meet, respond to, and anticipate the needs of our diverse client base.

### OBJECTIVES

- 2A** To ensure the people we serve receive the best possible care, we will pursue accreditation and certification with rigorous, distinguished accrediting bodies, addressing excellence and best practice in service delivery, management, governance, and health and safety.
- 2B** To help an increasing number of people, we will introduce or expand our programs in areas of Southwestern Alberta where there is both a critical need and the ability to support these additional services.

## OPERATIONAL EFFICIENCY

Lethbridge Family Services is committed to using our resources efficiently and continually improving on best practices and technologies to increase our ability to serve the families and individuals of Southwestern Alberta.

### OBJECTIVES

- 3A** To support our staff in their efforts to help the community we will continue to implement essential IT systems and organizational functions that enhance their work.
- 3B** We will continue to integrate our core business functions into program processes where applicable to strengthen and support the entire organization.
- 3C** We will operate on the discipline of Lean that streamlines use of resources, reduces duplication, eliminates waste, and leverages best practices.

## FINANCIAL STEWARDSHIP

Lethbridge Family Services will make sound strategic financial decisions and grow our revenue to accelerate the impact of our program areas in the community.

### OBJECTIVES

- 4A** To maximize the utilization of our resources, we will continuously and critically evaluate the allocation of our resources for efficiency and effectiveness.
- 4B** To increase our base of support from the community, we will develop new streams of financial support that align with our vision, mission, and values.
- 4C** To increase the financial stability of the organization we will develop a business model that leverages our strengths and creates long-term value.