



Strategic Plan

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Consulting

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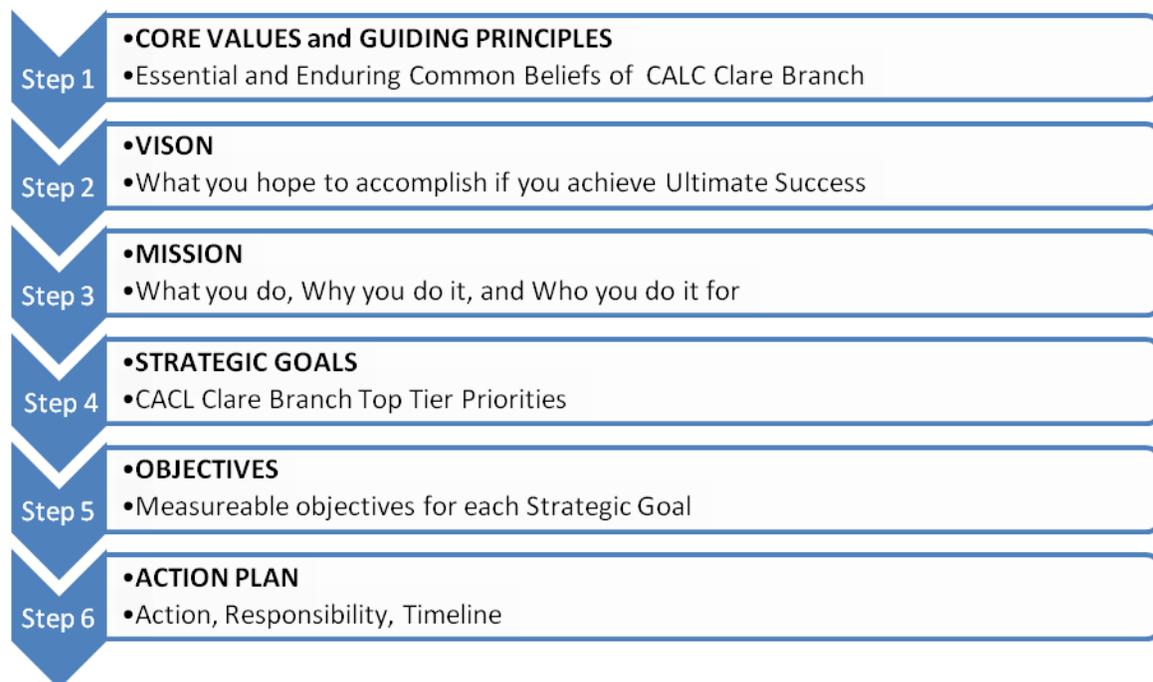
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Part 1: Strategic Planning Process

The following document outlines the Strategic Plan of CACL Clare Branch and is intended to provide a clear overview of the organizations strategic directions, goals and objectives. This plan was developed by the Board of Directors and facilitated by Tim Alison, co-founder of Happy Entrepreneur Consulting.

To ensure success with our clients, Happy Entrepreneur Consulting utilizes a phased approach



that can be used to develop a new strategic plan or to review/revise an existing strategic plan.

It is important to remember that strategic planning is a process and not an event. Once clearly defined, Core Values, Vision, and Mission are expected to remain intact (although wording may be changed to provide further clarification). The details of the plan (goals, objectives, and measureable action items) will change in response to new circumstances. This underscores the importance of regular updates for any strategic plan (at least once per year).

Part 2: Organizational Context

CACL Clare Branch is a registered, non-profit organization supporting adults living with intellectual and other challenges. The organization operates two branches - l'Atelier de Clare (workplace) and la Maison Jerome (home). Our services are offered in both official languages.

Founded in 1978, L'Atelier de Clare is an Adult Service Centre providing day programs to adults living with intellectual and other challenges of our community. We are located in Church Point, on the shores of Saint Mary's Bay in Southwest Nova Scotia. Our program includes work and life skills counseling, job training and employment. In addition to classes in literacy and numeracy, healthy living, effective communication, and social well-being, our clients participate in our workplace activities - woodworking, craft production, engraving, lawn maintenance, home-cleaning services, and retail sales. We operate under the principles of independence and inclusion.

Our Nova Scotia Department of Community Services licensed group home, la Maison Jérôme, is also located in Church Point. La Maison provides a family residence for nine adults, who participate in the workplace activities at l'Atelier de Clare. Residents are supported by qualified staff in their daily living in a safe, pleasant, and healthy environment. We operate under the principle of respect for individuality within a context of social cohesion and community integration.

Governance

CACL Clare Branch is governed by a volunteer Board of Directors. There are currently 8 Board members. Committees include:

- Executive
- Finance
- Maintenance
- Policies and Procedures Review Committee
- Social Enterprise.

The organizations policies and procedures refer to a number of other committees which may provide input - but they are not currently meeting. Examples include fundraising, health and safety, etc.

Staffing

The board employs a full Executive Director whom the board holds responsible for administrative functions and the allocation of resources to carry out the operations. The relationship of the board to the Executive Director is advisory as it relates to the other members of the staff. CACL Clare Branch has seventeen employees (not including grant employees).

Part 3: Strategic Plan

Core Values and Guiding Principles

What are core values?

Core values are the essential and enduring common beliefs of the CACL Clare Branch. Core values require no external justification; they have *intrinsic* value and importance to the organization. Core values exist in relation to clients, employees, the community, government (Municipal, Provincial and Federal), community organizations and any other relevant stakeholders. CACL Clare Branch's values are reflected in the organizations guiding principles.

What are guiding principles?

Guiding principles are the basis upon which organizations decide on policies, priorities, and programming. They help drive the establishment of goals, objectives, and action plans.

CACL Clare Branch Guiding Principles:

- All persons have equal dignity. Dignity does not depend on physical, intellectual, or any other differentiating characteristic – it is an inherent right.
- All persons are entitled to equal access to the community supports necessary to enable equal participation.
- All persons deserve to be treated with compassion and caring.
- All persons have the capacity for growth and expression.
- All persons have a need for security and respect.
- All persons have the right to make choices that affect their well-being.

Vision

What is a vision statement?

An organizational vision statement is a short statement that describes what the organization and others with similar purpose hope to achieve. It is not about the products or programs that help get you there.

CACL Clare Branch Vision Statement:

All citizens of Clare enjoy full participation in all sectors of community life.

Mission

What is a Mission Statement?

A good mission statement should provide readers with a solid understanding of the day-to-day function of your organization. A mission statement is short (25 words or less) and answers five key questions:

- Who you are
- What you do

- Who you do it for
- Why you do it
- Where you do it

CACL Clare Branch Mission Statement:

We offer living, learning and working environments to adults living with challenges to enhance individual potential, independence and full community living.

Strategic Goals

What are Strategic Goals?

Strategic goals are an organizations articulation of its top-tier priorities. Knowing that every organization has finite resources, strategic goals need to make a maximum contribution to the vision and mission and are often designed to maximize strengths and to minimize or overcome weaknesses. Strategic Goals serve as the foundation upon which objectives and action items are built.

CACL Clare Branch Strategic Goals

Strategic Goal #1: Provide maximum value to our clients with available program funding

Strategic Goal #2: Maximize the Social Enterprise Potential of the organization

Strategic Goal #3: Develop a Leadership and Governance Plan

Objectives

What are Objectives?

Objectives are a specific accomplishment or achievement that will help the CACL Clare Branch achieve its strategic goals.

CACL Clare Branch Objectives

Strategic Goal #1: Provide maximum value to our clients with available program funding

Objective #1: Evaluate and Prioritize social, recreational, life skills, and residential programs

Objective #2: Increase Community Support for our organization

Objective #3: Identify and capitalize on partnership opportunities to support program delivery

Objective #4: Increase financial support from government

Strategic Goal #2: Maximize the Social Enterprise Potential of the organization

Objective #1: Increase annual engraving revenues to \$10,000 for the current fiscal year

Objective #2: Establish a sustainable and profitable shredding operation

Objective #3: Increase the ratio of clients engaged in Social Enterprise

Objective #4: Increase Client satisfaction with Social Enterprise engagement

Strategic Goal #3: Develop a Leadership and Governance Plan

Objective #1: Review and revise all job descriptions and qualifications

Objective #2: Review and revise Board Governance model

Objective #3: Review and revise organizational Policies and Procedures

Objective #4: Develop Leadership Succession Plans

Action Items

What are Action Items?

Action items are a specific action or activity that will help CACL Clare Branch achieve one or more objectives.

Strategic Goal #1: Provide maximum value to our clients with available program funding

Objective #1: Evaluate and Prioritize social, recreational, life skills, and residential programs

Action: Prepare projected outcomes on client services with status quo funding (report)

Responsibility: Executive Director

Completion Date: July 15, 2013

Action: Review client services

Responsibility: Board

Completion Date: October 31, 2013

Action: Prioritize client services with status quo funding

Responsibility: Board

Completion Date: October 31, 2013

Objective #2: Increase Community Support for our organization

Action: Prepare online presentation to illustrate projected outcomes on client services with status quo funding.

Responsibility: Executive Director
Completion Date: October 31, 2013

Action: Provide information briefing to 3-5 community organizations
Responsibility: Board
Completion Date: Ongoing

Action: Develop fundraising campaign(s)
Responsibility: Board
Completion Date: December 31, 2013

Action: Meet with parents of transitioning students
Responsibility: Staff
Completion Date: Annually

Action: Communicate projected outcomes with parents/family members of existing clients
Responsibility: Staff
Completion Date: Fall

Objective #3: Identify and capitalize on partnership opportunities to support program delivery

Action: Identify potential partnership opportunities (minimum of 1)
Responsibility: Executive Director
Completion Date: August 15, 2013

Objective #4: Increase financial support from government

Action: Communicate projected outcomes with status quo funding
Responsibility: Board
Completion Date: September 15, 2013

Strategic Goal #2: Maximize the Social Enterprise Potential of the organization

Objective #1: Increase annual engraving revenues to \$10,000 for the current fiscal year

Action: Prepare a new website for engraving
Responsibility: Staff
Completion Date: July 30, 2013

Objective #2: Establish a sustainable and profitable shredding operation

Action: Review and approve Business Plan
Responsibility: Executive Director/Board
Completion Date: September 2013

Objective #3: Increase the ratio of clients engaged in Social Enterprise

Action: Task analysis for each social enterprise activity

Responsibility: Staff
Completion Date: July 31, 2013

Action: Align social enterprise activity with client abilities, interest, and preferences
Responsibility: Staff
Completion Date: Ongoing

Objective #4: Increase Client satisfaction with Social Enterprise engagement

Action: Client satisfaction survey
Responsibility: Staff
Completion Date: March 31, 2014

Strategic Goal #3: Develop a Leadership and Governance Plan

Objective #1: Review and revise all job descriptions and qualifications

Action: Review and revise job descriptions and qualifications for Executive Director
Responsibility: Board
Completion Date: September 15, 2013

Action: Review and revise job descriptions and qualifications for all staff
Responsibility: Executive Director
Completion Date: September 30, 2013

Objective #2: Review and revise Board Governance model

Action: Establish new meeting agenda model
Responsibility: Board Chair/Daniel Robichaud
Completion Date: September 15, 2013

Objective #3: Review and revise organizational Policies and Procedures

Action: Review and present to Board
Responsibility: Executive Director
Completion Date: September 15, 2013

Objective #4: Develop Leadership Succession Plans

Action: Establish succession plan for Executive Director
Responsibility: Board and Executive Director
Completion Date: December 31, 2013

Action: Establish succession plan for key employees
Responsibility: Executive Director

Completion Date: December 31, 2013