

# STRATEGIC PLAN

2023 - 25

NEXUS COMMUNITY SUPPORT SOCIETY



# The Facilitator

**Dr. Warren Helfrich** is an accomplished facilitator and consultant passionate about supporting leadership and team development, strategic and tactical planning, organizational accreditation, and performance measurement.

Warren has more than 20 years of experience working with public and private sector health and human services organizations across the globe, supporting them to:

- strengthen their teams and organizational culture,
- create targeted strategic and operational plans,
- implement performance measurement and evaluation systems,  
and
- successfully completing third-party accreditation.



Registered with the BC Association of Clinical Counsellors, Warren has been directly involved in diverse initiatives to improve service delivery, including Community Living BC's 'Quality of Life' Initiative and the Ministry of Children and Family Development's province-wide review of residential services for children and youth in BC.

Based out of Penticton, Warren has been a surveyor and trainer for the accrediting body CARF for over a decade. He is also a Registered Clinical Counsellor (RCC) and a Certified Daring to Lead Facilitator.

He holds an M.A. in Social Work from the University of Toronto and a Ph.D. from the University of Calgary.

# Introduction

In the Spring of 2022, NEXUS Community Support Society initiated a comprehensive review and renewal of our strategic plan.

Information was gathered and compiled through interviews and focus groups held in May and June. That info was then used as a guide in creating an environmental scan.

On August 15th, 2022, a full-day facilitated planning event took place, bringing senior staff and the Board together.

This planning event resulted in identifying strategic directions and specific associated objectives.

In sum, the planning work covered the following areas:

Organizational Foundations:  
Mission, Vision, Values

Strengths, Achievements  
& Core Competencies

Challenges  
& Trends

Opportunities  
& Risks

Strategic Directions (themes)  
& Objectives

# The Organization

NEXUS Community Support Society is a registered charity that provides various services and supports to individuals and families in the Kootenays and Columbia-Shuswap.

Our mission is to create more inclusive and connected communities and to help people with intellectual and developmental disabilities live their best lives.

Our services include day programs, employment support and training, advocacy, life skills classes, family and youth support, advocacy and outreach, community outreach and education, and support for caregivers.

Our team of professionals is here to provide personalized and tailored services that meet the unique needs of each individual and family.

We strive to provide resources, programs, and support to help individuals build meaningful relationships and connections that last a lifetime. Our goal is to create an environment of acceptance and understanding for everyone and ultimately build a better future.

# Planning Context

NEXUS Community Support Society is a CARF accredited provider of services.

CARF's accreditation standards require that organizations consider the following broad areas in the development of their strategic plan:



- The expectations of, and relationships with, the persons served and other stakeholders
- The competitive and legislative or regulatory environment that organizations operate in
- Financial opportunities and threats
- The organization's capabilities in relation to the needs in their service area
- The role of technology in supporting efficient and effective service delivery and operations
- Information from the analysis of performance improvement

# Activities & Data Sources that Informed the Strategic Plan

1

Interviews with key stakeholders identified by NEXUS

2

An interview with NEXUS' current CEO

3

Focus groups with senior leadership, managers,  
team leads, and supported individuals

4

A full day facilitated planned event held virtually on  
August 15th, 2022

# Mission, Vision, & Values

The mission, vision and values of the NEXUS Community Support Society grounds the work of the organization, including its future strategic direction.



our  
mission

Supporting and empowering  
individuals and families  
to live full lives.



our  
vision

Inclusive communities  
that embrace diversity  
and equality,  
where all members belong.



our  
values

## DIVERSITY

Each person is unique.  
Accepting our  
individual differences.

## RESPECT

Everyone is treated with dignity.  
Every person has strengths,  
abilities, and value.

## BELONGING

Accepting everyone  
for who they are.  
The right to be a citizen of  
our community.

## CHOICE

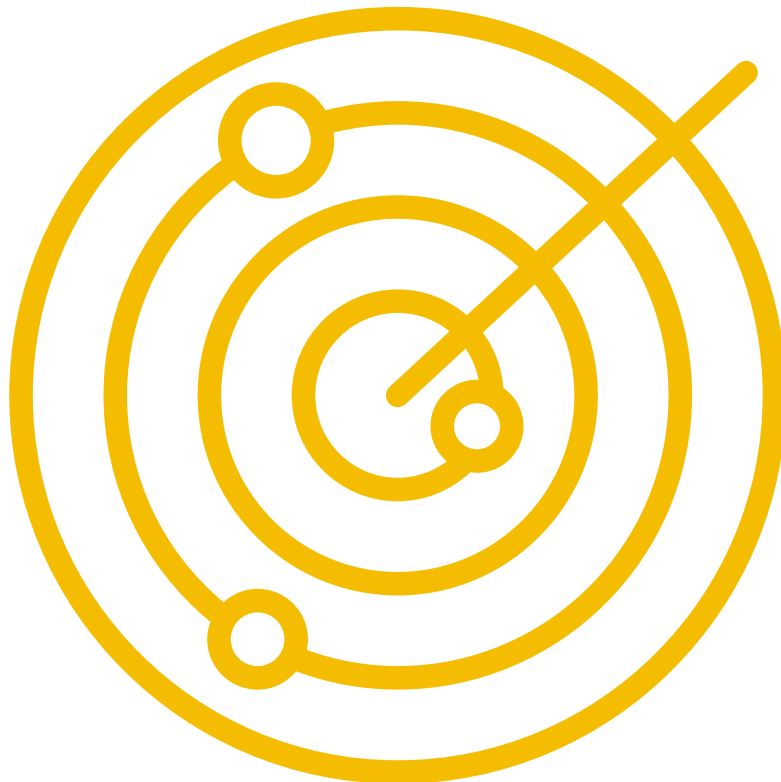
Having the support  
and freedom  
to make  
our own choices.

# Environmental Scan

The following reflects the high-level results of a comprehensive scan of NEXUS' internal and external operating environment.

The scan was conducted following a modified SWOT approach (strengths, weaknesses, opportunities, and threats) as well as an analysis of trends utilizing a PESTEL model (political, economic, sociological, technological, legal and environmental).

The scan includes information gathered through interviews and focus groups which was added to and refined during the facilitated session.





# Achievements

In our various forms, NEXUS has been vital in providing services to persons with intellectual and developmental disabilities for more than 65 years. First located in the Kootenays, we have now grown into providing services in Columbia-Shuswap.

With a focus on the last several years, a facilitated session identified the following achievements:



**Amalgamation of Cranbrook and Creston Societies**



**Improvements to internal systems and processes**  
e.g., new service plan format, improved technology



**Successfully navigating the pandemic**  
managing Public Health Officer's Order, adapting to protocols



**Growth & Development of Programs**



**Offering CPI, MHFA and Open Future to all staff**



**Continued CARF accreditation even with COVID struggles**



**Growth and development of our leadership team**

# Strengths

Stakeholders defined the strengths of the organization through their responses during focus groups and interviews.

The following strengths emerged through an analysis of their feedback and additions made during the facilitated session, in order of importance:

## 1 A highly person-centered organization

Decisions are made from the perspective of what's best for those we serve.

There are strong and caring relationships between individuals and the staff that support them.

## 2 Delivering high quality care

Despite the many challenges the pandemic has presented, our programs are well-run and continue to deliver quality care to individuals. Each program focuses on preserving a safe and welcoming environment for individuals and families and providing the necessary resources and support to help them reach their goals. They also strive to uphold a culture of respect, dignity, and positive relationships with the participants. In addition, the programs are constantly looking for ways to improve their services and ensure that their services meet the participants' needs.

## 3 Strong & collaborative leaders

The organization is led by people that have been on the front lines.

They collaborate and work well together.

They effectively navigated the amalgamation, public health orders, and numerous other challenges, resulting in a very strong organization with a solid reputation.

# 4

## Cohesive teams that know the work

The leadership group has excellent communication and works well together.

At the front-line level, there is a strong sense of camaraderie and connection.

# 5

## Resiliency & Flexibility

The organization and its people have shown incredible resilience over the past two years, weathering the pandemic and public health order challenges.

They have demonstrated collaborative problem-solving and the ability to respond quickly and effectively to change, including leaning into hard decisions when needed.



## Strong systems, processes, and structure

NEXUS has put in place strong and well thought out systems and process to support the work (e.g., clear policy and procedure, technology).

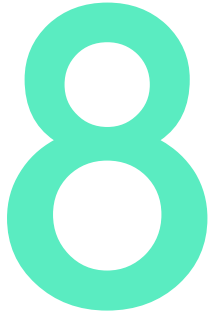
Those systems and processes were critical in the amalgamation processes.

The structure of the organization has worked well in supporting individuals.



## A diverse team

Our organization is enriched by the diverse skills and perspectives that our leadership and front line bring to the table. Our Board of Directors is highly accomplished and includes parents of some of those we serve. This combination of expertise and experience makes us a well-rounded and knowledgeable team.



## Financial Stability

The organization is well managed financially and has resources to ensure its long term stability.



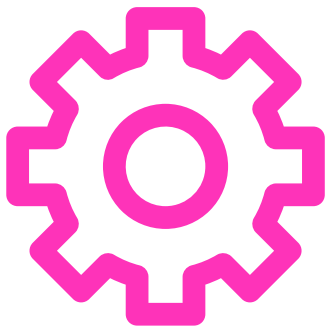
## Strong partnerships with Community Partners

NEXUS has cultivated strong partnerships in the community that support the work of the organization. [specifics on what was done]

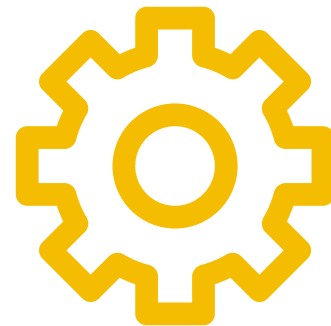
# Core Competencies

Core competency is defined as an organization's defining strength, providing the foundation from which it can grow, seize upon new opportunities and deliver value to clients and the community.

Through the facilitated session, the following were identified as NEXUS' core competencies as an organization:



**Proactive,  
Resourceful  
& Innovative  
Problem solvers**



**Values-based Approach  
to Service Delivery,  
inclusive of:**

- i.  
Being committed to Person  
Centered Care
- ii.  
Being committed to Diversity  
and Inclusion

# Challenges

The focus groups, interviews and conversation during the planning event were also used to identify organizational challenges.

These were analyzed and sorted into the following themes, in priority order and categorized as internal and external:

## INTERNAL WEAKNESSES & CHALLENGES

# 1 Recruitment/ Retention

We continue to face ongoing challenges in recruiting and retaining staff for our programs/services.

Low wages in comparison to other health services contribute to the challenge.

The amount of time and energy involved in staffing and managing scheduling when there aren't enough staff is a substantial drain on resources that could go elsewhere.

The current situation also results in hiring staff with limited training in working with our clientele while being expected to maintain the same level of service. This issue is sector-wide.



## 2 Building Common Culture

Building a sense of shared identity across the organization following the amalgamation has been an ongoing process, made more difficult by the restrictions put in place due to the pandemic. To combat this, the organization embraced virtual communication to ensure that everyone is connected and informed.

Unfortunately, this has not been enough to bridge the gap between the two communities in Creston and Cranbrook, and there is still a sense of grieving and loss for staff in Creston and a sense of “us” and “them” between the two locations.

## 3 Supporting Creston and Revelstoke's Transition

The challenge of adopting and integrating new systems and processes in Creston and Revelstoke that were already in place in Cranbrook is ongoing.

# 4

## Streamlining Communication/ Staff Engagement

There is a sense among team leads and managers of not being included/consulted in decision making as often as they feel they should be.

In general, there is a need to streamline communication and ensure that staff are being effectively engaged.

# 5

## Ensuring Workload Balance & Equity

There are examples of imbalance in the workload between people in the same or similar positions that needs to be addressed.



## Adopting Technology

There are ongoing issues with adopting technology that are in place to support the work or documentation of the work.



## Ensuring Systems & Structures Keep up with Growth

As the organization has grown, there is a need to adapt or add new systems or processes.

# 8

## Building up the Strength of the Board

The Board has benefited from having long serving members and continuity over time, but would also benefit from having new membership and greater diversity.

# 9

## Managing Growth

Taking advantage of growth opportunities while managing our current challenges.

# 10 Follow-through as a Leadership Group

While leadership excels at following up on matters, it can sometimes struggle at keeping them on the future table for discussion until resolution or until we have decided to postpone. This is due to the sheer number of competing projects requiring leadership's attention, which unfortunately has sometimes led to missed opportunities or delays in progress.

## EXTERNAL WEAKNESSES & CHALLENGES

# 1 Service Delivery Model Changes

CLBC continues to advance changes to service delivery models to adapt to the current service delivery context, which includes increased demand, staffing shortages, and changing needs and/or expectations from those being served.

## 2 Potential for a Wave of New Services

There is continued and increasing demand for new services for persons with disabilities.

This could result in further opportunities for service expansion.

## 3 Consolidation

There is a continued trend towards consolidation of services among fewer and fewer service providers, something seen in several publicly funded service areas in BC.

The consolidation of services may be both a challenge and an opportunity for NEXUS.

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## Lack of Diversity of Funders

A heavy reliance on CLBC as the primary source of revenue.

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## Legal Restrictions

CRA rules may limit our ability to take advantage of certain opportunities.

# Trends

A review of trends in the current operating environment impacting NEXUS was completed during the facilitated session utilizing the PESTEL model (political, economic, sociological, technological, legal and environmental):



## POLITICAL



Union negotiations



Response to staffing shortages in healthcare sector  
how it will be addressed by provincial/federal levels of government



Focus on mental health needs post pandemic



Change in NDP leadership can change the landscape of social services



Engaging with local governments to combat housing issues

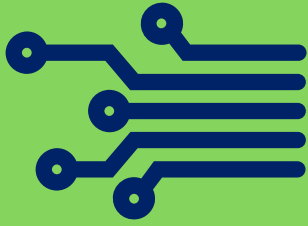


Fringe minorities are able to have more of a voice right now which changes the political landscape



Provincially the focus is on the health sector  
this leaves community social services in the dark in terms of funding, evolution, and priority





# TECHNOLOGICAL



The use of technology to reduce carbon footprint  
e.g., electrifying our vehicles, etc.



Increasing use of communication tools for virtual meetings



Government security requirements often stalls the rollouts of new technology



Technology may allow individuals to live more independently (without staff)



Generational gaps in comfort levels with technology



Differing preferences of communication methods  
technology versus face-to-face



Technology comes with added costs that are not supported in current  
funding models



Use of virtual reality may open up opportunities for experiencing and learning as  
well as brain patterning for individuals



# ECONOMIC



Global labour market shortages



Inflation costs are far greater than current budget increases



The sector does not have the capability to be competitive with starting wages



Focus on funding coming in boxes that don't always fit needs



Increased interest rates in relation to our long-term debt



An impending recession  
how it may change government funding



# LEGAL



Legal risks involved with making many decisions  
this has only increased over time



As the number of workers new to the field increases, the potential for medical errors and other mistakes with severe consequences also rises.  
proper training is essential to ensure safety and minimize such risks.



Human rights considerations for unvaccinated employees  
legal costs associated with possible termination



Labour related legal costs are a growing reality



# SOCIAL



Long term impact of isolation over last few years



A slow shift to mental health awareness  
employers may not be ready to embrace this/respond to the unique needs



An increased awareness of social injustices  
this can both divide and bring together communities



Changing demographic with more complex needs



Supporting the COVID distancing transition and re-entry to socializing



Recognition of need to build advocacy groups for those without voices



Social media impacts on society



# ENVIRONMENTAL



Climate change is a global concern and global focus  
we will have to adapt to meet future requirements, and this comes with added costs and planning



Heat related illness is a growing concern



Lack of affordable land and building availability



Increased heating and cooling costs



How to rapidly and safely mobilize a community in case of a disaster



Required changes meant to assist environments that impact daily routines and individual's stress levels



Natural disasters are becoming more severe and more frequent  
the reality of the impact on us and to those we serve is a growing threat



Older sites/homes  
ergonomic alternatives are not always available

# Opportunities

The following themes for opportunities emerged from an analysis of all focus groups and interview material and during the facilitated event.

They are in priority order and aligned with the broad categories of growth and diversification of services, branding and community awareness, community engagement, and strengthening systems and infrastructure.



## Growth & Diversification of Services



Currently qualified with MCFD and can bid on upcoming contracts



Addressing housing needs in the community, owning properties



Addressing street entrenched behavior  
e.g., safe injection sites, working with unhoused



Possible amalgamations with organizations that are struggling or working with other organizations to address staffing shortages  
e.g., sharing of resources/combining efforts



Growing existing services  
such as employment in Creston or outreach



MCFD hub tenders coming out  
potential service partnerships with other agencies



Diversify service offerings outside of services for adults with disabilities



Look at better uses for current owned properties



Programming for individuals with complex needs



## Branding & Community Awareness



Making NEXUS more well known in the community and with key funders/stakeholders  
e.g., municipal government



Being an employer of choice



## Community Engagement



Leaning into reconciliation  
a priority for the current provincial government



Being a leader among organizations in the community  
e.g., offering training to businesses, partnerships on social issues



## Strengthening Systems & Infrastructure



Getting everyone caught up and operating fully on common systems



Cross training opportunities



Strengthen communication and staff engagement internally

# Threats & Risks

Threats were identified by numerous contributors during interview and focus groups and further articulated during the facilitated event. They included the following:



## Lack of qualified staff

unfilled front line and leadership positions adds stress for existing employees and creates service delivery risks and low job satisfaction



## Competition

although NEXUS is the largest service provider in the area for adults with disabilities, there are competitors both locally and provincially that would seek to expand if there are opportunities



## Over-Reliance on One Funder

CLBC funding for contracted services is the source of most of the organization's revenue. While this is currently stable and likely will continue to be, a lack of diversified funding sources may limit future flexibility



## Downloading of Responsibility from CLBC

there is a continuing trend of downloading of responsibility for supporting individuals from CLBC to agencies without proper compensation. Organizations like NEXUS assume considerable risk in this process



## Possibility of a Provincial strike

would severely impact program operations




# STRATEGIC THEMES & OBJECTIVES





Through the facilitated session,  
key strategic themes emerged.



These themes reflect thoughtful consideration  
of all the topics reviewed throughout the day  
as well as the interview and focus group data.



Most importantly...

each theme is intended to support NEXUS  
in achieving its mission and vision  
by leveraging its strengths  
and core competencies  
while addressing challenges and risks.

**We will  
achieve  
our  
Mission  
by . . .**



# STRATEGIC THEME

# 1

1

# Growth & Diversification of Services

## objectives

i

Continue to incrementally grow CLBC funded services

ii

Diversify housing services

iii

Grow MCFD funded services

iv

Seek out potential amalgamation, merger, and/or acquisition opportunities that align with our mission



# STRATEGIC THEME

# 2

2

# Strengthening Our Workforce & Culture

## objectives

i

Develop and implement a long-term recruitment and retention strategy

ii

Develop and implement an internal communication and engagement strategy

iii

Implement initiatives to improve workplace culture

e.g, staff events focused on relationships, articulating values into actions

iv

Further develop internal training and education offerings

including: leadership training



# STRATEGIC THEME

# 3

3

# Engaging Our Communities

## objectives

i

Improve brand awareness in the communities we serve  
who we are, what we do

ii

Communicate mission and expectations to staff and community

iii

Develop and implement a Truth & Reconciliation strategy  
related to Aboriginal health issues  
in collaboration with local First Nations and Metis communities





# STRATEGIC THEME

# 4

4

# Maintaining Strong Systems & Infrastructure

## objectives

i

Build and continuously update detailed operational work plans to ensure follow-through on tasks

ii

Work with organizations in the communities to effectively make use of shared resources for education and training

iii

Strengthen governance functions through recruitment and refining Board processes and training



# NEXUS Community Support Society Strategy Map

