

**NEW AGE SERVICES INC.**

***Stakeholder Strategic Planning Session***

*26 September 2009*

**A Summary of the Discussion**



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## NEW AGE SERVICES INC.

### *Stakeholder Strategic Planning Session*

*30 September 2009*

## A Summary of the Discussion

### Let's Get Started

Helene and Rosemarie welcomed everyone to the session, indicating what they hoped would be achieved. Then they turned the floor over to the facilitator, Peter Faid.

After reviewing the agenda, Peter then asked each participant to introduce his or herself and then complete the following statement.

*When I talk to my family or friends about the work of New Age Services, the one thing I am most proud of is...*

- The ability to be **flexible, creative and understanding**. The quality of work is exceptional, it makes me so proud
- The **team work and accountability**
- The **diversity and the values evident** throughout our work
- The **opportunities for education** – personal and professional
- My ability to mentor and teach and **see great growth in our clients and in our staff**
- The **openness and friendliness**. This is a family, and I enjoy coming to work
- The **agency's ability to work with caregivers as a team** and achieve what's best for the individual
- The amazing work, the **dedication and loyalty of staff** make such a difference. They're angels on earth
- The **help I receive** as a client. NAS really helped me out.
- I came to this age by choice, as **my friends spoke so highly of it**

## How our World is Changing

For the next exercise, Peter asked participants to work in groups of three to identify four environmental changes that will have an impact on the agency over the next decade. They were asked to consider the challenges and opportunities. Each group wrote its ideas on post-it notes, which were then posted on the flipchart.

The following themes emerged.

- **Our aging population**

***Challenges and opportunities***

- Clients are aging and their needs are changing.
- Increasing medical issues means we will have to adapt our services.

- **Recruiting and retaining qualified staff**

We need qualified staff for mentorship, foundations and certified program training

***Challenges and opportunities***

- Wage parity does not exist and we can't offer a benefit package.
- We need to promote the field and find ways to get people to come, and stay.
- The absence of a pension plan may affect staff retention negatively.

- **Changes in healthcare**

***Challenges and opportunities***

- Demand will increase and there are not enough resources.
- If beds close, there will be an immediate influx of people who will need support from agencies, particularly people with mental health issues

- **A new for more networking**

***Challenges and opportunities***

- Not enough people are aware of what we do.
- There is a great need to increase our networking with others in the field

- **Cuts to funding**

***Challenges and opportunities***

- Less money creates an opportunity to be more flexible and realistic. We need to keep an open mind.

- Keeping qualified staff will be a challenge.

- **Social issues**

- ***Challenges and opportunities***

- There is a continuing controversy over the benefits of employment versus sheltered work and institutional living versus community inclusion.

- **Population increases**

- ***Challenges and opportunities***

- More people moving to Alberta will increase tax revenue.

- **Recession and cutbacks**

- ***Challenges and opportunities***

- It may be a challenge to find volunteers.
    - Insurance costs are expected to increase.
    - Employment rules may change, making it more difficult to include our agency.

- **Becoming a learning organization**

- ***Challenges and opportunities***

- As we learn from our mistakes, we are doing things better.
    - One of our challenges is working for political change.

## **Our Core Values**

Participants were asked to randomly draw a core value from a hat, then to comment on how the chosen value is reflected in the work of the agency.

The values and examples are as follows.

**Respect.** We closed the agency following the death of a client.

**Non-judgemental.** We work with a variety of ages and cultures, seeing that as an opportunity to learn and incorporate different values into our work.

**Dignity.** I was given back my pride as a person.

**Spirituality.** Realizing how the agency can help us clients has been very important.

**Altruism.** The needs of the caregiver and the client are foremost.

**Quality.** We are there no matter what, going the extra mile and ensuring that no one is left behind.

**Ethical.** Confidentiality is key in respect of personal and client issues.

**Safety.** We have learned from the performance of other agencies about what happens when safety is not considered to be an important value.

**Professionalism.** This is the important link to all of the other values we practice every day.

**Trust.** Our change of ownership and changes in PDD drew on our trust.

**Giving.** Every day, every hour, we all contribute over and above what is necessary because it is reciprocal.

**Growth.** Everything we do is centred on growth and learning from our experiences. Searching for qualified staff, developing our certificate program, and our team leadership are examples.

## **Clarifying our Strategic Directions**

Attention then turned towards using what had been discussed so far to develop key considerations or strategic directions that New Age Services would have to address over the next few years.

- **Quality staffing**
  - Training and development of leadership, frontline workers and contractors
  - Creating more mentoring and learning opportunities to encourage people to work here
  - Determining how to recruit and retain qualified people
  
- **Aging clients**
  - Developing appropriate strategies, policies, practices and information related to aging; for e.g., death, moves, health
  - Seeking out partnerships and other ways to creatively support this population
  - Determining the skills and services this client group will need
  - Getting the word out about seniors with disabilities
  - Offering a continuum of care – what will this look like?

- **Becoming more efficient**
  - Focusing on efficiency without losing quality or understanding
  - Partnering with others is a possible option for increasing our efficiency
  
- **Increasing public awareness of our services**
  - Advertising the agency will increase access to funding, community support and opportunities for our clients
  - Improving awareness of NAS by the community and government will help to address funding cuts
  - We will need to improve our communications, both internally (newsletter) and externally in the community (advertising)
  - We need to increase our networking with other agencies
  
- **Advocating**
  - Making sure the client services coordinator is more aware of clients' needs on a personal level so more financial support can be obtained
  - Encouraging agencies, guardians and other stakeholders to work together as advocates for everyone in this field, with the objective of making wages fair for staff and funding available for clients

## **Some Possible Actions**

In the afternoon, participants focused on trying to define actions for five strategic directions, as described below.

***What actions should we be recommending that would enable NAS to recruit and retain employees?***

### ***Advertising and promotion***

- Publish a community newsletter specific to NAS and our client group
- Create partnerships with businesses by explaining what we can do for them
- Put up a billboard indicating when we will be in a community, as a way to inform and introduce NAS and community disability services to the community at large
- Advertise in free newspapers and on the Internet
- Attend job fairs
- Present information to classes at universities, colleges and high schools
- Spread the news by word of mouth

## ***Mentorship***

- Finalize and implement our structured mentorship program
- Continue the basic training, but expand it to include mental health, physical health, universal precautions and legal needs and issues
- Expand the mentorship program by partnering with other agencies
- Connect with other agencies and pool resources for training and hiring activities
- Introduce a student practicum for students at colleges and universities

## ***Hiring and Retention***

- Introduce hiring incentives, such as spa memberships after six months of service
- Take steps to recognize current staff

## **What actions should we be recommending that would enable NAS to better meet the needs of our clients as they age?**

### **1-2 Years**

- Develop a care-giving or resource centre for people with developmental disabilities who are aging
- Implement medical support plans for all clients

### **1-3 Years**

- Develop detailed training and resources for age-specific challenges; for example, personal directives, mobility, dementia, personal care, etc. Create a binder of these resources for applicants and to use when seeking funds
- Participate in and send staff to in-service training sessions on dieing and aging
- Liaise with other agencies and professionals in the community willing to focus on our client group; train these personnel as needed

### **3-5 Years**

- Expand the care-giving model to all seniors to take advantage of the cuts to nursing home beds
- Seek partnerships with hospices, senior centres, nursing homes, etc.

**What actions should we be recommending to increase government and public awareness of NAS and the quality of its services and programs?**

**Information to Take to Others**

- Take the message out to: the media (print and electronic), educational institutes, children's groups, disability services, government, fairs, and other events
- Approach the media to remind people what happened in the past with de-institutionalization, to promote the agency's day-to-day work and bring awareness to the bottom line of hourly pay Relay stories about our agency and clients through free community papers
- Write letters to MLAs about the importance of increasing funds for education, transportation and other services and the reduction of poverty
- Participate in the Wish Foundation and service clubs such as Rotary and the Shriners
- Rally and organize others to the cause, recognizing the strength in numbers

**Information to Give to Others When they Visit Us**

- Invite government representatives into our facility; provide them with training and information; let them meet our clients and professionals in a social setting
- Hold training sessions with guardians and families to help them understand how funding works
- Distribute information about NAS during other events, although it may require additional funding
- Invite the media to learn more about our positive successes

**What actions should we be recommending to increase our efficiency by partnering with other agencies?**

- Share relief staff by setting up a pool, but with the understanding that wage parity applies
- Share lists of resources, and develop training programs in partnership with other agencies
- Become involved in other organizations' working groups and committees

- Develop partnerships with others such as CHR, schools, children's programs, and seniors facilities and groups; seek partnerships with others for funding purposes
- Hold strategic planning sessions with other agencies without the presence of government representatives
- Consider developing a joint newsletter with other agencies
- Invite others to our fundraising and social events (golf, picnic, etc.)
- Explore interest in bulk buying of medical and office supplies
- Extend our mentorship program beyond the agency as a partnership funding proposal

**What actions should we be recommending to increase opportunities for agencies, guardians and other stakeholders to be stronger advocates for both clients and staff?**

#### **Encourage dialogue between common stakeholders**

- Hold annual or biannual meetings with agencies to review concerns and issues
- Expand by offering services to seniors in caregiver settings
- Encourage dialogue across common stakeholders and develop support systems
- Hold information sessions, including with guardians and families of clients to help them understand community disability service provision and get involved in advocacy

#### **Prepare information for future advocacy role**

- Prepare a package of information on advocacy and how people can participate
- Provide form letters that people can copy or fill out and submit on specific issues
- Publicize MLAs' phone numbers and use our newsletter to encourage people to contact them

#### **Next Steps**

Peter ended the session by giving everyone a chance to reflect on what had transpired. Participants were impressed with the amount of information that had been generated and they looked forward to continuing to work in the future on the various strategic directions. Peter then indicated that he would be preparing a summary of the planning session. In closing Helene and Rosemarie thanked everyone for their excellent contributions.