

2024/2025 ANNUAL OPERATING PLAN



Our 2023-2026 Strategic Plan

Sustainability Through Change

By March 31, 2026, Surrey Place will have solidified business models that effectively respond to the changes in service delivery and enhance our long-term sustainability and adaptability as an innovative organization.

At Surrey Place, we know that innovation, adaptability, and resiliency must be present to best serve our communities through the ever-changing landscape. Our foundation is strong, and we will leverage our experience to realize sustainable, healthy organizational growth.

As service models evolve, the needs of those we serve, the increase in complexity, and our team grows, we will prioritize creatively diversifying our sources of funds, exploring strategic partnerships, and building capacity across the sector.

Focusing on a strong, sustainable organization will ensure that people continue to receive the exceptional care and service they need.

OUR COMMITMENTS:

Leveraging Autism paid services models into sustainable not-for-profit revenue generation.

We will further our understanding of evolving funding models, enhancing our adaptability and ability to apply new revenue, increasing sustainable and accessible service delivery.

Expanding business-to-business (B2B) not-for-profit revenue opportunities to build capacity across the sector.

We will leverage our extensive knowledge and experience, partnering with fellow service providers to build service capacity through skills training and knowledge and resource sharing.

Building our capacity for fund development.

We will continue to explore opportunities to leverage Surrey Place's strong reputation to generate new revenue sources and funding support, from both the public and private sectors, such as accessing grants, raising funds, and engaging in corporate investments.

Investing in people, technology, systems upgrade, and creating infrastructure.

We will commit resources to ensure that, as an organization, we have the tools, technology, and workforce to deliver excellent services, building systems and efficiencies as we go.



Sustainability Through Change

Leveraging Autism paid services models into not-for-profit revenue generation.

<i>What do we want to achieve by March 31, 2025?</i>	<i>What are the milestones and deliverables that indicate progress toward our goal?</i>	<i>What is our success measure?</i>
Implementation and ongoing refinement of the operational service model for paid ABA services	<ul style="list-style-type: none">• Pricing model• Product offerings• Service model• Roll-out of customer satisfaction survey• Increased staff capacity• Strategic facilities plan	<ul style="list-style-type: none">• Client satisfaction for autism services

Sustainability Through Change

Expanding business-to-business (B2B) not-for-profit revenue opportunities to build capacity across the sector.

<i>What do we want to achieve by March 31, 2025?</i>	<i>What are the milestones and deliverables that indicate progress toward our goal?</i>	<i>What is our success measure?</i>
Grow business-to-business (Services for Partners and Organizations (SPO)) program	<ul style="list-style-type: none">• Developed a new pricing model• Expanded product offering• Determined staff capacity through clinical transformation	<ul style="list-style-type: none">• SPO revenue

Sustainability Through Change

Building our capacity for fund development.

<i>What do we want to achieve by March 31, 2025?</i>	<i>What are the milestones/ deliverables that indicate progress toward our goals?</i>	<i>What is our success measure?</i>
Develop Surrey Place fundraising and grant program	<ul style="list-style-type: none">• Developed the infrastructure for fundraising and grant program	<ul style="list-style-type: none">• Number of fundraising opportunities• Grant revenue

Sustainability Through Change

Investing in people, technology, systems upgrade and creating infrastructure.

<i>What do we want to achieve by March 31, 2025?</i>	<i>What are the milestones/ deliverables that indicate progress toward our goals?</i>	<i>What is our success measure?</i>
Develop a digital and data governance strategy	<ul style="list-style-type: none">• Developed the cybersecurity plan• Finalized the in-house CRM development plan• Developed the action plan for data governance• Reviewed the data sharing platform across the sector	Milestone completion: <ul style="list-style-type: none">• 60% completion of the digital strategy

Our 2023-2026 Strategic Plan

Accessible and Exceptional Service

By March 31, 2026, Surrey Place will have bolstered its reputation for delivering quality, evidence-informed and impactful services. We will have continued our commitment to co-design and client engagement, increasing the integration of lived experience into how we develop and deliver our services and support clients as they navigate their journey.

At our core, Surrey Place exists to partner with those who need us and to co-create a path that provides access to high-quality services to help improve their lives. It is where our conversations begin and is the cornerstone for measuring our impact and success.

We value the lived experiences and unique circumstances of the individuals who work

with us. We are committed to increasing engagement in program co-design while applying our expertise, skills, and leading research. Where we cannot deliver the services ourselves, we will leverage the expertise of fellow service providers.

We meet change and challenge with curiosity and interest and strive to learn and improve together.



OUR COMMITMENTS:

Continuously improving system and service navigation.

We will support people as they navigate services for their evolving needs, facilitating care journey's that are responsive and accommodating by collaboration with other service providers.

Increasing client and family engagement in program co-design.

We will further integrate lived experiences and unique perspectives in our approach to service by proactively engaging those we work with to inform and create future offerings.

Cultivating academic affiliations and continuing clinical research.

We will nurture academic and research partnerships that enable us to contribute to clinical best practices and methodologies that are the foundation of our excellent clinical care.

Fostering a stronger sector through leadership, partnership, and education.

We will support the sectors' collective ability to serve clients by developing partnerships and training relationships that create capacity, develop skills, and are rooted in transparency and collaboration.

Exceptional and Accessible Service

Continuously improving system and service navigation.

<i>What do we want to achieve by March 31, 2025?</i>	<i>What are the milestones/ deliverables that indicate progress toward our goals?</i>	<i>What is our success measure?</i>
Complete phase 2 of clinical transformation initiatives	<ul style="list-style-type: none">Completed the journey map for each of the age divisionsCompleted the lift action plan for fiscal year 23/24Defined service model that includes targets and caseloads, capacity for each developmental services discipline	<ul style="list-style-type: none">75% journey maps completed

Exceptional and Accessible Service

Increasing client and family engagement in program co-design.

<i>What do we want to achieve by March 31, 2025?</i>	<i>What are the milestones/ deliverables that indicate progress toward our goals?</i>	<i>What is our success measure?</i>
Develop a co-design strategy and framework	<ul style="list-style-type: none">• Tested the co-design elements to various initiatives• Consulted with co-design thought leaders and participate in co-design network• Developed a co-design toolkit• Developed a co-design committee	<ul style="list-style-type: none">• Number of co-design or end-user engagement

Exceptional and Accessible Service

Cultivating academic affiliations and continuing clinical research.

<i>What do we want to achieve by March 31, 2025?</i>	<i>What are the milestones/ deliverables that indicate progress toward our goals?</i>	<i>What is our success measure?</i>
Leverage academic affiliations for research and new innovations	<ul style="list-style-type: none">Secured affiliation agreements that facilitate student work on projects through placement and research	<ul style="list-style-type: none">Number of academic affiliated projects

Exceptional and Accessible Service

Fostering a stronger sector through leadership, partnership, and education.

<i>What do we want to achieve by March 31, 2025?</i>	<i>What are the milestones/ deliverables that indicate progress toward our goals?</i>	<i>What is our success measure?</i>
Develop a sustainable and scalable partnership strategy and implementation plan	<ul style="list-style-type: none">• Scanned current partnership initiatives• Determined potential strategic partnership models	Milestone Completion: <ul style="list-style-type: none">• 100% Completion of a formal strategic partnership policy and process

Culture of Resilience

By March 31, 2026, Surrey Place will have enabled a resilient and healthy workplace that can reliably staff and support excellent service delivery. Over the next three years, we will have continually empowered our staff to grow into leadership roles and expanded our succession planning efforts with an eye toward long-term sustainability.

We know that delivering responsive, effective, and coordinated service starts with equipping staff with the tools they need to succeed and offering an environment that enables them to do so. We also know these factors are critical in ensuring we can approach change, one of the few constants in our work with openness and curiosity.

We are committed to providing a

healthy and safe workplace culture that continues to nurture our staff's skills, commitment, and professional growth while finding new ways to attract qualified staff in an evolving labour market.

We will continue to improve processes and pathways for internal cohesion and knowledge transfer that forms the foundation of an agile organization.



OUR COMMITMENTS:

Advancing our commitment to EDIA, anti-racism, and reconciliation journey.

We will continue to evaluate our organizational practices, ensuring that our services are representative, welcoming and barrier-free. In relationship with Indigenous organizations, racialized communities and peoples, we will deepen our journey of reconciliation and anti-racism.

Developing pathways for growth and succession.

We will invest in our staff development while establishing growth pathways to encourage advancing their expertise and opportunities for leadership. We will prioritize effective internal knowledge transfer and ensure every department takes steps toward succession planning for all critical roles and leadership.

Enabling a resilient environment where change is well supported.

We will think critically about implementing new and different initiatives and their potential impacts, communicate consistently and equip management and staff with tools to feel secure and engage with change meaningfully and productively.

Exploring innovative ways to be competitive in the hiring market.

We will refine our profile as a desirable employer in line with the current labour market, compensation and hiring trends by engaging our presence in growing service areas, clinical specializations, and with academic and accreditation partners.

Culture of Resilience

Advancing our commitment to Equity, Diversity, Inclusion and Accessibility (EDIA), anti-racism, and Reconciliation journey.

<i>What do we want to achieve by March 31, 2025?</i>	<i>What are the milestones/ deliverables that indicate progress toward our goals?</i>	<i>What is our success measure?</i>
Embed Equity, Diversity, Inclusion and Accessibility (EDIA) at every level of the organization	<ul style="list-style-type: none">Identified a representative from each department to ensure ownership and accountability of EDIA best practices	<ul style="list-style-type: none">100% staff trained in EDIA

Culture of Resilience

Advancing our commitment to EDIA, anti-racism, and reconciliation journey.

<i>What do we want to achieve by March 31, 2025?</i>	<i>What are the milestones/ deliverables that indicate progress toward our goals?</i>	<i>What is our success measure?</i>
Develop a quality structure, process, and outcomes that emphasize equity, belonging, and inclusion	<ul style="list-style-type: none">• Established the quality management structure• Developed the organization's accreditation readiness workplan• Developed the French Language Services (FLS) action plan	Milestone completion: <ul style="list-style-type: none">• Surrey Place Quality Improvement Plan (QIP) published• French Language Service (QIP) submitted to the Ministry

Culture of Resilience

Developing pathways for growth and succession.

<i>What do we want to achieve by March 31, 2025?</i>	<i>What are the milestones/ deliverables that indicate progress toward our goals?</i>	<i>What is our success measure?</i>
Develop an organizational development and talent management strategy	<ul style="list-style-type: none">• Update talent management succession planning process and individual development plans for high-potential candidates	<ul style="list-style-type: none">• Number of individual development plans developed

Culture of Resilience

Enabling a resilient environment where change is well-supported.

<i>What do we want to achieve by March 31, 2025?</i>	<i>What are the milestones/ deliverables that indicate progress toward our goals?</i>	<i>What is our success measure?</i>
Implement change management strategies across Surrey Place	<ul style="list-style-type: none">• Executive team and other key management positions to receive formal change management training• People Services collaborate and consult with the Project Management Office (PMO) to ensure management methodology is incorporated in projects.	<ul style="list-style-type: none">• Number of change management consultations provided

Culture of Resilience

Exploring innovative ways to be competitive in the hiring market.

<i>What do we want to achieve by March 31, 2025?</i>	<i>What are the milestones/ deliverables that indicate progress toward our goals?</i>	<i>What is our success measure?</i>
Develop a strategy to ensure that the workforce reflect the changes in the sector	<ul style="list-style-type: none">• Developed scarce skills strategy for hard to fill positions. e.g., Psychologists.	<ul style="list-style-type: none">• Vacancy rate of less than 10% for hard to fill positions