



Carizon Family + Community Services

Strategic Plan 2014-2018



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1 INTRODUCTION

Carizon Family and Community Services was formed in 2012 and was officially incorporated in early 2013. The new organization represents the coming together through an amalgamation of kidsLINK and Mosaic Counselling and Family Services, two agencies committed to servicing children, adults and families in the Waterloo Region area.

Following completion of the amalgamation's legal and governance processes and the integration of administration and services delivery, the Board of Directors, in the summer of 2013, identified the need to develop the first Strategic Plan for Carizon.

On Wednesday, November 13, 2013, the Board of Directors and the Chief Executive Officer met with the facilitator to undertake the first half of the strategic planning process. The workshop focused on developing an environmental scan, including a presentation on societal and local trends; and the development of a strengths, weaknesses, opportunities and threats assessment which is available in Appendix 1. This work was followed by the initial preparation of Vision and Mission Statements for Carizon.

The second workshop was hosted on Tuesday, November 19th, 2013 involving the Board and the Chief Executive Officer. This session focused first on finalizing the Vision and Mission, along with a review of Values and Principles. This work was followed by the development of the Strategic Directions and Priorities that Carizon will focus on over the next three plus years.

This document represents the draft Strategic Plan for Carizon Family and Community Services. It will be reviewed by the Board of Directors, amended as appropriate and finalized via Board approval. Upon approval, the Implementation Plan for the Strategic Plan can be developed, possibly building on the implementation template charts that are available in Section 6.

2 VISION

A Vision is like a horizon. It represents a point in the future that has the ability to galvanize the goodwill, focus and energy of an organization’s stakeholders to move forward with common cause and purpose. Similar to a horizon, as one moves towards it, the horizon moves. This movement reflects the fact that the operating environment for Carizon is continually changing. Therefore, Carizon’s Vision needs to always reflect a changing future and be able to adapt to the transitions and perspectives that emerge as it moves forward. The following Vision was developed for Carizon Family and Community Services

Hope ♦ Wellness ♦ Community

The following perspectives provide further understanding and insight into the three word themes that are the foundation of the Vision.

Hope	Carizon works with children, adults and families that are experiencing a range of challenges and barriers within their lives. Many feel they can’t change their situation, are overwhelmed by the challenges and get lost or give up hope. Carizon focuses on being a place of hope, giving people an opportunity to overcome their challenges and / or forge new positive directions. Providing hope and an opportunity to change, is the first step for any person or family being able to overcome their challenges and to move forward successfully. Hope is an enabler and Carizon is that enabling opportunity.
Wellness	Carizon’s work is focused on enhancing the wellness of individuals and families. When people are mentally, emotionally, physically and socially well, they have the tools and the capacity to face and overcome challenges, to build on their aspirations and goals, to utilize their skills, and to fully engage in their opportunities and responsibilities.
Community	Carizon does not work alone in supporting individuals and families. They draw on the community for resources, goodwill, volunteers, purpose and insight. Carizon serves and works with the community, represents the community’s response to supporting those individuals and families who have challenges, and reflects the community in its values, services and the outcomes it pursues on behalf of those it serves.

3 MISSION STATEMENT

A Mission Statement informs the reader of the essence and fundamentals of an organization. In application terms, all strategic and operational decisions an organization is considering need to align with and be supportive to the Mission. If a decision does not support or align with the Mission Statement, the organization must ask why it would make such a decision or whether it is time to review it Mission. The following Mission Statement has been developed for Carizon Family and Community Services.

Carizon is a multi-service community organization committed to improving the future of individuals and families through supportive, therapeutic and preventative programs.

The following material provides further insights and perspectives of the key themes within the Mission Statement.

A Multi-Service Community Organization	<p>Carizon offers a wide range of services that touch many dimensions of an individual’s or family’s life. This involves children’s mental health, credit counselling, educational supports, community development, family counselling and other areas.</p> <p>It is through this multi-service framework that Carizon is able to meet the needs of individuals and families on a holistic basis within an integrated services delivery environment.</p>
To improving the future of individuals and families	<p>Identifies the people who are supported by Carizon, that is individuals and families. Individuals represent people who have specific needs. Families represent relationships that could be supportive to an individual and / or where the families themselves need supports and services to enhance their well-being.</p> <p>This phrase also identifies the primary outcome of all the work Carizon undertakes and focuses on, that is improving the future of individuals and families. This is achieved through the Vision of providing hope, focusing on wellness, and integrating people within their communities based on the</p>

	services foundation of Wellness – Resiliency - Trauma.
Through supportive, therapeutic and preventative programs	<p>Identifies the three primary service delivery dimensions of Carizon. They provide supportive programs that enhance the capacity of individuals and families, building on their strengths in order to move forward successfully.</p> <p>Carizon also delivers therapeutic programs through its counselling and Children’s Mental Health Services that assist individuals and families to identify their challenges, to change and to effectively move forward.</p> <p>Also offered are preventative programs intended to respond to situations before significant challenges arise or become more dominant by alleviating issues before they become an overwhelming problem.</p>

4 VALUES AND PRINCIPLES

Values and Principles have three applications within a Strategic Plan. First, they support further understanding of the important themes within the Mission Statement. Second, and possibly most importantly, they identify how Carizon will value, engage with and support people and families. Third, they have the potential to identify key areas of organizational accountability.

The following Values and Principles have been developed for Carizon Family and Community Services.

4.1 CORE VALUES

We believe...

<i>Potential</i>	<i>That every person has potential</i>
<i>Valuing People</i>	<i>In valuing each person and their importance to our community now and in the future.</i>
<i>Strong Welcoming Communities</i>	<i>In the importance of communities being welcoming and inclusive of all their members.</i>
<i>Dignity and Respect</i>	<i>That every person is treated with dignity and respect as an individual based on their unique strengths and needs no matter their background, culture or life experiences</i>

4.2 PRINCIPLES

We believe in:

<i>Quality Services</i>	<i>The continuous development of client-centered, quality services that focus on the needs and strengths of each person</i>
<i>Innovation</i>	<i>Developing an organizational culture that fosters innovation, continuous learning and improvement, best practices and team approaches</i>

Collaboration	<i>Working collaboratively with families, services providers and the community to achieve the best outcomes for each person served based on the contributions of all involved</i>
Our People	<i>Valuing the contributions of our volunteers, staff and supporters towards the well-being of each person and family served, and in the achievement of Carizon’s Vision and Mission</i>
Accountability	<i>Being accountable for the quality of the services provided, the decisions made, the effective use of the resources provided, and acting ethically and with integrity in all that we do.</i>

5 STRATEGIC DIRECTIONS

Strategic Directions are first level in implementing Carizon’s Strategic Plan in moving towards the achievement of its Vision and Mission. They identify the key directions and priorities that the organization will work on over the next three to five years, along with the strategies that will be employed to achieve the Strategic Directions.

The following three Strategic Directions have been established for the 2014-2016 primary planning period and also potentially for 2017 and 2018.

Strategic Direction 1: Fostering Client Success

In its continuous quest to develop and deliver services that respond to the evolving needs of individuals and families, and supporting them to achieve improved futures, Carizon will:

- 1.1 Develop a Wellness - Resiliency – Trauma Program and instill it across Carizon.
- 1.2 Continuously develop and improve its programs and services, including:
 - Effectively integrating the programs and services of the two founding agencies;
 - Identifying and assessing new program and service needs in the community, and opportunities to effectively respond;
 - Sourcing and evaluating best practices, innovative ideas and other perspectives that continuously improve Carizon’s program development and delivery
- 1.3 Actively pursue opportunities for partnership and collaborative initiatives with universities, colleges, institutes, foundations, services providers and related bodies that enhance the quality and reach of the services available, integrate research findings, share resources and facilitate continuous learning.
- 1.4 Develop diverse community engagement strategies that substantively increase awareness of Carizon, its programs and value to the community; the needs of the people and families supported; and how community members can meaningfully contribute.

Strategic Direction 2: Pursuing Sustainable Growth

In an operating environment that is experiencing significant structural change, growth in needs and their complexity and other change perspectives, Carizon will pursue relevant and sustainable growth, focusing on:

- 2.1 Developing a growth framework that assesses optimum organizational size, scope, geographical reach, services integration and other growth dimensions.
- 2.2 Continually assessing and actively engaging in beneficial amalgamations, shared services and related organizational consolidations.
- 2.3 Actively assessing and pursuing social entrepreneurship opportunities alone or within consortiums.
- 2.4 Continuously assessing funder priorities, policies and new initiatives in submitting service and funding proposals in support of Carizon's future services delivery and growth strategies.
- 2.5 Developing a strategic organizational approach to the emerging lead agency structure for Children's Mental Health Services related to potentially being the lead agency, or not being the lead agency or operating within a co-lead agency framework.
- 2.6 Developing specific initiatives to engage with multi-cultural, seniors and other unique service populations that are emerging within the community as to their specialized needs, demographic transitions and related opportunities.

Strategic Direction 3: Building Our Capacities to Serve

Carizon needs to develop key resources in building the organizational capacities required to meet current and future servicing needs and delivery approaches, and its growth strategies, focusing on:

- 3.1 Developing a distinctive and empowering Carizon organizational culture with aligned human resources development policies.
- 3.2 Developing a Technology Plan and platform to support digital communication requirements, operating and report generating enhancements and online services delivery approaches.

- 3.3 Assessing the physical assets of Carizon to determine their value, the long term needs for capital repair and renewal funds, and the best economic use of the assets related to leasing versus owning.
- 3.4 Pursuing funding diversification in order to enhance Carizon’s sustainability and capacities, by increasing the range of funders, re-engaging with donors and the community in a post amalgamation environment, and intensifying fund development initiatives, including a focus on planned-giving.
- 3.5 Continuously developing Carizon’s governance model and practices to become the ‘Board of Choice’ and attract the best community leadership talent.
- 3.6 Developing comprehensive evaluation frameworks that:
- Annually measure organizational performance, outcomes and value contributions to people, families, the community and funders;
 - Continuously enhance Board effectiveness;
 - Effectively assess Chief Executive Officer performance;
 - Continuously assess strategic trends and their application to enhance Carizon services and operations, and longer term organizational relevance.

The first Strategic Direction focuses on the importance of Carizon continually developing, delivering and evaluating its services in alignment with the evolving needs of individuals and families, funder and community expectations, research and development data and a host of other perspectives. In order for Carizon to remain relevant, to deliver on its Mission and to beneficially impact the lives of the people its supports, there is an absolute need to **continually renew, assess and evolve** its programs and services to reflect the transitions occurring within its operating environment and the lives of people.

The starting point for this Strategic Direction is to build a foundation for all Carizon’s programs and services based on its Wellness – Resiliency - Trauma philosophy which aligns with one of the organization’s End Statements. This philosophy needs to be integrated throughout all Carizon’s programming, and drive ongoing program development and delivery.

The second strategy focuses on Carizon’s programs in terms of integrating the kidsLINK and Mosaic programs to maximize effectiveness and efficiency, to pursue new initiatives and opportunities as they emerge and present themselves, and to ensure innovation and best practices are continuously

incorporated as programs evolve overtime. Programs cannot be static as the operating environment continually changes, therefore, there is an evident need for continuous renewal and refreshment, the use of best practices from a wide array of sources and the need to be foster experimentation via new approaches, pilot projects and other initiatives in moving forward.

Expanding Carizon's partnerships and collaborative initiatives is cited as a key success factor. Opportunities to partner, not just with other service providers, but with universities and colleges; within research frameworks and specialized institutions, such as the Schlegel Institute for Aging and other bodies on provincial, national and international levels need to be actively pursued. Such a strategy supports the identification of best practices, the continual evaluation and improvement, and ultimately the ability, to offer the best and most strategic services to the people supported and the community.

A fourth strategy focuses on engaging the community to create greater awareness of and value and supports for Carizon. Sustaining a strong and visible presence provides a more effective platform for advocacy, fund development, community support and volunteer recruitment initiatives.

The second Strategic Direction recognizes that the status quo, in terms of services, scope and organizational positioning, is not a sustainable alternative in an operating environment that is continuously transitioning. Changes are occurring at a more rapid rate, are becoming increasingly structural and have the potential for significant funding, policy, regulatory / reporting and other accountabilities. Carizon needs to develop a comprehensive strategy that **supports sustainable growth** and that is flexible in adapting to changes as they occur, whether known, anticipated or unknown at this time. Developing a culture of effectively adapting, being flexible, pursuing new initiatives, risk taking and managing change is a key success factor for Carizon.

The first strategy within this Strategic Direction is to identify the **optimum size, scope and service geography** that Carizon should focus on and use as a measure in assessing its growth opportunities. This is a fundamental initiative in supporting a sustainable growth agenda which itself will change as time moves forward. The strategy needs to be reviewed at least annually as new information comes into the operating environment and to facilitate strategic dialogues.

Growth strategies have been identified in terms of amalgamations with comparable agencies that could deepen current service delivery activities as well as expand the scope of the services offered. Social entrepreneurship represents another possible growth strategy, such as market-based fees for services, selling of programs and products and other related initiatives. Alignment with funder directions is a key growth strategy in terms of the increasing use of proposals for new programs and services, the range of new funder methodologies / approaches for services delivery, shifts in funding priorities and other

considerations that need to be assessed and acted upon in order to keep Carizon a preferred service delivery agency.

One of the most significant known change considerations that will impact Carizon's growth is the introduction of the lead agency model within the Children's Mental Health Services sector. Over the course of the next six months, some sixteen agencies will be selected across approximately thirty-four service areas in Ontario. Subsequently, the remaining service areas will have identified lead agencies. It is vital to Carizon's long term sustainability and services delivery model that it effectively assess and act upon the lead agency initiative. This assessment needs to consider three possible outcomes; being the lead agency, not being the lead agency or the possibility of being a co-leader within the lead agency model. It will be important to assess the benefits and the risks / impacts of all three of these outcomes on the Children's Mental Health Services Carizon provides, on the services that integrate with its Children's Mental Health Services and on Carizon as an organization.

A further strategy within this Strategic Direction, is the need to develop more targeted efforts towards specific population groups as demographics continually change within the service area. With over 26% of the Region of Waterloo's population now not born in Canada and this number increasing significantly over the next decade, there is urgency in Carizon developing initiatives to communicate, engage and build relations with, and to develop services that align with multi-cultural communities as these can be uniquely different experiences across relationship, service need and other dimensions.

Over 26% of the Region of Waterloo's population now not born in Canada

Over 40% of the population in the Region are reaching 55+ years

Other potential target populations would involve senior services, with over 40% of the population in the Region now moving over 55 years of age and having unique changing health, social and support requirements. Another target consideration could be neighbourhoods which is becoming a more important delivery model for provincial and regional governments. The Region of Waterloo has identified twenty-seven high risk neighbourhoods. Engaging in service delivery around neighbourhoods spans demographic dimensions placing the focus on geographical and community development perspectives that are also seen as important specialized approaches. Carizon also has to continually assess other emerging demographic or geographical groups that will have specialized service delivery considerations within its growth model, such as Autism, elder abuse, and other growing health conditions.

The third Strategic Direction involves positioning Carizon to have the capabilities to be able to effectively, continue to beneficially deliver its services and to **operate as a valued and relevant organization**.

In its post amalgamation environment, it is vital for Carizon to develop a distinctive organizational culture that builds on the strengths of both kidsLINK and Mosaic but reflects solely the Vision, Mission and Strategic Priorities of Carizon. Aligned with the cultural strategy, is the need to integrate a strong human resources development program that fosters continuous learning, risk taking, succession planning, enhanced internal communications and team and skills development.

Technology will play a significantly greater role within Carizon going forward. This will include gaining operational efficiencies through technology that supports accounting, operations, management information system and other similar applications. It will also involve improving and changing the scope of communications to targeted audiences through the website, the use of social media, and related strategies.

The third technology perspective is the potential growth of **online services** delivery as is happening with credit counselling and for which pilot programs are occurring within Children's Mental Health Services. This evolving service delivery approach is being pioneered and will likely have a substantive impact on how services evolve over the next decade. An integrated Technology Plan is required to support all three applications, and to position Carizon for future success relative to its capabilities to respond to changing needs and to improve its operating efficiency.

Assessing Carizon's physical assets as to their value and whether the organization is better positioned in terms of leasing or owning these assets is an important undertaking. The considerations that emerge reflect annual facilities budgeting requirements and balance sheet reserves to support facility capital maintenance and renewal or to generate funds from the sale of assets to support the strategic work of the organization and related considerations.

Diversifying the financial resources of Carizon is a strategy that many non-profit organizations are continually pursuing. This involves funder alignment, increasing fund development initiatives, pursuing partnerships on shared services and a host of other considerations. With a greater diversity of funding resources, comes greater sustainability as funding envelopes change over time. A strategy of diversification, pursuing new sources and continually assessing funding opportunities will be important actions at the implementation level.

A key success factor for many non-profit organizations today is its ability to attract governance talent. There are only so many individuals within a community that are interested in governance leadership roles, have the skills and talents that effectively contribute to organizational success and are attracted to

specific organizations. Carizon needs to continually develop its governance model, community engagement practices and relevancy within the community in order to attract the best governance leadership talent on an ongoing basis. This needs to be undertaken through ongoing organizational development and community engagement, but also by developing a strong Board of Director search process that proactively identifies, engages with and attracts that talent.

Organization evaluation is also evolving as a key success factor for non-profit organizations. There is increasing pressure and expectations that organizations can articulate the value that they deliver in enhancing the lives of people and families supported for the funds provided to them by donors, government, foundations and others. In order to affirm those benefits and outcomes, and to remain a preferred agency for funder support, evaluation frameworks need to be effectively developed, continuously reviewed and results reported on using meaningful and understandable metrics.

Four evaluation processes have been identified as important to the future success of Carizon. The first is the development of an annual evaluation framework that supports the identification of the outcomes to be delivered by Carizon.

The second involves the ongoing evaluation of the governance model to ensure that it represents community and funder expectations, effectively governs the organization in terms of its oversight and future direction setting accountabilities, and gives comfort to funders that organizational effectiveness and integrity is continually assessed and is in place.

The third area of evaluation is the Chief Executive Officer in terms of an annual performance appraisal based on strategic directions, annual operating goals and overall effectiveness. This platform then becomes a tool for the Chief Executive Officer to undertake staff performance evaluations throughout the organization that are aligned with Carizon's Strategic Plan, annual goals and performance measures.

The fourth area of evaluation is the need to continually identify, assess and act on the strategic trends, changes and opportunities that exist within the operating environment. Many organizations have not developed the strategic ability to effectively identify and assess societal, community and sector trends on a timely basis, often putting them in a position of reacting rather than being proactive. It will be important for the Board and senior staff to allocate time and to develop an evaluation model whereby they can identify and assess trends on a timely basis, and develop the plans and strategies necessary to effectively capitalize on the opportunities they represent and to minimize the challenges that may evolve.

6 IMPLEMENTATION

6.1 WORK PROGRAM

The following charts provide a framework for developing an Implementation Plan for the three Strategic Directions. This will be developed once the Strategic Plan is approved and will need to be continually reviewed and amended during the 2014 to 2018 period.

The Implementation Plan represents a roadmap that guides and measures the specific activities undertaken in support of the Strategic Directions and their strategies. However, this roadmap must also remain flexible as change continues to evolve within the operating environment and other impacts will occur that will adjust/amend priorities, methods and activities.

One initial task is to establish the priorities for the strategies within each Strategic Direction as to both sequence and year or years to be undertaken. A three level prioritization model is offered for consideration by Carizon.

Priority	Description
A	Strategies that are the most significant, and have the highest value, importance or need for Carizon in moving forward.
B	Strategies that are important but may need an "A" priority to be completed first before it can be launched, or are not deemed to be an immediate or a highest priority.
C	Strategies that have been identified as important but are deemed to have lesser consequences and / or need, or may be dependent on whether resources and staff / volunteer time is available.

For approvals, four levels could be utilized in completing the Implementation Plan.

Level	Requirements
1	Requires up to an including Ministry / funder approval
2	Requires up to an including Board approval

- 3 | Requires up to and including Chief Executive Officer approval
- 4 | Requires up to and including Director approval

Strategic Direction 1: Fostering Client Success

In its continuous quest to develop and deliver services that respond to the evolving needs of individuals and families, and supporting them to achieve improved futures, Carizon

Objective	Priority Ranking	Tasking	Project Lead / Team	Due Dates	Approval Requirements	End Metrics
1.1 Develop a Wellness - Resiliency – Trauma Program and instill it across Carizon.						
1.2 Continuously develop and improve its programs and services						
1.3 Actively pursue opportunities for partnership and collaborative initiatives with universities, colleges, institutes, foundations, services providers and related bodies that enhance the quality and reach of the services available, integrate research findings, share resources and facilitate continuous learning.						
1.4 Develop diverse community engagement strategies that substantively increase awareness of Carizon, its programs and value to the community; the needs of the people and families supported; and how community members can meaningfully contribute.						

Strategic Direction 2: Pursuing Sustainable Growth

In an operating environment that is experiencing significant structural change, growth in needs and their complexity and other change perspectives, Carizon will pursue relevant and sustainable growth

Objective	Priority Ranking	Tasking	Project Lead / Team	Due Dates	Approval Requirements	End Metrics
2.1 Developing a growth framework that assesses optimum organizational size, scope, geographical reach, services integration and other growth dimensions.						
2.2 Continually assessing and actively engaging in beneficial amalgamations, shared services and related organizational consolidations.						
2.3 Actively assessing and pursuing social entrepreneurship opportunities alone or within consortiums.						
2.4 Continuously assessing funder priorities, policies and new initiatives in submitting service and funding proposals in support of Carizon's future services delivery and growth strategies.						

	Objective	Priority Ranking	Tasking	Project Lead / Team	Due Dates	Approval Requirements	End Metrics
2.5	Developing a strategic organizational approach to the emerging lead agency structure for Children’s Mental Health Services related to potentially being the lead agency, or not being the lead agency or operating within a co-lead agency framework.						
2.6	Developing specific initiatives to engage with multi-cultural, seniors and other unique service populations that are emerging within the community as to their specialized needs, demographic transitions and related opportunities.						

Strategic Direction 3: Building Our Capacities to Serve

Carizon needs to develop key resources in building the organizational capacities required to meet current and future servicing needs and delivery approaches, and its growth strategies

Objective	Priority Ranking	Tasking	Project Lead / Team	Due Dates	Approval Requirements	End Metrics
3.1 Developing a distinctive and empowering Carizon organizational culture with aligned human resources development policies.						
3.2 Developing a Technology Plan and platform to support digital communication requirements, operating and report generating enhancements and online services delivery approaches.						
3.3 Assessing the physical assets of Carizon to determine their value, the long term needs for capital repair and renewal funds, and the best economic use of the assets related to leasing versus owning.						

	Objective	Priority Ranking	Tasking	Project Lead / Team	Due Dates	Approval Requirements	End Metrics
3.4	Pursuing funding diversification in order to enhance Carizon's sustainability and capacities, by increasing the range of funders, re-engaging with donors and the community in a post amalgamation environment, and intensifying fund development initiatives, including a focus on planned-giving.						
3.5	Continuously developing Carizon's governance model and practices to become the 'Board of Choice' and attract the best community leadership talent.						
3.6	Developing comprehensive evaluation framework						

6.2 STRATEGIC PLAN REVIEW

A three-part Strategic Plan review process is identified for Carizon as follows:

- At a minimum quarterly, the Board should complete a review on the following Strategic Plan elements, possible via an assigned Board Committee:
 - o Actions taken
 - o Barriers occurring
 - o Recommendations on revisions and new inputs
 - o Other key information
- Each year, the Board and senior staff should allocate a dedicated block of time to review the Strategic Plan, the key inputs, changes in the operating environment and make appropriate adjustments to the timing, tasking and related dimensions of the Strategic Plan's implementation.
- Every three to five years, the Board and senior staff should engage in a full review process similar to the current initiative or on an expanded basis involving a stakeholder consultation program in order to ensure the relevancy, timeliness and scope of the Strategic Plan in moving Carizon towards the realization of its Vision and Mission.

APPENDIX 1

STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS ASSESSMENT

Strengths

- Resilient to and accepting of change as an organization.
- The diversity of sources of funding that allows the organization to participate with different levels of government and create less dependency on a single source.
- The strength, awareness and credibility / reputation of the Mosaic and kidsLINK brands.
- The organization owns its buildings which are well located.
- The Board is focused on strategic planning, change and making challenging decisions to move the new organization forward.

Concerns / Issues / Weaknesses

- Developing the bench strength of the organization in support of succession and transitions.
- Changes in funding models and government policy that could have high impact, including the vulnerability of having one large program at approximately \$2.5 million.
- The scope and intensity of uncertainty related to a number of variables, involving the economy, funder directions and constraint, government policy, etc.
- The potential loss over the next number of years of legacy and boomer generation individuals who have been strong advocates and financial supporters for the agencies.
- The level of technology in the organization is not where it needs to be.
- Limited reserves for infrastructure repairs and maintenance.
- The mono-cultural context of the organization in a community where multi-culturalism is growing significantly.
- How the lead agency model will roll out, and the impacts such a model will have on Children's Mental Health Services and Carizon.

Opportunities

- Pursuing the lead agency role
- Additional mergers and amalgamations
- Increasing fund development initiatives
- Exploring and moving into niche areas where the organization has competitive advantages, such as with school boards, work place situations and moving on strategic partnerships.

- Being a leader in advocating / working on technology and infrastructure development for the broader non-profit sector.
- Capturing a larger 'piece of the pie' in terms of examining fee for service opportunities, program consolidations and other initiatives.
- Exploring the benefits of selling its physical assets and moving into leasing models in order to develop monetary resources.

Threats Assessment

- Major changes in the funding models and the impact of constraint
- Not being the lead agency and being negatively impacted
- The possibility that Children's Mental Health Services will become less of a priority for government funders as boomers put more focus on health care and as fiscal constraint continues.
- Being too inflexible which will hurt the organization in an always changing future
- Not achieving workforce flexibility that can adapt more quickly to change.
- The affordability of the workforce in the future as fiscal constraint continues, and the raiding of staff by the regional government and school boards which have more resources to support higher staff compensation levels.
- Not having the technology and the infrastructure necessary to operate more efficiently, to develop new digitally-based programming, to support program evaluation and organizational outcome measurement and other applications.
- The increasing volatility and complexity of clients which will result in higher service costs with potentially no funding increases, as well as workplace safety.
- An extreme event that results in the organization receiving significant negative media resulting in the loss of credibility and support.