



# Building Strong Families

January 2018





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## Introduction



Catholic Family Service completed its 60<sup>th</sup> year of operation in 2017. Throughout our proud history we have served with compassion and reverence for all of humanity — regardless of where our clients come from, who they choose to love, how much money they have, or where they go to pray. And in my 25 years with the agency I have learned this to be true: our programs and services strive to be barrier free, always. We promote ease of access for those who have the courage to come to us for help, and will offer something of value to everyone who reaches out. That is our promise to the community.

I am proud of the strategic planning document you are now reading. It is the work of many people — staff, Board members, clients, community partners, funders and individual donors — who care deeply about making our organization the best that it can be. This document sets the stage for how we will begin our next 60 years of service. It describes why we exist, what we want to achieve, the enduring values that guide our organization, and the initiatives we will execute in the years ahead as we pursue our ambition.

Our strategic plan document begins with a discussion about our purpose — ***Building Strong Families***. Serving the needs of the family is in our name and in our organizational DNA. I believe in my heart that ‘Building strong families’ represents the true higher calling of Catholic Family Service. It is the reason we exist as an organization.

I am sometimes asked “Why is CFS focused on family?” This is discussed more fully in the pages that follow, but let me give you my short answer to that question: it’s about the kids. When we identify how and when to support children and families in the course of their development, we can change how a child’s life narrative unfolds into adulthood and have the greatest impact on the generation to come.

Family is the single most important influence in a child’s development. From their first moments of life, children depend on family to protect them and provide for their needs. In order to develop to potential, a child requires a connection with one or more adults who have an irrational emotional relationship with the child. Someone’s got to be crazy about that kid; this is usually family. We all know that children will seek out a sense of connection, closeness, belonging, significance; if they don’t find this in family they will look for it elsewhere, often in an unhealthy way. We work with people to help them understand the importance of healthy adult relationships, effective co-parenting, and secure parent / child attachment; this fosters stronger human connection within the family and, in so doing, serve the needs of the child.

We also know from our own experiences that strong families share and buffer the losses and wins that a child encounters in life. By establishing successful relationships with adults and other children, a child can build a foundation of resilience that will serve for a lifetime. At Catholic Family Service, we help children acquire resilience — like emotional regulation, coping with stress, being able to plan and problem solve — by supporting the child’s nurturing caregiver relationships. The programs and services we deliver to individuals can in turn provide the help that many families need but only some receive. Interventions designed to support parents and other natural caregivers by treating an addiction, mental health issue or domestic violence will, in the end, have a positive outcome toward building resilience in the child. And on it goes: parenting courses for young dads; affordable counselling for families when they need it; the Families & Schools Together program — these and other family-centric programs ultimately provide a pathway to enhance the health and well-being of children and youth and their families.

We will continue to do the amazing work we have always done, invigorated by our purpose of ***Building Strong Families***.

A handwritten signature in cursive script that reads "Patricia Jones".

Patricia Jones, CEO  
January 23, 2018

## Purpose, ambition and values

Why do we exist as Catholic Family Service? What do we aspire to achieve as an organization? What are the enduring values that guide our behaviour?

### Driven by purpose

The best performing organizations are clear about their purpose. Purpose acts as both an energy source and a governor. It helps to frame the organization's ambition for itself and its people. The best strategies are always informed by a sense of purpose.

Our statement of purpose — **Building Strong Families** — articulates the higher calling of CFS. It provides the passion for what we do. It underlines the true meaning behind the daily activities of our staff and volunteers.

- Our **counselling programs** offer accessible and affordable services to both children and adult individuals, couples, families and groups. We build capacity and resilience, heal emotional wounds, repair relationships and address crises that negatively impact the family's well-being. Web resources, telephone, video chat, text and face-to-face modalities are used to reduce barriers and increase the family's access to our services. Our professional counselling services address the essential emotional and mental health concerns that prevent clients from recognizing their strengths and building their resilience.
- Our **programs for pregnant and parenting youth**, including moms and dads, grandparents and natural supports, address the complex needs of young families. Our wrap-around services take a holistic approach to supporting and empowering vulnerable young families. This means we provide counselling services to support adjustment to early parenting; life skills development for teen parents; specialized childcare services that emphasize early childhood attachment, learning and development; stay-in-school programs and learner bursaries for pregnant moms; and parenting skills programs for young dads — together with a broad mix of social support activities. Working in partnership with the Calgary Board of Education, Alberta Health Services and the Calgary Achievement Centre for Youth, these programs and services help at-risk youth begin their journey toward family strength and resilience.
- Our **community-based programs** enhance individual capacity, empower parents and build community. Our programs create healthy connections between kids, their peers, families, schools and the community. This is accomplished in many ways: progressive and innovative mentorship for families; collaborations with schools to connect families with elementary teachers and other parents to cultivate and nurture relationships that are vital to each child's social and academic success; support for individual capacity-building through educational and financial literacy programs; and positive intervention with youth and their parents when the family is vulnerable.

Our purpose:

### **Building Strong Families**

Catholic Family Service is committed to building strong families.

Our programs and services respond to the challenges that threaten families and leave them vulnerable. We focus on enhancing the mental health and well-being of our clients, empowering parents, nurturing children's healthy development and enabling success in school. We take an integrated approach across our service portfolio, always looking for the opportunity to encourage discussion and healing at the family level.

In so doing, we enable CFS professionals to help their clients build strong and resilient families — and to break through the cycle of vulnerability to live the lives they have always wanted.

## Achieving our ambition

Our purpose describes why we exist as an organization; our ambition describes the collective desire for a certain achievement and the willingness to strive for its attainment. The two are intertwined — achieving our ambition helps us to fulfill our purpose, and purpose contextualizes ambition.

This ambition statement articulates what we want to achieve at Catholic Family Service over time. It describes a goal focused on sector leadership — but leadership in itself is not the only reason for such an ambition. Rather, the intent behind striving for sector leadership is to stimulate our thinking about how CFS must evolve in response to the changes happening around us. An aspiration for leadership challenges us to consider changes to our service framework so that we stay relevant to the needs of our clients; uncover innovative methods to deliver services and measure their outcomes; find new ways of working across internal organizational boundaries and with peer organizations; formulate new strategies for securing the funding we will need to continue our work.

By aiming for sector leadership we will inspire in each other the behaviour and commitment needed to best fulfill our purpose of ‘Building Strong Families’. Moreover, as a leader we aspire to help raise the performance and collective impact of all organizations working in the sector for the benefit of the Calgarians we serve together.

## Living our shared values

Having **purpose** inspires and unites us. It gives us energy. Being clear about our **ambition** helps turn that energy into positive results for our clients and the community. Moreover, when everyone in the organization operates under a set of **shared values** it has a multiplying effect on our collective will, driving higher performance and better outcomes.

Shared values provide the ethical framework of a great organization. They guide our actions and behaviour. They influence the way we work with each other — and the way we serve our clients and engage with the community.

Our ambition:

**We aspire to become a strong leader among not-for-profit agencies delivering social services in Calgary, and a committed provider of family-centric services in our community.**

**This means we will:**

1. Set the standard for collaboration among peer organizations in Calgary’s social services sector
2. Become the preferred recipient of funding from organizations focused on serving the needs of the family
3. Pioneer the evolution of services related to family systems, through research, advocacy and innovation
4. Deliver programs and services that yield sector-leading outcomes

Our values:

**Our values define who we are as an organization.**

**We are:**

- People who serve our clients and each other with kindness, respect and compassion
- Professionals who demonstrate courageous leadership — advocating for change, collaborating with key partners, challenging the status quo, and fostering innovation
- Leaders who accept and expect mutual accountability

# The healing power of family

Why is CFS driven to build strong families? Why not simply dedicate the organization to building strong and resilient individuals?

Although many organizations in Calgary provide support to families, we stand apart because **all that we do** is filtered through the lens of family — regardless of who is in the room. This makes us different.

Family systems are complex: experiences, expectations, personalities, social status, financial stability and other factors create a dynamic environment in which individual family members thrive — or not. Our commitment to honour the family is based on the conviction that the needs of individuals cannot be understood and served in isolation, but only in the context of the support system that surrounds them.

Most importantly, we believe that serving the family means serving the child, and in so doing offers the best chance at breaking the cycle of generational vulnerability and chronic malaise. By supporting, teaching and nurturing families in their unique culture, we can help them to discover their purpose; when families feel organized around common goals and a set of principles to fall back on in times of stress, they can find the strength to reach out and ask for the help they need.

## What we mean by ‘family’

Inclusiveness is the key to defining family in a diverse society. Understanding what is meant by ‘family’ requires a focus not on what families look like, but rather what families do. Single parent or sole-support families. Extended families. Childless couples. Families with two moms, or two dads. Families of mixed religion, or no religion. Blended families. What each of these (and other) constructs has in common is the relationship between an adult and another person — a relationship that endures over time, through which a responsible commitment has been made to provide for the well-being of another. Even someone who has no family, or feels that way, may have one or more relationships built upon a commitment by one person to the well-being of another. How the commitment is made and the specific form it takes is independent of the concept of ‘family’ and the system of support a family provides.

## Looking through the lens of family

Research shows that early life experiences change our brains in ways that make us more or less vulnerable to health and wellness problems in adulthood. This profound reality provides a compelling call to action for our organization.

*When we identify how and when to support children and families in the course of their development, we can change how a child’s life narrative unfolds into adulthood.*

Think of the healing power in that statement. Research has shown that regardless of background and circumstances, children who find attachment and human connection in the first years of life and at other sensitive periods of development have the chance to lead happier, healthier lives into adulthood. They will face reduced risk for mental health problems and addiction. They will make more positive contributions to the communities in which they live and work. They will be stronger role models for the children they bring into the world.

While all families have the same function — to provide for the well-being of another person — they may do things differently even if they happen to look alike. Accordingly, there is no ‘one right way’ to support the development of families and children. Services and programs must be combined and tailored to reach beyond the individual to understand the workings of the family surrounding that individual. This is the magic in what we do. It is the cause that inspires us to offer a rich portfolio of services, and to thereby help every family in a way that speaks to their unique circumstances and needs.

We believe that delivering our services through the lens of family will ultimately change the trajectory of a child’s life. It is through our work with families that we can have the greatest impact on the generation to come. At its core, Catholic Family Service exists for that reason. A rapidly changing world means that will be called upon to continually evolve our programs, services and competencies in the years ahead but our purpose as an organization — **Building Strong Families** — will endure.

## The world in which we operate

During the previous two decades, non-profit leaders and their Boards often asked: “Where do we find the money?” In today’s environment of complexity and accelerated change, the better question is: “How must our organization adapt to better accomplish our purpose and thrive in this ever-changing environment?”

Through its programs and services, Catholic Family Service addresses the underlying root cause of many pervasive social issues such as mental health, addictions, domestic violence, poverty and homelessness. The societal impact of these issues can be reduced when programs such as those offered by CFS are readily available, and responsive to the evolving needs of an ever-changing world.

Taking the time to anticipate the impact of external trends most relevant to the organization is an important step toward building a strategic plan that is enduring. The table below summarizes the trends we believe will have the greatest impact on CFS over the next five years. Appendix 1 describes each trend and impact in more detail.

### Economic trends

- ▶ The overall capacity for charitable giving will diminish
- ▶ The demand for services will intensify
- ▶ Opportunities will emerge to expand the employee and volunteer base

### Social / cultural trends

- ▶ Donors will expect greater transparency from the organizations they support, and new ways to engage
- ▶ Not-for-profits will be called upon to place additional emphasis on Human Resources best practices
- ▶ Employers will face increasing pressure to respond to living wage / minimum wage trends
- ▶ Advances in research and shifting attitudes will yield new approaches to improving well-being
- ▶ Addressing increasingly complex societal issues will require more (and better) collaboration among service providers

### Demographic trends

- ▶ Calgary’s age 25-54 population will grow
- ▶ The absolute number of seniors in Calgary will steadily increase
- ▶ Population growth will come largely from outside the country

### Technological trends

- ▶ Innovative fundraising approaches will be required to sustain revenue in the not-for-profit sector
- ▶ There will be growing interest in the sector regarding multi-stakeholder collaboration in the delivery of services

### Political and Legal / Regulatory trends

- ▶ Government fiscal policy will be a wildcard for Alberta’s not-for-profit sector
- ▶ Canada’s refugee policy will continue to drive demand for social services
- ▶ The lack of affordable housing will continue to be problematic in Calgary

## Strategic direction, 2018-2022

Our purpose is compelling. Our ambition is clear. What strategy will we execute to achieve this aspiration?

A powerful strategy is grounded in reality. It takes an honest look at the challenges and opportunities facing the organization today and in the future, and makes deliberate choices about how it will address them. A well-designed strategy sets a direction of travel in an uncertain world. It helps focus the organization on where its people should be concentrating their efforts, helps align resources and energies, and helps facilitate change toward an agreed end.

The challenges and opportunities facing the agency were explored by the Strategy Discussion Group, a team composed of 14 CFS professionals. This team executed a six-month work plan to deliver findings and proposals supporting the development of our 2018-2022 strategic plan.

Three recurring themes emerged from their work:

- i. deliver all services through a 'family' lens;
- ii. step forward as a leader to encourage greater collaboration across the not-for-profit sector, and through this effort raise the collective impact of all the players; and
- iii. evolve our existing programs and pioneer new services to address the emerging needs of the family.

Our strategy is built around the above three themes. The execution of our strategy is supported by our organizational shared values and enabled by a culture where all employees, not only those in titled positions, demonstrate the behaviours of a strong leader. This is represented by the graphic below and explained further in the pages that follow.



## Our three strategic themes

A number of proposals came forward regarding the initiatives we should undertake over the coming years. These are described below under each strategic theme. The list is extensive but at the same time incomplete; more ideas will flow and new projects will be identified as the strategy unfolds. Notwithstanding, the initiatives currently proposed, when considered together as a program of strategic change, describe a future direction for Catholic Family Service consistent with our stated purpose and ambition.

### **Theme #1: Serve through the lens of the family**

Our highest strategic priority is to strengthen the family unit, in whatever construct ‘family’ exists for each client. This compels us to filter all that we do through the lens of family by considering the family dynamic associated with each presenting problem. In some cases our services will in fact be delivered in a *family-centric* fashion, such as in the Families & Schools Together and Functional Family Therapy programs. In most situations, however, our services will be delivered to an individual — Affordable Counselling or Never Too Late, for example. But in working with the individual our goal will always be to deliver services in a *family-focused* manner by keeping the issues, challenges and needs of the client’s supporting family system in mind. This is the central tenet of our strategy.

Going forward, we will serve through the lens of the family by:

- Evaluating the design of existing programs to clearly identify the logical connection of each service to other CFS offerings, and to our purpose of Building Strong Families;
- Working more closely with other community agencies to complete a circle of services that reach every member of the family;
- Refining the client intake process in order to gain a deeper understanding of the family context of each individual who comes to us for help;
- Enhancing our professional development and performance management programs to enunciate the importance of the ‘family lens’, and to enhance the ability of our people to deliver their services with the family in mind. This will entail initiatives such as —
  - ✓ Refining our recruiting process to identify candidates with an aptitude to team beyond organizational boundaries and the professional credentials to serve in different program areas;
  - ✓ Strengthening the internal and external referral processes by building a greater awareness among our people regarding the organization-wide portfolio of CFS services and how they connect — both within and outside the agency — to serve the holistic needs of the family;
  - ✓ Introducing a staff rotation program to provide the appropriately qualified professionals with an opportunity to learn more about the integration of CFS services, thereby gaining practical experience in different programs or departments within the agency;
  - ✓ Providing the training and tools required to encourage our staff to develop a stronger ‘case manager mindset’ when working with their clients;
  - ✓ During the onboarding process and thereafter, ensuring that all our people understand what we mean by barrier-free service — and then evaluating annual performance against that standard; and
- Developing innovative methods to measure and report on outcomes relevant to the overarching objective of strengthening the family. This will also include finding ways to develop deeper and richer insights into our performance through the use of data analytics.

### **Theme #2: Collaborate across the sector**

We aspire to become a strong leader among the not-for-profit agencies delivering social services in Calgary, and in pursuit of that goal to set the standard for collaboration among peer organizations in a way that enhances the collective impact of the entire sector.

This means we will:

- Champion among other social services agencies the importance of viewing those we serve through a family lens, and advocate for services that align along a continuum of family-focused and family-centric services;
- Participate in the right networks to help drive discussion on the trending social issues likely to impact the family, and the appropriate role that should be played by sector members in meeting the emerging service needs;
- Work with top-level sector leaders (such as United Way or Alberta Health Services) to facilitate greater collaboration within the social services sector overall, with the primary objective to facilitate system-wide social change and generate greater community impact;
- Formalize our key inter-agency referral relationships, with an emphasis toward documenting a robust Memorandum of Understanding regarding mutual expectations. This will include establishing protocols for regular CEO-to-CEO and Director of Operations-to-Director of Operations dialogue in order to assess the performance of our referral agencies and develop an action plan in response to identified challenges or opportunities;
- Establish similar protocols for regular Board-to-Board dialogue with strategic partners (for example, City of Calgary) as a component of the Board's stewardship role regarding these critical relationships;
- Identify opportunities in the Calgary market for CFS to build deeper strategic relationships by exploring —
  - ✓ The consolidation or realignment of services among agencies; or
  - ✓ The amalgamation of entities; and
- Incorporate relevant sector-level data in our annual impact report so that we clearly demonstrate to funders and donors our contribution as a strong leader in the sector, and the payback to the community from their investment in CFS.

Meeting the challenge of becoming a strong leader among sector peers demands that CFS itself must invest in its leaders present and future. Doing so will involve activities such as the following:

- Evaluate our processes for recruiting, training, performance management and annual compensation to ensure they align with our strategic goals and the ambition for sector leadership;
- As a component of accountability agreements, prioritize and actively support professional development programs for Managing Directors and Supervisors that are related to leadership character, competencies and commitments; and
- Create a long-term game plan for succession and transition in senior leadership positions.

### **Theme #3: Continually evolve our services**

We know today that emerging political, economic, social and technological trends will impact the well-being of individuals, families and whole communities. The impact of these trends will be felt in different ways by different segments of the community. By extension, this will affect the work we are called to do — new services; different delivery models; new strategic alliances; new ways of understanding family systems.

To remain relevant to the people we serve, our programs and services must react to the ever-changing world around us. In response we will:

- Carry out a comprehensive and disciplined Service Framework Review to assess the strategic fit and alignment of existing programs and services, and make adjustments as required;
- Create a roadmap of research activities targeted toward understanding and articulating the service needs of vulnerable Calgarians who are likely to be impacted by future trends, along with the financial plan to support our research program;
- Lead the effort to develop a sector-coordinated response to emerging service needs (such as might be required for older adults or new Canadians, for example);
- Build a rolling 3-year outlook regarding the evolution of programs and services that CFS will deliver, based upon our assessment of the most likely issues and attendant future needs of our clientele;
- Set specific goals related to our own staff diversity (background, education, language skills, gender, ethnicity, generation, leadership style and so on) to better serve an increasingly diverse client base. As well, tailor the diversity component of the agency's volunteer recruitment and training processes in order to strengthen our connection with a diverse population;
- Increase the frequency and quality of the transition plans we develop for clients, so that we broaden (where appropriate) the mix of family-focused services and agencies brought to bear on a presenting issue; and
- Expand our web-based and self-serve capabilities to enhance the barrier-free nature of our services.

### Linking strategy to operations

Great leaders have an inspiring vision. Front-line staff are experts at what they do. A critical component of strategy implementation is to therefore connect staff expertise to the overarching vision in a practical, common sense way so that changes introduced through the strategy will actually work in practice.

This is not as simple as it sounds. Strategy embraces the whole of the organization; implementing a broad portfolio of initiatives such as those previously described will involve people, process and technology touching all departments within the agency. This can be challenging to manage. As well, the program of strategic renewal at CFS will expand over time and will continue to require an implementation focus throughout the life of the strategic plan. Taken together, these two factors — the **volume** of initiatives and the **duration** of the change program — have the potential to upset the balance between driving change on the one hand, while operating the business on the other.

To mitigate this risk, an important first step toward implementing the strategy is to envision how a portfolio of strategic initiatives fits within the operations of the business. A useful way to accomplish this is to map the proposed initiatives to areas of business activity, thereby illustrating where changes will take place and how they align to the day-to-day operations of the business.

In broad terms, the business activities of Catholic Family Service can be considered to fall under the following four areas of focus:

- a) Programs and services
- b) People and competencies
- c) Enabling infrastructure
- d) External strategic relationships

To demonstrate the linkage between strategy and operations, the initiatives proposed for each of the strategic themes (pages 7-9) have been mapped to the above four areas of business focus. This relationship is shown in the three tables beginning on the following page.

**How our strategy aligns to the operations of the business**

*Theme #1: Serve through the lens of the family*

Strategic initiative ↓	Strategic initiative primarily relates to:			
	Programs and services	People and competencies	Enabling infrastructure	External strategic relationships
Evaluate the design of existing programs to clearly identify the logical connection of each service to other CFS offerings, and to our purpose				
Work more closely with other community agencies to ensure the necessary services reach <u>every</u> member of the family				
Refine the client intake process in order to gain a deeper understanding of the family context of each individual who comes to us for help				
Refine our recruiting process to identify candidates with an aptitude to team and the professional credentials to serve in different program areas				
Strengthen the referral process by building a greater awareness among our people regarding the organization-wide portfolio of CFS services				
Introduce a staff rotation program to provide qualified professionals with an opportunity to learn more about the integration of CFS services				
Provide the training and tools required to encourage our staff to develop a stronger ‘case manager mindset’				
Ensure that all our people understand what we mean by barrier-free service and evaluate annual performance against that standard				
Develop innovative methods to measure and report on outcomes relevant to the overarching objective of strengthening the family				

*Theme #2: Collaborate across the sector*

Strategic initiative ↓	Strategic initiative primarily relates to:			
	Programs and services	People and competencies	Enabling infrastructure	External strategic relationships
Champion the importance of serving through the family lens and advocate for greater coordination along the services continuum				
Participate in the right networks to help drive the discussion on trending social issues and emerging service needs				
Work with top-level sector leaders to facilitate greater collaboration within the social services sector overall				
Formalize our key inter-agency referral relationships, with an emphasis toward documenting mutual expectations evaluating performance levels				
Implement protocols for Board stewardship of our strategic partnerships				
Identify opportunities for CFS to build deeper strategic relationships				
Incorporate relevant sector-level data in our annual impact report				
Align Human Resources processes with the strategic goal of sector leadership				
Provide professional development to Managing Directors and Supervisors to enhance leadership character and competencies				
Create a long-term game plan for senior leadership succession and transition				

*Theme #3: Continually evolve our services*

Strategic initiative ↓	Strategic initiative primarily relates to:			
	Programs and services	People and competencies	Enabling infrastructure	External strategic relationships
Carry out a comprehensive and disciplined Service Framework Review to assess the strategic fit and alignment of existing programs and services				
Create a roadmap of research activities, along with the financial plan to support our research program				
Lead the effort to develop a sector-coordinated response to emerging service needs				
Build a rolling 3-year outlook regarding the evolution of programs and services that CFS will deliver, attendant to the future needs of our clients				
Set specific goals related to our own staff diversity and tailor the diversity component of the agency's volunteer recruitment and training processes				
Increase the frequency and quality of client transition plans				
Expand our web-based and self-serve capabilities to enhance the barrier-free nature of our services				

## Building a leadership culture

Culture does not change because we desire to change it. Culture changes when the organization is transformed by people working together every day.

One of the most important determinants of a highly successful organization and the key to an extraordinary workplace is organizational culture. Culture is how organizations ‘do things’ — the system of shared vision, values and principles that governs how people behave in organizations. The culture of an organization is shaped and amplified over time by a range of factors such as history, strategy, Board performance, management skills, and employee social styles.

What is meant by a *leadership* culture? It refers to an environment where all employees, not only those in titled positions, demonstrate the behaviours of a strong leader: unshaken belief in the vision of the organization; dedication to executing the agreed strategy; willingness to listen and to accept feedback; commitment to act fairly and consistently in making decisions that are in the best interests of the organization; courage to embrace the possibilities inherent in innovation and to encourage others to do so. In a leadership culture, employee engagement is high. Leaders exist throughout the organization. All staff understand the enterprise strategy and execute daily in alignment with it. They build a strong sense of belonging to the organization — a personal attachment to its purpose and a deep commitment to achieving its ambition. Research shows that an organization’s success at building and sustaining a leadership culture is a defining feature of industry leaders.

The character, competencies and commitment of the senior team has a profound impact on the performance and productivity of the entire organization, and on its culture. Character influences the choices leaders make about what to do, as well as whether they will commit to acquiring the requisite competencies in any given situation. But no matter how strong the character, competencies and commitment of the senior team, the contribution of a handful of leaders is not in itself sufficient to infuse a leadership culture throughout the organization. More is required to move the culture forward, such that:

- Leadership behaviour is nurtured routinely and systematically.
- Good character and sound judgement is talked about openly and often.
- Soft skills — such as teamwork, patience, and providing authentic feedback — are built into training programs where practical and reinforced through real-life experiences.
- The performance management framework sets expectations regarding leader behaviour, guided by organizational values — and, most importantly, the related feedback loop ensures that demonstrated leadership is acknowledged and appropriately rewarded.

We presently enjoy a great culture at Catholic Family Service, formed through 60 years of caring for others. Our culture is part of what makes us successful today. To support our vision and strategy for *Building Strong Families*, we must now leverage our existing cultural foundation and aspire to do even more — to stretch ourselves by taking on the shared challenge of building a *leadership culture* throughout the agency.



### A comment about Strategic Intent:

What will fundamentally drive the evolution of Catholic Family Service over the next 5 years? Should our primary objective be to become **bigger** (deliver the same services, but reach more clients), **broader** (introduce new services into the offering) or **better** (deliver the same services at existing volumes, but in a way that achieves a much higher impact)? All three objectives are necessary to some extent, but the reality is that it is not possible to pursue all three concurrently and equally because invariably trade-offs are required. Typically, a choice must be made by every organization regarding its primary intent.

What should be the primary intent for our organization — bigger, broader or better?

This topic was debated by the Strategy Discussion Group during discussion of the 2018-2022 strategic plan. Their response to the framing question was unanimous: **our primary focus in the coming five years must be to become better in all that we do.**

Their reasoning? By first striving to achieve operational excellence — in business processes, both administrative and client-facing; in staff competencies; in leadership roles and capabilities; in organizational design and related reporting lines — we would put in place a solid foundation that will ultimately enable CFS to grow in absolute size (bigger) and expand our service reach (broader).

To successfully grow in size and reach, Catholic Family Service must first focus on becoming 'better'. Our strategy has been built with this intent in mind.

## Execution and next steps

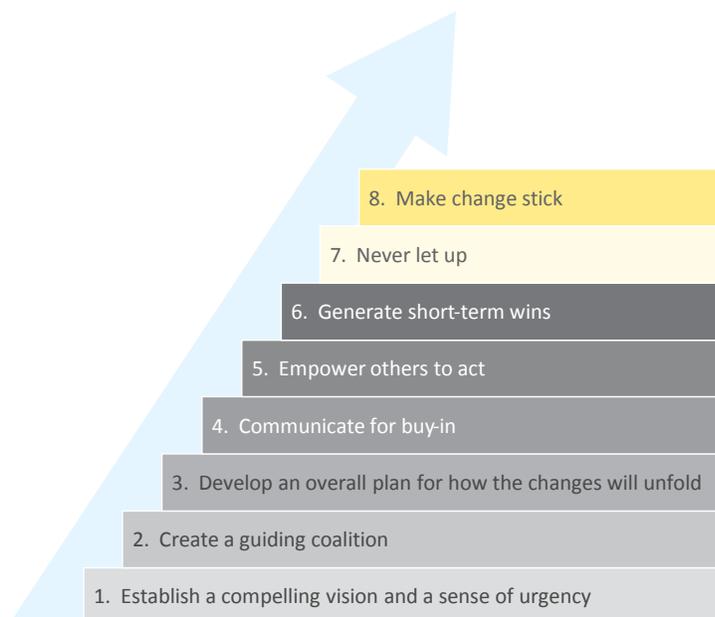
Typically, a strategy is much easier to define than it is to deliver. Why have so many great organizations failed in executing their strategy?

A key difference between those organizations where strategies were successfully executed and those that failed relates to whether the organization’s leaders gave effective sponsorship and guidance to the change agenda. Accordingly, as we move forward into the execution phase of our strategy, the CFS Board and senior leadership team commit to following a focused and structured approach toward implementing the changes required to achieve our ambition.

### Managing the change agenda

The reach of our vision, as well as the sheer number of strategic initiatives in our pipeline, suggests that we will be implementing change at CFS long into the future. The accelerating pace of change in the world around us means that in some cases our organization will be called upon to embrace new ways of doing things rapidly and in quick succession. Continuous change will be an important element of our operating paradigm in the years ahead.

Managing change is hard but not new. In 1995, Professor John Kotter wrote *“Leading Change: Why Transformation Efforts Fail”* for Harvard Business Review. Based on more than 15 years of observation and analysis, that article and his follow-up book, *Leading Change*, identified the mistakes organizations make when trying to effect change. It offered an eight-step process for successfully managing change and identified eight common factors that impeded implementation. Many thousands of leaders have since used Kotter’s principles and processes in their organizations. This framework is tried and true and provides a constructive way to sponsor and guide strategy implementation. We will be mindful of this model as we plan and implement the strategic initiatives proposed for Catholic Family Service.



#### Strategy execution:

##### *What gets in the way of success?*

- i. Lack of commitment from the top
- ii. Diffused and undisciplined activities and communications
- iii. Insufficient investment or inadequate staff resources
- iv. Failure to overcome political and cultural resistance to the strategy
- v. Destructive optionality — where parts of the organization opt-out from some aspects of the strategic change program
- vi. Not having the right people in the right jobs
- vii. Lack of authenticity in what is achievable
- viii. Lack of alignment in measures, messages and activities

## Executing with discipline

Research shows that organizations often fail to properly estimate the level of discipline required to actually implement new initiatives and make the changes stick. They miss the point that the hardest part of the job is executing the change, not designing the strategy. Proper planning, allocation of sufficient resources and continuous monitoring are powerful levers to mitigate the risk of failure during the strategy implementation phase.

Implementation of our strategic change agenda will follow a disciplined approach based upon four principles:

### 1. Implement in waves

An important step in the change journey is to set priorities — to determine where to start, what to do next, and when. Accordingly, the thoughtful alignment and sequencing of strategic initiatives will be our first line of defence against the eight common impediments to successful execution.

We will implement our initiatives in discrete stages (or ‘waves’), avoiding a big-bang approach. Each wave of implementation will be supported by an overall roadmap detailing the strategic initiatives that will be addressed at that stage, along with an indication of interdependencies and target timeline; this will ensure that all our people have an opportunity to see what is being planned and when the changes will be introduced.

To illustrate the concept of ‘implementing in waves’, Appendix 2 provides two examples of how we might envision an implementation roadmap for CFS looking out over the next several years.

### 2. Embrace project management ‘good practices’

Each strategic initiative will be managed as a ‘project’. This will begin with the identification of an individual to lead each project, who will be responsible for developing the project charter, workplan and execution timeline.

Project plans will be approved by the senior leadership team — which then becomes responsible for sponsoring the project and assigning sufficient staff resources to deliver against the plan.

As each strategic initiative is implemented, the leadership team will ensure that the critical steps have been successfully completed before the next project is introduced. This will guard against bottlenecks and organizational fatigue.

### 3. Monitor progress

The senior leadership team will track implementation status against the agreed project plans, using a simple-but-effective status report template applied consistently across all projects.

During execution, the project leader will identify roadblocks or unexpected issues impacting the implementation plan; senior leadership will be expected to respond quickly to address the identified impediments.

### 4. Communicate effectively (and often) with internal and external stakeholders

We will deliver short, meaningful and authentic messages to our stakeholders concerning the change program. Importantly, we will communicate in an interactive way — seeking input and ideas, rather than simply sending out communiqués. This will provide valuable feedback to senior leadership concerning the net benefits of the changes being introduced (“*Are we seeing the payback that was intended?*”) and the organization’s level of resilience (“*Are we ready for the next wave of change?*”).

Disciplined execution and oversight of the implementation effort requires dedicated focus and in some cases dedicated resources. The CEO, working with the Executive Leadership Team and reporting to the Board, owns the responsibility to ensure that the necessary sponsorship, oversight and resources are in place to successfully deliver the strategic change agenda for Catholic Family Service.

## Appendix 1: External scan of emerging trends

### *Economic trends*

#### **The overall capacity for charitable giving will diminish**

In 2014, as oil prices began to drop, 41% of organizations responding to the Alberta Nonprofit Survey expected to generate higher revenue in that year; in 2016 only 28% reported that they were able to do so. Similarly, the Calgary and Area United Way campaign generated \$55.7m in 2016, compared with \$59.7m in 2014. To this point, governments have provided a stabilizing effect through grants and contracts, but this buffer is not likely to be sustainable over the long term.

Although the overall capacity for charitable giving is on a downward trend, revenue growth opportunities will still exist for those organizations able to introduce fresh ideas into their fundraising activities; the UP Foundation 2017 Gala is a prime example of revenue growth in a tough economy.

#### **The demand for services will intensify**

Many organizations have reported increased demand on their programs and services. Social service organizations in Alberta are now responding to increased rates of suicide, domestic violence, and food bank uptake as a consequence of the economic downturn.

However, economic pressures are not the only cause. Canada's changing demographics — an aging population, increased rural-to-urban migration of Indigenous communities, rising income inequality and a record number of immigrants and refugees — are all driving higher demand for social programs and services. This raises a question about the continuing capacity of non-profit organizations to address this increased demand. In the words of one respondent to the Alberta Nonprofit Survey: "Social services are needed today more than ever, but unfortunately the money is now drying up."

#### **Opportunities will emerge to expand the employee and volunteer base**

In the midst of these challenges, some non-profits are finding opportunities to augment their human

resources. Survey respondents indicated that they have been successful in building a stronger and more diverse workforce given the available depth and experience to draw from. Others have witnessed an increase in volunteer skills numbers. Acquisition of high-quality staff and volunteers will be an important strategy for how leading non-profits meet the growing service needs in a tough economy.

### *Social / Cultural trends*

#### **Donors will expect more transparency from the organizations they support, and new ways to engage**

Donors are demanding greater visibility regarding how decisions are made, where their gifts are going, and the impact they are having through their investment of time and money. This has two significant implications:

1. Non-profits will be expected to collect convincing qualitative and quantitative information to evidence their "mission effectiveness", yet the complex nature of many issues can make it difficult to attribute cause and effect — and in some cases, it will be a challenge even to agree on the right metrics to measure.
2. Non-profits will be encouraged to create more robust donor and volunteer engagement processes. The generation that now represents the largest pool for donations has a very different perspective regarding the relationship they build with the non-profits they support. A growing percentage want to be hands-on in leveraging their money, time and talent. Also, many volunteers expect to be presented with options as to how they volunteer.

#### **Not-for-profits will be called upon to place additional emphasis on HR best practices**

Non-profit organizations operate in an environment of financial constraints that often lead to an underinvestment in staff capacity. Paradoxically, many employers place crushing demands on their people and expect new hires to have a high level of academic credentials — even for contract work or internships. This creates a challenging situation for the HR function in the not-for-profit sector.

A growing body of research on HR models for the non-profit labour force offers several strategies to address the challenges:

- *Support a participatory and flexible work environment.* The generations that represent the largest portion of today's labour force expect their workplaces to provide a high level of engagement and a flow of information up, down and across the organization. Many also want the freedom to work remotely, and with flexible arrangements for their hours of work.
- *Build diversity.* A diverse employee population brings perspectives that help organizations address the complex and fast-paced operating environment, enrich problem solving and strategic decision-making, and generate innovative ideas.
- *Recruit the right leadership competencies.* The board and management need comprehensive leadership skills to navigate the competitive and accountability-driven world in which they operate. Importantly, the not-for-profit leaders of tomorrow must be able to facilitate, engage and innovate at a systems level across the social services sector.

Agencies must also be prepared for a transition in executive leadership. Respondents to a 2011 survey conducted by the Alberta Nonprofit Workforce Council indicated that the upcoming retirement of senior executives is among the most pressing areas of concern for many organizations.

### **Employers will face increasing pressure to respond to living wage / minimum wage trends**

The Alberta government implemented a \$1 increase to the province's minimum wage in October 2016 and has committed to increase the base further by 2018. As organizations transition to the new minimum wage standard, the impacts and challenges of the increase are being felt in various ways. For example:

- To the extent that profitability is negatively affected by the wage increase, corporations may respond by reducing their charitable giving.
- Across the marketplace, wage increases at the bottom of the pay scale could place upward pressure on other positions. This will create financial difficulties for non-profit organizations;

unlike the corporate sector, most non-profits will be unable to pass along even a portion of such higher costs to their 'customers'. This will put at risk the organizations ability to maintain either employee levels or service levels — or both.

### **Advances in research and shifting attitudes will yield new approaches to improving well-being**

New knowledge related to social issues, or in delivery approaches toward health and well-being, will drive the evolution of social programs and services in the years ahead. For example, research in early social childhood development has increased our understanding of the importance of fathers in the health and development of children; these new insights must be factored into public policy, social service offerings, and school outreach programs

Some of the key issues occupying the social agenda at present include Indigenous-settler reconciliation, early childhood intervention, engaging men in violence prevention, enhancement of natural supports, and integration of newcomers. In an effort to address these issues, governments, researchers and policy advocacy groups and non-profits are currently emphasizing the systemic problem of poverty and homelessness as both the underlying cause and the outcome of many of the issues noted above. As a key player in building a stronger social services sector, leading non-profits will play an increasingly important policy and advocacy role as they work with others to seek solutions for emerging societal issues.

### **Addressing increasingly complex societal issues will require more (and better) collaboration**

There is general acceptance that most societal issues cannot be solved by one department, one organization, or one sector working in isolation: a single entity cannot provide all the ideas, dollars, competencies or staff to solve the most complex societal issues. There are a number of trends that arise from this reality:

- *Work across boundaries.* Strong leaders will inspire their people to understand that their organization's mission cannot be achieved unless other sectors or other organizations in the ecosystem succeed as well.

- *Consider strategic transactions.* The search for better outcomes is fueling a growing interest in mergers and amalgamations as a way to improve efficiency and quality. As well, non-profits are turning toward joint venture arrangements to expand their programs and services. Many non-profit organizations are also exploring creative ways to lower their administrative costs and, where appropriate, outsourcing functions such as human resources, financial management, fund development, and government relations.

### *Demographic trends*

#### **Calgary's age 25-54 population will grow**

As Calgary's population grows over the next few years, the proportion of toddlers and preschoolers is expected to remain steady, the percentage of teenagers will decline slightly, and the ratio of seniors will increase. At nearly 48% of the city's population, the largest and fastest-growing demographic of Calgarians will be between ages 25 and 54.

Despite this demographic reality, many funders and donors are expected to continue focusing their attention on youth-related initiatives. This is likely to leave the 25-54 age demographic under-served.

#### **The absolute number of seniors in Calgary will steadily increase**

The proportion of the population aged 65 and older is expected to rise from slightly more than 14% in 2014 to nearly 18% in 2020. This will have multiple implications in terms of fundraising strategies, volunteer engagement and services offered:

- Older adults are currently more likely to donate; they also tend to donate more. This concentration of fundraising in the hands of fewer donors requires non-profits to reassess their fundraising models.
- This age demographic is highly skilled and may have more time to volunteer — presuming they are offered the right form of engagement.
- Calgary City Council has identified six local priority areas: (i) access to information and services; (ii) community health and support; (iii) housing; (iv) participation and inclusion; (v) prevention and response to elder abuse; and (vi) transportation

and mobility. Forward-thinking non-profits will have an opportunity to partner with the City in delivering services aligned to these priorities.

#### **Population growth will come largely from outside the country**

International migration accounted for 60% of Calgary's population growth in 2016. Net inward migration in 2017 was 23,000 people, with 93% coming from outside Canada. Nearly half of the population will likely be immigrants or children of immigrants by 2036 if current immigration levels continue. This will drive overall demand for services, with the commensurate need to provide services that are tailored to different cultures and offered in different languages.

### *Technological*

#### **Innovative fundraising approaches will be required to sustain revenue in the not-for-profit sector**

More organizations are acknowledging the need to foster program and service innovation. But innovation applies to sources of revenue, as well. Impact investing — where donors align to a purpose, not simply an organization — is becoming more common. There is also renewed interest among non-profits to find ways of generating earned income. These trends will divide the sector into two groups: organizations that thoughtfully respond these trends, and those that do not.

Innovation is also needed in the area of broad-based fund development. The changing demographic picture of Canada has also created a donor marketplace that is much more complex and fragmented than it used to be. As a result, when it comes to donor acquisition and retention, a one-size-fits-all model no longer works — specific and targeted strategies will be needed for different donor audiences.

#### **There will be growing interest in the sector regarding system change efforts**

Systemic design is a useful framework to promote collaboration between governments, philanthropic organizations, and non-profits. This approach can help organizations identify relationships between systems, understand possible unintended consequences, develop new pilot projects, and adapt to increasingly complex environments. The momentum for collaborative initiatives and shared measurement systems will

accelerate in the years ahead. While provincial governments have largely been the early adopters of systemic design principles in the policy development process, high-performing non-profit organizations are now becoming active players in this effort.

#### *Political and Legal / Regulatory trends*

##### **Government fiscal policy will be a wildcard for Alberta's not-for-profit sector**

Government policy has a powerful impact on the financial health and even the strategic direction of the non-profit sector. Given the potential for significant changes in provincial fiscal policy, the most resilient non-profits will be those who are nimble enough to seek new and creative ways of working with all levels of government to finance and deliver their programs and services.

##### **Canada's refugee policy will continue to drive demand for social services**

As of January 2017 there were approximately 3,700 refugees in Alberta, with over half living in Calgary. A majority of the refugee families were government sponsored, which means they were typically selected based on humanitarian need. The experiences suffered by these families invariably raise social and educational challenges; such families also tend to take longer to establish themselves. Moreover, 65% of all Syrian refugees (not just government-sponsored families) speak only Arabic. Consequently, many Syrian refugees report feeling abandoned and lost after arriving in Canada.

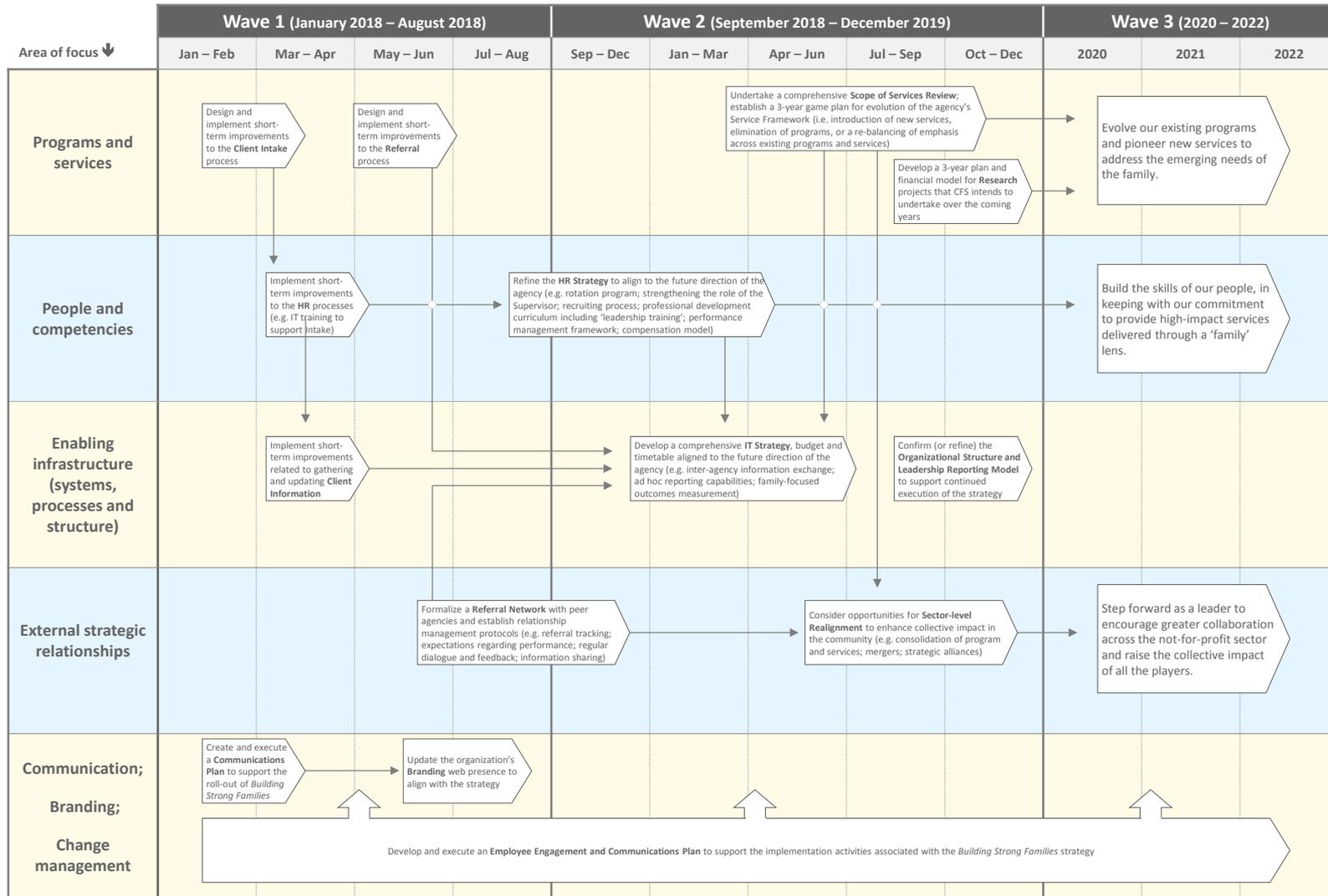
Thousands of refugees are now living in Calgary with limited formal support. This gap will need to be addressed, at least in part, by the not-for-profit sector.

##### **The lack of affordable housing will be continue to be problematic in Calgary**

Calgary has recently been designated the least-affordable city in Canada for the poor — the most damaging statistic being that cost of housing consumes a disproportionately large percentage (66%) of the monthly income of a single parent on social assistance. This leads to a correspondingly high incidence of homelessness that will continue to grow if left unchecked.

Tackling 'homelessness' is a complicated issue because cause and effect are not easily discerned. For example, does homelessness and poverty lead to problems with mental health, substance abuse and other vulnerabilities — or is it the other way around? Should homelessness be the first priority, or will other approaches directed to other social issues ultimately yield the greatest progress against homelessness? Regardless, it will be incumbent upon leading non-profits to collaborate across the sector to respond to the harsh reality of homelessness in Calgary and the issues it creates.

## Appendix 2: Illustrative implementation roadmap (high-level overview)



## Appendix 2: Illustrative implementation roadmap (wave 1 ~ detailed activities and timeline)

Project ↓	January	February	March	April	May	June	July	August
<b>Client intake process</b> ↑ ↓	<p>Develop a common intake process for the agency. This would involve a base of set intake questions that are standard agency-wide, supplemented by program-specific intake data gathering as required. Through this activity, ensure that our client intake process is family-focused, and that we gather client information through the lens of the family.</p>		<p>Build a logical connection between the client intake process and our approach toward the referral process. Collect data on clients who contact us by way of a specific CFS program but who are immediately referred to another CFS program or another agency. As well, adopt a standard way of tracking contacts that did not become clients of CFS.</p>		<p>Update our training materials and provide a 'refresher course' to familiarize all staff with the changes we are making to the client intake process as well as the related changes and improvements to the referral process and our IT system.</p>		<p>Improve the internal communications and information exchange for CFS staff who are regularly involved in client intake activities. Implement regular meetings on an agency-wide level to ensure the teams stay consistent with the new processes and up-to-date on CFS programs. Also, create an intranet page with upcoming program start dates and locations to assist with intake and / or referral.</p>	
<b>Referral process</b> ↓ ↑	<p>Identify and track key organizations based upon overall areas of focus (e.g. recreation; housing; parenting support; food bank) rather than programs. Encourage our staff to increase the use of these referral relationships outside of the traditional CFS silos – focus on meeting a client need more than providing a program-driven referral.</p>		<p>Improve top-down communication to impress upon our professionals the importance of referrals (internal, external agencies and natural supports) in delivering services through the lens of 'family'. Also, strengthen the messaging regarding the importance of tracking all referrals for all clients.</p>		<p>Ensure that relevant information available within the current process and IT system is easily accessible across the agency. For example, use the intranet and I-drive to provide information about current MOUs. Also, update our training materials (including onboarding) to enhance staff knowledge about the referral process.</p>		<p>Implement short-term improvements to the IT system to make it easier for our people to track referrals with greater consistency and accuracy. This might entail, for example, a drop-down list that identifies common internal and external referrals applicable to various programs and the ability to capture referral information in client records.</p>	
<b>Client information management</b> ↓ ↑	<p>Immediately enhance data collection in future by informing the onboarding process with a manual that clearly sets out the process and rationale for the data we collect and track (at client intake and throughout the course of our relationship). As well, create an information site that reflects current partnerships and collaborations so as to assist with both the client intake and referrals processes.</p>			<p>Identify and implement short-term improvements within the existing IT system. For example, conduct a regular review of programs to weed out irrelevant data elements, or data duplication when clients are served through more than one CFS program. As well, re-purpose the forms committee to identify new data elements that we must track more carefully and consistently (such as internal and external referrals).</p>			<p>Implement centralized intake and data collection, to the extent practical, including protocols and guidelines for restricted / unrestricted system activities and access to client information.</p>	