



University
Settlement

Founded 1910

Strategic Framework 2022-2027

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Strategic Framework 2022-2027

INTRODUCTION

University Settlement (US) was founded in 1910 as Toronto's first community-based social service centre. In 2022, the organization delivers services through three locations – two in downtown Toronto (Wards 10 and 11) and one in North York (Ward 18). Service offerings have evolved over the years in response to the changing needs of an increasingly diverse local community.

Over the last 122 years, US has had to adapt to many local and global forces (world wars, pandemics, economic downturns) that have challenged its resiliency. The last two years have also been difficult within the COVID environment. University Settlement has demonstrated its ability to change and be flexible in adjusting to new realities.

As Ontario emerges from the current pandemic, US has embarked on a Strategic Planning process to anticipate what the future holds and how to take advantage of the opportunities it presents. The process began in March 2021 with an environmental scan followed by an extensive stakeholder consultation. This information gathering prepared the Board and Management to think strategically about opportunities and challenges, build on past successes, and identify future directions. The planning process was guided by a Board-Management Strategic Planning Steering Committee working in collaboration with a consultant from VISION Management Services.

During a Board-Management Retreat on February 5, 2022, participants developed 5 interdependent Strategic Priorities and Directions. Staff reviewed and contributed to this discussion at a separate Staff consultation session on March 1, 2022 resulting in a draft Strategic Framework 2022-2027.

The Strategic Planning Steering Committee reviewed and modified the draft document on March 14th. This version of the Strategic Framework 2022-2027 is being recommended by the Committee for Board approval at its March 22, 2022 board meeting.

The Strategic Framework contains US' Vision, Mission, Values; Strategic Priorities and Directions; related outcomes; and a number of possible strategies (to be refined by the Management Team).

The Executive Director (ED) and the Management Team will present a more detailed Operational Plan for the Board at its April 2022 board meeting.



VISION, MISSION AND VALUES

An organization's vision, mission and values are the foundation for any strategic planning process. Note: these statements were not revised as part of the 2022 planning process.

Our Vision

Our vision is a community that is safe and healthy, and where individuals of all ages, from all social classes and cultures belong, mixing freely and respecting one another. In this place, people's basic needs are met and they have the opportunity to grow and learn through participation in artistic, cultural, recreational, educational and employment opportunities.

Our Mission

University Settlement helps individuals and families to learn and grow by engaging them in social, cultural, recreational and educational opportunities. Founded in 1910, University Settlement is committed to enhancing the quality of life of the people in the diverse communities we serve.

Our Values

At University Settlement, we as staff, volunteers and Board:

- *Value partnerships and teamwork*
- *Demonstrate responsiveness to community needs*
- *Respect and celebrate the diversity of our community*
- *Operate with equity and fairness*
- *Ensure accountability and transparency to our stakeholders*
- *Work towards excellence in all that we do*
- *Nurture the potential of all those with whom we interact.*



STRATEGIC PRIORITIES AND DIRECTIONS

Participants articulated five interconnected Strategic Priorities and Directions. These address the major themes identified in the information gathering phase (see *Strategic Plan Report November 2021- Analysis of feedback from key stakeholders* – under separate cover). They will help University Settlement’s Board and Management make strategic decisions about how to focus their and others’ energy over the next five years.

The first priority - Services and Programs - is “mission critical” reinforcing the reason WHY an organization exists and outlining the vehicles it uses to deliver on its mission. The other 4 priorities are “enabling priorities” that contribute to, and enable, the organization to achieve its mission for the benefit of its clients and communities. Each Priority (*not presented in order of importance*) is followed by a Strategic Direction.

- 1. SERVICES AND PROGRAMS:** Increase mission impact through service/program effectiveness.
- 2. STRUCTURE AND CAPACITY:** Recruit and retain the right people within an effective staffing structure.
- 3. TECHNOLOGY:** Develop and obtain more advanced technology to improve capacity.
- 4. ADVOCACY AND COMMUNICATION:** Implement a focused advocacy and communication plan.
- 5. FINANCIAL SUSTAINABILITY:** Continue to diversify funding revenues and balance the budget.

Each Priority is followed below by a set of related Outcomes and possible Strategies. The lists of possible Strategies are not intended to be comprehensive and they may not be desirable or feasible. They are listed here to give the reader a better understanding of what might be entailed in achieving the Strategies Priorities. The Management Team will refine and determine which of these and other Strategies will become part of the Operational Plan.



SERVICES AND PROGRAMS

Increase mission impact through service/program effectiveness

US provides services in three wards (wards 10, 11 and 18). Toronto's population is increasingly diverse and aging, and the number of children living in the city is increasing. The demographic profile of the GTA is evolving and will be impacted by the federal government's aim to increase immigration. University Settlement offers a mix of programs and services and activities that respond to community members' changing needs and interests.

US will need to continually review and renew its portfolio of services and programs as clients' needs evolve. Its programs and services must be continuously assessed as to their relevance and effectiveness in achieving mission impact.

Outcomes: measures of success

- Service success measures are individualized to specific programs and may include: client satisfaction; evidence of skill progression and other learning; increased number of participants registering for, and returning to, our services/programs; etc.
- Services and programs are culturally appropriate
- People have better access to recreation
- Other agencies refer clients to us
- There is a positive impact on the communities we serve (*specific indicators to be identified – e.g. people experience less racism, people feel like they belong*)

Principles

The following principles were identified in priority order through polls taken by Board, Management and Staff to inform the development of the right mix of services and programs over the next five years.

- ✓ There is stable funding
- ✓ US has the skills & expertise to provide the service
- ✓ Responds to emerging needs
- ✓ US has the facility and resources to provide the service/program
- ✓ High demand for service
- ✓ Serves a high needs population
- ✓ Serves a lot of people
- ✓ Contributes to our reputation
- ✓ Results are measurable
- ✓ Matches funders' priorities



Possible Strategies

Management and Staff will apply these principles and other measures in determining which services and programs will be maintained, expanded, divested or started to ensure that US can achieve its mission outcomes.

STRUCTURE AND CAPACITY

Recruit and retain the right people within an effective staffing structure

US operates with a flat lean management model and small staff complement which limits its capacity to build and grow services.

With a management team that is getting close to retirement, succession planning has become more urgent. This challenge is exacerbated in an environment wherein agencies are competing to recruit and retain quality staff.

Operating across three locations means that effective internal communication processes are critical so that staff can collaborate in supporting one another and achieving common goals.

Outcomes: measures of success

- Opportunities are offered to develop future leaders (mentorship & internal promotions)
- Support is provided for staff growth, building on their lived experiences
- Retention rates for staff are high
- A succession plan is in place enabling a smooth transition for staff leaving
- Communication is improved across locations, between programs and among staff
- A well-designed staffing structure makes the best use of available staff
- US has a competitive salary and benefits package

Possible Strategies

- ✓ Create a learning environment for staff development – include diversity, equity and inclusion principles
- ✓ Restructure back-office functions for greater efficiency
- ✓ Pursue non-traditional sources for staff recruitment
- ✓ Co-design cross-program staff engagement and communication opportunities
- ✓ Include exit interviews to inform retention strategies
- ✓ Develop a succession plan for the organization
- ✓ Include board recruitment and training to reflect this Direction
- ✓ Provide staff with a living wage and flexible working conditions
- ✓ Foster a positive collaborative working relationship with the Union



TECHNOLOGY

Develop/obtain more advanced technology to improve capacity

These last two years have reinforced the importance of having access to technology. Digital skills have become a basic literacy imperative. Marginalized groups and communities are at risk of getting left behind in this environment.

US has demonstrated its adaptability in using technology to keep its programming going during the pandemic. Although technology can be expensive, US recognizes that the future must include a level of technology that increases its capacity, reporting capability, digital service delivery and registration systems. Human Resources (HR), Client Relations Management (CRM), and other areas would benefit from updated technologies.

Outcomes: measures of success

- US' internal capacity to deliver services online is improved
- Reporting capability is increased and simplified
- Digital service delivery and registration systems are improved – e.g. HR (Human Resources), CRM (Client Relations Management), etc.
- Clients have better, more equitable access to programs and services
- A cyber-security plan is in place

Possible Strategies

- ✓ Improve tools and software informed by a technology plan
- ✓ Train staff in advanced technological skills – include clients in the training where appropriate
- ✓ Recruit staff with tech skills
- ✓ Establish a fund for investment, maintenance and training in technology
- ✓ Set up a “tech enabled” community centre to help with client access



ADVOCACY AND COMMUNICATION

Implement a focused advocacy and communication strategy

US uses a set of values based on an inclusive and anti-racism framework and is intentional about ensuring its programming is in alignment with this lens. There is a history and expertise at US of being thought leaders in specific areas such as affordable day care and settlement issues. Strong relationships with government and community groups have facilitated US' ability to advocate.

The challenges of not having enough staffing support to populate social media, implement communications activities and create promotional materials have hindered the advocacy work that US would like to do in partnership with its community.

Outcomes: measures of success

- Community voices are amplified around specific issues (*e.g. anti-Asian racism*)
- US' profile, reputation and visibility are increased in the community
- The community is more engaged and participates in advocacy activities
- Safe spaces are created for community members to participate in advocacy
- Programs and services are aligned with and provide vehicles for advocacy issues (*e.g. child care, settlement challenges*)

Possible Strategies

- ✓ Increase visibility of US through strategies such as: leveraging influential members of the Board and community, using our locations for signage, developing promotional materials, taking advantage of mobile technologies and social media
- ✓ Identify priority areas for advocacy and leadership using US' expertise
- ✓ Engage community members to participate in advocacy efforts through a co-design approach
- ✓ Educate staff and community members on advocacy matters
- ✓ Partner with other groups to strengthen US' advocacy efforts
- ✓ Create a communication plan that reaches out in diverse languages and across multiple vehicles



FINANCIAL SUSTAINABILITY

Continue to diversify funding revenues and balance the budget

US is in a good place financially, having overcome its financial challenges over the last few years and showing budget surpluses. Applications for foundation grants have been quite successful over the years and have brought in program funds.

A fundraising position will soon be filled by a new hire. This position will attend to improving tools and processes for fundraising.

US is well positioned to take advantage of government interests in increasing immigration numbers and investing in child care capacity.

Outcomes: measures of success

- US articulates and promotes its compelling story resulting in increased numbers of donors, donations, volunteers and clients
- There is a robust fund development plan in place increasing revenues from various sources
- There is a better alignment between funder priorities and developing revenue sources
- Budgets continue to be balanced

Possible Strategies

- ✓ Continue current successful strategies for achieving balanced budgets
- ✓ Build up an endowment fund and planned giving revenues
- ✓ Develop cases for support to use in fundraising opportunities
- ✓ Use updated CRM and other technologies to improve fundraising capacity
- ✓ Identify and pursue new revenue streams



Strategic Framework

2022-2027

NEXT STEPS

1. **Board Approval:** The recommended Strategic Framework 2022-2027 will be presented to the Board for approval on March 22, 2022.
2. **Operational Plan:** The Management Team will develop an Operational Plan based on this Framework for review by the Board on April 26, 2022.
3. **Communication Strategy:** The Management Team will develop a strategy to communicate the Strategic Framework to staff and relevant stakeholders.

CONCLUSION

This Strategic Framework 2022-2027 outlines five interconnected Strategic Priorities and Directions that will guide Management and Board decisions and activities over the next five years. These Priorities and Directions leverage organizational expertise and strengths while addressing US' challenges.

It's helpful to remember that the possible Strategies identified will take time to refine and implement. All Strategies cannot be pursued simultaneously in the short term, or in the first year. US' Management Team will determine how to operationalize the Priorities. The Board will monitor progress and pursue its own work related to this Strategic Framework. The Framework should be revisited annually to determine what updates are required.