

**RESOLVE COUNSELLING SERVICES CANADA
YEAR ONE OF 2018-2021 STRATEGIC PLAN**

PRIORITY # 1: BUSINESS DEVELOPMENT— FOCUSED PURSUIT OF MORE REVENUE				
PROGRAM: CREDIT COUNSELLING				
Desired Outcome: To Increase Overall DMP Revenues by 5%				
Action/Strategy	Resources	Responsibilities	Indicators for Monitoring	Indicators of Achievement
<p>Increase the average number of first and second “counselled” appointment times from 124 to 203 per month</p> <p><i>Decrease the number of “no show” appointments</i></p> <p><i>Increase the number of filled appointment time slots</i></p> <p><i>Add additional appointment slots to schedule</i></p>	<p>Team meeting with CCS counsellors to develop action plan</p> <p>Scoreboard monitoring of team activity</p> <p>Dashboard analytics on progress</p>	<p>Oversight and Directives:</p> <ul style="list-style-type: none"> -Debbie -Ena -Jeri -Constance 	<p>November 2018</p> <p>Proposed completion (roll-out) of outlined action items</p>	<p>METRICS:</p> <p>Increased number of first and second “counselled” appointments; fewer no-show appointments; increased number of DMPs</p> <p>OUTCOMES & ACHIEVEMENTS:</p>

<p><i>Stagger appointment times to offer a variety of convenient options to clients</i></p> <p><i>Monitor schedules and open new appointment times as needed</i></p> <p><i>Continue to send appointment reminders and begin asking clients to re-confirm scheduled appointments</i></p> <p><i>Provide on-demand counselling when possible</i></p> <p><i>Call clients who are 5 minutes late for scheduled appointments to confirm they are on-route</i></p> <p><i>Contact no-show clients to re-schedule appointments</i></p>				
<p>Evaluate targeted advertising options for higher income demographics</p>	<p>Define demographics and key personas of higher income households; solicit advertising quotes and prepare marketing budget estimates</p> <p>Determine geographic catchments and costs</p>	<p>Shared duties:</p> <ul style="list-style-type: none"> -Jeri (Ottawa-multiple) -Constance (Whitby) -Tania 	<p>Concern with implementation of targeted advertising initiatives in Year 1/ability to absorb unbudgeted advertising activity</p>	<p>METRICS:</p> <p>Number of new DMPs corresponding to higher income determinants over that of previous terms</p>

	for targeted promotional activity; evaluate marketing media options		<p>August 2018 Market assessment and geographic catchments evaluated; cost estimates completed and submitted to Debbie</p> <p>September 2018 Next steps defined for current year activity or future planning</p>	OUTCOMES & ACHIEVEMENTS:
<p>Pursue paid workshop MOUs with community agencies and public institutions</p> <p>Meet with agency stakeholders for the purpose of soliciting and maintaining new business</p>	<p>Define agencies and institutions:</p> <p>Post-secondary/ educational, hospitals, government</p> <p>Work with community outreach spreadsheets developed by Ottawa (2017) and Belleville (2018) summer students</p>	<p>Shared duties:</p> <ul style="list-style-type: none"> -Debbie (MOU) -Jeri (Ottawa-multiple) -Constance (Whitby) -Staff opportunities for involvement -Tania 	<p>September 2018 Outreach collaterals developed and activity calendar completed</p>	<p>METRICS: Quarterly outreach/activity updates detailing agency/organization type/name, meeting dates, outcomes</p> <p>Number of new DMPs referred through outreach activity</p> <p>OUTCOMES & ACHIEVEMENTS:</p>
<p>Pursue existing EAP contracts for workplace opportunities (i.e. ‘lunch and learns,’ wellness seminars, etc.) on budgeting and debt management subject matter</p>	<p>Obtain existing EAP contract/HR contact information</p> <p>Connect with EAP contracts to propose speaking (workshop) opportunities</p>	<p>Shared duties:</p> <ul style="list-style-type: none"> -Jeri (Ottawa-multiple) -Constance (Whitby) -Staff opportunities for involvement -Tania to assist 	<p>September 2018 EAP client contracts identified per market area, mail merge communication created and ready for release</p>	<p>METRICS: Quarterly activity updates detailing existing EAP contract engagements, workshop dates, outcomes</p>

				<p>Number of new DMPs referred through existing EAP agreements</p> <p>OUTCOMES & ACHIEVEMENTS:</p>
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PROGRAM: EAP/CONSULTING

Desired Outcome: To Lead EAP and Consulting Services in Kingston and Surrounding Area

Action/Strategy	Resources	Responsibilities	Indicators for Monitoring	Indicators of Achievement
<p>Prepare a business and marketing plan for Consulting Services</p> <p>Leverage funding and positioning opportunities within the surrounding area through KEDCO</p>	Existing EAP counselling/program material and performance metrics to inform program descriptions	<p>Tania to develop business and marketing plans</p> <p>Kim</p>	<p>November 2018 Business and marketing plans completed; submitted to KEDCO</p>	<p>METRICS: New opportunities for program positioning in community, increased exposure of services; increased Consulting program revenues</p> <p>OUTCOMES & ACHIEVEMENTS:</p>
<p>Finalize “sales” package for Consulting Services</p>	Re-format existing EAP service descriptions and promo material for positioning within Consulting stream. Develop new copy and design elements as warranted	Tania	<p>August 2018 Final “sales” package proposal. Submit budget for production to Kim for approval</p> <p>August/September 2018 Advance production files to print and web services</p>	<p>METRICS: New Consulting sales packages—printed and uploaded to agency website</p> <p>OUTCOMES & ACHIEVEMENTS:</p>

Actively pursue new bid opportunities for EAP and Consulting programs within the surrounding area	Search and monitor public tender websites (MERX, Biddingo); qualify and pursue opportunities	Tania/Kaveh	Ongoing	METRICS: Number of EAP and Consulting opportunities actively pursued through open bids OUTCOMES & ACHIEVEMENTS:
Actively promote customizable and limited-service EAP and Consulting options to small-medium sized business in the surrounding area	Build on existing mail merge of small-medium sized businesses throughout Belleville-Brockville corridor	Tania/Anne	Ongoing EAP/Consulting services mail-out fulfilled quarterly.	METRICS: Number of EAP and Consulting opportunities pursued and awarded through open bid opportunities OUTCOMES & ACHIEVEMENTS:

PROGRAM: CLINICAL SERVICES

Desired Outcome: To Pursue and Accommodate New Business in Revenue-Generating Programs

Action/Strategy	Resources and Actions	Responsibilities	Indicators for Monitoring	Indicators of Achievement
Increase full-fee client awareness of Individual & Family Counselling and Child & Youth Counselling services	Research demographics and define key personas of higher income demographics	-Kim -Tania (All)	Concern with implementation of targeted advertising initiatives in Year 1/ability to absorb unbudgeted advertising activity	METRICS: Number of new Individual & Family and Child & Youth Counselling clients corresponding to higher income determinants

<p><i>Evaluate advertising options that target higher income demographics</i></p>	<p>Evaluate advertising media options and budget feasibility</p>		<p>September 2018 Advertising recommendations and budget estimates completed and submitted to Kim</p> <p>September 2018 Next steps defined for current year activity or proposed for next budget year</p>	<p>(defined in market assessment) over that of previous terms)</p> <p>OUTCOMES & ACHIEVEMENTS:</p>
<p>Ensure client intake system has enough capacity to respond in a timely and efficient manner to a variety of incoming client needs (to support both full fee and subsidized clients)</p>	<p>Review current capacity limitations of client intake system</p>	<p>Kim</p>	<p>July 2018 Additional 7 hours—intake position hired and trained</p>	<p>METRICS: Number of new full fee Individual & Family and Child & Youth Counselling clients compared to previous term</p> <p>Number of new client leads entering the intake pipeline (captured in “Dash Board” app) compared to previous term</p> <p>OUTCOMES & ACHIEVEMENTS:</p>

PRIORITY #2: FIT FOR THE CHALLENGE—PEOPLE & ORGANIZATIONAL DEVELOPMENT

PROGRAM: AGENCY SERVICES

Desired Outcome: To Excel at People Management

Action/Strategy	Resources and Actions	Responsibilities	Indicators for Monitoring	Indicators of Achievement
<p>Pursue and implement qualified HR management representation and oversight</p>	<p>Existing HR files, policies and procedures, collective bargaining agreement, management insight</p>	<p>Donna</p>	<p>June 2018 2-month contract extended to CHRP-qualified HR Consultant</p> <p>Extension of term or on-going position possible upon further qualification of suitability to role and fulfilment of contract benchmarks</p>	<p>METRICS: Qualified HR agency oversight</p> <p>OUTCOMES & ACHIEVEMENTS:</p>
<p>Address current limitations within HR purview</p> <p><i>Employee orientation system:</i></p> <p><i>Effective employee orientation</i></p> <p><i>Up-to-date orientation packages</i></p> <p><i>Employee terms of reference</i></p> <p><i>Performance appraisals</i></p> <p><i>Training manuals</i></p>	<p>Existing HR files, policies and procedures, collective bargaining agreement, EERC</p>	<p>Shared duties: -HR Consultant -Donna -Support from other managers</p>	<p>November 2018 Proposed completion of outlined action items</p>	<p>METRICS: Improved HR management, evidenced through enhanced efficiencies and available resources</p> <p>OUTCOMES & ACHIEVEMENTS:</p>

<p><i>Timely turnaround on orientation materials and queries</i></p> <p>Collective Bargaining Agreement:</p> <p><i>Agency policy coherence to Collective Bargaining Agreement</i></p> <p>Management Salary Grids</p>				
<p>Reduce risk management concerns of single-person positions</p> <p>Develop staff program support training manuals, inter-program cross-training opportunities</p>	<p>Existing job descriptions, terms of reference, reporting supervisor detail (managers—all)</p>	<p>Shared duties:</p> <ul style="list-style-type: none"> -Donna -HR Consultant -Support from other managers -Risk Management Committee 	<p>January 2019</p> <p>Proposed completion of outlined action items</p>	<p>METRICS:</p> <p>Completed program support training manuals; program support training opportunities scheduled</p> <p>OUTCOMES & ACHIEVEMENTS:</p>

PRIORITY # 2: FIT FOR THE CHALLENGE—PEOPLE & ORGANIZATIONAL DEVELOPMENT				
PROGRAM: CREDIT COUNSELLING				
Desired Outcome: To Excel at People Management				
Action/Strategy	Resources	Responsibilities	Indicators for Monitoring	Indicators of Achievement
<p>Engage team members on collective actions and</p>	<p>CCS Management meetings with staff to discuss goals and</p>	<p>Shared duties:</p> <ul style="list-style-type: none"> -Debbie -Ena -Jeri 	<p>August 2018</p> <p>Progress/goal scoreboards in place</p>	<p>METRICS:</p> <p>“Strategic Plan— Priority 1 and 4” staff achievement goals</p>

department goals; enact scoreboards	review progress via scoreboard tool	-Constance	and updated at CCS meetings.	measured against scoreboard objectives OUTCOMES & ACHIEVEMENTS:
Develop program support manuals	Existing program support materials	Shared duties: -HR Consultant -Debbie -Jeri -Constance	November 2018 Program support manuals completed	METRICS: More encompassing training for new staff members; enhanced awareness of other program streams (cross-training)
Provide customer service training for staff	Grant application submitted for CCS staff customer service training	Debbie	Funding outcome Pending Grant application submitted for CCS staff customer service training	Funding support awarded, training scheduled. OUTCOMES & ACHIEVEMENTS:

PRIORITY #2: FIT FOR THE CHALLENGE—PEOPLE & ORGANIZATIONAL DEVELOPMENT

PROGRAM: EAP/CONSULTING & CLINICAL PROGRAMS

Desired Outcome: To Excel at People Management

Action/Strategy	Resources	Responsibilities	Indicators for Monitoring	Indicators of Achievement
Develop program support manuals	Existing program support materials	Shared duties: -HR Consultant -Kaveh -Kim	November 2018 Program support manuals completed	METRICS: More encompassing approach to new staff training; enhanced inter-program awareness

Develop cross-training opportunities across other internal program streams	Newly-developed program support manuals	Shared duties: -Kim -Kaveh -HR Consultant	January 2019 Cross-training system established	Inter-program awareness and functionality OUTCOMES & ACHIEVEMENTS:
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PRIORITY# 3: EQUIPPED FOR THE CHALLENGE—INFRASTRUCTURE & TECHNOLOGY

PROGRAM: AGENCY SERVICES

Desired Outcome: To Engage in Effective Future Resource Planning

Action/Strategy	Resources	Responsibilities	Indicators for Monitoring	Indicators of Achievement
<p>Collaborate with IT Business Partner (Computer Depot) on development of 3-year IT Infrastructure/ Equipment Refresh Plan</p> <p><i>Review of any Fair Market Value leases coming due in the next 3 years</i></p> <p><i>Audit of owned computer and server equipment for refresh—specifically Credit Counselling fax server and Clinical laptops</i></p> <p><i>Review of printing infrastructure across Credit Counselling offices</i></p>	<p>Agency and Computer Depot inventory records, leasehold agreements, warranty specifications, amortization schedules, etc.</p>	<p>-Tania -Computer Depot</p>	<p>October 2018 Comprehensive audit of IT maintenance replacement requirements through year 2021 completed</p>	<p>METRICS: Comprehensive understanding of short-term future IT and equipment resource needs</p> <p>OUTCOMES & ACHIEVEMENTS:</p>

<p><i>Review of server equipment warranty status/compared to lease term to determine what warranty top-ups are required</i></p> <p><i>Renew anti-virus subscriptions across agency</i></p> <p><i>Warranty extensions of critical network equipment/firewalls</i></p>			<p>July 2018 Renewal complete</p> <p>Sept 2018 Warranty extensions on servers finalized</p>	
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PRIORITY# 3: EQUIPPED FOR THE CHALLENGE— INFRASTRUCTURE & TECHNOLOGY

PROGRAM: CREDIT COUNSELLING

Desired Outcome: To Participate in Smarter Use of Existing Technologies

Action/Strategy	Resources	Responsibilities	Indicators for Monitoring	Indicators of Achievement
Enhance user experience and output efficiencies with the Online Assessment tool	Existing Online Assessment form	<p>Proposals and implementation: Tammy/Shane O’Quinn</p> <p>Oversight and directives: -Debbie -Ena -Jeri -Constance</p>	June/July 2018 Proposed Implementation	<p>METRICS: Revised online assessment tool live</p> <p>OUTCOMES & ACHIEVEMENTS:</p>
Explore enhanced customer experience tools and applications	Shane O’Quinn assessment	<p>Proposals and implementation:</p> <p>-Tammy/Shane O’Quinn</p>	August 2018 Proposals/cost estimates reviewed; evaluated	METRICS: Increased number of new client leads entering the sales

<p><i>After hours call service</i></p> <p><i>Appointment reminder software for text/email notifications</i></p> <p><i>Digital client satisfactory surveys and client follow-up (post-appointment, bi-annually, annually)</i></p>		<p>-David Schmidt Oversight and directives:</p> <p>-Debbie -Ena -Jeri -Constance</p>	<p>Concern with implementation of initiatives in Year 1/ability to absorb unbudgeted tools and applications</p>	<p>pipeline/no missed calls (captured in dashboard app); increased DMP conversions/new client leads</p> <p>OUTCOMES & ACHIEVEMENTS:</p>
<p>Implement Credit Counselling “Dash Board” for real-time, analytic insight into revenue generating progress goals</p>	<p>Assessment/development by Shane O’Quinn</p>	<p>Proposals and implementation: Tammy/Shane O’Quinn</p> <p>Oversight and directives: Debbie</p>	<p>July/August 2018 Dashboard implemented</p>	<p>METRICS: Real-time analytics for size/number of new DMPs</p> <p>OUTCOMES & ACHIEVEMENTS:</p>
<p>Better utilize Bell Total Connect platform for internal efficiencies and improved customer service</p> <p>Staff training on system features and capabilities</p>	<p>Training by David Schmidt</p>	<p>Training module development/staff training: David Schmidt</p> <p>Oversight and directives: -Debbie -Ena</p>	<p>September 2018 Training module developed and staff training scheduled</p>	<p>METRICS: Staff better informed of Bell Total Connect system capabilities; increase user capabilities, ROI (technology spend)</p> <p>OUTCOMES & ACHIEVEMENTS:</p>

PRIORITY# 3: EQUIPPED FOR THE CHALLENGE—INFRASTRUCTURE & TECHNOLOGY

PROGRAM: CLINICAL & EAP/CONSULTING

Desired Outcome: To Participate in Smarter Use of Current Technologies

Action/Strategy	Resources	Responsibilities	Indicators for Monitoring	Indicators of Achievement
<p>Generate and analyze client feedback (pre/post) to become better informed of client needs and areas for service delivery improvement</p>	<p>Pre/Post Client Questionnaire</p> <p>Client Satisfaction Survey</p>	<p>Kim</p>	<p>December 2018 System developed and implemented</p>	<p>METRICS: Service improvement opportunity—review and assessment of data findings as part of Clinical program staff meetings</p> <p>OUTCOMES & ACHIEVEMENTS:</p>
<p>Strongly incorporate webinar technology as a tool to deliver EAP and Consulting wellness workshops</p> <p><i>Provide counsellor training on webinar technology</i></p>	<p>Existing webinar platform, program marketing materials</p>	<p>Shared duties: -Tania -Kaveh -Kim -Staff (webinar training)</p>	<p>January 2019 EAP and Consulting counsellors webinar training scheduled</p>	<p>METRICS: Increased number of EAP and Consulting clients engaging in webinar sessions, decreased counsellor/affiliate travel time and expense</p> <p>OUTCOMES & ACHIEVEMENTS:</p>

<p>Develop website profiles showcasing agency expertise and capability in workplace mental health issues</p>	<p>Marketing collaterals and descriptive program materials. Kim may have additional resource materials</p>	<p>Shared duties: -Tania -Tammy (Shane O'Quinn)</p>	<p>September 2019 Profiles developed and posted to website; social media</p>	<p>METRICS: Increased public awareness of agency expertise and leadership in mental health issues</p> <p>OUTCOMES & ACHIEVEMENTS:</p>
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PRIORITY# 4: COMPETITIVE, SUSTAINABLE BUSINESS/FINANCIAL MODEL

PROGRAM: AGENCY SERVICES

Desired Outcome: To Determine the Financial Viability of Agency Revenue-Generating Programs

Action/Strategy	Resources	Responsibilities	Indicators for Monitoring	Indicators of Achievement
<p>Pursue external consulting services to review design and delivery elements of revenue-generating programs</p> <p><i>Year 1-2:</i> -Credit Counselling -Individual & Family Counselling -Child & Youth Counselling</p> <p><i>Year 2-3:</i> -EAP/Consulting</p>	<p>Program files Financial reports External environmental screenings; etc.</p>	<p>Donna to commission external reviewer</p>	<p>TBD—as per external reviewer proposal</p>	<p>TBD—as per external reviewer proposal</p>

<p>Restructure Finance Management role</p> <p><i>Move to an outsourced back-office integration model for agency finance management; with internal accounting clerk support</i></p>	<p>Agency financial resources</p>	<p>Donna</p>	<p>August 2018 Procurement completed; purchase of service contract advanced</p>	<p>TBD</p>
<p>Cultivate an operational platform for the Fundraising Committee; plan forward fundraising activities for the year ahead</p>	<p>Fundraising Committee</p>	<p>Shared duties:</p> <ul style="list-style-type: none"> -Fundraising Committee -Tania 	<p>June 2018 Standing item for <i>Fundraising</i> added to monthly staff meetings</p> <p>Request for two staff member volunteers (one each from Clinical and Credit Counselling) to join Fundraising Committee</p> <p>June 2018 Calendar of year-ahead fundraising activities completed, including:</p> <ul style="list-style-type: none"> -Giving Tuesday (November) -Winter season send-out (December) -Family Day (February) 	<p>METRICS: Increased staff awareness, of agency fundraising initiatives</p> <p>Stronger pre-planning, roll-out of fundraising campaigns</p> <p>OUTCOMES & ACHIEVEMENTS:</p>

PRIORITY# 4: COMPETITIVE, SUSTAINABLE BUSINESS/FINANCIAL MODEL

PROGRAM: CREDIT COUNSELLING

Desired Outcome: To Maintain the Current Number of DMPs

Action/Strategy	Resources	Responsibilities	Indicators for Monitoring	Indicators of Achievement
<p>Refresh sales scripts, fostering a stronger counsellor call-to-action:</p> <p><i>Encourage clients to try a DMP option first before other alternatives (bankruptcy, consumer proposal, etc.)</i></p> <p><i>Stronger move to sign client DMP agreements during first appointment session</i></p>	<p>Grant application submitted for CCS staff customer service/sales training</p> <p>Team meeting CCS counsellors</p> <p>Progress scoreboard</p>	<p>Shared duties:</p> <ul style="list-style-type: none"> -Debbie -Ena -Jeri -Constance 	<p>Funding outcome Pending</p> <p>Grant application submitted for CCS staff customer service training</p>	<p>METRICS:</p> <p>Funding support awarded, training scheduled</p> <p>Increased number of DMPs opened and decreased number closed; tracked and measured in Dashboard analytic</p> <p>OUTCOMES & ACHIEVEMENTS:</p>
<p>Reduce the overall number of client files closed unsuccessfully</p>	<p>CCS Counsellor training in client relationship management</p> <p>Staff training on how to troubleshoot Creditor Relations issues</p> <p>Dashboard analytic</p>	<p>Shared duties:</p> <ul style="list-style-type: none"> -Debbie -Ena -Jeri -Constance -Shane O'Quinn/Tammy (dashboard) 	<p>January 2019</p> <p>Staff training on troubleshooting Creditor Relations issue scheduled</p>	<p>METRICS</p> <p>Reduced number of client files that have been closed unsuccessfully; tracked and measured in dashboard analytic</p> <p>OUTCOMES & ACHIEVEMENTS:</p>

PRIORITY# 4: COMPETITIVE, SUSTAINABLE BUSINESS/FINANCIAL MODEL

PROGRAM: CLINICAL & EAP/CONSULTING

Desired Outcome: To Enact a Better System for Understanding Revenues and Program Costs

Action/Strategy	Resources	Responsibilities	Indicators for Monitoring	Indicators of Achievement
<p>Develop a standard suite of marketing and proposal collaterals for EAP and Consulting bid opportunities</p> <p><i>Presentation/proposal package</i></p> <p><i>Program descriptions</i></p>	<p>Current and past EAP contract materials, newly re-branded FSEAP templates</p>	<p>Tania</p>	<p>October 2018 Standard templates/proposal package completed</p>	<p>METRICS: Standard suite of updated, accessible templates and collaterals—improving time efficiencies on proposal preparation</p> <p>OUTCOMES & ACHIEVEMENTS:</p>
<p>Conduct a cost-revenue analysis of Clinical program streams</p> <p><i>Individual & Family Counselling</i></p> <p><i>Child & Youth Counselling</i></p>	<p>(May be completed in part by External Consultant review process)</p>	<p>Shared duties: -Kim -External Consultant/Program Review</p>	<p>TBD</p>	<p>TBD</p>
<p>Assess existing metrics in revenue-generating programs for better understanding of revenue break-even points and funding thresholds (United Way)</p>	<p>Shalini (Accounting graduate) to develop spreadsheet for informing funding break-</p>	<p>Shalini to develop algorithms/spreadsheets to inform Kim</p>	<p>April 2018 Spreadsheet developed/provided to Kim with Individual & Family Counselling and Child & Youth Counselling break-even points and number of</p>	<p>METRICS: Shorter wait lists for full fee counselling (business growth area)</p> <p>Improved monthly revenues over costs in</p>

	even points in revenue-generating programs		required full-fee appointment slot	Individual & Family Counselling and Child & Youth Counselling programs OUTCOMES & ACHIEVEMENTS:
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