

CDCD

**Community Development
Council Durham**

Building Strength in Our Community Since 1970



STRATEGIC PLAN 2018 – 2023

Prepared for CDCD Board of Directors
Approved March 28, 2018

The Baker Group Inc.
Leadership | Strategy | Communications | Philanthropy



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EXECUTIVE SUMMARY

Community Development Council Durham (CDCD) is an independent, not-for-profit social planning organization that has been working to enhance the quality of life for individuals, families, and communities in Durham Region for more than 45 years.

It organizes and implements a variety of research, community development, and social planning initiatives and administers and delivers social service programs.

The Baker Group Inc. (BGI) was engaged by CDCD to deliver a Strategic Plan to assist in the development of a three-year strategy focusing on the organization's principles, services, values, and vision for the future.

This engagement encompassed the:

- Design and execution of a strategic visioning and comprehensive planning process.
- Development of an actionable strategic plan, including an itemized projected budget for its implementation.
- Development of recommendations regarding the plan's implementation and support structure.
- Use of appropriate communication strategies and tactics.
- Adherence to the agreed schedule.
- Provision of ongoing feedback to ensure the organization is on track.

The process to develop this plan was as important as the final plan produced. As such the Planning Process is described in Appendix 1. Of note, the Board changed the horizon of this plan to five-years given the scope of work to be completed.

This document presents Strategic Directions that are designed to inform CDCD's annual operating plans and budgets for the next 5-year period. At the onset of this project, the Board and Management advised that the Vision, Mission, and Principles approved in the previous strategic plan would be maintained. BGI is not recommending any changes to these.

Based on the planning process undertaken, the following Strategic Directions are recommended:

- Position CDCD as the hub for effective Social Planning, Community Development, and Research in Durham Region
- Excellence in Governance
- Build Brand and Reputation
- Enhance Community Collaboration
- Diversify Funding
- Optimize Resources

STRATEGIC DIRECTIONS

CDCD's stated Vision is “an equitable, inclusive and socially just community that is committed to meaningful participation for all”, with the associated Mission Statement being “to identify regional community development needs and inform relevant policy and programming, while supporting and delivering effective services.”

Guiding Principles:

GUIDING PRINCIPLES:

- In the enhancement and protection of social and economic rights and freedoms;
- That innovative responses to community needs require collaborative thinking and practice;
- That we must uphold and embody equity, inclusivity and social justice;
- That meaningful participation is defined by both the community and the individual, and that each person should be equipped and supported with the tools and resources to enable this participation, and
- In sustainable solutions to community issues and concerns.

These Strategic Directions were developed following facilitated working sessions with the Board of Directors, the Management Team, and the Staff Team. This was in addition to meetings with individual community stakeholders as well as a thorough document review and environmental scan. These Strategic Directions will serve to define the annual Operating Plan and Budget as that is the mechanism to implement the strategy.

Position CDCD as the hub for effective Social Planning, Community Development, and Research in Durham Region

CDCD is positioned to lead in Durham Region and serve as the hub for social planning. Key projects like the Living Wage Study as well as Point-in-Time Count are examples of the type of projects Durham needs CDCD to spearhead. **The time to act is now.**

OBJECTIVE

1

Building on CDCD's pivotal role in social planning in identifying community trends, partner with Regional Municipality of Durham and associated municipalities to develop and deliver a true social planning council and community development for the Region.

OBJECTIVE

2

Promote CDCD as the thought leader in Durham Region in social planning and research through partnerships with community entities such as academic, healthcare and government to enhance community wellbeing.

OBJECTIVE

3

Build on past successes of incubating new programs to meet emerging needs by formalizing a process for capacity building of innovative or emerging community programs and non-profits.

Excellence in Governance

Create an exemplary Board Governance model that will serve the organization and its clients in advancing the CDCD Vision and Mission for years to come.

OBJECTIVE 1 Conduct a review of the by-laws to modernize and update language to eliminate ambiguity and inconsistency as identified in the Environmental Scan, and to address the issue of Membership and its role in the CDCD governance construct.

OBJECTIVE 2 Develop a Board Governance Manual that operationalizes the by-laws and specifically defines the Board role in areas including, but not limited to, strategic planning, delegation of authority to the Executive Director (including performance metrics and evaluation), fiduciary duty, decision-making guidelines, code of conduct, and confidentiality.

OBJECTIVE 3 Implement a Board Recruitment and Succession Planning process to ensure the Board reflects the community, has the proper complement of Directors and key leadership succession in place that includes a Skills Matrix to ensure there is specialist and community representation in place to best advance CDCD's Mission.

OBJECTIVE 4 Invest in Board training and professional development; and create a comprehensive Board Orientation program and Board evaluation process.

OBJECTIVE 5 Implement a process to review Board and organizational Policies in a regular and timely fashion to ensure relevance and consistency.

OBJECTIVE 6 Enhance the profile of the Board with the CDCD staff while respecting role of the Executive Director.

Build Brand and Reputation

CDCD is known by its clients, funding agencies, and elected officials; as well as individuals planning to immigrate to Canada.

The community at large has little knowledge of CDCD, but may have some awareness of its program offerings (without knowing the affiliation with CDCD). Management has done a very good job building relationships with community leaders and funders by way of 1:1 meetings and networking. The opportunity exists to invest budget and time in branding and awareness building.

Strengthening the CDCD brand will build a stronger and more vibrant entity that supports this new strategy. Branding is defined as the perception the public have about a product or service. It is what individuals think of when they hear the entity's name or see its image. It can involve a new visual identity or logo. But it is so much more than that.

OBJECTIVE 1

Develop and implement a comprehensive communications plan and branding process designed to:

- Build a compelling vision statement that will help to align stakeholders – internal and external – toward a unified goal.
- Create a brand positioning statement that will clearly distinguish CDCD in the community.
- Home in on your ideal stakeholders/customers by service or offer so that you can connect with and market to them more effectively and efficiently.
- Identify and craft your key messages to lead impactful and persuasive conversations.
- Define where your organization holds an advantage in the market, and to help you strengthen your positioning so your success is sustainable over time and when faced with competitors in your market space.

Enhance Community Collaboration

Partnerships within Durham Region are a strength CDCD has built up over decades of work. This continues to be the case today and is an area that CDCD leadership must continue to invest in going forward. This strategic direction is an extension of and will be informed by the communications plan.

OBJECTIVE 1 Align business units/programs with the strategic priorities of government and granting funding bodies to optimize support.

OBJECTIVE 2 Explore social enterprise opportunities in order to implement programming designed to fund and address the critical social service issues that are the purview of CDCD.

OBJECTIVE 3 Increase visibility to all eight Durham Region municipalities to better position CDCD as the hub for effective Social Planning, Community Development, and Research in Durham Region.

OBJECTIVE 4 Begin working with Durham Region immediately to develop plans and a funding model to establish CDCD as the hub for Social Planning, Community Development, and Research across Durham Region.

Diversify Funding

There is a perception that CDCD is well resourced for the programs currently being offered. While this is mostly true, it is important to remain ahead of the curve, the will of government, and other granting bodies to ensure programs are being funded adequately to meet existing and emerging community needs.

Funding is at the core in advancing the previously discussed strategic directions. Ongoing and varied funding must be the goal.

OBJECTIVE 1 Explore social enterprise opportunities in order to implement programming designed to fund and address the critical social service issues that are the purview of CDCD.

OBJECTIVE 2 Explore the feasibility of creating a culture of philanthropy by developing fundraising capacity to seek private donations for program funding.

OBJECTIVE 3 Explore opportunities to develop program offerings on a fee-for-service model.

OBJECTIVE 4 Remain focused on key Federal, Provincial, and Regional/Municipal relationships to maintain and to advocate for increased funding.

Optimize Resources

Operations is the backbone of any organization.

It is the responsibility of management, and encompasses annual planning, financial management, human resources, information technology, office management, capital planning, and facilities management. CDCD's operations are on a solid footing, and the staff are the agency's greatest strength.

OBJECTIVE 1 Become an employer of choice in Durham Region by investing in staff in order to recruit and to retain the best team possible.

OBJECTIVE 2 Fully engage the Management Team in the implementation of the Strategic Plan to improve results.

OBJECTIVE 3 Implement a Management led operational planning cycle that is defined by the Strategic Plan that focuses on a 5-year horizon and articulates specific measurements and metrics for success.

OBJECTIVE 4 Create a programmatic outreach model that enables CDCD services to be accessed in more remote areas by way of satellite offices or mobile service delivery.

Implementation

Further analysis by Management is required to fully cost the implementation and operationalization of the Strategic Plan. Elements will need to be prioritized over a horizon of 1-5 years and choices need to be made. **Additional funding will be required from new or enhanced sources.**

Management, in developing its annual operating plans, are well positioned to determine the specifics for budgeting.



APPENDIX 1 – PLANNING PROCESS

The Baker Group Inc. (BGI) was engaged by Community Development Council Durham (CDCD) to deliver a Strategic Plan to assist in the development of a three-year strategy focusing on the organization’s principles, services, values, and vision for the future. During the process, the Board changed the horizon to five years given the scope of work to be completed. The planning process involved “unpacking” the organization to examine component parts like its structure, systems, and strategies in order to identify areas of strength, as well as areas requiring intervention and strategic consideration.

The engagement began on June 1, 2017.

Bob Baker was the lead on this project, and was joined Derek Tustin as Research Associate.

BGI followed a three-phase process to fulfill the mandate of this strategic planning engagement:



Phase 1

On June 5, 2017 BGI held a Project Design meeting with the strategy working group to confirm:

- key goals of this project
- deliverables
- timeline (agreed to December 2017 Strategic Plan delivery date)
- document review
- stakeholder consultations

The project launched into Phase 2 once the Project Design was set.

Phase 2

During this phase, we conducted a review and evaluated the outcomes of current and past plans, conducted a document review and environmental scan, and facilitated working sessions with the Board, Management, and the Staff Team.

The environmental scan encompassed the document review and has been provided under separate cover to the Board. As discussed, our approach is holistic; we examined the entire entity to provide customized advice that leads to a realistic and workable plan.

This planning process engaged critical internal and external stakeholders, including but not limited to: Board of Directors, employees, community and funding partners.

Working sessions were held with the Management team (August 23) and the Board of Directors (August 29) which were future focused and provided a good foundation for perspectives going forward. The themes that developed from both groups were complementary. On November 3, 2017, BGI conducted a SOAR (*Strengths – Opportunities – Aspirations – Results*) exercise, attended by 31 CDCD staff, to gather critical input to the process.

BGI also conducted individual interviews in September and October with key external stakeholders identified by CDCD:

- Audrey Andrews – Manager, Strategic Partnerships and Initiatives, Regional Municipality of Durham.
- Scott Aquanno – Faculty of Social Science and Humanities, UOIT.
- Peter Clutterbuck – Social Planning Network of Ontario.
- Lorne Coe – Member of Provincial Parliament, Whitby.
- John Connolly – Director, Housing and Diana Chappell – Program Manager, Region of Durham, Housing Service Division.
- Debbie Douglas – Executive Director, OCASI (Ontario Council of Agencies Serving Immigrants).
- Barb Fannin – Community Investment Coordinator, United Way Durham.
- Barbara Oram – Partnership Coordinator, Durham District School Board.

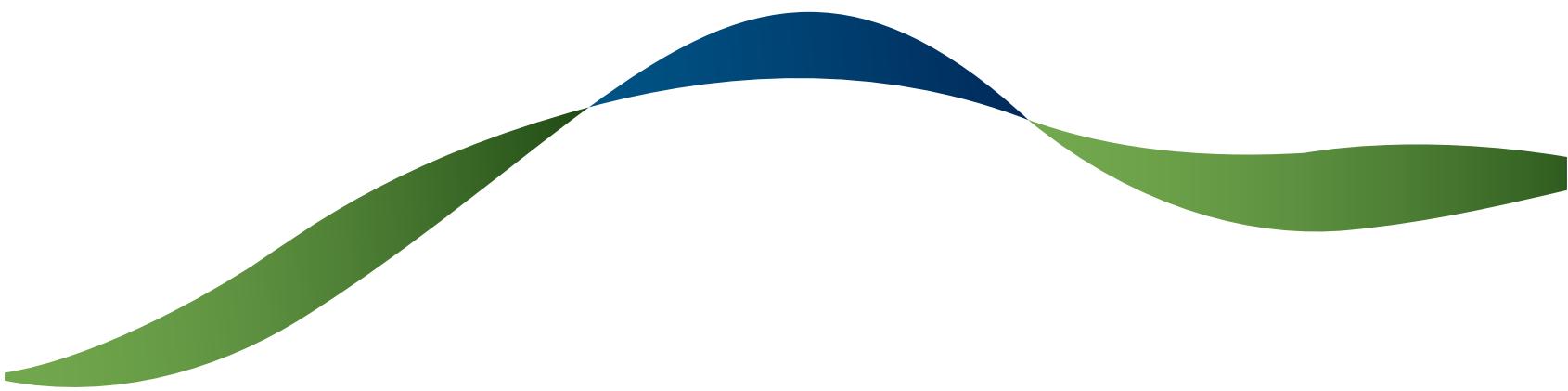
Further, throughout the planning process, BGI provided status updates to the Board via the Executive Director. This was in addition to maintaining regular contact with the Executive Director throughout Phase 2. All aspects of Phase 2 formed the components that led to the recommendations in CDCD's Strategic Plan.

Phase 3

Phase 3 is the development and delivery of the Strategic Plan.

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