

Canadian Mental Health Association – Calgary Region

2021 - 2025 Strategic Plan

March 2021

Table of Contents

Executive Summary	1
The Approach	2
Mission, Vision, Values	2
Current Mission	2
Proposed Mission	2
National Vision Statement	2
Values	2
Environmental Scan & Stakeholder Engagement	3
Ideal Future State	4
Obstacles	5
Supporting Strategies	6
Supporting Strategy #1: Mental Health Gateway	6
1. Communicate a consistent value proposition	6
2. Confirm and communicate core services and identify areas for innovation	6
Supporting Strategy #2: Inclusive Integrated Client-Focused Model	7
3. Implement inclusive, integrated programs	7
Supporting Strategy #3: A Role Model Employer	7
4. Implement multi-directional, transparent and intentional communication	7
5. Implement a collaborative and strategic Human Resource Framework	7
6. Build and celebrate a wellness-oriented culture based on diversity, equity and inclusion	7
Supporting Strategy #4: Preferred Collaborative Partner	8
7. Develop and evaluate partnerships with intent	8
Supporting Strategy #5: Sustainable, Evidence-Based Funding Model	8
8. Communicate CMHA Calgary's social value, community impact, and demonstrate fiscal responsibility	8
CMHA Calgary Strategy Map	9
Relationship Between Ideal Future State, Supporting Strategies and Success Indicators	10
Strategy at a Glance	12
Appendix 1: Strategies and Timing	13
Appendix 2: The Process	14
Appendix 3: Transformational Strategy Methodology	15

Executive Summary

As Calgary's leading community mental health agency*, Canadian Mental Health Association – Calgary Region (CMHA Calgary) helps Calgarians by reducing the impact of mental illness and addiction in our community. As our city emerges from the pandemic, many among us are facing the social, economic, and emotional consequences of a prolonged public health emergency. CMHA Calgary will play a critical role in addressing the effects of the pandemic.

CMHA Calgary faces its own challenges. Demand for our services is increasing and the pandemic restricts how we serve our community members. Technology offers new avenues for service delivery and is also disrupting traditional treatment models. Donors and government are eager to help, and competition among not-for-profits is high with the economic fallout.

Against this challenging backdrop, our 2021 - 2025 Strategic Plan will set CMHA Calgary up for success in serving community members.

As a client-focused organization, we will remain an important gateway for our clients as they navigate the complexities of their mental health journey. We will promote peer support models and reduce the stigma around mental health as we serve a clientele growing in size and diversity.

In our efforts to become a role model employer, we will offer our employees a wellness-oriented culture based on diversity, equity, and inclusion. We will introduce strategies to develop, engage, and retain our team members.

We will continue to build on our reputation for innovation by partnering with organizations that help us fulfill our mission. Together, we will prove value for our community through evidence-based models, fiscal responsibility, partnerships, and an entrepreneurial mindset.

**In all places throughout this document mental health refers to mental health and addictions.*

The Approach

In January 2020, CMHA Calgary's Board of Directors and the Executive Team developed a new strategic plan, but COVID-19 took hold before it could be finalized. When the new Executive Director joined CMHA Calgary in mid-2020, the executive leadership team was invited to refresh the strategy in face of the new demands presented by the pandemic.

Phases of the strategic planning process included:



Mission, Vision, Values

The first step in the strategic planning process was to look at CMHA Calgary's mission and values. However, CMHA National is also revisiting the national mission and values. A detailed review of CMHA Calgary's Mission and Vision is on pause until National has completed its work.

Current Mission

- A leader in reducing the impact of mental disorders and addiction in promoting mental health, wellness and recovery through community-based services.

Proposed Mission

- Promoting resilient and mentally healthy communities through wellness and recovery-oriented supports and services.

National Vision Statement

- Mentally healthy people in a healthy society.

Values

- Respect, recovery, empowerment, self-awareness, partnership, excellence, client-focused, and teamwork

Environmental Scan & Stakeholder Engagement

The environmental scan covered four topics and identified high-level themes that include:

- **Community mental health:** COVID-19 is amplifying the mental health crisis, but experts say it is also creating opportunities to improve services.
- **E-mental health:** Growth is exponential, and there are many different options available to clients. Careful thought is needed to determine how to best navigate the field.
- **Philanthropy:** COVID-19 has disrupted traditional charity relationships; “mental health” is now a focus in many other not-for-profits.
- **Diversity, equity, and inclusion:** There are unique and critical opportunities with accompanying challenges for service delivery.

Stakeholder engagement included partners, funders, board members, clients, and staff and identified several high-level themes:

- CMHA Calgary is viewed as an important sector leader and has an opportunity to expand its vision for partners.
- Stakeholders also indicated the importance of nurturing partnerships and bringing in other voices.
- There is a need to tend to the people within CMHA Calgary.
- The community-based mental health model is powerful and has a powerful impact on clients served which in turn positively impacts the community.
- Mental health is no longer a boutique problem, it’s a “Walmart problem” that is attracting more funding and more competition among agencies.
- Many routes for innovation are possible and there is a tension to be held between focus and expanding service delivery, as well as rethinking service delivery channels.

These findings informed the strategic planning workshops.

Ideal Future State

An ideal future state is a description of the desired future. It answers the question, “What do we want to see in place in five years' time, because of our efforts?” CMHA Calgary identified a future state that included:

A mental health gateway. CMHA Calgary serves as a gateway to wellness and community for people with mild to moderate mental health concerns.

An inclusive, integrated client-focused model. We are the go-to organization for community mental health, inclusive and supportive of our clients’ individual mental health journeys. Peer models, built on prevention and promotion, are integrated into all of our services. We have reduced mental health stigma in the ways we connect with people.

A role model employer. Our inclusive, engaging, wellness-oriented culture is built on attraction, retention, and leadership development strategies. We are an employer of choice.

A preferred, collaborative partner. We co-lead collaboration across the continuum of community mental health services by forming intentional partnerships to increase impact and diversify our reach.

Sustainable, evidence-based funding model. Our programs and services attract funding because they demonstrate impactful change for our clients and communities.

Obstacles

Obstacles are a social reality that creates pain or paralysis and when identified become a doorway to change. They are often ‘the unmentionables’ in every conversation and are the shadow that intervenes between what we want to do and getting it done.

They are real, tangible, present states that are often legacies of previous structures, strategies, decisions. They are not about blame. Obstacles answer the question, “What is blocking us from moving towards our desired future state?”

At CMHA Calgary, we are blocked from our desired future state by:

Unclear strategy that prevents effective partnerships. This obstacle acknowledges gaps in understanding between CMHA Calgary and the community, inconsistent marketing, and challenges breaking down mental health stigma. It raises the question of whether CMHA Calgary is really interested in partnering and identifies poor and fractured partnerships.

Weak trust and communication prevents the development of a supportive culture and limits the ability to attract and retain a high-quality workforce. Trust and communication, fear and insecurity are identified as factors contributing to turnover, (low) staff engagement and morale which impacts the organization’s brand. The obstacle also identifies a missing operational policy framework.

Ad-hoc prioritization and decision-making prevents us from saying yes or no to opportunities and from achieving our goals. Unclear scope of vision and strategy and inconsistencies around what is important combined with a fear of missing out leads to workload management issues, a shortage of resources (people, money, tools, training), raising the question of whether there are too many programs. COVID-19 is aggravating the situation. Individualized programs cost more.

Unclear strategy prevents us from communicating a clear value proposition and confuses balanced funding. This obstacle recognizes the challenge of funder-imposed limitations, uncertain funding environments, the importance of sustainable funding and the challenges of the current economic climate. It acknowledges that mental health is generic and attracting more players, but that funding is not meeting the needs of society. A lack of cohesive provincial CMHA vision for funding priorities may limit CMHA Calgary’s ability to try new things.

Hiring and training process is not addressing skill gaps and blocks us from being efficient. The obstacle identified missing IT skills amongst staff such as outlook, staff anxiety using IT tools, and gaps in the ability to use data in day-to-day work.

Staff are disconnected from the strategic direction of the organization, and it blocks effective integrated program delivery and a sense of belonging. This obstacle indicates that CMHA Calgary staff

are working as individuals rather than a collective group and may hold a personal focus rather than client or program focus. It identifies silos and organizational structures as obstacles and recognizes that without focus, staff do what is comfortable for them. It also raised the consideration that consensus may not always be possible.

Supporting Strategies

Strategy emerges from the analysis of the tension between the desired future state and the current reality. Strategy sets the direction for moving toward something while allowing a way to discover the real nature of the path along the way.

Strategic frameworks give shape to how the path can be discovered. Not every strategy is bold and new. We apply strategies to create new ways of working and new areas of focus for our organization.

Strategies answer the question “What can we do to address our obstacles and move towards the desired future state?” and are clustered into supporting strategies. Supporting strategies that will move CMHA Calgary towards its vision include:

Supporting Strategy #1: Mental Health Gateway

1. Communicate a consistent value proposition

We will clarify CMHA Calgary’s core value proposition and promote the brand clearly so that funders, partners, clients, and team members understand what CMHA Calgary offers and staff can identify their role in delivering the value proposition. We will use metrics to articulate the value of CMHA Calgary’s services to help funders, partners, and clients to understand CMHA Calgary’s offering and enable staff to create social value through their work.

2. Confirm and communicate core services and identify areas for innovation

We will define core services and create a decision-making matrix that evaluates opportunities for partnerships. We will link innovation to our value proposition along with core services. Our clarity around core and innovative services simplifies connections with funders.

Supporting Strategy #2: Inclusive Integrated Client-Focused Model

3. Implement inclusive, integrated programs

CMHA Calgary will review and incorporate peer models across all its programs. Programs will be evaluated according to the social value they create, how they contribute to inclusivity, and whether they support CMHA Calgary's 'value add' in the community.

Supporting Strategy #3: A Role Model Employer

4. Implement multi-directional, transparent and intentional communication

This strategy is rooted in the recognition that communications and information sharing inside and outside of the organization is critical. CMHA Calgary will implement an intentional, transparent, communications strategy to ensure that team members understand how they connect to the organization.

5. Implement a collaborative and strategic Human Resource Framework

CMHA Calgary will commit to creating a comprehensive Human Resource Framework that will build a strong Human Resources structure that supports all organizational areas and long-term business objectives. This will ultimately result in creating a Human Resource strategy that will set the direction for all the key areas of Human Resources, including workforce and talent planning, selection and retention, managing employee recognition and engagement, and a transparent compensation management system. This will be supported by an across-the-board performance development and management program for improving employee overall performance and to assist managers and employees identify areas for improvement, set SMART (specific, measurable, achievable, relevant and time-bound) goals, measure progress, and outline a strategy to achieve those objectives. The process will include regular feedback through employee engagement surveys as well as coaching and development opportunities to resolve performance gaps and support employee growth. It will also create Human Resource performance metrics to help track human capital and measure how effective our Human Resource programs and initiatives are. CMHA Calgary will implement a decision-making authority framework for Finance and Human Resource. Processes and procedures will be transparent, consistent, and clearly articulated.

6. Build and celebrate a wellness-oriented culture based on diversity, equity and inclusion

To create greater cohesiveness, CMHA Calgary will build and enhance relationships inside the organization, with the Board, and external partners. The key to this strategy is defining culture and setting expectations, providing open, transparent and honest feedback, and celebrating success. Some of the activities contemplated under this strategy are leadership development, team building including

the development of a team charter, regular communications between staff, leadership and the board, as well as staffing models that support team building across programs.

Supporting Strategy #4: Preferred Collaborative Partner

7. Develop and evaluate partnerships with intent

CMHA Calgary will develop a partnership engagement framework to help us evaluate existing and new partnership(s) opportunities.

Supporting Strategy #5: Sustainable, Evidence-Based Funding Model

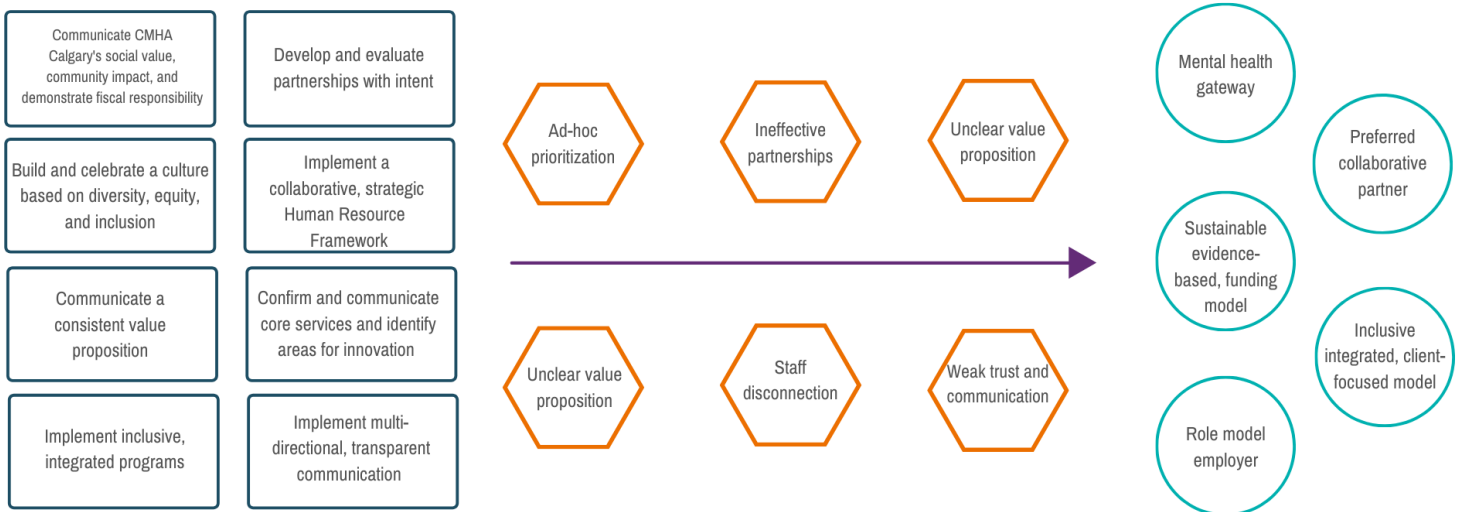
8. Communicate CMHA Calgary's social value, community impact, and demonstrate fiscal responsibility

CMHA Calgary adds value to the community through our work, and we will support the development of key metrics and tools like Social Return on Investment (SROI) to clearly articulate and communicate the impact and social value of CMHA Calgary's services.

CMHA Calgary Strategy Map

Relationship between Vision Elements, Obstacles, Supporting Strategies

Strategy Map



Relationship Between Ideal Future State, Supporting Strategies and Success Indicators

Because the strategic planning process moves from ideal future state to obstacles, to supporting strategies and success indicators, when one strategy is actioned it supports multiple vision elements. The purpose of this chart is to illustrate those relationships.

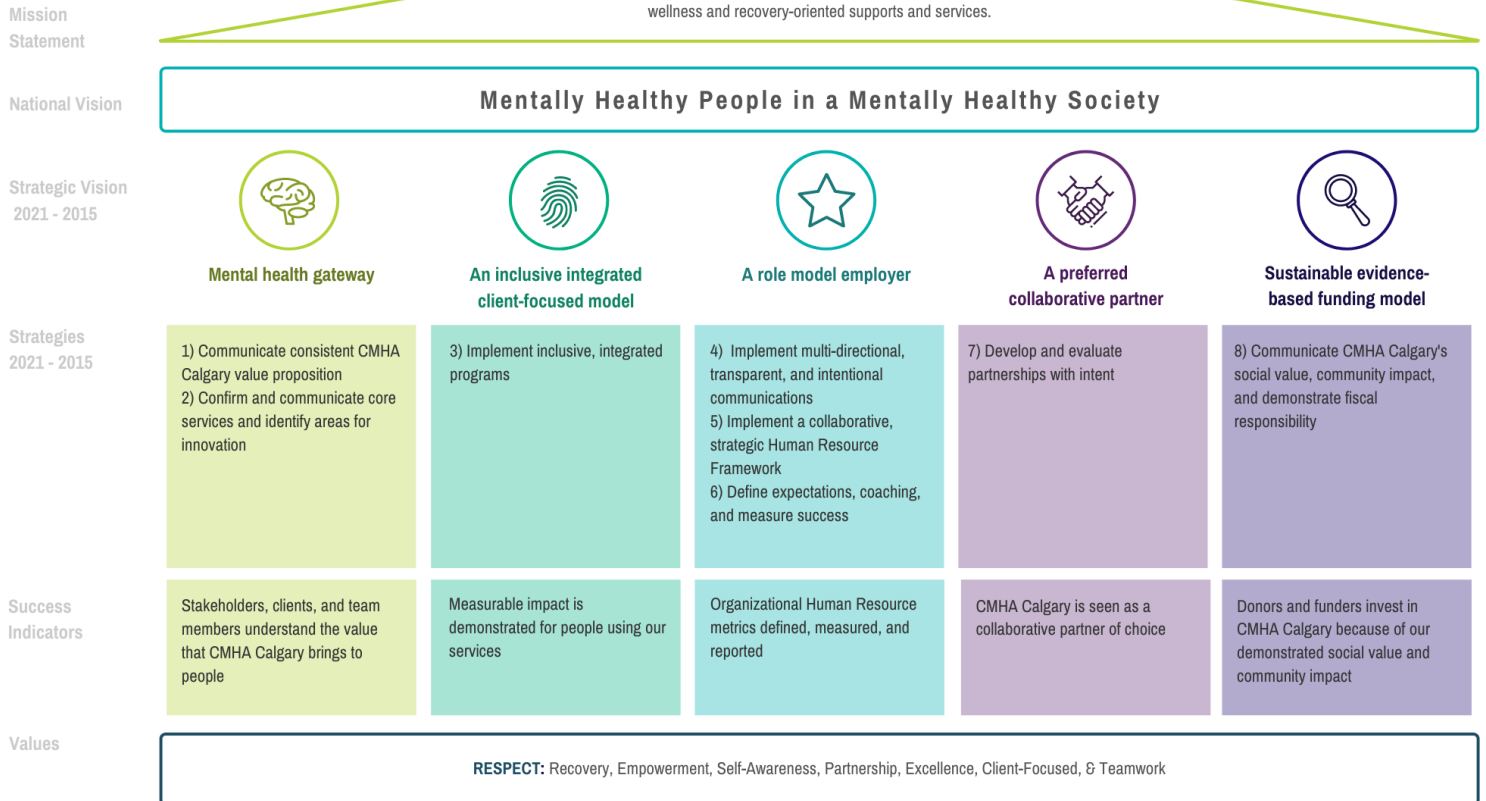
Ideal Future State	Supporting Strategies	Success Indicators
Mental Health Gateway	<ul style="list-style-type: none"> ● Communicate a consistent value proposition ● Confirm and communicate core services and identify areas for innovation ● Communicate CMHA Calgary’s social value, community impact, and demonstrate fiscal responsibility 	Stakeholders, clients, and team members understand the value that CMHA Calgary brings to people.
Inclusive Integrated Client-Focused Model	<ul style="list-style-type: none"> ● Confirm and communicate core services and identify areas for innovation ● Inclusive integrated client-focused model ● Implement multi-directional transparent and intentional communications 	Measurable impact is demonstrated for people using our services.
A Role Model Employer	<ul style="list-style-type: none"> ● Implement a collaborative, strategic Human Resource Framework ● Build and celebrate a wellness-oriented culture based on diversity, equity, and inclusion ● Communicate CMHA Calgary’s social value, community impact, and demonstrate fiscal responsibility 	Organizational Human Resource metrics defined, measured, and reported.
Preferred Collaborative Partner	<ul style="list-style-type: none"> ● Develop and evaluate partnerships with intent ● Confirm and communicate core services and identify areas for innovation ● Communicate a consistent value proposition ● Communicate CMHA Calgary’s social value, community impact, and demonstrate fiscal responsibility 	CMHA Calgary is seen as a collaborative partner of choice.

<p>Sustainable, Evidence-Based Funding Model Partner</p>	<ul style="list-style-type: none"> ● Communicate a consistent value proposition ● Communicate CMHA Calgary’s social value, community impact, and demonstrate fiscal responsibility 	<p>Donors and funders invest in CMHA Calgary because of our demonstrated social value and community impact.</p>
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Strategy at a Glance

2021 - 2025 Strategy

Promoting resilient and mentally healthy communities through wellness and recovery-oriented supports and services.



Appendix 1: Strategies and Timing

Strategies unfold over time. Not every strategy can be started at once. Operational planning identifies the sequencing of strategic work.

Operational Overview 2021 – 2025

	Q1				Q2			Q3			Q4				2022				2023			
	J	F	M	A	M	J	J	A	S	O	N	D	1	2	3	4	1	2	3	4		
Mental Health Gateway																						
1. Communicate our greatest value proposition																						
1.1 Develop leadership and navigation																						
1.2 Launch new website																						
2. Confirm and communicate core services & identify areas for innovation																						
2.1 Review core & innovation programs																						
2.2 Business continuity initiatives																						
2.3 Hiring Strategy																						
Inclusive, Integrated, Client-Focused Model																						
3. Implement inclusive integrated program																						
3.1 Incorporate peer model into all programs																						
3.2 Warm transfers between programs																						
3.3 Communicate client outcomes																						
Role Model Employer																						
4. Implement multi-directional transparent commu																						
4.1 Routine organization updates																						
5. Implement a collaborative and strategic Human Resource Framework																						
5.1 Project plan for HR Framework																						
5.2 Develop job descriptions (for peers and employees)																						
5.3 Define compensation bands for employee groups																						
5.4 Revamped benefits package																						
5.5 Digitization of HR Functions																						
5.6 Review, revise CMHA Calgary Operational Policies																						
5.7 Standardize onboarding and orientation program																						
5.8 Performance Development/Management Program																						
5.9 Implement decision making authority framework for HR and Finance																						
6. Build and celebrate a wellness-oriented culture																						
6.1 Employee engagement framework, survey and response																						
6.2 Create a framework for cultural competence																						
Preferred, Collaborative Partner																						
7. Develop and evaluate partnerships with intent																						
7.1 Partner Framework																						
7.2 New Partnership Opportunities																						
Sustainable, Evidence-Based Funding																						
8. Communicate CMHA Calgary's social value, community impact, and																						
8.1 Social return on investment program measures																						
8.2 Define CMHA Calgary Value Proposition																						
8.3 Build a framework for evidence (inclusive of SROI)																						
8.4 Develop funding strategy aligned with value proposition																						
8.5 Advertising and promotion plan																						
8.6 Define the donor journey																						
8.7 Shifting to a Culture of Philanthropy																						

Appendix 2: The Process

Step	Who	Timing
Kicked off process with Executive Leadership Team (ELT)	ELT	Nov. 18, 2020
Stakeholder engagement, interviews and focus groups	Board Members Staff Clients Funders Partners	Dec. 2 – 14, 2020
Environmental scan	Dave Robertson	Dec. 2 – 14, 2020
Review stakeholder engagement/environmental scan findings with ELT	ELT	Dec. 15, 2020
Strategic planning with ELT	ELT Board Members	Jan. 4, 5, 6, 7, 2021
Review first draft of strategy with Board Members	ELT Board Members	Jan. 23, 2021
Review first draft plus Board Members feedback with ELT; generate second draft	ELT	Jan. 28, 2021
Introduce management team to second draft of strategic plan; determine strategic milestones	ELT Senior Management	Feb. 2, 2021
Overlay existing work activity; action planning (180-day horizon); first draft thinking, measures	Senior Management	Feb. 3, 2021
Review first draft of Operational Plan	ELT	Feb. 8, 2021
Identify success indicators for strategic directions, and supporting strategies	ELT	Feb. 11, 2021
Review documents in preparation for Board Meeting	ELT	Feb 16, 2021
Final draft of strategy for Governance Committee Review; review with Board	Governance Committee	Feb. 23, 2021
Final Board review	Board Members	Mar. 3, 2021

Appendix 3: Transformational Strategy Methodology

Institute of Cultural Affairs (ICA)

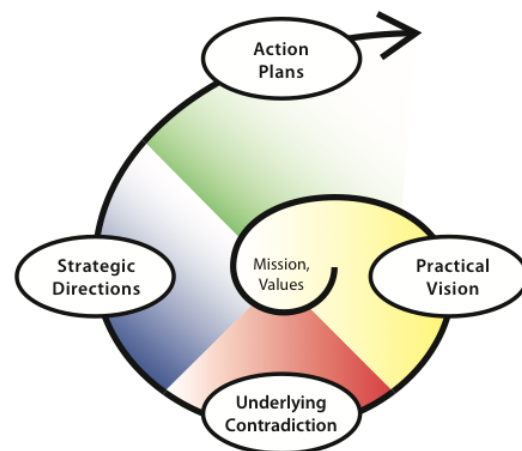
CMHA Calgary’s strategic plan was developed using the **Transformational Strategy Model**; a highly participative, consensus-driven approach to strategic thinking. Developed by the **Institute of Cultural Affairs (ICA)**, Transformational Strategy is a core methodology in a body of knowledge called the Technology of Participation (ToP®).

Transformational Strategy is a series of structured methods to help draw and recognize contributions from each person while helping groups deal with large amounts of data in a short time. Participants’ contributions are pooled into larger collections of information in a way that allows rich patterns to emerge. Transformational Strategy has proven to successfully address polarization, conflict and diversity.

Transformational strategy begins by acknowledging the strategy spirals out from an organization's core identity -- their mission and values.

It then asks the question, “*What do we want in our future?*” which leads to the creation of the **practical vision**. “Practical” means the vision is grounded in the organization’s mission and describes a future state that can be achieved.

Next, the process asks the question “*What is blocking us from realizing our hopes and dreams?*” This step reveals **underlying contradictions** that deal with the current reality, acknowledge tensions and identify the root cause. When underlying contradictions are addressed, they unlock forward momentum.



Concrete strategies are created by asking “*What can we do to deal with our blocks and move towards our vision?*”. Blocks are usually organization-wide, so one strategy may tackle multiple blocks and while working towards multiple vision elements. Strategies are grouped together to form **strategic directions**. **Action planning** is the transition from strategy to operational planning, where strategy moves from abstraction to executable plans. It answers the questions: “*What will we do? Who will do it? When?*”

ICA International is a global network established in 1960 and now implementing social change in over 36 countries. ICA International holds consultative status II with the United Nations. Robin Parsons is a certified trainer with ICA Canada, a member of ICA International.