



Removed from Cultural Diversity Plan: Remaining operational while addressing pandemic regulations and restrictions continues to be the primary focus of the Association. Although every effort has been made to support cultural diversity, training and planning during this reporting period we have been limited in our ability to be as attentive and diligent based on public health restrictions and Staffing needs. The Facility Manager, Business Administrator, Executive Group, Core Group, Board of Directors continues to monitor and meet needs / identified areas of concern as they are brought forward and will continue to do such in 2023-24 planning efforts.

Performance Measurement and Management Plan

The Annual Performance Measurement and Management Plan helps to ensure review, analysis, and quality improvement in the work and programs of The Ita Wegman Association. We review our performance with particular attention to input from our Companions, their representatives, Coworkers, funders and community stakeholders. We also review how we meet cultural diversity requests, provide support delivery, ways in which we make our services known in the wider community, our performance goals, our Coworker needs, resource requirements, and funding needs. The Improvement Plan lists the specific goals we will be attending to in the coming year and forecasts any potential concerns. For quality improvement efforts the Accreditation Task Force, Executive Group, and Board of Directors reviews the plan on an ongoing basis.

Each year we evaluate the performance of our services to identify our strengths, as well as the areas we need to improve upon. We examine our work according to accreditation standards listed below and factors such as: 1) Indicators, 2) Objectives, 3) Targets, 4) effectiveness, 5) the efficiency of services, 6) service access, 7) results, 8) input / companion characteristics when applicable / satisfaction / feedback from Coworkers and community stakeholders, and 9) extenuating circumstances / influencing factors to identify gaps, trends, potential causes and conducts and completes a comprehensive analyses that is compared from year to year and utilized to support organizational efforts for ongoing quality improvement.

We collect information on a regular basis (i.e. weekly, monthly, quarterly, annually) throughout the reporting year using a variety of methods such as Companion Individual Support Plan (ISP) meetings, house meetings, quarterly Companion goal tracking surveys, Companion meetings, performance evaluations, Coworker meetings, exit interviews, bi-annual satisfaction surveys, monthly statistical review, databases and Excel spreadsheets etc. IWA leadership groups (the Human Resource and Relations Group, Accreditation Task Force, Executive Group, and Board of Directors) work in consort with Association committees Health and Safety Committee etc., to coordinate, gather, review, analyze and report on findings determined to create action planning and associated strategies to support improvement efforts.

Results of work completed and action planning determined is shared with Coworkers, Companions, Funders, Stakeholders and Community Members on a regular basis i.e. weekly, monthly, quarterly, annually throughout the reporting year via our website, annual general meeting, onsite oversight visits, Glenora Farm newsletter, one on one meetings, community forums, Coworker meetings etc

In each of our service areas we set outcome targets that reflect our review categories and which are appropriate to the unique nature of each service offered. Results determined in our review categories are analyzed annually and action plans are developed in response. In some cases, where results are not providing the information needed or best practices or other environmental changes suggest a new direction, new outcomes and targets are set. This annual process contributes to the continuous quality improvements of the work our Coworkers are conducting, in our quest to offer Companions we support the best service possible and a high quality of life.

In addition to the review categories of performance improvement, IWA also analyses the demographics of the Companions we serve, including the categories of gender, age, primary language, Indigenous background, presenting challenges and community. We do this to have a better overall view of the Companions we serve as well as the areas where we may need to focus on service development.

IWA regularly receives input from Companions, Companion Family members, Coworkers, Stakeholders, and Community Members. The input is used to assist in decision-making and all planning efforts to support quality assurance. Any feedback related to a complaint is addressed following IWA policy and procedures and all complaints are reviewed and analyzed annually to determine trends, areas for performance improvement, actions required and follow up planning to support quality assurance efforts. Please refer to the bottom of the document for a plain-language summary of how data can be collected by the IWA.

The following results reflect the period of September 1, 2022 - December 31, 2022, as reported through ongoing feedback, satisfaction survey analysis, Companion goal tracking surveys, statistical collection, ISP reviews, exit summaries, Excel spreadsheets etc.

Changes from 2022 version

General language updates (ie. Coworker=Coworker, families=family/representatives, removed significant others, etc.)

General formatting changes (bullet points, line breaks, etc.).

More information included regarding how feedback is gathered and at which frequencies.

Changed reporting period to accurately reflect when data was collected.

Cited relevant policies for Complaints, Issues and Grievances

Glenora Farm has reviewed and revised all job descriptions and performance evaluations for all Coworker positions. This allows the organization to ensure we are providing training based on the scope of the roles and responsibilities of each Coworker.

Specified feedback survey timelines

1.M.2-The organization identifies gaps and opportunities in preparation for the development or review of a PM&M Plan, including consideration of:

Input from Persons supported 1.M.2.a.1

Comments and suggestions from persons supported (Companions) are considered when preparing for the development or review of the PM&M plan. If the organization notices trends in the analysis of survey data, meeting minutes, individual plan reviews, databases, or one-on-one conversations, then those trends will be considered in the plan review or development. IWA regularly receives input from Companions (**OP20 Feedback**). The input is used to assist in decision-making and all planning efforts to support quality assurance. Any feedback related to a complaint is addressed following IWA policy and procedures (**CP14 IWA Companion Complaints, Issues or Grievances**), and all complaints are reviewed and analyzed annually to determine trends, areas for performance improvement, actions required and follow up planning to support quality assurance efforts.

Input from Personnel/Coworkers 1.M.2.a.2

Comments and suggestions from personnel (Coworkers) are considered when preparing for the development or review of the PM&M plan. If the organization notices trends in the analysis of survey data, meeting minutes, exit interviews, annual reviews, or one-on-one conversations, then those trends will be considered in the plan review or development. IWA regularly receives input from Coworkers (**OP20 Feedback**). The input is used to assist in decision-making and all planning efforts to support quality assurance. Any feedback related to a complaint is addressed following IWA policy and procedures (**ECP27 Coworker Complaint, Grievance and Conflict Resolution**) and all complaints are reviewed and analyzed annually to determine trends, areas for performance improvement, actions required and follow up planning to support quality assurance efforts.

Input from Other stakeholders 1.M.2.a.3

Comments and suggestions from other stakeholders (Companion family/representatives, Board of Directors, funder, licenser, community partner, customer, etc.) are considered when preparing for the development or review of the PM&M plan. If the Association notices trends in the analysis of survey data, meeting minutes, or one-on-one conversations, then those trends will be considered in the plan review or development. The IWA regularly receives input from Companion Family members, Coworkers, Stakeholders, and Community Members. The input is used to assist in decision-making and all planning efforts to support quality assurance. Any feedback related to a complaint is addressed following IWA policy and procedures and all complaints are reviewed and analyzed annually to determine trends, areas for performance improvement, actions required and follow up planning to support quality assurance efforts.

Characteristics of the persons supported 1.M.2.b

The Ita Wegman Association understands that in preparation for our Performance Measurement and Management Plan the characteristics of the persons supported should be considered. IWA analyses the demographics of the Companions we support, including the categories of gender, age, primary language, Indigenous background, presenting challenges and wider community supports. We do this to have a better overall view of the Companions we serve as well as the areas where we may need to focus on program development.

Expected results 1.M.2.c

The Ita Wegman Association strives to be a leader in our industry and expects high performance results. Goal targets are set for each objective and indicator and these targets are compared against the organization's actual performance. In each of our service areas we set outcome targets that reflect our review categories and which are appropriate to the unique nature of each service offered. Results determined in our review categories are analyzed annually and action plans are developed in response. In some cases, where results are not providing the information needed or best practices or other environmental changes suggest a new direction, new outcomes and targets are set. This annual process contributes to the continuous quality improvements of the work our Coworkers are conducting, in our quest to offer the Companions that we support the best service possible and a high quality of life.

Extenuating and influencing factors that may impact results 1.M.2.d

Changes in funding levels, numbers of people supported, economic factors and recovery from natural disasters and global pandemics may influence or impact our performance results. Despite the organization's best efforts to ensure data is received consistently and in a reliable way from a trained administrator, the way surveys are administered, and the way information is collected from surveys may influence or impact the results.

Comparative data available 1.M.2.e

Comparative data is available from myriad of sources. Previous bi-annual satisfaction surveys for Companions, Coworkers and other Stakeholders, and quarterly goal-tracking surveys for Companions. For each objective and indicator, the IWA compares our actual performance with our performance goal and with previous years data, if data is available.

Communication of performance information 1.M.2.f

Results of work completed and action planning determined is shared with Coworkers, Companions, Funders, Stakeholders and Community Members on a regular basis i.e. weekly, monthly, quarterly, and annually throughout the reporting year via our website, annual report, annual general meeting, newsletter, one on one meetings, community forums, Coworker meetings, Companion meetings, etc.

Technology to support implementation of the PM&M Plan 1.M.2.g

Online surveys (bi-annual satisfaction and quarterly goal tracking) are administered via Google Forms and the survey links are sent out via email. People supported have surveys administered via paper copy. Google Forms provides data from all responses of each survey.

1.M.3- The organization implements a performance measurement and management plan that:

A. Addresses: (1) Collection of relevant data on the characteristics of persons supported.						
House	Initials	Gender	Race	Age	Diagnosis*	Diagnosis*key: Developmental Disability (DD), Autism Spectrum Disorder (ASD), Dual - Mental Health and DD (MH/DD), Acquired Brain Injury (ABI), Hearing Impairment (HI), Physical disability (PD), Visual Impairment (VI)
Helios		F	First Nations / White	18-40	DD	
		F	White	41-65	DD	
		M	White	41-65	DD, VI	
		F	Middle Eastern / White	18-40	DD	
Corwyn		F	White	41-65	MH, DD	
		M	White	41-65	DD	
		F	White	41-65	DD	
		M	White	41-65	DD, VI	
Big House		M	White	18-40	DD, HI	
		M	White	18-40	DD, ASD	
		M	White	41-65	MH, DD	
		F	White	18-40	MH, DD	
		F	White	18-40	DD, HI	
Farmhouse		F	First Nations / White	41-65	DD	
		F	Middle Eastern / White	41-65	DD, PD	
		F	White	41-65	DD, PD	
		M	White	41-65	DD	
Day Only		F	African Canadian / White	18-40	DD	

		M	White	18-40	DD			
		F	White	18-40	DD			
	Community Integration: 20 (100%)	Identify as female: 12 (60%)	White: 15 (75%)	41-65: 11 (55%)	DD: 10 (50%)			
	Community Housing: 17 (85%)	Identify as male: 8 (40%)	Middle Eastern/White: 2 (10%)	18-40: 9 (45%)	MH, DD: 3 (15%)			
			African Canadian/White: 1 (5%)		DD, HI: 2 (10%)			
			First Nations/White: 1 (5%)		DD, PD: 2 (10%)			
					DD, VI: 2 (10%)			
					DD, ASD: (5%)			
	(2) For each program/service seeking accreditation, identificaion of measures for service delivery objectives, including, at a minimum:	(a) Results achieved for the persons supported (effectiveness)	Addressed in section 1.M.4					
		(b) Experience of services received and other feedback from persons supported	Addressed in section 1.M.5 and 1.M.6					
		(c) Experience of services and other feedback from other stakeholders	Addressed in section 1.M.5 and 1.M.6					
		(d) Resources used to achieve results for the persons supported (efficiency)	Addressed in section 1.M.7					
		(e) Service access	Addressed in section 1.M.8					
	(3) The collection of data about the persons supported at:	(a) The beginning of services	Glenora Farm application form, trial visit, Admission process, Companion orientation and training, Anamnesis, My Booklet BC, previous service provider, transition documents					
		(b) Appropriate intervals during services	Annual ISP meetings, as-needed during services, goal tracking surveys, satisfaction surveys					
		(c) The end of services	IWA Policy & Procedure CP18.1 Discharge and transition summary					
		(d) Point(s) in time following services	Time frame decided upon between parties in the exit procedure. Documented on CP18.1 Discharge and transition summary					
	(4) Identification of priority measures determined by the organization for business function objectives		Addressed in section 1.M.4					
	(5) The extent to which the data collected measures what they are intended to measure (validity)		The Accreditation Task Force regularly reviews questions posed in surveys to ensure questions measure what they are intended to measure. Despite the organization's best efforts to ensure data is received consistently and in a reliable way from a trained administrator, the way surveys are administered, and the way information is collected from surveys may influence or impact the results.					

	(6) The process for obtaining data:	(a) In a consistent manner (reliability)	Biannual satisfaction surveys for Companions, family/representatives, Coworkers and other stakeholders are administered in March and September. Surveys for Companions are conducted by the House Coordinator who has been trained in survey administration. Surveys for family/representatives, Coworkers and other stakeholders are sent out through an internet based survey program. Quarterly goal tracking surveys for Companions and their House Coordinators are shared in February, May, August and November. Surveys for Companions are conducted by the House Coordinator who has been trained in survey administration. The IWA ensures that data is collected consistently in a way that could be reproduced by another data gatherer or at another time. The designated Coworker who has attended CARF Advanced Performance Measurement and Management will conduct the surveys.	
		(b) That will be complete	The IWA will ensure all Companions and Coworkers who are able will be given a chance to provide data. It is noted that some Companions are non-verbal and we are unable to obtain unbiased feedback information from them. The organization is looking to improve ways that the non-verbal people we support can share their feedback. All accredited programs (Community Housing and Community Integration) are included in performance improvement efforts.	
		(c) That will be accurate	The IWA works towards ensuring all data secured is accurate. Ways we work to ensure data sources are accurate include: anonymous satisfaction surveys for Coworkers, Companion family/representatives, and stakeholders. The IWA is in the process of reviewing Companion satisfaction survey administration to improve anonymity. It is noted that some Companions are not able to understand or engage with satisfaction surveys (including the the simple-language questions), these Companions currently do not participate in the biannual satisfaction surveys and the IWA is reviewing alternative methods for these individuals to provide satisfaction survey feedback. Every effort has been made to ensure answers given are accurate, including trained survey administrators.	
	(7) Extenuating and influencing factors that may impact results		Addressed in section 1.M.2.d	
	(8) Timeframes for the:	(a) Analysis of data	Analysis of service delivery occurs annually in November. Analysis of business functions occurs annually in December. Analysis of Performance Measurement & Management Plan and creation of an associated action plan (1N1&2 Performance Analysis) occurs annually in January.	
		(b) Communication of results	Within 2 months, results of analysis of service delivery and business functions are communicated with persons supported, Coworkers and other stakeholders. Results can be communicated in a variety of ways including but not limited to via email, at meetings, posted on the Glenora Farm website, shared on social media, and through our quarterly newsletter.	
	(g) How:	(a) Data are collected	Data is collected via application forms, annual ISP meetings, satisfaction surveys, goal tracking surveys, meeting minutes, complaints, issues and grievances, exit interviews, performance evaluations,	
		(b) Data are analyzed	Data is analyzed by the Accreditation Task Force, Human Resource and Relations Group, Executive Group, and Board of Directors.	
		(c) Performance improvement plans are developed	A performance improvement action plan is developed after collecting and analyzing the data from the previous year (1N1&2 Performance Analysis).	
		(d) Performance improvement plans are implemented	Performance improvement plans are implemented after annual analysis of business functions and service delivery, and communicated via the 1N1&2 Performance Analysis.	

		(e) Performance information is communicated	Results of analysis of service delivery and business functions are communicated with persons supported. Coworkers, and other stakeholders, the results will be posted on our website. The information communicated may vary in content, format and timing according to the needs of the group. Results can be communicated in a variety of ways including but not limited to via email, at meetings, posted on the Glenora Farm website, shared on social media, and through our quarterly newsletter.	
B. Is reviewed at least annually for relevance			The Performance Measurement and Management Plan is reviewed annually by the Accreditation Task Force in January. This plan was last updated in January 2023.	
C. Is updated as needed			In addition to being reviewed annually, the Performance Measurement and Management Plan is updated as needed. Any updates that are deemed not pressing are inserted as a comment on the document. Any updates that are deemed pressing are changed with the approval of the Accreditation Task Force and distributed to the Human resource and Relations Group, the Executive Group, and the Board of Directors for endorsement.	

1.M.4- Results Achieved for the Persons Supported (Effectiveness Domain)

	Objective	Indicator	Who applied to	Time of Measure	Data source	Obtained by	Performance goal
	1.M.4.a	1.M.4.b	1.M.4.b.1	1.M.4.b.4	1.M.4.b.3	1.M.4.b.2	1.M.4.b.5
Community Integration	Companion participation rates consistent	% of CLBC-funded Community Integration only Companions that miss less than 225 hours (30 days/year. 1 day of program=7.5 hr)	Community Integration Companions	Annually	Service Level Reporting	Business Admin	95%
	Involvement in community	% of Companions that indicate they know what supports and services are available in the wider community	Community Integration Companions	Biannually	Companion satisfaction survey	Admin and Development Coordinator	75%
Community Housing	Companion participation rates consistent	% of Companions that remain living in their residence without a month of consecutive absences	Community Housing Companions	Annually and occurrence-based	Database, periodic reports, occurrence-based reports	Business Admin	95%
	Involvement in community	% of Companions that indicate they know what supports and services are available in the wider community	Community Housing Companions	Biannually	Companion satisfaction survey	Admin and Development Coordinator	75%

1.M.5- Experience of Services and other feedback from persons supported

	Objective	Indicator	Who applied to	Time of Measure	Data source	Obtained by	Performance goal
	1.M.5.a	1.M.5.b	1.M.5.b.1	1.M.5.b.4	1.M.5.b.3	1.M.5.b.2	1.M.5.b.5
Community Integration	Companion satisfaction	% of Companions that indicate they feel happy when in the day program	Community Integration Companions	Biannual	Biannual satisfaciton survey	Admin and Development Coordinator	90%
	Interpersonal relationships	% of Companions that indicate they are able to spend time with friends and family at IWA	Community Integration Companions	Biannual	Biannual satisfaciton survey	Admin and Development Coordinator	85%

	Autonomy	% of Companions that indicate they are able to help plan or sometimes help plan what they do in the day program	Community Integration Companions	Biannual	Biannual satisfaciton survey	Admin and Development Coordinator	50%
Community Housing	Companion satisfaction	% of Companions that indicate they feel happy when in their home	Community Housing Companions	Biannual	Biannual satisfaciton survey	Admin and Development Coordinator	90%
	Interpersonal relationships	% of Companions that indicate they are able to spend time with friends and family at IWA	Community Housing Companions	Biannual	Biannual satisfaciton survey	Admin and Development Coordinator	85%
	Autonomy	% of Companions that indicate they are able to help plan or sometimes able to help plan what they do in their home	Community Housing Companions	Biannual	Biannual satisfaciton survey	Admin and Development Coordinator	50%

1.M.6- Experience of Services and other feedback from other stakeholders (directors, funders, licensers, community partners, customers, etc.)

	Objective	Indicator	Who applied to	Time of Measure	Data source	Obtained by	Performance goal
	1.M.6.a	1.M.6.b	1.M.6.b.1	1.M.6.b.4	1.M.6.b.3	1.M.6.b.2	1.M.6.b.5

Community Integration	Positive communication with family/representatives	% of Family/representatives that feel communication from IWA Coworkers is clear, sufficient and timely	Community Integration family/representatives	Biannual	Biannual satisfaciton survey	Admin and Development Coordinator	90%
	Stakeholder satisfaction	% of other stakeholders that are satisfied or extremely satisfied with the services IWA provides	Other Stakeholders	Biannual	Biannual satisfaciton survey	Admin and Development Coordinator	90%
	Coworker satisfaction	% of Coworkers that are satisfied or very satisfied with their employment at IWA	Coworkers	Biannual	Biannual satisfaciton survey	Admin and Development Coordinator	80%

Community Housing	Positive communication with family/representatives	% of family/representatives that feel communication from IWA Coworkers is clear, sufficient and timely	Community Housing family/representatives	Biannual	Biannual satisfaciton survey	Admin and Development Coordinator	90%
	Stakeholder satisfaction	% of other stakeholders that are satisfied or extremely satisfied with the services IWA provides	Other Stakeholders	Biannual	Biannual satisfaciton survey	Admin and Development Coordinator	90%
	Coworker satisfaction	% of Coworkers that are satisfied or very satisfied with their employment at IWA	Coworkers	Biannual	Biannual satisfaciton survey	Admin and Development Coordinator	80%

1.M.7- Resources Used to Achieve Results for the Persons Supported (Efficiency Domain)

	Objective	Indicator	Who applied to	Time of Measure	Data source	Obtained by	Performance goal
	1.M.7.a	1.M.7.b	1.M.7.b.1	1.M.7.b.4	1.M.7.b.3	1.M.7.b.2	1.M.7.b.5

Community Integration	Stable day program utilization rates	% of day program spots that are filled	Community Integration Companions	Annually	Service Level Reporting	Business Admin	100%
	Companions have goals that are specific, measurable, achievable, realistic and time specific.	% of Companions that have SMART goals identified in their ISP goal planning and documented in the Companion database.	Community Integration Companions	Annually	ISP meeting and database	Workshop Leader or House Coordinator	100%
	Utilizing volunteer service for direct support delivery	% of support delivery personnel that are volunteering their services	IWA Coworkers	Annually	Volunteer Tracking database	Admin and Development Coordinantor	50%
Community Housing	Stable bed utilization rates	% of available beds utilized	Community Housing Companions	Annually	Periodic and occurence-based reports	Business Admin	100%
	Companions have goals that are specific, measurable, achievable, realistic and time specific.	% of Companions that have SMART goals identified in their ISP goal planning and documented in the Companion database.	Community Housing Companions	Annually	ISP meeting and database	House Coordinator	100%
	Utilizing volunteer service for direct support delivery	% of support delivery personnel that are volunteering their services	IWA Coworkers	Annually	Volunteer Tracking database	Admin and Development Coordinantor	50%
1.M.8- Service Access							
	Objective	Indicator	Who applied to	Time of Measure	Data source	Obtained by	Performance goal
	1.M.8.a	1.M.8.b	1.M.8.b.1	1.M.8.b.4	1.M.8.b.3	1.M.8.b.2	1.M.8.b.5
Community Integration	Accessibility (physical location, environmental, financial, employment, and communication)	% of stakeholders that indicate the accessibility of IWA is excellent or above average	Other stakeholders (director, referring agency, funder, licensing agency, community partner, or customer)	Biannually	Biannual Satisfaciton Survey	Admin and Development Coordinantor	90%
Community Housing	Accessibility (physical location, environmental, financial, employment, and communication)	% of stakeholders that indicate the accessibility of IWA is excellent or above average	Other stakeholders (director, referring agency, funder, licensing agency, community partner, or customer)	Biannually	Biannual Satisfaciton Survey	Admin and Development Coordinantor	90%
1.M.9- Business functions							
Category	Objective	Indicator	What applied to	Time of Measure	Data source	Obtained by	Performance goal
	1.M.9.a	1.M.9.b	1.M.9.b.1	1.M.9.b.4	1.M.9.b.3	1.M.9.b.2	1.M.9.b.5
Effectiveness	Completed budgets	% of budgets that are completed, reviewed and analyzed to support operational needs on a consistent basis	Finance	Monthly	Profit and loss statement, budget vs. actual	Business Admin, Finance Committee	100%

Effectiveness	Signed contracts	% of funding contracts that are reviewed and signed annually at the review date associated with the contract	Finance	Private contracts are reviewed and negotiated annually, or as needed. CLBC contracts span a two-year timeframe and are reviewed annually, or as needed. The IWA reviews all contracts to ensure contracts held are representative of individual disability support needs provided by IWA.	CLBC program budgets, contracts and reports. Privately held contracts.	Business Admin, Finance Committee	100%
Effectiveness	Completed performance evaluations	% of paid Coworker performance reviews that are completed consistently and on time.	Human Resources & Relations	Annual	Coworker files, Coworker review tracking spreadsheet, annual task calendar	Human Resources and Relations Group	100%
Experience of services- other stakeholders	Family/representative satisfaction	% of family/representatives that indicate they are satisfied or very satisfied with business functions	Operations	Biannual	Biannual satisfaction survey	Admin and Development Coordinator	90%

1.M.10- Documented education and training in accordance with roles and responsibilities for performance measurement and management

Education and training is provided to Coworkers in accordance with their roles and responsibilities in the organization relating to performance measurement and management. Training for each position is comprehensive and is based on the roles and responsibilities of each Coworker. The required trainings are outlined in the documents **ECP25 Coworker Training**, **ECP4 Orientation Spreadsheet** the excel *Training Cohorts* document (all updated quarterly). As recommended by CARF, there is a need to delineate roles, link positions with a curriculum or equivalent, and to document all of the above. You can often find evidence of required trainings in IWA policies & procedures and organizational plans.

Position	Roles	Responsibilities	Education and training required	Documentation of education and training
Board Of Directors	Officers & Directors	Person supported focus	See ECP25- Coworker Training , ECP4- Orientation Spreadsheet , and <i>Training Cohorts</i> spreadsheet for a list of required training.	Signed endorsement conducted annually. Documentation saved on IWA internal server.
		Integrity & trust	See ECP25- Coworker Training , ECP4- Orientation Spreadsheet , and <i>Training Cohorts</i> spreadsheet for a list of required training.	Signed endorsement conducted annually. Documentation saved on IWA internal server.
		Support vision and strategy	See ECP25- Coworker Training , ECP4- Orientation Spreadsheet , and <i>Training Cohorts</i> spreadsheet for a list of required training.	Signed endorsement conducted annually. Documentation saved on IWA internal server.
		Support Camphill vision and philosophy	See ECP25- Coworker Training , ECP4- Orientation Spreadsheet , and <i>Training Cohorts</i> spreadsheet for a list of required training.	Signed endorsement conducted annually. Documentation saved on IWA internal server.

		Governance and succession planning	See ECP25- Coworker Training, ECP4- Orientation Spreadsheet. and <i>Training Cohorts</i> spreadsheet for a list of required training.	Signed endorsement conducted annually. Documentation saved on IWA internal server.
		Leadership and accountability	See ECP25- Coworker Training, ECP4- Orientation Spreadsheet. and <i>Training Cohorts</i> spreadsheet for a list of required training.	Signed endorsement conducted annually. Documentation saved on IWA internal server.
		Strategic resource management and financial oversight	See ECP25- Coworker Training, ECP4- Orientation Spreadsheet. and <i>Training Cohorts</i> spreadsheet for a list of required training.	Signed endorsement conducted annually. Documentation saved on IWA internal server.
Admin Operations	Admin & Development Coordinator, Business Administrator, Facility Manager	Person supported focus	See ECP25- Coworker Training, ECP4- Orientation Spreadsheet. and <i>Training Cohorts</i> spreadsheet for a list of required training.	Relias training documentation. Stored online in the relias database and in each personnel file. Updated annually in personnel files.
		Integrity & trust	See ECP25- Coworker Training, ECP4- Orientation Spreadsheet. and <i>Training Cohorts</i> spreadsheet for a list of required training.	Relias training documentation. Stored online in the relias database and in each personnel file. Updated annually in personnel files.
			See ECP25- Coworker Training, ECP4- Orientation Spreadsheet. and <i>Training Cohorts</i> spreadsheet for a list of required training.	Relias training documentation. Stored online in the relias database and in each personnel file. Updated annually in personnel files.
		Manage vision & purpose	See ECP25- Coworker Training, ECP4- Orientation Spreadsheet. and <i>Training Cohorts</i> spreadsheet for a list of required training.	Relias training documentation. Stored online in the relias database and in each personnel file. Updated annually in personnel files.
		People & relationship management	See ECP25- Coworker Training, ECP4- Orientation Spreadsheet. and <i>Training Cohorts</i> spreadsheet for a list of required training.	Relias training documentation. Stored online in the relias database and in each personnel file. Updated annually in personnel files.
		Resource management	See ECP25- Coworker Training, ECP4- Orientation Spreadsheet. and <i>Training Cohorts</i> spreadsheet for a list of required training.	Relias training documentation. Stored online in the relias database and in each personnel file. Updated annually in personnel files.
		Decision making	See ECP25- Coworker Training, ECP4- Orientation Spreadsheet. and <i>Training Cohorts</i> spreadsheet for a list of required training.	Relias training documentation. Stored online in the relias database and in each personnel file. Updated annually in personnel files.
Admin Support	Admissions Coordinator	Person supported focus	See ECP25- Coworker Training, ECP4- Orientation Spreadsheet. and <i>Training Cohorts</i> spreadsheet for a list of required training.	Relias training documentation. Stored online in the relias database and in each personnel file. Updated annually in personnel files.
		Integrity & trust	See ECP25- Coworker Training, ECP4- Orientation Spreadsheet. and <i>Training Cohorts</i> spreadsheet for a list of required training.	Relias training documentation. Stored online in the relias database and in each personnel file. Updated annually in personnel files.
		Support vision & purpose	See ECP25- Coworker Training, ECP4- Orientation Spreadsheet. and <i>Training Cohorts</i> spreadsheet for a list of required training.	Relias training documentation. Stored online in the relias database and in each personnel file. Updated annually in personnel files.
		People & relationship management	See ECP25- Coworker Training, ECP4- Orientation Spreadsheet. and <i>Training Cohorts</i> spreadsheet for a list of required training.	Relias training documentation. Stored online in the relias database and in each personnel file. Updated annually in personnel files.
Workshop Leader	Community Support Worker (Workshop Leader)	Person supported focus	See ECP25- Coworker Training, ECP4- Orientation Spreadsheet. and <i>Training Cohorts</i> spreadsheet for a list of required training.	Relias training documentation. Stored online in the relias database and in each personnel file. Updated annually in personnel files.
		Integrity & trust	See ECP25- Coworker Training, ECP4- Orientation Spreadsheet. and <i>Training Cohorts</i> spreadsheet for a list of required training.	Relias training documentation. Stored online in the relias database and in each personnel file. Updated annually in personnel files.

		Carry out vision & purpose	See ECP25- Coworker Training, ECP4- Orientation Spreadsheet , and <i>Training Cohorts</i> spreadsheet for a list of required training.	Relias training documentation. Stored online in the relias database and in each personnel file. Updated annually in personnel files.
		People & relationship management	See ECP25- Coworker Training, ECP4- Orientation Spreadsheet , and <i>Training Cohorts</i> spreadsheet for a list of required training.	Relias training documentation. Stored online in the relias database and in each personnel file. Updated annually in personnel files.
		Resource management	See ECP25- Coworker Training, ECP4- Orientation Spreadsheet , and <i>Training Cohorts</i> spreadsheet for a list of required training.	Relias training documentation. Stored online in the relias database and in each personnel file. Updated annually in personnel files.
		Decision making	See ECP25- Coworker Training, ECP4- Orientation Spreadsheet , and <i>Training Cohorts</i> spreadsheet for a list of required training.	Relias training documentation. Stored online in the relias database and in each personnel file. Updated annually in personnel files.
House Coordinator	Residential Care Worker (Primary House Coordinator), Residential Care Worker (Supporting House Coordinator)	Person supported focus	See ECP25- Coworker Training, ECP4- Orientation Spreadsheet , and <i>Training Cohorts</i> spreadsheet for a list of required training.	Relias training documentation. Stored online in the relias database and in each personnel file. Updated annually in personnel files.
		Person supported focus	See ECP25- Coworker Training, ECP4- Orientation Spreadsheet , and <i>Training Cohorts</i> spreadsheet for a list of required training.	Relias training documentation. Stored online in the relias database and in each personnel file. Updated annually in personnel files.
		Integrity & trust	See ECP25- Coworker Training, ECP4- Orientation Spreadsheet , and <i>Training Cohorts</i> spreadsheet for a list of required training.	Relias training documentation. Stored online in the relias database and in each personnel file. Updated annually in personnel files.
		Carry out vision & purpose	See ECP25- Coworker Training, ECP4- Orientation Spreadsheet , and <i>Training Cohorts</i> spreadsheet for a list of required training.	Relias training documentation. Stored online in the relias database and in each personnel file. Updated annually in personnel files.
		People & relationship management, build relationships	See ECP25- Coworker Training, ECP4- Orientation Spreadsheet , and <i>Training Cohorts</i> spreadsheet for a list of required training.	Relias training documentation. Stored online in the relias database and in each personnel file. Updated annually in personnel files.
		Resource management	See ECP25- Coworker Training, ECP4- Orientation Spreadsheet , and <i>Training Cohorts</i> spreadsheet for a list of required training.	Relias training documentation. Stored online in the relias database and in each personnel file. Updated annually in personnel files.
		Technical knowledge	See ECP25- Coworker Training, ECP4- Orientation Spreadsheet , and <i>Training Cohorts</i> spreadsheet for a list of required training.	Relias training documentation. Stored online in the relias database and in each personnel file. Updated annually in personnel files.
		Decision making	See ECP25- Coworker Training, ECP4- Orientation Spreadsheet , and <i>Training Cohorts</i> spreadsheet for a list of required training.	Relias training documentation. Stored online in the relias database and in each personnel file. Updated annually in personnel files.
Support	Short Term Coworker (Partially paid volunteer), Community Support Worker Backfill, Residential Care Worker Backfill	Person supported focus	See ECP25- Coworker Training, ECP4- Orientation Spreadsheet , and <i>Training Cohorts</i> spreadsheet for a list of required training.	Relias training documentation. Stored online in the relias database and in each personnel file. Updated annually in personnel files.
		Integrity & trust	See ECP25- Coworker Training, ECP4- Orientation Spreadsheet , and <i>Training Cohorts</i> spreadsheet for a list of required training.	Relias training documentation. Stored online in the relias database and in each personnel file. Updated annually in personnel files.
		Support organization vision and purpose	See ECP25- Coworker Training, ECP4- Orientation Spreadsheet , and <i>Training Cohorts</i> spreadsheet for a list of required training.	Relias training documentation. Stored online in the relias database and in each personnel file. Updated annually in personnel files.
		Build relationships	See ECP25- Coworker Training, ECP4- Orientation Spreadsheet , and <i>Training Cohorts</i> spreadsheet for a list of required training.	Relias training documentation. Stored online in the relias database and in each personnel file. Updated annually in personnel files.

		Technical knowledge	See ECP25- Coworker Training, ECP4- Orientation Spreadsheet. and <i>Training Cohorts</i> spreadsheet for a list of required training.	Relias training documentation. Stored online in the relias database and in each personnel file. Updated annually in personnel files.	
Understanding characteristics, barriers and severity factors					
	Factors	Information obtained by	Information source	Information storage	Importance of information
Critical demographic characteristics					
Community Integration	Age	Admin Operations, Care Group	Companion application, Anamnesis, My BC Booklet, referral from funding agency, information from previous service provider.	Companion database, physical file, Companion file on file share.	Companions must be 18 years or older to engage with the Community Integration program. IWA does not have a cut-off age, however when Companions reach an age where their medical needs are not able to be safely supported by IWA Coworkers, transition measures will be engaged with.
	Gender or sex	Admin Operations, Care Group	Companion application, Anamnesis, My BC Booklet, referral from funding agency, information from previous service provider.	Companion database, physical file, Companion file on file share.	IWA must be able to engage with and support gender pronouns preference and needs of Companions in the Community Integration program. The IWA will provide Companion-specific Coworker training regarding gender or sex.
	Medical needs	Admin Operations, Care Group	Companion application, Anamnesis, My BC Booklet, referral from funding agency, information from previous service provider.	Companion database, physical file, Companion file on file share.	IWA must be able to engage with medical needs of Companions in the Community Integration program. If a Companion has medical needs that are beyond what the IWA has capacity to support, that must be addressed. The IWA will provide Companion-specific Coworker training regarding medical needs.
Community Housing	Age	Admin Operations, Care Group	Companion application, Anamnesis, My BC Booklet, referral from funding agency, information from previous service provider.	Companion database, physical file, Companion file on file share, red binder at the Companion's residence.	Companions must be 18 years or older to engage with the Community Integration program. IWA does not have a cut-off age, however when Companions reach an age where their medical needs are not able to be safely supported by IWA Coworkers, transition measures will be engaged with.
	Gender or Sex	Admin Operations, Care Group	Companion application, Anamnesis, My BC Booklet, referral from funding agency, information from previous service provider.	Companion database, physical file, Companion file on file share, red binder at the Companion's residence.	IWA strives to have a balance of genders in the Community Housing program. Knowing the gender of a Companion will help balance the households, and provide comfortable and safe spaces for persons supported. The IWA will provide Companion-specific Coworker training regarding gender or sex.

	Medical needs	Admin Operations, Care Group	Companion application, Anamnesis, My BC Booklet, referral from funding agency, information from previous service provider.	Companion database, physical file, Companion file on file share, red binder at the Companion's residence.	IWA must be able to engage with medical needs of Companions in the Community Housing program. If a Companion has medical needs that are beyond what the IWA has capacity to support, that must be addressed. The IWA will provide Companion-specific Coworker training regarding medical needs.
	Factors	Information obtained by	Information source	Information storage	Importance of information
Barriers to successful outcomes					
Community Inclusion	Language	Admin Operations, Care Group, Workshop Leader	Companion application, Anamnesis, My BC Booklet, referral from funding agency, information from previous service provider.	Companion database, physical file, Companion file on file share.	In order to deliver appropriate and personalized support, The IWA must understand the unique way that each Companion communicates and work to maintain and/or improve communication methods.
	Ability to engage with technology	Admin Operations, Care Group, Workshop Leader	Companion application, Anamnesis, My BC Booklet, referral from funding agency, information from previous service provider.	Companion database, physical file, Companion file on file share.	Ability to engage with technology should not impact a Companion's participation in the C.I. program. Companions that use adaptive technology will be supported in the program and training will be provided to IWA Coworkers.
	Access to family and support	Admin Operations, Care Group, Workshop Leader	Companion application, Anamnesis, My BC Booklet, referral from funding agency, information from previous service provider.	Companion database, physical file, Companion file on file share.	When a Companion does not have access to family and support, this can affect their sense of well-being, potentially acting as a barrier to successful outcomes of the Community Integration program. Not having a family/representative could limit the self-advocacy opportunities for an individual. The IWA works closely with families/representatives for goal planning and addressing any challenges that occur in the C.I. program.
	Language	Admin Operations, House Coordinator	Companion application, Anamnesis, My BC Booklet, referral from funding agency, information from previous service provider.	Companion database, physical file, Companion file on file share, red binder at the Companion's residence.	In order to deliver appropriate and personalized support, The IWA must understand the unique way that each Companion communicates and work to maintain and/or improve communication methods.

Community Housing	Ability to engage with technology	Admin Operations, House Coordinator	Companion application, Anamnesis, My BC Booklet, referral from funding agency, information from previous service provider.	Companion database, physical file, Companion file on file share, red binder at the Companion's residence.	Ability to engage with technology should not impact a Companion's participation in the C.H. program. Companions that use adaptive technology will be supported in the program and training will be provided to IWA Coworkers.
	Access to family and support	Admin Operations, House Coordinator	Companion application, Anamnesis, My BC Booklet, referral from funding agency, information from previous service provider.	Companion database, physical file, Companion file on file share, red binder at the Companion's residence.	When a Companion does not have access to family and support, this can affect their sense of well-being, potentially acting as a barrier to successful outcomes of the Community Housing program. Not having a family/representative could limit the self-advocacy opportunities for an individual. The IWA works closely with families/representatives for any Companion-specific life needs (goal planning, medical support, broader community engagement and addressing any challenges that occur in the C.H. program).
	Factors	Information obtained by	Information source	Information storage	Importance of information
Severity challenges					
Community Inclusion	Trauma	Admin Operations, Care Group, Workshop Leader	Companion application, Anamnesis, My BC Booklet, referral from funding agency, information from previous service provider.	Companion database, physical file, Companion file on file share.	IWA Coworkers receive trauma-informed training. Trauma can affect many aspects of a Companion's life and this can be considered a severity challenge. IWA Coworkers will engage with any Companion's trauma-related issues with care and compassion. Communication with family/representatives and previous service provider is integral in understanding any history of trauma and best practices regarding how to engage with or de-escalate trauma-related events/issues.
	Diagnosis	Admin Operations, Care Group, Workshop Leader	Companion application, Anamnesis, My BC Booklet, referral from funding agency, information from previous service provider.	Companion database, physical file, Companion file on file share.	Understanding diagnosis of Companions supported is integral to providing appropriate support. Communication with family / representatives and primary health teams is essential in delivering safe and effective services.
	Racism	Admin Operations, Care Group, Workshop Leader	Companion application, Anamnesis, My BC Booklet, referral from funding agency, information from previous service provider.	Companion database, physical file, Companion file on file share.	Racism can have a negative impact on the health / mental health and outcomes of persons supported. IWA Coworkers receive cultural diversity training. The IWA has a Cultural Competency plan that is reviewed and updated annually.

Community Housing	Trauma	Admin Operations, House Coordinator	Companion application, Anamnesis, My BC Booklet, referral from funding agency, information from previous service provider.	Companion database, physical file, Companion file on file share, red binder at the Companion's residence.	IWA Coworkers receive trauma-informed training. Trauma can affect many aspects of a Companions life and this can be considered a severity challenge. IWA Coworkers will engage with any Companions trauma-related issues with care and compassion. Communication with family/representatives and previous service provider is integral in understanding any history of trauma and best practices regarding how to engage with or de-escalate trauma related events/issues.
	Diagnosis	Admin Operaitons, House Coordinator	Companion application, Anamnesis, My BC Booklet, referral from funding agency, information from previous service provider.	Companion database, physical file, Companion file on file share, red binder at the Companion's residence.	Understanding diagnosis of Companions supported is integral to providing appropriate support. Communication with family / representatives and primary health teams is essential in delivering safe and effective services.
	Racism	Admin Operations, House Coordinator	Companion application, Anamnesis, My BC Booklet, referral from funding agency, information from previous service provider.	Companion database, physical file, Companion file on file share, red binder at the Companion's residence.	IWA Coworkers receive anti-racism training.

In this plan, The Ita Wegman Association of BC can include surveys sent out during the 2022 and 2023 calendar year, summary of responses from Google Forms, our written analysis, and the following planning worksheets: 1) Identifying stakeholder expectations 2) Defining person supported & other stakeholder expectations 3) Program logic model 4) CARF Walker Program Evaluation Framework 5) Understanding characteristics, barriers and severity factors 6) Program description, service model/approach, target population and community need 7) Design activity handout 8) Workbook: 6 steps to building a performance management system