



MONTAGE  
SUPPORT SERVICES

# STRATEGIC PLAN

## 2024-2028



# Introduction

This strategic planning document is designed to outline the future direction, goals, and initiatives of Montage Support Services. In today's dynamic and competitive support infrastructure landscape, a well-defined strategic plan is essential to guide us toward success and ensure our ability to adapt, thrive, and meet the needs of the people we support. This document serves as a roadmap, charting a clear course for our organization during the coming three-and-a-half years. It outlines our vision, mission, core values, and strategic priorities driving our decisions, investments, and actions.

Through a collaborative effort and an assessment of our internal strengths and areas for growth, we have crafted a strategic plan that reflects both aspiration and feasibility. This plan will guide us in making informed choices, allocating resources efficiently, and responding adeptly to changes in our environment.

As we embark on this journey, it is crucial to emphasize a strategic plan is not static. Instead, it represents a living document and will evolve in response to new insights, challenges, and opportunities. Regular reviews and adjustments will ensure that our organization remains agile and aligned with its strategic objectives.

By adhering to the principles outlined in this strategic planning document, we are confident in our ability to achieve our goals and realize our shared vision. Let us forge ahead together, committed to innovation, collaboration, and excellence, as we shape the future of Montage Support Services.

*Jullio Orlando,*  
CEO



# Our Current Reality

## Through various working groups and organizational discussions, Montage has determined:

- We want to create momentum for person-centred thinking and creative, community-based support.
- We want to embrace changes in the current societal landscape and respond by
  - being better at what we do
  - build more intentional partnerships to influence our collective impact
  - Strengthen our support talent
  - Be strategic to ensure sustainability

## What Impact, For What People?

### Montage serves four main groups of stakeholders:

1. People with Intellectual Disabilities
2. Our Employees and Volunteers
3. The Community
4. Families, Caregivers and Friends

## Who Benefits from our Work?

Our services centre around adults with complex support needs and developmental disabilities. This population includes several sub-groups:

- Adults with complex physical or mental health needs;
- Older adults (seniors) with disabilities; and
- Victims of human trafficking who have developmental disabilities.

We seek to benefit families and caregivers, in that they often represent sustainable relationships for people with disabilities and offer resources that can lead to security, well-being and support for community involvement.



# Who are we?

An important part of any strategic planning process is to “take stock” of an organization’s internal environment (strengths and challenges/limitations) and the external environment (opportunities and threats/challenges) in which it operates. This is often referred to as environmental scanning. Through the strategic planning process, we spent some time focusing on who we are.

## Our Strengths

- Well-situated to respond to ‘Journey to Belonging’
- We are empathic and believe in inclusion
- We are committed and collaborative
- We are a learning organization
- We take a person-centred approach
- We welcome change

## Our Limitations

- Workforce Development
- Employee overload
- We need resources and capacity for growth
- Being unable to meet demand
- Fear of compromise

## Our Opportunities

- Build on what we’re good at: innovation and person-directed supports
- Use of assistive technology
- Build on a ‘*just enough support*’ approach
- Build on whole-life planning
- Collaboration
- Expansion of workforce

## Our Threats

- Staffing shortages
- Workforce capacity
- Remaining competitive
- Trying to be all things to all people
- Not responding to consumer expectations
- Dependency on single-source funding
- Broader infrastructure limitations

## Our Desire is for a Future Where:

- The people we support participate fully in their communities.
- We have a sustainable network of beneficial relationships with other organizations.
- We’ve expanded our services to those who require complex support.
- We are strong, reputable, capable, accountable and well-managed.
- We have a culture of teamwork, learning, and person-centredness.
- We have diversified revenue and strong business practices.
- We have strong leadership and effective risk management.
- We have a stable, high-performing, and committed workforce.



# OUR MISSION

Montage Support Services empowers and gives voice to people with developmental disabilities to live good lives in their communities.



# OUR VISION

All people have the opportunity to live a good life and to belong.



# OUR VALUES

**At Montage, many values guide our work, and our Core Values are:**

**Wisdom:** having good judgement and insight into each person's wellbeing.

**People:** sharing a common human experience in seeking belonging.

**Collaboration:** working together and selflessly taking time to help each other.

**A Positive Mindset:** embracing good attitudes and positivity.

**Growth:** investing in individual and collective development and wellbeing.

## Our values will guide our work in the following ways:

We regard every person we encounter as unique and having equal rights.

Person-centred approaches empower people with choice and control.

We respond with thoughtfulness, kindness, and professionalism.

We communicate quickly, respectfully, and with integrity.

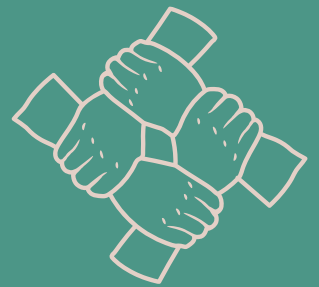
Creativity, collaboration, and innovation guide our work.

A good life is built with valued social roles and relationships.

Our workforce is diverse, and every team member adds value.

We look for opportunities to invest in growth, health, and well-being.

Natural supports are enduring relationships and should be welcomed and involved.



# Our Strategic Directions

## 2023-2025

## 2026-2028

1

**We have a sustainable workforce to support our person-centred work**

**What does SUCCESS look like?**

- We are fully staffed
- We have high retention rates
- Effective transitions in leadership
- Widespread support for person-centred practices including consistency and quality support

**Our First Priorities for 2024/25**

- Create emergency succession plans
- Revise new employee orientation
- Update and transform human resource-related policies, practices, and procedures to reflect a person-centered framework
- Create HR Key Performance Indicators
- Develop values-based recruitment
- Orient all staff to Mission/Vision/Values

**Our Next Priorities 2026-2028**

- HR Systems reflect Montage's values and incorporate person-centred tools
- Performance appraisals incorporate personal growth and practical learning
- Montage meets HR's KPIs

2

**We have a demonstrated commitment to person-centred living, culture, and competencies**

**What does SUCCESS look like?**

- We have a culture of person-centred work.
- Our practices ensure consistency
- People and their networks are partners in planning.
- We consistently meet our KPIs for person-centred work
- We measure, report and shift using outcomes for people.

**Our First Priorities 2024/25**

- Create tools to monitor and evaluate our services
- Develop a 'Quality of Life' working group
- Focus on person-centred reviews and plans; celebrate successes often
- We will establish KPIs for our quality of life and staff development
- We will train all staff in PC thinking

**Our Next Priorities 2026-2028**

- We measure progress using KPIs and person-centred reviews
- Data is used to support learning and change
- People are better connected to community and relationships

3

**We have sustainable organizational capacity**

**What does SUCCESS look like?**

- We have a solid and viable business model and diversified revenues
- We invest in strong governance and leadership
- We have partnerships that increase our impact and strengthen us
- We have enhanced our use of tech to support all aspects of our work

**Our First Priorities 2024/25**

- Develop team charters and ground rules for all teams
- Create an evaluation plan using KPIs for all areas.
- Map out potential partners
- Create a plan for using tech to improve the efficiency of support, HR, and communication.

**Our Next Priorities 2026-2028**

- Establish an up-to-date risk management plan
- Fully update our policies to reflect the organization's values
- We will develop and implement an updated business model
- We will increase our collective impact through partnerships

4

**We have increased community engagement and contribute to welcoming communities**

**What does SUCCESS look like?**

- Montage is a well-established and trusted brand, the 'goto provider' for people with complex needs and victims of human trafficking.
- People are more active in the community and have more relationships

**Our First Priorities 2026-2028**

- Increase the number of connections and the involvement in community for the people we support.
- Develop a communications team and a marketing plan to support inclusive community development
- Increase our revenue from more sources
- We will communicate intentionally to share success stories internally and with our external networks.

5

**We have increased our impact for the people we support and their networks**

**What does SUCCESS look like?**

- We have increased our impact and personalization by using person-centred approaches
- Montage is valued as an organization that responds to the Journey to Belonging and as a leading organization
- We will focus on being experts at supporting people with complex needs and those who are victims of human trafficking.

**Our First Priorities 2026-2028**

- We will increase the measurable impact by using tools like "just enough support"
- We will situate the organization as leaders in communication and technology to best support people with limited communication
- Families and networks are well supported by strong communication and meaningful planning
- We will conduct 2 Working Together for Change workshops
- We will complete health aging plans for everyone over 50 years of age
- We will develop a business plan for the future of H.T.