



Accola Annual Operations Plan 2025–2026

Q3 Progress Update

Q3 Progress Update — Accola Annual Operations Plan 2025–2026

Initiative	Lead	Q2 Status	Q3 Status	Q3 Notes
Comprehensive programmatic review at LIS	Elisabeth & Janine	Green	Green	Programmatic review recommendations compiled and reported; review of recommended changes to current programming underway.
Respond to the needs of the time by incorporating participant and community voices in the evaluation and continuous improvement of Accola	Matt / SLT	Green	Green	Tools being modified/added to incorporate missing participant and community measures using identified criteria.
Increase access to support and referrals	Matt / Cheryl / Haven	N/A	Mixed	Culturally specific cross-program referral tracking in progress. Legal services: need funding to expand access; currently tracking existing access. Applications pending for additional funding. Follow-up with Haven needed on spiritual support questions for Sarah's program.
Design and launch the expanded Wisdom Ways to Accola and the community	Haven	N/A	Green	Q3 events implementation continuing; registration and outreach ongoing; partnership co-creation conversations underway.
Capture and build upon Accola's unique community building model	Matt / Andree	Green	Mixed	Partners identified; still working to develop the community partner feedback model. Participant insight mechanism also in process of development.
Build awareness about Accola's work, make connections across Accola programs and partner organizations, and grow the donor base	Andree	N/A	Green	Strategic 1:1s underway; partners being invited to advisory councils and program planning. Shared events co-hosted with partners; newsletter distribution and storytelling/interviews in progress.
Implement earned income strategies for expanding opportunities across Accola	Tiffany	Green	Green	Feasibility study completed; report of findings and recommendations drafted; roadmap for planned implementation in development.
Conduct a facilities feasibility study of Sarah's property and make recommendation for future use	Matt	Green	Green	Recommendation developed on whether to renovate, rebuild, or purchase; project team assembled with results target on track.

Initiative	Lead	Q2 Status	Q3 Status	Q3 Notes
Establish participant informed Accola standards and education for those interacting with participants/residents/clients	Matt / Janine / Cheryl	Green	Green	List of existing standards and education with gaps completed by January 2026. List of needs identified by March 2026.
Foster a culture that recognizes and nurtures Accola (staff, participants, board, and volunteers) sense of spirituality	Matt / Haven	Green	Green	All surveys and conversations on track for completion by March 2026.
Practice ways to achieve a cohesive Accola staff culture	Matt / Andree / Tiffany	N/A	Mixed	Quarterly all-staff meetings taking place. 90% of business account merge complete; documentation of shared resources complete; staff/resource sharing identification continuing into Q4.

Progress Summary

Overall Progress: Initiatives have moved into active Q3 implementation. Strong progress continues in earned income, standards development, and spirituality work. Several initiatives managing phased timelines as planned.

On Track (Green):

- Comprehensive programmatic review — Recommendations reported; review of changes underway
- Participant & community voices — Tools being modified using identified criteria
- Wisdom Ways expansion — Q3 events running; partnership co-creation conversations begun
- Build awareness / partnerships — Strategic 1:1s launched; shared events and storytelling active
- Earned income strategies — Feasibility study complete; findings and recommendations developed
- Facilities feasibility — Recommendation on renovate/rebuild/purchase developed
- Standards and education — Gaps list complete; needs list identified by March 2026
- Spirituality culture — All surveys and conversations on track for March 2026 completion

In Progress (Yellow/Mixed):

- Increase access to support and referrals — Cross-program referral tracking active; legal services funding applications pending; spiritual support follow-up with Haven needed
- Community building model — Partners identified; feedback model development still in process for both partner and participant mechanisms
- Cohesive staff culture — Quarterly meetings taking place; 90% of account merge complete; resource sharing documentation done; Q4 will finalize identification of sharing benefits

Key Observations:

- No high-risk red items at this stage; all initiatives are progressing as designed or with intentional phasing
- Q3 deliverables reflect a shift toward synthesis, data collection completion, and implementation deepening
- Q4 will focus on finalizing studies, completing planned events, and documenting outcomes for the next fiscal year planning cycle

Initiative 1: Comprehensive programmatic review at LIS

Person leading initiative: Elisabeth & Janine

Goals:

- Q1 Scope defined by end of Q1
- Q2 Complete comprehensive analysis of current programming by end of Q2
- Q3 Review and report on recommended changes/updates to current programming by end of Q3
- Q4 Draft plan for implementing recommendations by end of Q4

Initiative 2: Respond to the needs of the time by incorporating participant and community voices in the evaluation and continuous improvement of Accola

Person leading initiative: Matt with SLT Support (SLT Lead: Elisabeth & Janine, Tiffany)

Goals:

- Q2 Evaluate existing feedback tools and data from all programs, ensuring participant and community voice is reflected
- Q3 Modify/add tools to incorporate any missing participant and/or community measures, using identified source/criteria
- Q4 Establish schedule and process for administering tools and evaluation

Initiative 3: Increase access to support and referrals

Person leading initiative: Matt with SLT Support (SLT Lead: Cheryl)

Goals:

- Q1 Identify SLT lead and establish plan
- Q2 Establish baseline for culturally specific cross program referral, and set measurable goal for expansion
- Q3 Track progress on goals for expanded culturally specific cross program referral
- Q4 Assess: Increase number of referrals across programs by goal met?

Initiative 4: Design and launch the expanded Wisdom Ways to Accola and the community

Person leading initiative: Haven

Goals:

- Q1 Create overall design for FY26 offerings; determine what to strategically pilot
- Q2 Carry out pilot events; seek and integrate feedback to inform development of Q3-Q4 offerings
- Q3 Continue implementation
- Q4 Complete planned events and develop offerings for next FY

Initiative 5: Capture and build upon Accola's unique community building model

Person leading initiative: Matt with SLT support (SLT Lead: Andree)

Goals:

- Q1 Assign an SLT lead, establish quarterly plan
- Q2 All-staff meeting is held by end of Q2, aimed at gathering feedback on existing community building model
- Q3 Develop and implement mechanism for gathering community partner insight. Collect feedback data.
- Q4 Leverage gathered feedback to document and share existing community building model

Initiative 6: Build awareness about Accola's work, make connections across Accola programs and partner organizations, and grow the donor base

Person leading initiative: Andree

Goals:

- Q1 Start community scan, outreach, intake process
- Q2 Complete community scan, outreach, intake process
- Q3 Start conducting strategic 1:1s, invite to advisory councils or program planning
- Q4 Finish conducting strategic 1:1s, invite to advisory councils or program planning

Initiative 7: Implement earned income strategies for expanding opportunities across Accola

Person leading initiative: Tiffany

Goals:

- Q1 Draft project plan
- Q2 Defined list of criteria for in-depth Feasibility Study
- Q3 Completed study
- Q4 Start implementation of low hanging fruit opportunities

Initiative 8: Conduct a facilities feasibility study of Sarah's property and make recommendation for future use

Person leading initiative: Matt

Goals:

- Q1 Meeting with key officials by end of Q1
- Q2 Visit comparable properties currently on the market
- Q3 Make recommendation to either: renovation, rebuild, or purchase
- Q4 Present results and recommendation

Initiative 9: Establish participant informed Accola standards and education for those interacting with participants/residents/clients

Person leading initiative: Matt with support from SLT (SLT Leads: Janine, Cheryl)

Goals:

- Q1 Identify SLT lead and establish plan
- Q2 Definition of the baseline needs requiring standards and education by October 2025
- Q3 List of existing standards and education, with gaps, by January 2026
- Q4 Final plan developed by end of Q4

Initiative 10: Foster a culture that recognizes and nurtures Accola (staff, participants, board, and volunteers) sense of spirituality

Person leading initiative: Matt with support from SLT (SLT Lead: Haven)

Goals:

- Q1 Broad definition developed by August 2025
- Q2 Develop information gathering strategy by November 2025
- Q3 All surveys and conversations complete by March 2026
- Q4 Data reviewed by team by April 2026

Initiative 11: Practice ways to achieve a cohesive Accola staff culture

Person leading initiative: Matt with support from SLT (SLT Lead: Andree, Tiffany)

Goals:

- Q1 Identify SLT lead and establish plan
- Q2 First quarterly meeting is held by December 2025
- Q3 Quarterly meetings taking place
- Q4 Quarterly meetings taking place