

Strategic Huddle: Optimization

HUDDLE TOPIC: **LISA BUILDS A FRIENDSHIP**

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This [year's strategic operating plan](#) includes work to optimize core systems at Karis including AlayaCare (and Unison), UKG, and Microsoft Office 365. Optimizing can include making a system work better, improving training for staff, or improving the way we make systems and training better. Optimization is about valuing people we support to live their best life, and valuing staff time and input.

Optimizing the AlayaCare system is a cyclical process to make things increasingly easier for staff to provide (and document) great support for people.

Lisa's Actions and Personal Growth

Lisa lives in Kingston and loves swimming. Her last Personal Plan theme was *"Take a Chance"*, and she embraced it by meeting her goal to swim regularly. At the pool, she reconnected with her cousin, who swims with a group of ladies. Their friendship deepened through regular connections at the pool.

This year, Lisa has a goal to build relationships beyond Karis, including strengthening her bond with her cousin. Since meeting at the pool, they've had lunch at the mall, gone shopping, and even attended the circus together. Initially, Lisa's DSP Michelle modelled and supported the conversations, but now Lisa confidently chats with her cousin and others in the group. Lisa has grown so much in independence, another goal of hers. Lisa has also become comfortable going to the pool while choosing to leave the comfort item from her youth at home.

Lisa's Actions linked to Goals and Visits in AlayaCare

Lisa's Goal to *build relationships outside of Karis* had been added to her Care Plan in AlayaCare and linked to the Action *build friendship with cousin*. Because the Action had been set to occur on a *"per request"* frequency, staff could then easily add it to any Visit where Lisa connects with her cousin. Adding specific Actions to specific Visits helps the staff connect Lisa's support plan with her support schedule.

Michelle Documents Lisa's Action

Michelle clocked into the relevant Visit with the Service Code *"Swimming"* on Lisa's Calendar and updated the Service Tasks (see right). She edited the Action *"Build friendship with cousin"* and selected Done to show it was completed for that Visit. She added a Comment noting that Lisa had spoken with her cousin and exchanged phone numbers. After clocking out, the visit tile turned blue, showing a *Completed* visit. Michelle knows that clocking in AlayaCare doesn't impact her pay as work hours are tracked in UKG.

The screenshot displays the AlayaCare interface for a specific visit. On the left, under the 'Actions' tab (1/1), the action 'Build friendship with cousin' is listed with a status of '1 (1 this visit)'. Below this, a green 'Done' button is visible. A comment box contains the text 'Lisa spoke with her cousin and exchanged phone numbers'. To the right, the 'Forms' and 'Goals' sections both indicate 'No data found.' The interface includes '+ Add' and 'Update' buttons at the top.

Service Tasks in Visit

Sharing Lisa's Action

While Michelle is on vacation, Amanda sees she is assigned to a Visit with Lisa with the Action *"Build friendship with cousin."*

PROMOTING COMMUNITIES WHERE EVERYBODY BELONGS

To review Lisa's progress, Amanda opens Lisa's Care Plan and filters for that Action. By clicking the Completions icon (right), she can view a list of all the Comments (below) that Michelle or other staff have added about Lisa's work on that Action.

Actions

Support

Build friendship with cousin

From 2025-09-01 | Any time | Per request

Build relationships outsi...

Completed for Build friendship with cousin

Update Time	Author	Completed	Duration	Comment
2025-10-10 10:30	Michelle Rob	✓	--	Lisa spoke with her cousin and exchanged phone numbers
2025-10-01 12:30	Michelle Rob	✓	--	Lisa met her cousin at the mall - they walked and laughed a lot
2025-09-25 14:00	Michelle Rob	✓	--	Lisa swam with her cousin at pool and arranged to meet at the mall

No need
to look
through
each
Visit!

Action Completions List in Care Plan

Improving the Way we Make Changes

We have also improved *how* we improve systems and training by involving DSPs and others in co-designing, for instance, ongoing changes to AlayaCare and related [AlayaCare Training Material](#).

CONVERSATION:

1. From the story above, what did Lisa do to grow her friendship with her cousin? What did she experience?
2. What did Michelle do to help Lisa grow her connection with her cousin? What did Michelle do in AlayaCare to make it easier for others to know how well Lisa is doing on this Action?

TEAM CHALLENGE:

- **Today, as a team, take action!** Discuss what you could do to make it easier for other team members to see how well people are doing on their Actions.

GOING DEEPER:

1. Everybody checks in at the **next team meeting!** What Comments on Actions are you able to see for people you support? For other people in your program that you sometimes support?
2. **Celebrate** growth this month! Stories of people who use our services taking action towards their goals are encouraging to share. With the person's consent, email communications@karis.org or the social media Champion in your district so we can celebrate their success together!



Valuing
People



Fostering
Belonging



Serving
Others



Celebrating
Gifts