

Optimizing our Data, Systems and Processes: Your Feedback in Action!

We've heard from many employees across the organization that there is a need to improve how we use our data, systems, and processes. To respond to this need, a key component of our operating plan is dedicated to saving staff time and enhancing service delivery for the people we support by improving how we use tools like AlayaCare, Unison, UKG, and Microsoft M365 (Teams, Outlook, Calendar, OneDrive, etc.) in our daily work.

To support this, we've adopted an **Agile approach** — working in small, focused steps, gathering feedback regularly, and adjusting quickly to deliver meaningful improvements. Simply put, Agile is a way of working that:

- **Does work in small chunks** (called “sprints”).
- **Gets feedback early and often** from those closest to the work.
- **Is flexible during the delivery of projects** — Meaning plans can be adjusted based on what's learned while the work is being done.
- **People collaborate closely** — team members (e.g. DTI, developers) and users (e.g. DSPs, PMs) work together.

In March of 2025, an “**Agile Working Group**” was put together to help us in our Agile Approach. This group gathers feedback, prioritizes the work, and monitors our progress of our optimization efforts. The work itself is then conducted by specially formed “Delivery Teams” when changes are more complex or by existing teams (such as DTI) when goals and objectives for implementing upgrades and other improvements to our systems are well defined and simpler in nature.

What is an Agile Working Group and why was it created?

As part of the 2026 Operating Plan to optimize our data, systems, and processes, Karis launched the optimization projects **Agile Working Group**. This cross-functional team brings together leaders and staff from different districts and service types (Executive Directors, Area Managers, Program Managers, DSPs, Host Family Coordinators, Community Schedulers, Service Standards Managers, and shared services). Together, the group reviews feedback we have already gathered from across the organization and prioritizes opportunities to reduce waste, save time, improve service delivery, and make better processes and usage of AlayaCare, Unison, UKG, and M365.

What has been done so far?

The Agile Working group has reviewed the full backlog of feedback and categorized items into two streams:

- **Items that don't need a delivery team:**
About half of the items in the full backlog of optimization work identified did not need a new delivery team and are being completed through existing procedures or channels (e.g. HR team alongside UKG and others). As of Sept 30, 2025, more than 50% of these are already completed or in progress.

- **Items that need a Delivery Team:**

As of Sept 30, 2025, four teams were formed to address more complex items – AlayaCare – (Group Living, SIL, CPS), UKG, Microsoft 365, and AlayaCare - Host Family.

Highlights by each team (as of Sept 30, 2025):

- **Non-delivery Team (Unison):** Improved Passport/Fee-for-service expense views to show more useful data for DSPs and PMs. Enabled clear differentiation between fee-for-service and ministry-funded individuals by syncing client tags from AlayaCare. Identified specific TAMS items for fee-for-service clients to prevent unnecessary data tracking.
- **Non-delivery Team (AlayaCare):** Automated OI notifications for on-call specialists enabling timely awareness and swifter response to incidents. In July 2025, the government introduced the Canada Disability Benefit (CDB) for individuals approved for the Disability Tax Credit (DTC). As teams support people in applying for the credit and the benefit, they can use two newly added checkboxes under the client profile's "Funding and Billing" section to easily track whether a person has been approved for the CDB and/or DTC.
- **AlayaCare Group Living Delivery Team:** Focused on the way we are using AlayaCare for scheduling and support documentation. The team has gathered feedback from multiple districts and proposed a future solution. Testing is now underway across Central, Ottawa, Kent, Hamilton, Essex, and Saskatchewan. Feedback will be reviewed with the Service Standards Managers (SSM) group and senior leaders. More updates will be provided soon.
- **UKG Delivery Team:** Focused on improving the scheduling view including translating rounding rules and color coding to quickly enable Community Schedulers and Supervisors to see where and when the staff have worked. Testing is complete, and updates to training materials are underway. A phased rollout of the new scheduling view is being prepared.

What's next?

The new Microsoft 365 and **AlayaCare - Host Family Services** teams have recently been established and started their work with operations representatives like DSPs, PMs and SSMs. More updates will be shared soon!