



Senior Support Services
*Supporting Seniors Independence
at Home and in the Community.*

SENIOR SUPPORT SERVICES – CPHC

STRATEGIC PLAN

2020-2023

CONTINUING TO MAKE A DIFFERENCE IN YOUR COMMUNITY



SENIOR SUPPORT SERVICES CPHC STRATEGY WORKSHOP HIGHLIGHTS

GROUP	DATE	#
BOARD/MANAGEMENT	NOVEMBER 12	15
STAFF, VOLUNTEERS	DECEMBER 12	4
PATIENTS	DECEMBER 12	
MIXED	DECEMBER 12	

revision: dec12

Participants:
See participant list
In Association with:
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Executive Summary

This document contains proceedings from a strategy session held on November 12, 2019 as well as a stakeholder focus group on December 12, 2019. The purpose of the workshop was to develop the major elements of a strategic plan for the next four years. The session began with a review of progress against our current plan over the last two years. Then the group reviewed the mission and vision. The group identified some long term objectives for the vision. Then the group conducted a current state analysis by identifying internal strengths and weaknesses and external opportunities and threats. Based on this, four priorities were agreed upon. Objectives were created for each priority. Below are the highlights.

Mission

To provide client centered services for seniors and their caregivers which promote choice, independence, and safety in their own homes and communities.

Vision

CPHC will be the leader and provider of choice offering innovative, responsive, and quality services for seniors to live independently in their own homes and communities. We will do this by:

1. Building a strong, cohesive and engaged team;
2. Enhancing awareness in the community so that people know what we do and what our services are.
3. Continuing to strengthen our financial stability to allows us to expand programs
4. Being recognized as the go-to organization for senior services in LLG, integrating seamlessly within an Ontario Health Team
5. Expanding our reach to serve all of the clients who need our services in LL&G, whether they can pay for the service or not.

Priorities in next two years

1. Marketing & promotion
2. Quality assurance
3. Strengthen the volunteer program
4. Collaboration with community partners

Objectives (by Priority)

Priority	Objectives
Marketing & promotion	<ol style="list-style-type: none"> 1. Marketing and PR strategy updated and implemented. 2. We are well known in all communities be the provider of choice for Senior Support Services 3. Program referrals to be increased (% increased to be determined) 4. Ability to meet LHIN benchmarks targets within next 12-18 months (especially in programs that are lagging) 5. Re-established a credibility with our donors & potential donors
Quality Assurance	<ol style="list-style-type: none"> 1. Formalized client and family feedback process 2. Identify gaps in services based on referrals and client and family feedback and referring agencies 3. Preparation & education to become an accredited agency
Strengthen the volunteer program	<ol style="list-style-type: none"> 1. Full volunteer program development implemented 2. Every program has adequate volunteer support by Dec 2021 - exact # to be determined based on needs identified in object1 above 3. Determine what budget is required for volunteer program
Collaboration with community partners	<ol style="list-style-type: none"> 1. We are now able to provide immediate services to clients returning home from hospitals and/or primary care appointments ...in partnership with primary health Care facilities throughout the communities (sharing services, coordinating care). * 2. Partnered with other organizations who have similar services and amalgamated specific services to provide better quality care.

Current State Assessment

<p>Strengths</p> <ul style="list-style-type: none"> • Integrated service • Service based (vs. product-based). • Experience base: we have been doing this for a long time • Lower client fees • Volunteer based agency with • 	<p>Opportunities</p> <ul style="list-style-type: none"> • Provide new services outside of the LHIN funded services • Meet expanding service needs (beyond our common basket of services without wait list) • Create a competitive advantage • OHTs • Complete & refined process for P&Ps;
<p>Weaknesses</p> <ul style="list-style-type: none"> • Volunteers: recruitment, engagement, support • Remaining current: ensure we are ahead of the curve • Marketing, collaboration & sales • Staff Development & training • Fundraising alternatives on ongoing basis 	<p>Threats</p> <ul style="list-style-type: none"> • Competition • Demographics outpacing our capabilities -> Waitlists • Some programs are operating at a loss but are in high demand • Funding uncertainties: LHIN?? govt policy changes... OHT model • Fundraising challenges in glutted Brockville area market

Path Forward

Task	Responsible / Date
1. Distribute results of Nov 12 session	Erik by 11/15
2. Focus Groups with staff, volunteers, clients	Fay / Erik Dec 12
3. Incorporate focus group findings, sequence timelines, reality check, resources required, investigator recommendations	E.D. January
4. Budget implications (placeholder)	E.D. Nov 30
5. Draft plan to Board	E.D. Mar 4
6. Strategy update session	Chair, Jan 2022

Focus Group Approach

Suggested agenda for December 12:

1. Opening preamble, purpose, anonymity, why we are asking you, what will be done with results (Chair, ED)
2. Present the vision, mission, 4 priorities
3. How do we make it work (actions, strategies, initiatives)
4. Have we missed anything? (beyond these 4)

Format: 3-4 sessions, 90 mins, 12-14 people each,

Editor's Notes:

- a. The symbol // or ... indicates that two similar ideas have been merged together.
- b. This document contains the meeting proceedings and is not intended as a "Final Report"

1.0 – Direction

1.1 – Progress Against Plan

Priority	Objectives by 2019	Status
Fiscal Discipline	1.1 1 Balance the operating budget in all CSS programs by Dec. 2019 1.2 There is a debt repayment plan and a reinvestment strategy in place by April 2019	Great progress
Marketing & rebranding	2.1 To increase awareness of organization and accessibility to services 2.2 The public recognizes our new name for exactly what we do and how we are unique	Good progress
Volunteer Management	3.1 Grow volunteer base to 601 active volunteers by Dec 2019 3.2 Establish a volunteer coordinator in 2018	WIP
Staff engagement & satisfaction	4.1 Improve staff morale using key metrics to be determined (sick leave usage, absenteeism, etc.) 4.2 Improve transparency & communication with staff	Good progress

Comments:

- ✓ We have come a long way since 2017
- ✓ Fiscal situation rectified
- ✓ Hats off to management and staff
- ✓ Good work on awareness
- ✓ Lots of progress on internal communications
- ✓ On a good path to a cultural shift towards new way of doing business

1.2 – Vision and Mission

Vision

To be the leader and provider of choice offering innovative, responsive, and quality services for seniors to live independently in their own homes and communities.

Mission

To provide client centered services for seniors and their caregivers which promote choice, independence, and safety in their own homes and communities.

The group endorsed these and developed some long term objectives to help make the vision more measurable. (**see section 1.2**)

1.3 – Objectives (long term)

Imagine it is 2023.

Support Services for Seniors CPHC has been successful. What does it look like? We know we will have been successful when we see the following...

What are the most compelling elements of this future state....

Item	What are the SIX most compelling?	Average	#votes /15
1	We are a strong team ...We are a better team .. we have an engaged workforce and happy clients and the organization is working as a cohesive team.	0.87	13
2	We are well known in the community and are the provider of first choice. ..the community knows who we are and trusts us to provide quality services for seniors ..People in the community know what we do and what our services are. We are a common name in the community.	0.87	13
7	Further strengthen financial stability to expand on programs without funding limitations. More private programs offered in the community. The provider of choice among further competitors ...we know we are successful when we are meeting budgets and and growing our areas. Debt is almost eliminated and our business has reached a state where our programs are self-sufficient.	0.87	13
6	We are viewed as a leader and organizations come to us to ensure the best in client care. Staff are retained and promotion happens from within.	0.67	10
9	The 'go-to' organization for senior services in LLG; integrated seamlessly within an Ontario Health Team; providing excellent timely services to all seniors in need in our area.	0.67	10
5	We are serving all of the clients who need our services in L&G and Lanark, whether or not they can pay for the service.	0.60	9
10	We are an essential partner in the community system supporting seniors to live in their communities.	0.33	5
4	We have increased transportation services, more in home respite support, and increased in house day programs	0.27	4
8	The health community of LL&G engages us with collaborative ideas	0.27	4
12	We have no waiting lists, full balance of services, and a center of excellence for senior services	0.27	4
11	All staff are aware of the expectations including performance and attendance through development of policies and guidelines	0.20	3
3	We know we have been successful with the basket of services	0.00	0

D

2.0 - Priorities

What must be our big priorities over the next 18-24 months? What do we need to “get done”?

The group brainstormed ideas in small teams (2.1). Then each team selected its top 3 ideas to share with the plenary (2.2). Finally, individuals were asked to identify “if we could only address three of the priorities in the next two years...” (2.3)

2.1 - Formulation

1st screening (top three from each group)

- 1) Financial: Strict financial discipline to maximize our capacity while managing debt
- 1.1) Remove the reliance on Fundraising to run programs/services.
- 2) Raising awareness about what we do, who we are and how we are the best at what we do -> improved marketing, promotion and sales
- 2.1) Implement Public Relations - a dedicated position/person.
- 2.2) Partnerships and Awareness & Client Centered Service
- 3) Strengthening the volunteer program; find creative ways to recruit volunteers
- 3.1) Increase volunteer base with full-time volunteer coordinator and utilize feedback and review reward program
- 3.2) Increase and recognize our volunteer base, which will help to increase services, help decrease costs
- 4) Quality assurance - includes efficiency, effectiveness and service -> Excellence in Service Delivery & Quality of Service through strong volunteer/ staff base
- 4.1) Formalize client and family feedback process and utilize data to make improvements
- 5) Collaboration with community partners to grow services together (reciprocal relationship building, cooperation) e.g. hospital, OHT
- 6) Staff engagement in services and operational needs - staff training/education; asset management and finances
- 7) Movement to implement private pay programs and grow these programs
- 8) Promote community health care within the home.
- 9) Direct focus from service centered to client centered; move from "for people" to "with people" - client centered

Ideas that did not make the 1st screening:

What are the big areas that CPHC - senior support services should focus on over the next two years?

Number of Contributions: 56

Team 1:

- (1/1) Move from for people to with people - client centered
- (1/2) Increasing community awareness and credibility is an essential part of community senior support services
- (1/3) Volunteer and Staff - recruitment, orientation, training & development

Team 2:

- (2/1) Staff development and training
- (2/2) Establishing a sense of trust and reliability in the community and with the employees.
- (2/3) Quality Assurance and Evaluation of programs in each community
- (2/4) Enhance and Reward volunteer participation

Team 3:

- (3/1) Encourage or empower staff to bring ideas to the table, i.e. think outside the box
- (3/2) Further strengthening community partnerships
- (3/3) Becoming the employer of choice.
- (3/4) Client centred vs. service centred model

Team 4:

- (4/1) Conduct environmental scan to identify gaps in services
- (4/2) Evaluation of programs in each community
- (4/3) Evaluate geographic need for various programs in communities we serve (what are we offering, what is needed, can we offer it?)
- (4/4) Use OHT transitions and developments - use them to our advantage
- (4/5) Monitor and improve staff morale
- (4/6) Utilize feedback from our volunteers
- (4/7) Reward volunteer participation

Team 5:

- (5/1) Evaluation of programs in each community
- (5/2) Enhance and Reward volunteer participation

2.2 - Selection

Item	What are the FOUR most important	Average	#votes /16
2	Raising awareness about what we do, who we are and how we are the best at what we do -> improved marketing, promotion and sales	0.94	15
4	Quality assurance - includes efficiency, effectiveness and service -> Excellence in Service Delivery & Quality of Service through strong volunteer/staff base	0.69	11
1	Financial: Strict financial discipline to maximize our capacity while managing debt	0.63	10
3	Strengthening the volunteer program; find creative ways to recruit volunteers	0.50	8
5	Collaboration with community partners to grow services together. (reciprocal relationship building, cooperation) e.g. hospital, OHT	0.44	7
6	Staff engagement in services and operational needs - staff training/education; asset management and finances	0.31	5
7	Movement to implement private pay programs and grow these programs	0.25	4
9	Direct focus from service centered to client centered; move from "for people" to "with people" - client centered	0.19	3
8	Promote community health care within the home.	0.06	1

3.0 – Objectives (by priority)

3.1 – Marketing and Promotion

Priority: Marketing and promotion

Goal: To raise awareness and increase clarity within our key audiences of exactly who we are and what we do

Lead: Management

Key Objectives by December 2021:

- (1/1) **2020:** Marketing and PR strategy updated and implemented. Need to ensure the person doing this has time to focus on this
- (1/1.1) Identify Key targets for Marketing within the next 6-12 months i.e. consumer, HCP, caregivers, general public, chamber of commerce, service clubs, community partners
- (1/2) **2021:** To be well known in all communities be the provider of choice in our community for Senior Support Services
- (1/3) **2021:** Program referrals to be increased (% increased to be determined)
- (1/4) **2021:** Ability to meet LHIN benchmarks targets within next 12-18 months (especially in programs that are lagging)
- (1/5) **2021:** We have re-established a credibility with our major donors and potential donors

Ideas that are redundant, or beyond scope of next two years:

3.2 – Quality Assurance

Priority: Quality assurance - includes efficiency, effectiveness and service

Goal: So that we can evaluate our effectiveness and improve fiscal accountability

Lead: Management

Key Objectives by December 2021:

- (2/1) **2021:** Formalized client and family feedback process and utilize data to make improvements
- (2/2) **2021:** Identify gaps in services based on referrals and client and family feedback and referring agencies
- (2/3) **2021:** preparation/education to become an accredited agency (what is involved, what are the standards etc.)

Ideas that are redundant, or beyond scope of next two years:

- (2/4) Utilization and waitlist data for each program offered in each community served.
- (2/5) Cost effectiveness and efficiency KPIs for each program offered in each community (staffing, resources, etc.)
- (2/6) Staff satisfaction and program evaluation information
- (2/7) Cost benefit analysis of programs offered in each community
- (2/8) GIVEN: Management support of financial controls

3.3 – Strengthen volunteer program

Priority: Strengthening the volunteer program; find creative ways to recruit volunteers

Goal: Increase our capacity and be sustainable from a financial and human lens

Lead: Management/HR

Key Objectives by December 2021:

- (3/1) **2021:** Full volunteer program development which includes: restructure recruitment program, recognition of volunteers, dedicated volunteer coordinator, performance appraisals/ management of volunteer, incentives for them to join our organization, ensure consistency across programs.
- (3/2) **2021:** Every program has adequate volunteer support by **Dec 2021** - exact number to be determined based on needs identified in object1 above
- (3/3) **2021:** Determine what budget is required for volunteer program

3.4 – Collaboration with Community Partners

Priority: Collaboration with community partners to grow services together (reciprocal relationship building, cooperation) e.g. hospital, OHT

Goal: To raise awareness, be financially sustainable, and ensure we remain relevant within the continuum of care

Lead: Management

Key Objectives by December 2021:

- (4/1) **2021:** We are now able to provide immediate services to clients returning home from hospitals and/or primary care appointments ...in partnership with primary health care facilities throughout the communities (sharing services, coordinating care). * Erik CAST project Hamilton
- (4/2) **2021:** Partnered with other organizations who have similar services and amalgamated specific services to provide better quality care.

Ideas that are redundant, or beyond scope of next two years:

- (4/3) Collaborated with Service Clubs and now have more volunteers to run our programs
- (4/4) Collaborated with groups on Fundraising and now have 3rd party events

Other Priorities (beyond our top 4)

- (5/1) GIVEN: Financial: Strict financial discipline to maximize our capacity while managing debt. Remove the reliance on Fundraising to run programs/services.
- (5/2) Staff engagement in services and operational needs - staff training/education; asset management and finances
- (5/3) Movement to implement private pay programs and grow these programs
- (5/4) Direct focus from service centered to client centered; move from "for people" to "with people" - client centered
- (5/5) Promote community health care within the home.

4.0 - Current State Assessment

- Strengths: What is currently working? What are three things that Support Services for Seniors CPHC is really good at or known for?
- Needs/Weaknesses: What are the major areas for improvement that must be addressed in order for Support Services for Seniors CPHC to be successful?
- What are the important external opportunities that we should be pursuing?
- What are the critical threats that we must consider in our future planning? (risk, challenges, threats, dangers)

4.1 - Strengths

Strengths: What is currently working? What are three things that Support Services for Seniors CPHC is really good at or known for?

XXX = differentiate us from others

Note: these are not prioritized

- 1) XXX integrated, comprehensive service (vs others) ... Solid Client base. -> We serve the clients that we have well.
- 2) XXX Service based (vs. product-based)...
- 3) XXX history, experience base: we have been doing this for a long time
- 4) XXX Client fees are lower... we subsidized
- 5) XXX Volunteer based agency with excellent commitment.
- 6) Dedicated and engaged Management Team and Staff -> compassionate and caring to our clients
- 7) Leadership and Board are strong. .. Leadership commitment to cultural change.
- 8) Improved staff morale
- 9) Engagement and credibility with community partners ..Collaboration with community partners/organizations;
- 10) Financially we are doing well and should continue to do well.
- 11) Physical assets are current and accessible
- 12) Re-Branding reflects what we do
- 13) Providing a variety of services with a reasonable cost.
- 14) Internal processes and efficiencies with centralization
- 15) Our programs -> ADP, MOW, Foot care, Transportation, Respite, Exercise programs
- 16) Adaptation to change - everyone worked hard to successfully achieve the re-organization of services and centralization of staff to our Brockville office.
- 17) Improved relationship with Leeds FHT

4.2 – Weaknesses, Opportunities, Threats (prioritized)

What are the 4 most important opportunities that we should be pursuing? What are the 4 most critical threats that we must consider in our future planning? If we could only address 4 weaknesses?

Item	IMPORTANCE AND INFLUENCE	Average	#votes /16
1.1	Volunteers - recruitment, engagement, feeling valued ..Volunteer recruitment & lack of appropriate volunteer supports	0.94	15
2.3	Provide new services outside of the LHIN funded services, i.e. private pay programs such as in-home foot care, in-home respite, bike initiative, palliative care, etc.	0.88	14
3.1	Competition in community from orgs offering similar or more enhanced services e.g. Lifeline income deteriorating due to competition - need alternate sources of regular revenue ..Being up to date	0.88	14
2.8	Opportunities to meet expanding service needs (beyond our common basket of services without wait list) and Being on the leading edge of trends (increase in # of seniors requesting more services)	0.56	9
3.3	Demographics outpacing our capabilities -> Waitlists with growing senior population, i.e. baby boomers. .. difficulty in finding volunteers	0.56	9
3.5	Some programs are operating at a loss but are in high demand - finding a break even and affordable cost	0.56	9
3.7	Funding uncertainties: LHIN?? government policy changes... Rollout of funding under the new OHT model (someone else holds to purse strings)	0.56	9
1.3	Remaining current: ensure we are ahead of the curve, our services	0.50	8
1.6	Marketing, collaboration and sales (build awareness of who we are, who we work with & what we do)	0.50	8
2.9	Create a competitive advantage (need to ensure we are the go to agency when people have a choice)	0.50	8
3.2	Fundraising challenges in glutted Brockville area market	0.50	8
1.5	Staff Development & training	0.44	7
1.11	Fundraising alternatives on ongoing basis	0.44	7
2.2	Ontario Health Teams -> Position ourselves to be an integral organization for the OHT development;	0.44	7
2.1	Complete and refined process for P&Ps; utilize networking opportunities to share and obtain best practices re policies, etc.	0.38	6
2.4	Enhance opportunities for staff growth and team building without financial restrictions, i.e. more training/workshop opportunities, staff appreciation, Christmas parties. ...	0.38	6
2.5	Better recognition means more opportunity (more people know about CPHC -> new growth areas)	0.38	6
3.4	Families prefer one stop shopping for all home care and home support services (families have to talk to multiple contacts)	0.38	6
3.8	public relations, marketing and awareness of our agency ... social media	0.38	6

1.2	Financial awareness: need to build understanding	0.31	5
1.7	professional service recruiting e.g. PSW, home help, Foot Care staffing etc)	0.31	5
2.7	Becoming more financially self sufficient	0.31	5
1.8	Balancing cost efficiencies (rural services, union environment) vs quality of service	0.25	4
1.14	Limited staff acknowledgement that we are not the only service provider in the area and the need to ensure we are the top leader of choice. .. Intake process for volunteers and new staff (on boarding) needs to be refined, i.e. faster.	0.25	4
1.12	Being better than the competition (i.e. Lifeline, CSS)	0.19	3
2.6	Efficiencies both financial and time with Centralization	0.19	3
2.12	Evaluate our current programs utilizing feedback mechanism from client, staff	0.19	3
1.4	Attendance management policy	0.13	2
1.10	More funding from government	0.13	2
1.13	Board and management stability (need balance between continuity and renewal)	0.13	2
2.10	New sources of funding/growth with compatible programs (developmental services)	0.13	2
2.11	Improve relations with / understanding of unions to enhance what we do	0.06	1
1.9	Lifeline modernization (need board awareness on this)	0.00	0
3.6	Board turnover	0.00	0

4.3 - Areas for Improvement

Item	IMPORTANCE AND INFLUENCE	Average	#votes /16
1.1	Volunteers - recruitment, engagement, feeling valued ..Volunteer recruitment & lack of appropriate volunteer supports	0.94	15
1.3	Remaining current: ensure we are ahead of the curve, our services	0.50	8
1.6	Marketing, collaboration and sales (build awareness of who we are, who we work with & what we do)	0.50	8
1.11	Fundraising alternatives on ongoing basis	0.44	7
1.5	Staff Development & training	0.44	7
1.2	Financial awareness: need to build understanding	0.31	5
1.7	professional service recruiting e.g. PSW, home help, Foot Care staffing etc)	0.31	5
1.14	Limited staff acknowledgement that we are not the only service provider in the area and the need to ensure we are the top leader of choice. .. Intake process for volunteers and new staff (on boarding) needs to be refined, i.e. faster.	0.25	4
1.8	Balancing cost efficiencies (rural services, union environment) vs quality of service	0.25	4
1.12	Being better than the competition (i.e. Lifeline, CSS)	0.19	3
1.10	More funding from government	0.13	2
1.13	Board and management stability (need balance between continuity and renewal)	0.13	2
1.4	Attendance management policy	0.13	2
1.9	Lifeline modernization (need board awareness on this)	0.00	0

4.4 - Key Opportunities

Item	IMPORTANCE AND INFLUENCE	Average	#votes /16
2.3	Provide new services outside of the LHIN funded services, i.e. private pay programs such as in-home foot care, in-home respite, bike initiative, palliative care, etc.	0.88	14
2.8	Opportunities to meet expanding service needs (beyond our common basket of services without wait list) and Being on the leading edge of trends (incr# of seniors requesting more services)	0.56	9
2.9	Create a competitive advantage (need to ensure we are the go to agency when people have a choice)	0.50	8
2.2	Ontario Health Teams -> Position ourselves to be an integral organization for the OHT development;	0.44	7
2.1	Complete and refined process for P&Ps; utilize networking opportunities to share and obtain best practices re policies, etc.	0.38	6
2.4	Enhance opportunities for staff growth and team building without financial restrictions, i.e. more training/workshop opportunities, staff appreciation, Christmas parties. ...	0.38	6
2.5	Better recognition means more opportunity (more people know about CPHC - > new growth areas)	0.38	6
2.7	Becoming more financially self sufficient	0.31	5
2.12	Evaluate our current programs utilizing feedback mechanism from client, staff	0.19	3
2.6	Efficiencies both financial and time with Centralization	0.19	3
2.10	New sources of funding/growth with compatible programs (developmental services)	0.13	2
2.11	Improve relations with / understanding of unions to enhance what we do	0.06	1

4.5 - Key Threats

Item	IMPORTANCE AND INFLUENCE	Average	#votes /16
3.1	Competition in community from orgs offering similar or more enhanced services e.g. Lifeline income deteriorating due to competition - need alternate sources of regular revenue ..Being up to date	0.88	14
3.3	Demographics outpacing our capabilities -> Waitlists with growing senior population, i.e. baby boomers. .. difficulty in finding volunteers	0.56	9
3.5	Some programs are operating at a loss but are in high demand - finding a break even and affordable cost	0.56	9
3.7	Funding uncertainties: LHIN?? Government policy changes... Rollout of funding under the new OHT model (someone else holds to purse strings)	0.56	9
3.2	Fundraising challenges in glutted Brockville area market	0.50	8
3.4	Families prefer one stop shopping for all home care and home support services (families have to talk to multiple contacts)	0.38	6
3.8	Public relations, marketing and awareness of our agency ... social media	0.38	6
3.6	Board turnover	0.00	0

5.0 – Focus Group 1

5.1 - Strengths

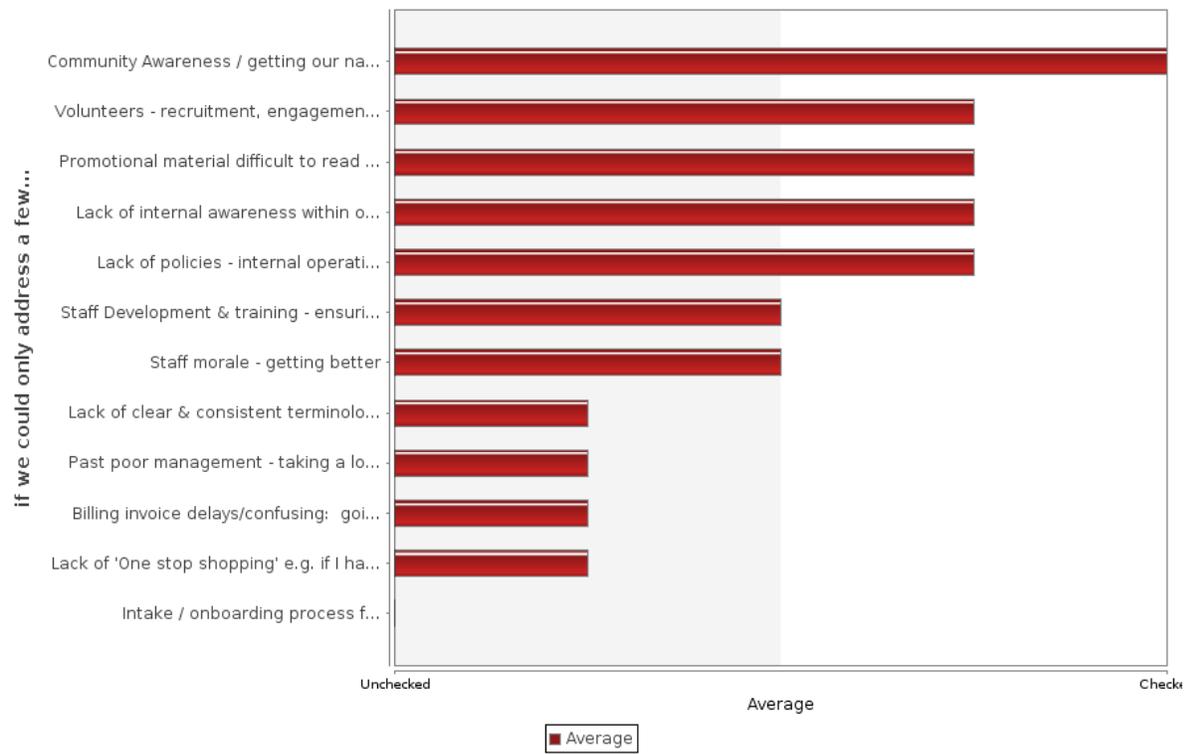
Strengths: What is currently working? What are three things that Support Services for Seniors CPHC is really good at or known for?
The group brainstormed, discussed, and then was asked to provide level of agreement with each statement

	Agreement	Avg.Score	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
1	Adult Day program is good	5.00	0	0	0	0	4
2	Client focused & client centered -> Front line engagement with clients is great	4.50	0	0	1	0	3
3	Senior Fitness Program - note: need new blood to keep program sustainable	4.50	0	0	0	2	2
4	We get back to new potential clients in a timely manner; we are professional and clear about our services.	4.00	0	0	1	2	1
5	Volunteer based agency with excellent commitment	4.25	0	0	1	1	2
6	History, experience base (we have been doing this for a long time)	4.25	0	0	1	1	2
7	All our programs are beneficial; some may need improvements or tweaking	4.50	0	0	0	2	2
8	Client fees are lower	3.00	0	0	4	0	0

5.2 - Areas for Improvement

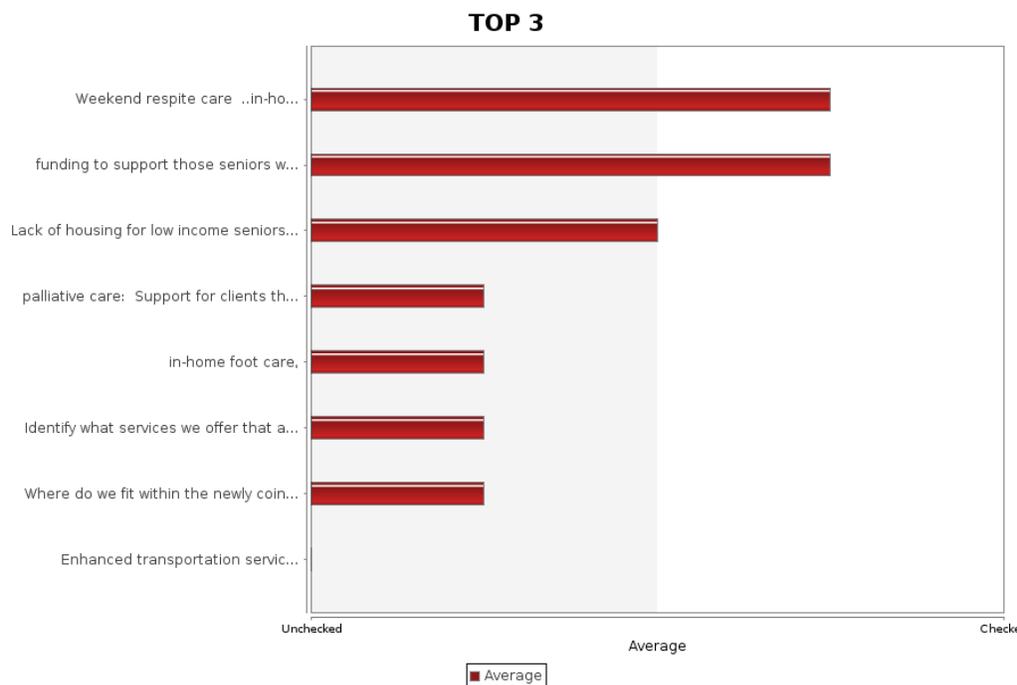
	TOP 6	Avg.Score	#votes/4
1	Community Awareness / getting our name out; people do not know about us and what we provide, sometimes till after client is in LTC; build community awareness of who we are, who we work with & what we do -> Getting our name out into the communities.	1.00	4
3	Volunteers - recruitment, engagement, supports -> Lack of volunteers for all programs.	0.75	3
7	Promotional material difficult to read -> New brochures are hard for the clients to read / see; business cards hard for seniors to read and clearly understand	0.75	3
9	Lack of internal awareness within our organization - of full scope of programs and services	0.75	3
10	Lack of policies - internal operating procedures e.g. staffing, HR, attendance management	0.75	3
4	Staff Development & training - ensuring our staff have the capacity to meet our client needs; lack of training for staff	0.50	2
6	Staff morale - getting better	0.50	2
2	Lack of clear & consistent terminology across the Province - in defining who we are, and the extent of our footprint & services within the province or community; lack of continuity (at least in terminology) throughout the province	0.25	1
5	Past poor management - taking a long time to recover and correct issues	0.25	1
8	Billing invoice delays/confusing: going out sometimes middle of following month, sometimes hard for clients to understand	0.25	1
11	Lack of 'One stop shopping' e.g. if I have a problem with my feet, teeth, respiratory, it sure would be nice to have a single portal for seniors (1 800 central office) to redirect me	0.25	1
12	Intake / onboarding process for volunteers and new staff needs to be refined	0.00	0

TOP 6



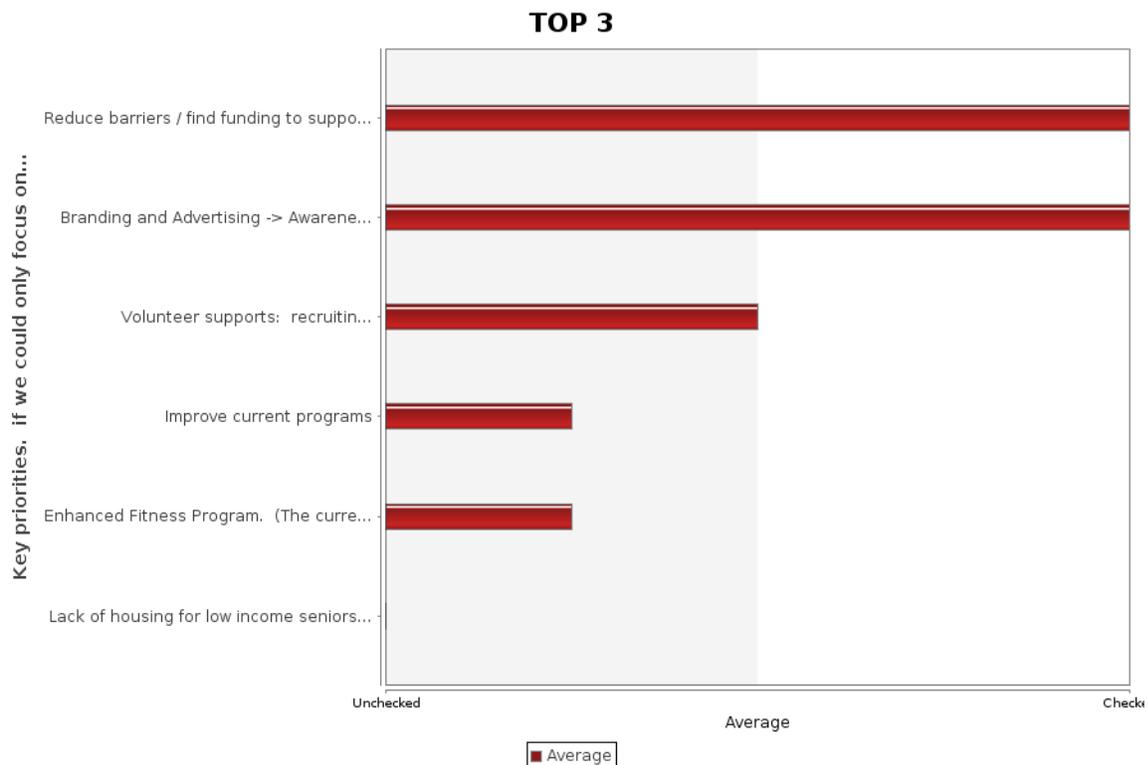
5.3 – New Programs and Services

	TOP 3	Avg.Score	#votes/4
1	Weekend respite care; In-Home Respite, (lack of beds in hospitals and LTC -> can we help here? with a transition, in between offering	0.75	3
5	funding to support those seniors who cannot afford our services -> more subsidy program for seniors who cannot afford the service - CPHC doesn't have enough resources for this	0.75	3
2	Lack of housing for low income seniors; housing affordability for less fortunate seniors	0.50	2
3	Palliative Care: Support for clients that are palliative; support for them to stay in home	0.25	1
6	In-Home Foot Care	0.25	1
7	Identify what services we offer that are not offered by others, or are MORE OUTSTANDING than those of others, i.e. What makes us GREAT?	0.25	1
8	Where do we fit within the newly coined Ontario Health Teams	0.25	1
4	Enhanced transportation services (beyond what we currently do)	0.00	0



5.4 – Key Priorities in next two years

	TOP 3	Avg.Score	#votes/4
1	Reduce barriers / find funding to support those seniors who cannot afford our services -> more subsidy program for seniors who cannot afford the service. CPHC doesn't have enough resources for this; funding for services that clients cannot afford.	1.00	4
2	Branding and Advertising -> Awareness in our communities of who we are and what we do ... Clearly understood materials to hand out	1.00	4
3	Volunteer supports: recruiting, engagement, keeping them, clarifying their roles etc.	0.50	2
4	Improve current programs	0.25	1
6	Enhanced Fitness Program. (The current program cannot satisfy the demand.)	0.25	1
5	Lack of housing for low income seniors. Housing affordability for less fortunate seniors	0.00	0



Comments merged prior to voting:

- 2. Reduce barriers / find funding to support those seniors who cannot afford our services -> more subsidy program for senior's who cannot afford the service - CPHC doesn't have enough resources for this ..Funding for service's that clients cannot afford.
 - 2.1. Subsidies - to those who cannot afford
 - 2.2. Reducing barriers to access our services , ex- SMILE funding direct to us?

5.7 – Participant List

Participant	Info
Erik	lockhare@queensu.ca
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Appendices

A – Session Overview

The **purpose** of the session is to agree on the major elements of our strategy for the next four years. This is a first step in the process and we expect some follow up dialogue in the next two months to refine our roadmap. The specific **objectives** for November 12th are to:

- a. Get input on our directions and the results we want to achieve over the next four years;
- b. Understand our current state (what is working, what is not, where can we improve, issues, risks);
- c. Agree on 4-5 priorities for the next 2-4 years;
- d. Develop objectives and next steps for each of our top priorities;
- e. Share next steps (what needs to happen in the next 60 days based on our work here).

Agenda

9:00	Overview/Context/Agenda		Chair / Erik
9:15	Review progress, mission, vision	Julia	
9:45	Current state assessment		
10:30	Refreshment Break		
10:45	Current state (cont'd)		
11:30	Key priorities		
12:00	Lunch		
12:30	Key objectives and initiatives		
3:30	Next Steps		Erik
4:00	Session close		Chair

Pre-Session Homework

Please make some notes on the questions below so we can “hit the ground running” on November 12th. *Bring your notes to the session.*

1. Our direction

Vision

To be the leader and provider of choice offering innovative, responsive, and quality services for seniors to live independently in their own homes and communities.

Mission

To provide client centered services for seniors and their caregivers which promote choice, independence, and safety in their own homes and communities.

Do this still seem meaningful and appropriate?

2. Current state.

Our internal Strengths... What we are known for... What are three things that the CPHC is really good at? What do we want to keep/maintain? What have been our major achievements?

Needs & Weaknesses. What are the major areas for growth and improvement that must be pursued in order for us to be successful?

External Issues, forces, influences (what should be on our radar screen?)

What are the 2-3 important *opportunities* that we should be pursuing?

What are the 2-3 critical *challenges, risks, threats* that we must consider in our planning?

3. Major Priorities. On which 3-4 areas should we focus our energies and resources in 2020? What about 2021-2022?

4. We can't do everything. What are the activities, initiatives, events, actions that are nice to do but we could put on hold or stop?

5. Measuring our Performance. What are the primary performance metrics that you would use to judge the success of the CPHC

B– Process Overview

The strategic planning session and focus groups were conducted using an electronic meeting system (EMS), an innovative facilitation process developed from research at the Queen’s School of Business. The Queen’s EMS, called “the Decision Centre”, combines expert facilitation with a state of the art group decision support system to enable groups to rapidly accelerate idea generation and consensus building. This facility consists of a network of laptops accessing software designed to support idea generation, idea consolidation, idea evaluation and planning. The tool supports, but does not replace, verbal interaction; typically 25% of interaction takes place on the computers. Feedback from groups who have used the Executive Decision Centre process includes: meeting times can be cut in half; participation goes way up; better idea generation and alternative evaluation; a more structured process; and automatic documentation of deliberations.

Over 500 organizations around North America use the Centre for meetings such as: strategic planning, visioning, annual planning, focus groups, team building, budgeting, program review, project planning, risk assessment, job profiling, 360 degree feedback, alternative evaluation, new product development and a variety of other meeting types.

In the session, participants were asked, for example, “What are our make or break issues in the next 2 years?” Participants typed in ideas on the laptops all of which appeared on a public screen at the front of the room. These ideas were then discussed and categorized into common themes. The group was then asked “if we could only address five of these in the next year, which ones are most critical?” Individuals selected his/her top 5 and the overall results were then displayed to the group and further discussed.

For more information on this process, please contact:

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C - Meeting Evaluation

(1) Roundtable Reflections on the Day (facilitator notes)

- (1/1) Great direction setting, focused on future
- (1/2) Very valuable, a bit overwhelming, exciting
- (1/3) We've made leaps and bounds compared to the last planning session
- (1/4) Valuable, glad to be part of it
- (1/5) Will help us get through future
- (1/6) Good session; I think this is doable
- (1/7) You folks have so much to offer LLG; we will be successful
- (1/8) Ditto.... It is really great to see we have made a lot of progress, closed the gap, and we are heading in the right direction. I am not too concerned other than the budget challenges
- (1/9) Really good. A bit leery about pulling this all together. I see a different direction from the Board and Management to be less in the weeds
- (1/10) Awesome team building. A great opportunity to get to know each other, and the organization. The Board is here with the best interests of clients
- (1/11) Very positive experience and I got to know everyone. I am in awe of where we/ you have come from and I am very positive about the road forward.
- (1/12) Optimistic; we have come a long way. Good luck
- (1/13) Time flies. What a difference since the last time we met to develop a strategy. We seem more proactive than reactive this time. We see a vision for the future; everything seems ambitious, but achievable
- (1/14) A comprehensive and collaborative day; improves our accountability. I hope that the Management Team and Board uses the Strategic Plan on a regular basis, i.e. "how do our day to day decisions fit into our strategic plan?"
- (1/15) In the past year we have come through some tough times. We have more to get through, but we are on a good path
- (1/16) Great day and feeling optimistic that we can do this!

(2) One thing you LIKED about today

- (2/1) Great opportunity for everyone to provide input
- (2/2) Great team building opportunity; wonderful to see everyone contributing to the discussion.
- (2/3) I liked the format. Great job keeping it on track and moving forward, thanks!
- (2/4) The excitement about the future
- (2/5) Great discussions and I think that we were able to develop a great plan to move forward.

- (2/6) The group work and ability to come up with achievable goals.
- (2/7) I liked seeing how far we have come
- (2/8) The format and open discussions
- (2/9) Great facilitation generating great discussion.
- (2/10) Enjoyed the venue.
- (2/11) I liked seeing that we are headed in the right direction
- (2/12) Input from everyone is invaluable; critical to our success.
- (2/13) The session was well organized and run with calm, humorous control - very impressed
- (2/14) A lot of great ideas coming from different perspectives
- (2/15) Great opportunity to offer and receive thoughtful input from management and board in a non-judgmental and pleasant environment
- (2/16) Full participation in an environment allowing each to speak freely
- (2/17) I truly felt today was very positive and inspiring. This is an excellent team; there are many challenges ahead; however I feel this team is up for the task.
- (2/18) I can't get over the difference between this session and the last session I attended
- (2/19) I love this method of meeting and using the think tank laptop method. It is so efficient and best use of time and resources.

(3) One thing you did NOT like or would change?

- (3/1) All good!
- (3/2) My cookie was a little hard
- (3/3) I can't really say that I didn't like anything. The session was good and very productive.
- (3/4) Comfort level to speak freely and full participation
- (3/5) Cannot think of anything!
- (3/6) I have to go home to clean up the snow
- (3/7) Missed the wine
- (3/8) I would have brought a sweater
- (3/9) Chairs are hard
- (3/10) Nothing
- (3/11) None
- (3/12) I would change nothing - excellent
- (3/13) It was all good

(4) Anything else to ensure our future success that did not get mentioned

- (4/1) What about 3-10 years... ..I like the durable and achievable part of the strategic plan! I am thinking how to sustain ourselves in the long run 3-10 year.
- (4/2) No...all good
- (4/3) Review Strategic Plan on a quarterly basis rather than annually and link operational plan to Strat Plan to ensure ongoing accountability
- (4/4) It would be great if our mission and vision could include mention on the communities we service, i.e. LL&G. It makes us unique from our competitors and shows pride in our counties.
- (4/5) I am still pondering the potential blowback of failing to make Staff Engagement a priority.
- (4/6) I think we covered it all. Our only downfall is the uncertainty of government funding
- (4/7) No....

- (4/8) None
- (4/9) I can think of nothing to add. Thanks
- (4/10) All points were discussed for future success.
- (4/11) 3-10 yearshow to have a sustainable plan for the company in the long run