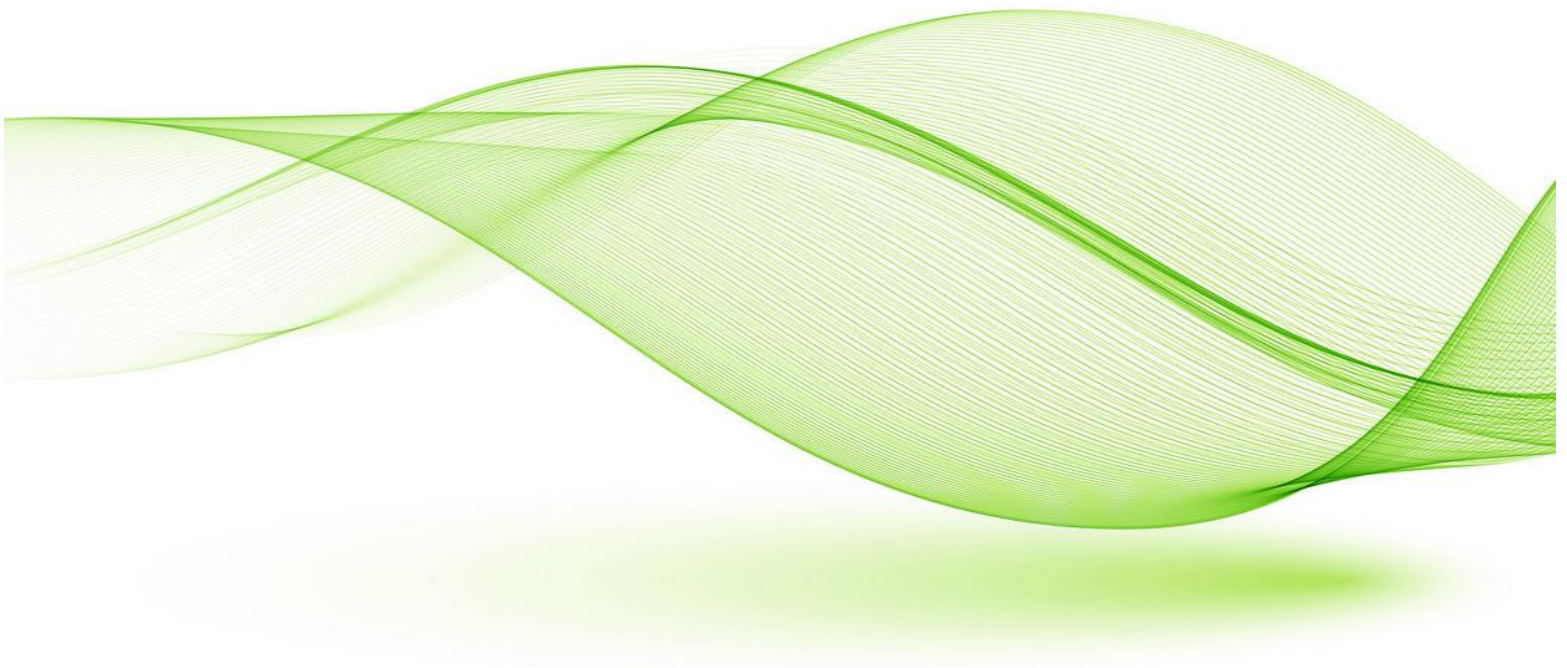




# STRATEGIC PLAN

2020 - 2025





## MESSAGE FROM THE NEW UNIONVILLE HOME SOCIETY BOARD CHAIR AND CHIEF EXECUTIVE OFFICER

Strategic planning presents an ideal opportunity for an organization to take stock, celebrate successes, reflect on the past, and look toward the future. In early 2019, New Unionville Home Society's (NUHS) Board of Directors had an opportunity to do just that.



Since 1967, New Unionville Home Society has been providing services to seniors in the community. From its humble beginnings, NUHS has grown into a multi-service campus with a large team of professional staff, dedicated volunteers, and robust governance structure.

The NUHS Board is composed of dedicated volunteers with diverse skills. Collectively, we are responsible for the governance and stewardship of the organization. Across Ontario, the long-term care sector is changing and the needs of seniors are progressing. Change presents both challenges and opportunities.

From the outset, our Board believed it was essential to gather input directly from our community of stakeholders. We understood that it was essential for our new strategic plan to reflect and respond to the needs of our current and future clients, and the changing nature of long-term care. To ensure that we had a current understanding of stakeholder views, we engaged a range of key audiences, including clients, residents, families, staff, and partners. We listened to their views. The goal was to develop a forward-looking strategic plan based on real engagement, which would guide us in the coming years and help us to continue to make a positive impact.

We are proud of our successes and excited about our future - one in which NUHS will be the leader in serving the needs of seniors in our community.

We thank everyone who took the time to participate and share their ideas. Together, we will work towards a thriving organization that enhances the experience of aging, one person at a time.

Sincerely,

A handwritten signature in black ink, appearing to read 'Glenn Crosby'.

Glenn Crosby  
NUHS Board Chair

A handwritten signature in black ink, appearing to read 'Abby Katz Starr'.

Abby Katz Starr  
President & Chief Executive Officer

## ABOUT NEW UNIONVILLE HOME SOCIETY

The New Unionville Home Society (NUHS) organization has been providing services to seniors for over 50 years. It was originally founded in 1967 by a group of dedicated volunteers as an expression of the concern of local citizens who wished to see more adequate and creative provision made for the care of older persons, particularly those residents in the community. NUHS consists of New Unionville Home Society, Unionville Home Society, Wyndham Gardens Apartments of Unionville, and UHS Foundation, each governed by a volunteer Board of Directors.

NUHS campus includes Union Villa long-term care home, Heritage Village bungalows and Wyndham Gardens life lease apartments, Unionville Community Centre for Seniors and the Adult Day Program. NUHS also has a Geriatric Outreach Team that provides care to seniors living at home, with a focus on helping them navigate the system of care and connecting them to the right care at the right time.

NUHS's reputation as a leader in seniors' services is the result of its commitment to quality care delivered by compassionate staff and volunteers.

### OUR MISSION

Enhancing the experience of aging, one person at a time.

### OUR VISION

A progressive community where older adults thrive; aging well and living better.

### OUR VALUES

The New Unionville Home Society, in its relationships with others, values and commits itself to:

- Caring Genuinely and Passionately
- Respecting Each Person
- Serving with Integrity and Commitment
- Advancing Quality and Innovation
- Connecting Communities

## TABLE OF CONTENTS:

Executive Summary.....	4
<b>Strategic Directions for 2020-2025</b>	
Innovative Seniors Care.....	5
Strong Partnerships.....	6
A Sustainable Organization.....	7
A Healthy Organizational Culture.....	8
Next Steps.....	9
Conclusion.....	10
Appendix I: Stakeholder Engagement Summary.....	11

## EXECUTIVE SUMMARY

With over 50 years of serving seniors in the community, New Unionville Home Society (NUHS) has built a strong reputation and a track record of accomplishments.

In February 2019, the Board set out to develop a new strategic plan with the intent of assessing NUHS's current state, context, strengths, and achievements; identifying opportunities to strengthen the organization; and forging a path for the future.

Following a comprehensive planning process, the Board established four strategic directions:

### **Strategic Directions for 2020-2025:**

- **Innovative Seniors Care**
- **Strong Partnerships**
- **A Sustainable Organization**
- **A Healthy Organizational Culture**

These strategic directions will serve to focus the work of NUHS over the next five years. They are driven by our mission and vision, while embracing the challenges and opportunities that lie ahead. These directions include the voices of our community of stakeholders, and envision a healthy, sustainable, and collaborative future for the organization.

NUHS is committing to a five-year strategic plan. As such, the directions are broad and oriented to the future, allowing the organization to respond and adapt as circumstances change over the years. The directions offer a framework for the development of annual operational plans with measurable targets and objectives.

NUHS is focused on ensuring that it remains a values-driven organization with a strong reputation in the community. We are committed to serving our clients, residents, their families and caregivers, community, and partners, and we strive to achieve our mission and vision through a commitment to our new strategic directions.

## INNOVATIVE SENIORS CARE

Meeting the current and future needs of seniors in our community requires a commitment to continual innovation. For non-profits in general, and the long-term care sector in particular, “business as usual” is no longer an option. With an increasing aged population, new models of care and service delivery are being explored to improve the aging experience and help retain health for as long as possible. As the sector looks beyond traditional output measures such as Case Mix Index (CMI), we will continue to ensure our models of care incorporate measures that include dementia care and other behaviours that are experienced through the aging process. With a commitment to innovative seniors care, we will be known as a centre of excellence in the region, and a leader in the sector across Ontario.

### Our Commitments

Over the next five years, we commit to *Innovative Seniors Care* by:

- a. **Investigating new and innovative practices and models of care** that deliver better care, improved outcomes, and also support financial and environmental sustainability.
- b. **Leveraging new technologies and digital strategies** to enhance and support the care we deliver.
- c. **Exchanging expertise and intellectual property** of new technological developments and innovations and applying these developments to the health care and long-term care sectors.
- d. **Tapping into an ecosystem of collaborators** across sectors in the region, and leveraging the existing innovation environment.
- e. **Becoming a centre of excellence** in future-oriented approaches to seniors care products and services.
- f. **Being recognized as a leader in innovation** in seniors care and attracting others to seek out partnerships and collaboration with our organization that offer mutual benefit.
- g. **Progressing beyond quality of care...towards quality of life**, for the benefit of our clients, residents, and community at large.

## STRONG PARTNERSHIPS

By leveraging our current partnerships and creating new ones, we create value as a whole that is greater than the sum of its parts. Change is occurring at an increasing pace, and we need to be prepared. Healthcare system transformations have underscored the importance of collaborations and partnerships. By collaborating with other service providers, we will be better able to anticipate and meet the needs of seniors in our changing community. We will proactively work and plan with our partners, and leverage their experience and expertise to amplify our impact and ability to serve the needs of our community.

### Our Commitments

Over the next five years, we commit to pursuing *Strong Partnerships* by:

- a. **Developing a partnership strategy** to identify and pursue high-value, innovative partnership opportunities, explore opportunities for integration, and seek mutually beneficial synergies.
- b. **Working with our partners** locally, regionally, and beyond with the goal of improving our delivery and quality of care, expanding our continuum of care and supporting aging in place.
- c. **Pursuing partnerships with** academic institutions to establish ourselves as a teaching institution, creating pathways for recruitment and development.
- d. **Creating capacity with partners** by pursuing creative and efficient solutions such as shared operational resources, back office integration, aligned governance strategies, and more.
- e. **Becoming active partners** within our local Ontario Health Team(s).
- f. **Identifying potential technology partnerships to pursue**, such as the Smart City technology hub.

## A SUSTAINABLE ORGANIZATION

Sustainability is fundamental in order to achieve our mission. With a growing demand for aged care and seniors services, NUHS is well positioned to meet the need. As we build our modern campus of care, we will hold true to the values and attributes that have enabled our strong reputation in the community. We commit to our core business of seniors care services, and to ensure that growth in the continuum of care is managed and intentional as we work to achieve the elements of a sustainable and resilient organization: strong leadership, efficient processes, effective communications, and financial stability.

### Our Commitments

Over the next five years, we commit to building *A Sustainable Organization* by:

- a. **Exploring new opportunities for revenue generation and diversification** to support the long-term sustainability of the organization, and updating our investment strategy.
- b. **Fostering a culture of philanthropy** in which donors, partners, and the community-at-large have meaningful opportunities to invest in NUHS.
- c. **Expanding our volunteer and donor base** to support ongoing quality of care and operations.
- d. **Establishing common principles** among the board and leadership team to guide decision making and future planning.
- e. **Enhancing our financial position** and enabling financially sustainable operations.
- f. **Developing a campus master plan** to sustainably manage our assets, land, capital reserves, and guide our future development.
  - i. Establishing a working group to drive implementation of the master plan.
  - ii. Using our land resources to create a real estate development that can generate income.
  - iii. Ensuring that we are stewards of the environment and explore green and eco-friendly solutions in our planning.
- g. **Conducting an in-depth financial analysis and risk assessment** of the organization and establishing goals and targets for sustainable growth.
- h. **Maintaining a strong and engaged board** that has the skills and expertise to lead NUHS into the future, and ensuring that the board's composition reflects the diversity of our community.



## A HEALTHY ORGANIZATION CULTURE

A healthy, dynamic workplace culture is the building block of a thriving organization. We recognize the importance of investing in our people and ensuring that they are empowered, supported, and appreciated. We will continue to nurture an organizational culture to meet the highest ideals of a high-performing workplace. In a demanding labour market, we strive to be an exemplary employer, with engaged employees who are supportive and supported.

### Our Commitments

Over the next five years, we commit to *A Healthy Organizational Culture* by:

- a. **Supporting management** to proactively manage our human resources and build capacity across the organization.
- b. **Reviewing our operations and human resources policies and processes** and identifying challenges and opportunities for improvement.
- c. **Promoting a culture of teamwork** among the organization that supports staff and volunteers to be engaged and empowered.
- d. **Enhancing our internal communications processes** to promote effective collaboration and engagement throughout the entire campus so that staff and volunteers feel informed and consulted.
- e. **Strengthening capacity** among the management team with strong recruitment and ongoing support.
- f. **Supporting ongoing training, education, and professional development** so that staff are empowered to learn and grow.

## NEXT STEPS

Our new strategic directions provide NUHS with strategic focus and a clear framework to drive change and progress. The Board has committed to the following next steps:

- A. Organizational targets and objectives will be developed that align with each strategic direction;
- B. The strategic directions will be communicated internally and externally; and
- C. Progress will be reviewed regularly and strategies amended as circumstances change over the next five years, with updates shared accordingly.

## CONCLUSION

The Board of Directors and management are proud of all that NUHS has accomplished to date. We are well positioned to pursue new ambitions. Through our new strategic directions, we will maintain focus as new challenges arise, and ensure that the community we serve remains our priority. We are committed to operating efficiently and effectively, and maintaining accountability through all our initiatives.

We thank all those who added their voices by contributing thoughts and feedback. We have heard you. The Board of Directors looks forward to reporting back on our progress over time, and to a strong track record of performance over the next five years.

## APPENDIX I: STAKEHOLDER ENGAGEMENT SUMMARY

Setting out with the goal of creating an actionable, forward-looking strategic plan, New Unionville Home Society (NUHS) saw meaningful stakeholder engagement as a critical step in the process.

Before identifying the strategic priorities, the Board reached out to engage and listen to the voices of NUHS's community of stakeholders. Their feedback served to strengthen and shape the new strategic plan.

A variety of stakeholders were engaged, including: Board members, staff, volunteers, residents/clients, caregivers, funders, and interested community members. Engagement strategies used to solicit input included focus groups, key informant interviews, and an online survey.

Before striking new strategic directions, NUHS decided early on to seek input from a wide array of stakeholders. In doing so, NUHS is ensuring that its next strategic plan is one that has a solid base, informed by experience, evidence, and the broadest-held perceptions.

The engagement phase took place between March 28 and May 7, 2019. Engagement sessions and opportunities were promoted by email, on the website, and through word of mouth.

The survey, key informant interviews, and focus group sessions had two general purposes:

1. To **engage stakeholders** by gathering input, ideas, and suggestions; and by including them in the planning process directly and in a meaningful way
2. To **educate stakeholders** about the work of NUHS and generally promote the work of the organization (as a positive legacy of the planning process)

NUHS invited the following audiences to participate in the engagement:

- Current and past Board members
- Current and past staff
- Current and past volunteers
- Current and past clients
- Caregivers and/or family members of current or past clients
- Funders
- Donors
- Community partner organizations (staff and volunteers)
- Community members

A total of **55 individuals** participated in focus groups.

A total of **4 key informant interviews** were conducted.

## Survey Results

There were **278 respondents** to the survey.

- **Good engagement:** The survey received a strong response rate, with 278 people participating.
- **Positive Impressions of the organization:** Based on experience, 83.1% rate their overall impression of NUHS as "excellent" or "good".
- **Awareness:** 63.3% of survey respondents said they fully understand what NUHS does.
- Feedback from stakeholders highlighted many strengths within the organization, while also identifying some important areas for improvement.

## Engagement Themes

The following are the most consistent themes (including areas of strength as well as opportunities for improvement or change) that emerged from the stakeholder engagement process:

- Organizational Culture
- Communications
- Health Human Resources and Staffing
- Campus and Capital Projects
- Governance
- Quality of Care
- Leadership