



Strategic Planning Report

Helping Hands
Orillia

Lee Pigeau Enterprises



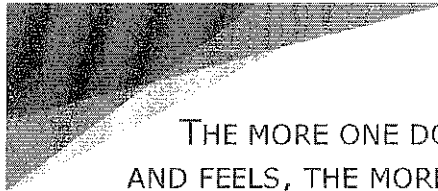
MESSAGE FROM THE EXECUTIVE DIRECTOR

Since its formation in 1972, Helping Hands has evolved and grown dramatically to meet the needs of the community. Currently, it serves about 1,400 clients, has 150 volunteers and employs 70 staff members, working to support people's ability to maintain and enhance their quality of life by living independently in their own homes. In this climate of limited resources converging with a growing demand on health-care and community support services, Helping Hands wants to ensure it is well positioned to meet the challenge in years to come. A strong strategic plan, designed to guide all levels of the organization, is a critical component of that goal.

We are excited about this new Strategic Plan for Helping Hands. It will lay the groundwork for future plans related to four strategic priorities **fundraising, public relations, branding, collaboration with strategic partners** and will provide the Board of Directors with a roadmap to effectively govern the direction of our organization.

The process of developing this Strategic Plan has involved Helping Hands board members, volunteers, management, clients and frontline staff. The collective experience of those involved, along with data from the surveys and interviews with stakeholders, were used to validate the organization's mandate and target client population while exploring what it means to be a leader in serving seniors and adults with physical disabilities. We are confident about the future of Helping Hands and its role in the community it serves. The clarity of direction that this Strategic Plan sets will allow us to work together to meet the needs of our clients and maximize the potential of our organization.

Rob Soczka



THE MORE ONE DOES AND SEES
AND FEELS, THE MORE ONE IS ABLE
TO DO, AND THE MORE GENUINE
MAY BE ONE'S APPRECIATION OF
FUNDAMENTAL THINGS LIKE HOME,
AND LOVE, AND UNDERSTANDING
COMPANIONSHIP.

Emelia Earhart

EXECUTIVE SUMMARY AND INTRODUCTION

This report was created to serve as foundation upon which Helping Hands will write its 2015-2019 strategic plan. It is based on meetings with stakeholders, staff, a one-day planning retreat, as well as independent research and best practices.

A strategic plan is the overall plan that facilitates the good management of any organization. Strategic planning takes you outside the day-to-day activities of your organization or project. It provides you with the big picture of what you are doing and where you are going. Strategic planning gives you clarity about what you actually want to achieve and how to go about achieving it, rather than a plan of action for day-to-day operations.

Strategic planning enables you to answer the following questions:

- Who are we?
- What capacity do we have/what can we do?
- What problems are we addressing?
- What difference do we want to make?
- Which critical issues must we respond to?
- Where should we allocate our resources? / What should our priorities be?

Only once these questions are answered, is it possible to answer the following:

- What should our immediate goals be?
- How should we organize ourselves to achieve this objective? (roles and responsibilities)
- Who will do what when? (Action planning table)

A strategic plan is not rigid. It does, however, give you parameters within which to work. That is why it is important that Helping Hands work together to:

- Base your strategic planning process on a real understanding of the external environment
- Use work you have already done to extend your understanding of the external environment and of your own capacity, strengths and weaknesses
- Make realistic recommendations and action plans for your charity
- Build consensus and agreement among all primary stakeholders

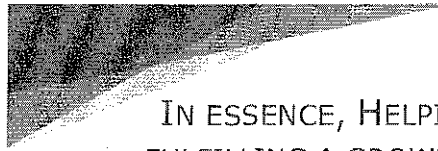


**PROVIDING A PLAN THAT GUIDES
THE GOOD INTENTIONS AND SKILLS
OF THE STAFF AND VOLUNTEERS AT
HELPING HANDS IS ESSENTIAL.**

Helping Hands is an organization that cares and wants to help as many people as possible. Its comprehensive scope of seniors and disability services has made it a valuable resource in the community; both to the consumers of its services and to the other service providers in the area.

There is much capacity within the organization and with a revised strategic plan that addresses the current realities facing Helping Hands, the organization can grow in a planned manner that satisfies both the internal and external needs of the organization.

Client Services Strategy: Helping Hands will continue to be a client-centered and accessible organization that supports seniors and adults with physical disabilities. We will focus service priorities on the needs of our clearly defined population and our areas of expertise.



IN ESSENCE, HELPING HANDS IS
FULFILLING A GROWING NEED FOR
CARE AT HOME AS OUR
POPULATION AGES.

Quality and Leadership Strategy: Helping Hands will sustain our leadership and focus on continuous quality improvement to ensure excellence in service delivery.

Funding Strategy: Helping Hands will continue to be an effective and efficient provider of services, while advocating for increases in core funding, and continuing efforts to diversify our funding.

Infrastructure Strategy: Helping Hands will continue to ensure that our infrastructure sustains our organization. Staff and volunteers will have the resources to provide quality services.

Partnerships & Collaboration Strategy: Helping Hands will actively seek out new and develop our current strategic partnerships to enhance our capacity to meet the needs of our clients.

Community Engagement and Communications Strategy: Helping Hands will ensure that the community and all other stakeholders receive clear messages about us so that they can access our services and support our mission, vision and values.

MISSION VISION AND VALUES

Our vision: To be a leader in providing outstanding client care, creating a rewarding workplace and developing a culture of community care.

Our Mission: To support of our client's ability to live independently and to maintain and enhance their quality of life.

Our values: Caring, accountability, participation, respect, integrity

ENVIRONMENTAL SCAN

The proportion of Ontario's population living longer and living well into their later years has never been greater. Our province is also aging faster than ever before. In 2011, there were 1,878,325 Ontarians aged 65 years and older, representing 14.6 per cent of the province's overall population. In the Orillia area, this shift is even more dramatic. 21% of the population is over 65. Orillia will also see the increase come faster than the rest of the province as our median age is 46 compared to 40 – there are more Orillians in their 50's than other age group.

While older Orillians are living longer and with less chronic illness or disability than generations before them, the vast majority of older adults have at least one chronic disease or condition. Indeed, as we age, our chances of living with chronic illness or disability will increase. While 77 per cent of seniors recently reported being in good health, we know that there exists a minority who particularly struggle with multiple complex and often inter-related health and social care issues. These issues can be directly related to socio-economic status; Orillia's population in all measured forms tracks below the provincial income norm.

To put this in perspective, we know that the top 10 per cent of older Ontarians, characterized as having the most complex issues, accounts for 60 per cent of our annual spending on health care for this population. At the same time, the healthiest 50 per cent of our older population accounts for only 6 per cent of our overall annual spending on health care for older adults. It is clear, our older population makes greater use of health, social, and community care services than the general population.



HELPING HANDS IS POISED TO BE A
LEADER IN PROVIDING COMMUNITY
CARE FOR SENIORS.

While some warn against "apocalyptic demography," few jurisdictions have grasped the complexity of illnesses and social challenges that too many older adults face, or the difficulties that this aging demographic will pose for our health, social, and

community care delivery systems as they currently exist. Helping Hands is poised to be a leader in providing community care for seniors.

At the national level, for the upcoming federal election senior's issues and health care are being considered sleeper issues that could help determine the outcome.

The National Senior's Council, under the direction of Alice Wong, the Minister of State for Seniors is concerned with the social isolation of seniors and working with key players in the non-profit, public and private sectors to address the issue.

At the provincial level, Mario Sergio the Minister Responsible for Seniors Affairs is head of the Ontario Seniors' Secretariat.

The Secretariat has issued the Sinha Report: Living Longer, Living Well that has become the basic for Ontario's Action Plan for Seniors, whose focus is as follows:

- Staying healthy and better access to health care:
 - more short-stay beds in long-term care homes
 - improved safety in long-term care homes
 - more community exercise and falls prevention programs
 - help to take time off work to care for family members
- Senior-friendly communities
 - Staying active and engaged in all aspects of community life:
 - more events to learn about healthy aging and active lifestyles
- Safety and security
 - Living safely, independently, with dignity:
 - elder abuse prevention and training for local police and community agencies
 - resources to help home support workers identify and address basic fire safety issues
 - wandering prevention program to help families living with Alzheimer disease or related dementias
 - more education on powers of attorney

Locally, the LHIN has a mandate to provide alternate levels of care – to ensure that only those who are in hospital are those who need hospital level care, not care that can be offered elsewhere:

- OSMH discharge planning
- Hospital services becoming more regional – some services such as stroke care may be moved out of HH service area to RVH
- PSW / CCAC issues
- PSW wage increases
- Home and Community Care review expert panel was to release a report on January 31st – this should be reviewed when it is actually released.
- There is a will to build the capacity of the system outside of hospital care – with a strong focus on volunteerism (family, friends and community organizations.)

The geography of Helping Hands' service area compounds many of the issues facing seniors and people with physical disabilities; while the area served is not large it is not well served by public transportation, is sparsely populated and in the middle of the snow belt. This compounds isolation and transportation issues in the winter.

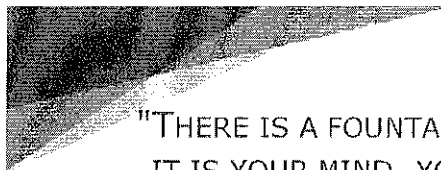
Modernization of home and community care is important locally, while *Age Friendly Communities* is a phrase that is gaining traction no single local entity has formally addressed seniors' issues. The municipalities of the area served do not have any written policies or direction on this matter. In fact, Helping Hands is seen as the expert in this field.

As noted, the population demographics of the Orillia area indicate a growing need for the services currently provided by Helping Hands that will mostly likely exceed those predicted for the entire province. The population in the service area has an older median population, and has a large percentage of individuals who fall within the lowest 40th percentile of incomes. The demographics of the older adults in the Orillia area is also more homogeneous, which has led to a consistent but undiversified view of the needs of seniors.

As our population ages, the seniors of tomorrow will not be the seniors of today. They will be more technically savvy, more aware of their rights and have increased expectations of the care they are given.

Seniors may also become more isolated from family in the future. Many adults who are in their 50's and 60's now have parents in this service area, but their children have moved out of Orillia. It is quite conceivable that Helping Hands will be assisting more than one generation of family in short order.

While Helping Hands also provides services to adults with disabilities, the population of this group outside of seniors is not growing and all of the services, strategies and tactics around this sector can be assumed within this document.




"THERE IS A FOUNTAIN OF YOUTH:
IT IS YOUR MIND, YOUR TALENTS,
THE CREATIVITY YOU BRING TO
YOUR LIFE AND THE LIVES OF
PEOPLE YOU LOVE. WHEN YOU
LEARN TO TAP THIS SOURCE, YOU
WILL TRULY HAVE DEFEATED AGE."

Sophia Loren

CLIENT NEEDS

Critical issues for seniors and people with disabilities in the Orillia area can be summarized as follows:

- Transportation
- Affordable Housing
- Food Security
- Mental Health
- Lack of and/or inadequate funding for programs, AODA, welfare, etc.
- Complexity & number of disabilities
- Accessibility of facilities in community



THE ACHE FOR HOME LIVES IN ALL
OF US, THE SAFE PLACE WHERE WE
CAN GO AS WE ARE AND NOT BE
QUESTIONED.

Maya Angelou

INTERNAL NEEDS

However, like all organizations, Helping Hands must address internal and operational issues in order to better address the critical needs of the consumers.

- An organizational-wide understanding of who we serve
- An ability for all staff and volunteers to communicate our work, our goals and our needs
 - The "30 second elevator pitch"
- Technology
- Communications
- Creating a growth funding model
- Key Performance Indicators linked to Strategic Goals
 - Organization-wide understanding of need for and rationale for improvements
- Volunteerism is key to the provision of current services and any growth in the near future.


COMMUNITY NEEDS

- Direction from LHIN and MOL
- Aging populations and demographics of Orillia
- Focus on alternative level of care for hospital patients
- Need for support of caregivers
- Collaborative model of care

RECOMMENDATIONS

Strategic

- Confirm the level of client care that Helping Hands is willing to provide through its programs. There is a need for a broad range of services from care beds to snow shovelling. Helping Hands cannot do everything but may be able to focus on new programs that complement its already large array of services.
 - Helping Hands must agree to the slate of primary services it offers and become professional in the administrative functions surrounding them, such as outcome measurements, tracking and evaluation.
- Helping Hands must determine who it serves in terms of direct client care. The board approved eligibility criteria for transportation services, in support of Helping Hands mandate, should serve as the baseline for all programs



IF YOU ASSOCIATE ENOUGH WITH OLDER PEOPLE WHO DO ENJOY THEIR LIVES, WHO ARE NOT STORED AWAY IN ANY GOLDEN GHETTOS, YOU WILL GAIN A SENSE OF CONTINUITY AND OF THE POSSIBILITY FOR A FULL LIFE.

Margaret Mead

- Aged 65 or greater, residing in Helping Hands' catchment area
 - Adults, over 18 years of age, residing in Helping Hands' catchment area and facing mobility limitations*
 - Those, in the above groups, unable to access their own source of transportation either through their own vehicle, family members or public sources of transportation
 - Clients falling outside the above criteria may be reviewed and approved by the Director of Client Services or designate on an individual basis (for the above cases, the Director of Client Services will prepare an exceptions report to be submitted to the Client Safety & Satisfaction Committee)
- Mobility limitations are defined as:
 - Physical limitations including vision, hearing, wheelchair or mobility aid
 - Medical conditions limiting mobility
 - NB: Subcontracted transportation services may fall outside of the above eligibility criteria.

Strategic Recommendations continued

- A focus on communication both internally and externally is extremely important for learning, client, staff and volunteer satisfaction, advocacy, fundraising and collaboration. This is the primary area for financial and HR investment.
- Working collaboratively with other providers of services for seniors is imperative for the senior management and board of Helping Hands. The ability to work well with others in the sector, to improve system navigation and “fill the gaps” on services will be a strategic focus that has the greatest impact on clients.
- Sustainability in the absence of increases of direct funding from the LHIN or and increase in fees.
 - The social entrepreneurship model that is currently in place at HH may be enhanced through a retail endeavour such as a café, a handyman service, frozen meal service for purchase, dog walking, etc.
 - A fundraising plan must be implemented to drive immediate revenue growth through special events and annual giving as well long-term financial growth through capital campaigns and planned giving.

Objectives

- Helping Hands must catalogue all services, programs and consumer interactions in a consistent manner in a centralized database. All implications – time, training, cost and attitudinal must be addressed.
- Helping Hands must research what services are needed or missing. Using resources from statistics Canada and other service providers such as: CMHA, LHIN, OSMH, CCAC, current partners and government sources (City of Orillia) is necessary.
- Recruit, retain and train volunteers in a planned manner to address areas of need and opportunity within Helping Hands
- Create a learning program for Helping Hands staff to ensure consistent services and messaging
- Initiate a communications audit
 - Create a communication plan to modernize the delivery of information, messaging and interaction between staff, clients, volunteers, funders and the community in general
- Initiate a fundraising feasibility study
 - The organization must create a fundraising plan that addresses the foreseeable operational improvements, increases in demand and capital purchases.
- Continue to be present at and provide a leadership voice to all local and regional working groups, task forces and collaborative efforts
- Initiate efforts to reach out to “like” agencies that are not part of the formal health care continuum through the LHIN such as Salvation Army, Sharing Place, Service Clubs, Heart and Stroke, Red Cross, Alzheimer’s Society, CARP, and Couchiching Family Health Team.



HOME IS WHERE YOU FEEL AT
HOME AND ARE TREATED WELL

Dalai Lama

Tactical / Ideas

- Create a glossary of terms – see APPENDIX F for preliminary list of terms that will need defining
- Create a working list of other service providers and their link to what we do – see APPENDIX C
- Create and revise policies that address issues mentioned in this document
- Create a joint staff/board committee to look at boundary issues
- Form a fundraising committee of the board/volunteers
- Create a volunteer involvement plan
- Produce a "Seniors Directory" as an awareness, programming and possibly a revenue generator. This will also help in determining and archiving what services are available for your clients
- Create a training plan for staff and volunteers
- Work closely with CCAC as your biggest operational partner and competitor for funds
- Senior management and board must implement a LHIN plan for standardized messaging to ensure stable and increased funding from the LHIN. This plan must show value and focus on friendraising-
 - Helping Hands must be and **be seen as** problem solvers and leaders.
 - Advocacy work should be done through the collaborative and not independently
- Track all seniors' issues and media mentions
- Implement a social communications plan – birthday cards, phone calls, anniversaries etc.
- Create more social interactions that have multiple benefits to relieve isolation, increase communication, generate revenue and provide specific programming
- New website
- Professional newsletter
- Branding and Communications toolkit – standards of communications



HOME IS THE NICEST WORD THERE IS

Laura Ingalls Wilder