

*ST. JOSEPH'S VILLA*  
*STRATEGIC PLAN*  
*2005 - 2010*

Developed by: St. Joseph's Villa Planning Committee  
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Approved by: St. Joseph's Villa Board of Trustees  
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# Table of Contents

<b>BACKGROUND.....</b>	<b>3</b>
<b>VISION STATEMENT.....</b>	<b>3</b>
<b>MISSION STATEMENT.....</b>	<b>4</b>
<b>1999 – 2004 STRATEGIC GOALS REVIEW.....</b>	<b>5</b>
<b>ENVIRONMENTAL SCAN</b>	
<b>1. DEMOGRAPHICS.....</b>	<b>5</b>
<b>2. FUNDING.....</b>	<b>6</b>
<b>3. HEALTH CARE SERVICES.....</b>	<b>6</b>
<b>4. HEALTH SYSTEM.....</b>	<b>7</b>
<b>5. OUTREACH.....</b>	<b>7</b>
<b>6. HOUSING.....</b>	<b>8</b>
<b>7. INDUSTRY AND TECHNOLOGY.....</b>	<b>8</b>
<b>8. PARTNERSHIPS.....</b>	<b>9</b>
<b>STRATEGIC DIRECTIONS.....</b>	<b>10</b>
<b>STRATEGIC GOALS.....</b>	<b>11</b>

# **St. Joseph's Villa Strategic Plan 2005 - 2010**

## **Background**

Strategic Planning is “A disciplined process for establishing and confirming the long-term strategic goals for the organization for the future and for defining the “roadmap” – the initiatives, plans and resources required – for the organization to achieve those goals”. The report which follows highlights the results of the planning work of the Board of Trustees of St. Joseph's Villa in consultation with its partners. The Strategic Plan 2005 – 2010 builds on the successful completion of the 1999 – 2004 Plan, addresses current challenges and opportunities, and incorporates visioning of the future.

In the fall of 2004, the planning process was begun with a community consultation meeting to develop a community needs assessment. The Open Space Technology format allowed the participants to develop their own agenda and prioritize topics to be developed and carried forward. The report was used by the Board to inform strategic planning.

In May 2005 the Board of Trustees held their formal planning retreat. Members reviewed progress on the previous strategic plan, studied the current environment, and visioned the future. The Board also began the process of developing a Vision Statement and reviewing the Mission Statement. These are important elements to the structure of the organization in defining who we are, what we do, how we do it, and how we view success. The new Vision Statement of St. Joseph's Villa was adopted in September 2005 and the Mission Statement was reconfirmed.

Following the development of the first draft of the Plan, Gallery Walks were held with the Villa Management Team, residents, families, staff, St. Joseph's Estates residents, and neighbours to vet the Plan and ask for their suggestions for enhancement or amendment. Their work has been incorporated into the final document.

## **Vision Statement**

*Built on our tradition of excellence in care, research and education, St. Joseph's Villa is a destination of choice for Seniors, an employer of choice for staff and volunteers, and a partner of choice for community programs and services.*

Approved, Board of Trustees, September 12, 2005

## **Mission Statement**

*In 1879 The Sisters of St. Joseph of Hamilton accepted the responsibility of providing support for the elderly and disadvantaged by establishing the House of Providence. Designated as a Charitable Home for the Aged, it was replaced in 1970 with a new facility named St. Joseph's Villa..*

### **OUR MISSION IS: “Living Our Values Everyday”**

We are committed to these values:

#### ***CARE***

Providing a holistic approach to meeting the physical, social, emotional, intellectual and spiritual needs of our residents.

#### ***QUALITY***

Enhancing quality of life with dignity, respect and self esteem of residents, their families, volunteers, staff and others with whom we come in contact.

#### ***SERVICE***

Helping those in need with a special dedication to the elderly and disadvantaged.

#### ***RESPONSIBILITY***

Utilizing the available human and financial resources in the most cost effective and efficient manner.

#### ***KNOWLEDGE***

Developing and maintaining excellent professional and support staff.

#### ***CHALLENGE***

Responding to the current and future needs of seniors in our community.

*We believe that our dedication to these values will enable us to strive for continued excellence in the care of seniors in our community now and in the future.*

Confirmed, Board of Trustees, September 12, 2005

## **1999 – 2004 Strategic Goals Review**

The Villa has enjoyed a high level of success in completing the goals that were set in the preceding Strategic Plan. The largest and most visible was the completion of the rebuilding of the facility to better meet the needs of our residents for improved living space, privacy, and quality care. The support of the St. Joseph's Villa Foundation was pivotal in developing the financing and fundraising programs that made the construction financially viable. The Ministry of Health and Long Term Care redefined their capital program to give us up-front resources to support the equity requirements of lenders. The Ministry has also improved the operating funding over the period to better support the provision of care and program services.

Our ability to meet goals in the provision of care has been confirmed with our success in achieving successive 3-year Accreditation Awards, ISO 9001 certification, Donner awards, Spectator Readers' Choice Awards, and positive resident satisfaction ratings. We have also completed priority goals in the areas of Mission, marketing, staffing resources, outreach services, performance management systems, research, and external involvement and partnerships. Those goals that are ongoing or were not previously first priority were refined and carried forward to the 2005 – 2010 Plan.

## **Environmental Scan**

### **1. Demographics**

Between 1996 and 2021, the Hamilton area will see an increase of 108% in the age 85 and over bracket. Population growth in the next ten years is projected at 5% and the proportion of seniors, aged 65 and over will increase from 14% to 17% of the total population. Females, who represent the majority of the older and Long Term Care population, are 50% more likely than males to live below the poverty line. 25% of seniors in the Hamilton area have incomes below the poverty level and they experience poorer health, greater use of health resources and are more likely to enter LTC. The growing senior population is also less likely to have caregiver support to maintain independence in their own homes.

Although the current reality of the female senior on limited income is very evident in current admissions, there is increasing evidence of available pension income to support preferred accommodation. Along with the growth in the number of seniors within the aging baby boomer population, the percentage having adequate pension plans is expected to also increase. The impact of recent market losses on the future strength of retirement savings is still to be determined.

The needs of seniors have increased. They are increasingly immobile and many are being admitted from hospitals, geriatric facilities, and psychiatric settings rather than from their

homes. Many require gastric feeding tubes and oxygen support. About 65% have mental health problems and/or dementia. Four in every five need assistance with dressing. About 62% need toileting assistance. It is estimated that more than 90% are at risk for injury to themselves or to others, and many residents display aggressive behavior.

There is competition for the resident population. With the opening of new and renovated beds across the Province, waiting lists dropped, beds stood empty and in 2004 the Villa had an occupancy crisis for the first time. With the completion of construction, the Villa is better placed to compete in the market and is experiencing improved occupancy results but this remains an issue requiring ongoing attention.

## **2. Funding**

The government of the day and its health strategies has a significant impact on the service the Villa is able to provide. The Villa's revenue is 64% Ministry of Health and Long Term Care, 30% resident co-payment, 5% preferred accommodation and 1% other.

The contributions of the Ministry of Health and Long Term Care to the industry have increased dramatically since the redevelopment of long term care in 1993 and especially since the 1999 strategic plan. The guaranteed per diem for a Case Mix Index (CMI) of 100 in 1999 was \$96.01 while in April 2005 it had grown to \$125.81, an increase of 31%. The increases reflect the Ministry's intent to improve the quality of care in long term care homes and to add employment opportunities by increasing the staffing levels of registered staff. The increases in Nursing and Personal Care were 36.6% and in Program and Support were 32.0% while in Accommodation, only an additional 17.9% has been added. For the Villa this has meant that the direct care envelopes have been able to both keep up with inflationary increases in staffing costs and add some additional staffing. While the increases have been steady they have not kept pace with current political promises so staffing has not been increased to the level desired by the Ministry. This is an important focus of current association lobbying.

Moreover, in the accommodation support services, the increases have not covered the inflationary costs being driven by salary rate increases across the organization. It is this envelope that must generate surpluses in order to manage debt and yet it has received insufficient support to stay even. The mortgage interest rate of 7.33% generates a required debt service surplus of over \$2M which must be managed through this Strategic Plan period. Repayment of the mortgage will be a combination of St. Joseph's Villa Foundation support and operating surpluses generated by preferred accommodation, operating economies and new revenue sources.

## **3. Health Care Services**

The accountability processes of the Ministry of Health and Long Term Care have become increasingly stringent. The Smith report "Commitment to Care: A Plan for Long-Term Care in Ontario (2004)" brought new government controls and more prescriptive care

standards. In developing strong compliance, inspection and enforcement programs, the Ministry launched a website for public posting of unmet standards and verified concerns of individual homes. The unmet standards posted for St. Joseph's Villa have detailed action plans that ensure compliance within a brief time period post inspection. The Villa's independent monitoring of performance is evidenced by our extensive Continuous Quality Improvement (CQI) program, our successful three year accreditation, and our achievement in being the first long term care facility in North America to be International Standards Organization (ISO) registered

The Ministry's goal of improved staffing has been matched with incremental funding targeted to the employment and retention of registered nursing staff. The Villa has used these resources to manage increased salary and benefit costs and to increase registered staff positions.

The ability of long-term care to attract physicians is being enhanced with new monetary support for physicians caring for long-term care residents and for on call services. It is also hoped that the development of family health teams will attract more physicians to family practice.

The long-term care system is moving from the classification/CMI system of care assessment to Resident Assessment Instrument – Minimum Data Set (RAI-MDS). The RAI-MDS tool provides a common and consistent assessment mechanism as well as workload measurements, quality assurance and benchmarking. The Villa was chosen as an early adopter site so will be well positioned for full implementation across the province.

#### **4. Health System**

The current government is committed to transform the health-care system and make it more patient centred and responsive to needs with the development of LHINs, Local Health Integration Networks. The LHINs are 14 community-based organizations with the mandate to plan, coordinate, integrate, manage, and fund care at the local level within their defined geographic areas. LHINs are currently focused on developing their Boards and working with local organizations to develop health delivery plans that focus on collaboration of service delivery and resource utilization. Our membership in the St. Joseph's Health System and our partnerships within OAHNSS have demonstrated our efforts to work across silos as well as within our service group. The LHINs will become responsible for funding allocations by 2007. Ongoing information on LHIN development is available through bulletins posted on the LHIN website, [www.lhins.on.ca](http://www.lhins.on.ca) and [www.health.gov.on.ca/transformation/lhin](http://www.health.gov.on.ca/transformation/lhin) as well as websites hosted by OANHSS and the St. Joseph's Health System.

#### **5. Outreach**

The 8 bed St. Joseph's Villa/ Dundas Rotary Respite Care service continues to be a success based on overall occupancy, repeat visits, Ministry renewal of contract and

feedback on demand from the CCAC. No other homes in the region have moved into this market with more than 1 or 2 beds. Although Respite Care is a difficult service for long term care homes to offer, our volumes have allowed us to develop expertise in the area of admissions, social work, and nursing that are specific and unique to short stay.

There are 7 day programs in the City of Hamilton, with St. Joseph's Villa being one of two sites to provide service to higher needs clients. The high number of clients (12.5%) requiring subsidy to access the program reflects the demographics of poor seniors that was previously outlined for long term care. The Ministry of Health and Long Term Care recognized the value of the pilot Special Needs Program by providing permanent funding to this dementia support group. New demands for service by those with visual impairment, developmental delays and requiring therapy programs present an opportunity for further development. The program helps the frail elderly maintain independence in the community and delay admission to LTC.

## **6. Housing**

An area of significant new growth and market demand is affordable housing for seniors. While the elderly, and especially the poor well elderly, are looking for new housing options an optimum solution is to develop that component on a campus already focusing on services, support and care for the elderly. There has been great difficulty in marrying the Federal program supporting housing models with the Provincial program providing supportive services. In April 2005, the Federal and Provincial governments jointly announced agreement to provide investments in affordable housing of \$602 million (\$301M each) over 4 years. Although seniors were not specifically highlighted as a target group, this level of financial support will provide opportunities to develop new housing for seniors.

Our organization has demonstrated success in the housing market. St. Joseph's Estates, our 107 suite, 2 building complex is now eight years old. The project has had 100% occupancy since the first building opened and had a waiting list of sixty (primarily couples), on a consistent basis prior to the occupancy. The occupancy owners of the 27 units that have been resold since the beginning have realized a return ranging between 4% and 7% annually since the period of first occupancy. There are no new major life equity projects, in our catchment area, competing with the Estates for resales. Our success in admitting all Estates residents who wish to come to the Villa continues to demonstrate the value of the continuum of care of this project. The Estates Advisory Committee have matured in their development to the stage where they are about to begin their own strategic planning process which will help to inform us about the next direction that could be taken with them.

## **7. Industry and Technology**

The completion of the Margaret and Charles Juravinski Wing, the Anne and Neil McArthur Family Wing, and the rebuild of the core areas has been a major goal

accomplishment from the previous Strategic Plan. In addition to providing a modern, home-like environment supporting privacy and dignity, the building also meets high industry standards in construction, support systems and environmental controls. Significant upgrades have been made to communication systems. In addition to computerized business systems, computers are available in all nursing stations for care documentation and our network is eHealth ready. The government's eHealth network will provide integration across providers of care from doctors and labs to CCACs, hospitals, and long-term care and will enable a smooth flow of patients through the facets of the system. Equipment funding that became available during construction enabled the installation of lifting devices for most resident rooms to ensure safety of staff and comfort of residents.

There are still opportunities for development of the building. The plans for the West wing were deferred until additional funding was available. The east side of the first floor north and south is awaiting development as are the east wing and 5<sup>th</sup> floor.

## **8. Partnerships**

St. Joseph's Villa is a member of the St. Joseph's Health System, a separately incorporated body which also includes St. Joseph's Healthcare (Hamilton), St. Joseph's Health Centre (Guelph), St. Joseph's Lifecare Centre (Brantford), St. Mary's General Hospital (Kitchener), and St. Joseph's Home Care. The System represents a fully integrated delivery of care and a continuation of the commitment of the Sisters of St. Joseph of Hamilton (SSJH) to provide faith-based care and services to the sick and elderly of the community. The Villa also provides management services under contract to the 12 bed Martha Wing of the SSJH Motherhouse. Membership in the System provides access to the economies of group purchasing in general and in the specific areas of legal services, audit, insurance and banking.

As a member of the Ontario Association of Non-Profit Homes and Services for Seniors (OANHSS) the Villa has input into long term care direction. OANHSS has a significant voice as both consultant and lobbyist with the Ministry of Health and Long Term Care to support the needs of seniors in long term care, community support services and housing. Senior staff at the Villa serve on many OANHSS committees including the Board, Finance Committee, eHealth Committee, Education Committee, OANHSS Region 2 Administrators, and OANHSS Region 2 Nursing. A current OANHSS focus has been to pressure the government to honour their election campaign commitment to improve resident care funding by \$6,000 per resident.

A focus of the Catholic Health Association of Ontario (CHAO) is to preserve catholic faith-based care in the province. This issue is of significant importance with the development of the LHINs and the maintenance of current governance structures particularly for faith-based organizations.

Ten years ago the St. Joseph's Health System approved the full integration of the System into the Father Sean O'Sullivan Research Centre. The St. Joseph's Health System

Research Network pursues a broad range of research activity. The researcher dedicated to the Villa focuses on projects targeted to the elderly and providing a continuum of quality care within the System and across the community.

Our fundraising and public relations partner is St. Joseph's Villa Foundation. The Foundation has been instrumental in providing donor support to the building construction and redevelopment through two successful capital campaigns. They have expressed ongoing commitment to developing resources to support debt management and completion of the full construction plan.

## **Strategic Directions**

St. Joseph's Villa's programs have been informed by and respond to the opportunities and threats of the environment in which we operate. Our success has been built on the capacity to see through the threats to the opportunities beyond and to capitalize on them.

The Strategic Planning process has given the opportunity to assess previous goals, analyze the environment, and review the input of stakeholders in order to develop future direction. The resulting Strategic Goals will set the direction of programs and services for the years 2005 –2010.

The Strategic Plan 2005 – 2010 is intended to be an ongoing living document. While the goals have been set, the implementation plans will undergo change, revision, and fine-tuning as work proceeds to achieving the goals. A reporting mechanism to the Board of Trustees is being established for periodic updates on progress on the Plan. Direction and input from the Board and other stakeholders will be incorporated into the Action Plans as required.

St. Joseph's Villa  
Strategic Goals  
2005 - 2010

Research

Continue our development as a centre of excellence in geriatric research, collaborating with St. Joseph's Health System partners, especially in Brantford and Guelph, and broadly communicating outcomes.

Free to Live Philosophy of Care

Continue implementation of Free to Live philosophy of care to enhance residents' quality of life while supporting the Villa's leadership role in mission effectiveness, pastoral care, ethics and value-based Catholic health care.

Outreach 1

Develop and implement a transportation plan that includes both access to outreach services and outings for residents through purchase of a new van and/or increased community resourcing and partnerships.

Outreach 2

Expand community outreach programs in areas such as expanded day program services/capacity, expanded clinics, pool programs, complementary therapies, and attending physicians and explore partnerships with other providers.

Building Utilization

Research, develop and implement a utilization plan, including housing, for the 5<sup>th</sup> floor, undeveloped areas of the 1<sup>st</sup> floor and floors in the East Wing. Complete the planned redevelopment of the West Wing.

Education

Create a positive learning environment that is rooted in a "culture of learning" and supported by ongoing education and development

Staffing

To ensure an ongoing commitment to quality care, develop a baseline of staffing levels as well as a plan to ensure continuing adequate levels of staff

Marketing

To ensure that the Villa and its services are promoted in a positive image to the community. To ensure that the Villa is and is seen as the "Best Long-Term Care Home" in the Dundas/ Hamilton and surrounding area. To enhance visibility of the Villa in the Dundas/Hamilton and surrounding area.

### Government Communications

To ensure that the important Villa messages are being communicated to local, provincial and federal government staff and politicians in a timely fashion.

### Safety

To adopt Resident Safety as a written, strategic priority/goal within the organization including a reporting system to the Board that is in accordance with applicable legislation and accreditation standards. To promote the safety of staff and volunteers and to continue to support safe work practices to ensure that prescribed safety standards are met or exceeded.

### Finance 1

Develop a salary and wage budget to achieve wage equity with external markets by 2008 as a fiscal priority subject to remaining financially viable.

### Finance 2

Develop annual operating budgets that meet debt service coverage requirements of financing without loss of service. Accumulate fund by 2008 that will generate sufficient cash to repay \$23 million construction costs.

### Partnerships

Collaborate with external local and provincial partners to ensure continuation of policies and programs that support the Villa Mission and maximization of funding. Position the Villa as a key advocate for seniors and a valued consultant in long term care management, expanding our Martha Wing role. Continue to expand the relationship with St. Joseph's Villa Foundation for the benefit of seniors.

### Organizational Effectiveness

Maintain an effective and efficient organization that ensures continuing viability and caring behaviour including strategic management practices

### Governance

Continue development of an operating and reporting structure that involves and supports the goals of the Board and the organization as defined in the Strategic Plan

