

Co-creating the Future Through Strategy 2024 – 2027

Final: Approved November 26, 2024

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Introduction

PHSS is a non-profit, community-based corporation providing a broad range of services with a focus on supporting individuals with complex physical and/or developmental disabilities to reach their full potential at home and in the community. PHSS is committed to providing lifetime care and support while encouraging and creating an inclusive community where individuals with complex disabilities have access to all the community has to offer and are included in a valued and meaningful way.

PHSS continues to grow as it responds to the needs of people and families in our community with flexibility and innovation.

PHSS is funded by the Ministries of Community, Children & Social Services; Housing; and Health and Health at Home (Home and Community Care).

With an eye to the future, PHSS' strategy process is meant to evaluate and enhance PHSS' commitment to our vision, mission, and values. Its goal is to create a culture of innovation and improvement as well as engage in reflection to ensure our supports are responsive to individuals and families who are a valued part of our community.

Our strategy process builds on:

- Co-creating solution-based responses/actions that consider individuals, families and communities.
- Encouraging constructive and critical reflection.
- Ensuring continuous improvement, innovation, and growth.
- Continuing commitment to providing high quality and individualized supportive care to every person we support based on comprehensive collaborative individualized planning that reflects each individual's full range of needs and pursuit of a meaningful and full life.
- Continually seeking out opportunities to provide services to a growing number of individuals, enhancing existing programs, and developing new programs of care.
- Engaging in research and innovation.

This document is meant as a reference and reminder of the discussions held by the Board and Executive Leadership in co-creating the future of PHSS. The Executive Leads will convert the big picture strategies and opportunities contained here into operational plans.

Strategy Process

PHSS continuously develops, updates and documents its strategy by focusing on a shared Vision and Mission, examining the external and internal environment, engaging in conversations that consider opportunities, and co-creating the future.

The strategy process included:

- Presentations about the environment from government and university partners, including academic and health institute sources, as well as from Executive Leads (ELs) and Board members
- The Participatory Action Research (PAR) process and its resulting recommendations (see below)
- Discussion/analysis of these findings by the Board, CEO and Executive Leads (ELs).
- Development of this Strategy 2024-2027 (by Board, CEO and ELs) at retreats held in London on June 4 and October 16, 2024.

The Vision, Mission and Strategic Pillars articulated in this report continue to serve as a framework within which PHSS' Board, CEO and Executive Leads will make decisions and select the opportunities to pursue over the next 3 years. Related operational strategies and initiatives will be further developed by the Executive Team.

To deepen the Board's understanding of the Vision and Mission, participants identified which elements of these statements were particularly meaningful to them.

Vision*

A leader in community inclusion of individuals with complex medical, physical and/or developmental needs.

- Community inclusion is the essence of who PHSS is. Everyone in the community belongs and every community will be a healthy community. We create macro and micro-communities on every level.
- Leadership speaks to innovation and pushing boundaries, teaching people to live in healthy caring communities, and taking on the responsibility to contribute to the greater environment.

**Note: Reference to Ontario was removed from the Vision in November 2024.*

Mission

PHSS supports individuals with complex medical, physical and/or developmental needs to live in their own homes and participate in community with family and friends.

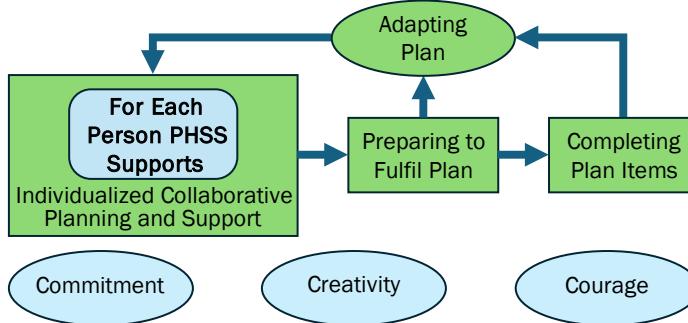
- Family and friends are an important part of an individual's life in supporting them in community.
- Individuals live in *their own homes*. We do not have a discharge policy.

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- PHSS' *people-first* philosophy means we respond uniquely to the needs of each person. Person-Centred Plans (PCPs) are an essential and fundamental vehicle through which we achieve this.

Fundamental Focus

Fundamental to the philosophy, culture, and priorities of PHSS is its unwavering focus on meeting the individualized needs and wants of every person that PHSS supports so they can have fulfilling, supported and meaningful lives in their community. PHSS' commitment to this focus must remain at the core of the governance, management, and operation of the organization.



Fundamental to PHSS is the focus on providing high quality and comprehensive individualized care to each person we support. At the centre is individualized collaborative planning and day-to-day support tailored to and reflective of the needs and wants of each individual. This includes the work and resources to prepare and complete each person's plan and to adapt their plan to reflect changing needs and wants.

Success depends on the commitment of everyone to the process and the effort needed to carry out each plan, creativity of each individual, family and staff to design and prepare to fulfil each plan, and the courage of each individual and staff to carry out and complete or adapt the components of each plan over time.

Since PHSS began, it has remained committed to growing its services and innovating the design and delivery of its programs while reaching out to support more individuals who will benefit from receiving support from PHSS within Ontario. The broad service strategies are collaboratively established by the Board and Management. Within these broad strategies Management has the authority to seek out opportunities and to establish new locations and programs based on the sustainability of the necessary support of families and partnering local agencies. One-time and base funding are necessary to establish and maintain the supportive care services in existing and new communities where PHSS provides one or more of its services. Providing Management with the flexibility and ability to explore and pursue likely opportunities has led to PHSS' successful track record of extending its locations where it provides services beyond London, and the introduction of new innovative programs that have benefited both individuals and their families for over 35 years.

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Preserving What's Sacred: PHSS Values

The Board has approved a set of Values that provide the Board and staff with a moral compass to evaluate all decisions made and actions taken. These Values are sacred, and it is the Board's and Management's responsibility to preserve and protect them on behalf of the individuals and families that are supported by PHSS.

Caring - PHSS is a caring organization focusing on the individuals we support, our staff, and the communities in which we operate.

Learning – PHSS continually pursues opportunities to listen, learn and innovate to enhance the quality of care we provide, adapt and grow our support services and corporate practices, and participate in research to better understand and identify how to advance our mission.

Personalizing Support – PHSS is dedicated to comprehensive individualized planning and personalizing how we support each individual we serve to meet their personal needs, goals, and engaging with family, friends and the community.

Stewarding – PHSS continually seeks opportunities to improve the cost effectiveness of its operations, resources and practices recognizing its obligations to the individuals it supports and funding organizations to function as a good not-for-profit corporate citizen.

Strategic Pillars and PAR

Four **Strategic Pillars** have evolved from PHSS' Vision, Mission, Fundamental Focus and Preserving What's Sacred. These Pillars are continuously updated to define the strategic directions moving PHSS into the future. They are listed here along with the PAR Recommendations which are based on direct input from individuals and families in co-creating the future. Both frameworks are defined in more detail on pages 9 and 11.

Strategic Pillars – PHSS Framework

1. Best Outcomes for People Supported
2. Organizational Capacity for Outcomes
3. Advocacy for People and PHSS
4. Innovation and Research

PAR Recommendations – integrated into the Strategy (separate cover)

1. Community Engagement
2. Transitioning through the Ages
3. Transportation
4. Learning and Sharing
5. Advocacy and Growth
6. Family Connections
7. System Coordination and Change

The Board's Role: Governing Beyond the Boardroom

Board members who act as ambassadors are more actively engaged, committed and satisfied in their governance role. Through this role, they can make a significant difference on behalf of individuals, families and the organization.

PHSS' Board reflected on the value-added contributions they are currently making and discussed how the Board might optimize its ambassadorial role going forward.

Board members recognize their responsibility to protect and live PHSS' Vision and Mission by making sound decisions, promoting PHSS, and advocating on behalf of individuals and families.

There was agreement that Board members can learn from individuals and families about how to provide support. Sharing good news stories at board meetings is one way to keep this learning continuous. Having an 'elevator' script and communication tools for Board members are useful to support the ambassadorial role.

Board members bring expertise, resources, networks and social capital that enable them to optimize the ambassadorial role. The various types of ambassadors are differently suited to individual Board member personalities. Together they provide effective contributions in the governance role.

TYPES OF AMBASSADORS

- ✓ Connectors – use their contacts to make connections and help individuals, families and organizations achieve goals, raise friends, and raise funds.
- ✓ Bridges – have roots in different cultures, networks and communities which gives them an opportunity to interpret/bridge different worlds and facilitate shared understanding and collaborations.
- ✓ Storytellers – have a deep understanding of the individuals supported and their families so they can tell compelling stories and tailor them to different audiences with passion.
- ✓ Resource Hunters and Gatherers – are well networked and resourceful, know how to negotiate for various contributions, and pursue alternative ways to get things done.
- ✓ Lived Experience – offers an authentic insight into what it's like for individuals and families to live their lives and can facilitate this understanding with others.
- ✓ Disruptive Co-creators and Advocates – embrace new possibilities and pioneer different pathways in achieving goals.
- ✓ Visionaries and Dreamers – have the imagination to envision and dream about what might be.

Leading the Way in Health and Social Care

Not all opportunities are equal in desirability or benefit. In making future decisions about what opportunities to pursue, the group analyzed what PHSS excels at and under what conditions PHSS would say *no*, *yes* or *maybe* to.

What are we best at?

- Serving to the best of our abilities
- Protecting who we serve
- Meeting the needs of the people we support
- Providing support to people with complex needs in the community
- Being navigators and collaborators
- Problem-solving
- Protecting what is sacred (mission and values) while growing and adding to our geographic presence
- Challenging the status quo which leads to innovation
- Supporting people through PCPs
- Being fiscally responsible while sustaining services and support
- Co-creating possibilities
- Seeking and sharing knowledge
- Pursuing opportunities
- Being relentless
- Building partnerships

What would we say NO to?

- Anything that is not providing a benefit to our population and those we support
- In areas we do not have the ability to influence or innovate change by using our resources
 - E.g. Long-term care, mental health, aggressive behaviours

Why would we say YES?

- Responding to a system need
- Responding to individuals and families
- Providing a deeper service – e.g. home for life, circle of support
- Engaging in evidence-based research

Why would we say MAYBE?

- Forming partnerships with organizations whose core does not have the same values as PHSS

- It's the right thing to do and fundraising is a viable strategy to pursue it
- Resources/funds not readily available
- Pursuing a Social Enterprise (defined as providing a public good that generates a revenue stream but is not necessarily serving the organization's primary vision and mission). Revenues can be redistributed to support the host organization
- Potential to create intentional communities
- Responding to service and support needs in the community

Considerations

- Resources available to fund a group of organizations for a common purpose
- Technology and AI innovations

PAR Recommendations

As noted above, the PAR process provides the Board and Management with direct input from individuals and families into the strategy process. The full report of the PAR process can be found under separate cover. The Recommendations at the Strategic and Operational levels are excerpted here and have provided guidance to the Strategy process. The Board will focus primarily at PAR's Strategic level, leaving the Executive Leadership Team to implement Operational Initiatives emerging from these Strategic levels.

1) Community engagement

Strategic

- Community engagement as an overarching theme
- Increasing awareness of PHSS in community
- Pursuing opportunities, partners and talent

Operational Initiatives

- Increase formal linkages with municipalities and community organizations
- Enhance use of volunteers and students

2) Transitioning through the Ages

Strategic

- PHSS supports individuals throughout lifespan
- Mission-critical: systems and relationships

Operational Initiatives

- Communicate this principle to individuals and families
- Identify practical pathways in PCPs
- Connect to high schools to help in transitions
- Apply technologies to help transitions
- Introduce high school students to career possibilities

3) Transportation
Strategic

- Persistent transportation challenges over the years
- Big picture advocacy issue

Operational Initiatives

- Analyze the inhibitors to success more deeply
- Build a business plan
- Experiment with innovative solutions

4) Learning and Sharing
Strategic

- Commitment to continuous learning and evaluation is in PHSS' culture

Operational Initiatives

- Continue to educate staff especially in Ottawa
- Continue the work of the *Quality and People Supported Committee* to ensure follow-up and evaluation

5) Advocacy and Growth
Strategic

- Create an advocacy and growth agenda based on priorities
- Develop a multi-agency, multi-stakeholder advocacy plan

Operational Initiatives

- Partner with Ontario Health Teams, community agencies and Health and Community Care Support Services (HCCSS) to create more respite beds/programs
- Create pathways to improve access to technology and its maintenance/repair

6) Family Connections
Strategic

- Continue to engage individuals and families as partners at all levels – e.g. strategic directions

Operational Initiatives

- Strengthen PCP approach and build on Western University's research findings
- Encourage and support families to be more involved in decision-making and advocacy

7) System coordination and change

Strategic

- Enhance PHSS' influence and system leadership in shaping the Health and Social Care sector

Operational Initiatives

- Reinforce that "every staff is a navigator"
- Create a pilot (with metrics) with a hospital-based point person for medically complex individuals
- Explore having a dedicated community/PHSS based nurse practitioner (NP)
- Disseminate information about activities and opportunities to other staff
- Solve challenges creatively

PAR Recommendations have been incorporated into the Strategic Pillars' Outcomes, Trends and Opportunities (see chart below).

Strategic Pillars

Outcomes: These Outcomes define the results that each of the Executive Leads (ELs) is aiming for. The ELs will create a set of metrics that the Board can refer to as they monitor the achievement of the Strategic Pillar.

Trends: The trends have been distilled from a series of environmental scans as a backdrop to developing the Strategy and Strategic Opportunities. These Trends continue to change over time. The Board and ELs must pay attention to the changing environment to recognize emerging opportunities and challenges.

Opportunities: These Opportunities will be transformed by the ELs into operational goals, metrics and initiatives based on this Board-approved final report *Co-creating the Future Through Strategy 2024-2027* (November 26, 2024).

Pillar: Best Outcomes for People Supported <i>Shannon Riley</i>		
Outcomes	What trends do we need to pay the most attention to?	Opportunities
<ul style="list-style-type: none"> • High-quality co-created services and supports • Responsive person/family-centred supports • Trained and qualified staff 	<ul style="list-style-type: none"> • Recruitment and retention HR Strategy • Individualization of funding/Self-directed funding • Possible social enterprise opportunities • Transitioning through the ages <ul style="list-style-type: none"> ◦ Individuals aging – increases in needs, staff hours, training, etc. • Transportation • Accessible vehicles, transit system, fleet management • Community engagement • DEI & accommodations • Housing options • Return to institutionalization & congregate settings as an efficiency proposition 	<ul style="list-style-type: none"> • Social enterprise opportunities • New services and support initiatives

Pillar: Organizational Capacity for Outcomes <i>Katie Coughlin</i>		
Outcomes	What trends do we need to pay the most attention to?	Opportunities
<ul style="list-style-type: none"> • Financial sustainability and growth • Sustainable infrastructure and administration to support operations and growth • Customized and optimized technology to support all aspects of PHSS & ancillary opportunities • Business development 	<ul style="list-style-type: none"> • Transitioning through the Ages <ul style="list-style-type: none"> ◦ Training ◦ System Placement • Transportation • Housing shortage/Housing costs <ul style="list-style-type: none"> ◦ Inflation: utilities, food, insurance • Supporting the immigration program • Diversity, Equity & Inclusion (DEI) • Expectations of families and pressures • Privatization • Direct funding • Home and community care filling the gaps • Metrics & reporting requirements • Skilled staff & training 	<ul style="list-style-type: none"> • Direct funding • Back-office provider • Informational Technology (IT), Digital by Design (DBD) • New services & support initiatives • Shared services

Pillar: Advocacy for People and PHSS		
Outcomes	What trends do we need to pay the most attention to?	Opportunities
<ul style="list-style-type: none"> Increased profile of people needing support, PHSS, and its mission Recognition of PHSS as a thought leader and influencer Community Education Internal communications Use of social media 	<ul style="list-style-type: none"> Increase the profile of PHSS <ul style="list-style-type: none"> What does PHSS mean? What does PHSS do? Aging population <ul style="list-style-type: none"> Aging in place Increase in strategic communication Waiting lists & changing expectations of families and funders 	<ul style="list-style-type: none"> Continued Board/staff education in accountability to Vision and Mission Identify audiences and plan strategic communications approaches Enhance Storytelling Create a communication and advocacy agenda Replicate what is working

Pillar: Innovation and Research <i>Donnie Antony</i>		
Outcomes	What trends do we need to pay the most attention to?	Opportunities
<ul style="list-style-type: none"> Innovative approaches to in-home and community supports through co-creation Day supports Partner and network development and management Participation in research opportunities/ projects Nurture a research agenda 	<ul style="list-style-type: none"> Sharing expertise with community Commitment to learning and education Community programs Partnering with businesses, educational and health institutes 	<ul style="list-style-type: none"> Technology Replicate what is working Developing partnerships with businesses, colleges, universities, health & medical institutes, communities and allies You at Home program expansion Increasing connections with researchers Learning from failures, lessons learned

Future opportunities

On October 16, 2024, the Board unanimously endorsed eleven Strategic Opportunities Informed by individuals, families, community and government.

The Board and Executive Team have co-created a shared understanding and direction forward. The Executive Leads will develop goals and metrics to support these Opportunities for the Board to monitor throughout the next few years. The Board will develop their own governing goals and plans to advance their ambassadorial contributions to these Strategic Opportunities.

Strategic Opportunities

1. Create more innovative models of care and support, and leverage what we have
The You at Home program is an example of a successful innovative model of care.
2. Further engage and work with families
Primary stakeholders include families— those currently involved with PHSS and those advocating for future services. The family circle surrounding the individual is vital, and there are always opportunities to engage families in various ways while preserving what is sacred in this process.
3. Sustain and build more trusted partnerships
Through collaboration and collaborative leadership, PHSS is well-positioned to embrace new ideas that will address the needs of people we support, families and the organization. Trusted partnerships are a vehicle for new models, advocacy, etc.
4. Respond to individual and family expectations and needs
Responding to the needs of individuals and families is essential. Families routinely articulate their expectations and vision for their children to enable them to lead fulfilling lives within the community. Engaging in the accommodation process, leveraging these expectations and using advocacy help turn aspirations into reality.
Note: The appropriate type of leverage will be incorporated into the operational language.
5. Continue to pursue research opportunities
As PHSS gains international recognition, we appreciate its uniqueness even more. Continuing our research is crucial, as it fosters partnerships and validates our work, enhancing our credibility and providing essential data. This research not only legitimizes our existence but also supports our Mission. We aim to broaden our research scope beyond our unique perspective, ensuring that as new opportunities arise, PHSS continues to be recognized as a valuable asset within the sector.
6. Develop new partnerships and networks to support the Vision, Mission and Strategy
PHSS will use a mapping exercise as a strategy vehicle to consider which partners and networks are the most productive: e.g. builders, suppliers, care delivery organizations etc.

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7. Pursue business opportunities and development, social enterprise and shared services
Develop revenue streams through innovative social enterprise models and collaborative shared services. Identify and leverage various revenue-generating avenues to enhance organizational sustainability. Navigate the dual responsibilities of being a guardian of our mission while also acting as a trader in the marketplace.
8. Adapt to the changes in funding practices
Adaptation must be centred on our core Mission and Vision to guide funding strategies. Cultivating the ability to pivot and respond to change is essential for sustainability.
9. Enhance intentional communication through storytelling, advocacy and education
Various communication vehicles offer a broad scope allowing leadership and staff to be intentional in their communication.
10. Optimize AI and technology to enhance wellness and support as well as leveraging other organizational activities
By optimizing AI and technological tools, the organization can enhance wellness, support and operational efficiency. PHSS can also strategically position itself to capitalize on new opportunities. In addition technology enables more sophisticated research methodologies.
11. Continue and pursue strategic national and international opportunities
By presenting on global platforms, we share valuable insights while also learning from diverse perspectives. We recognize the importance of keeping our Board members informed and educated about key developments and opportunities. We pursue initiatives that align with the Mission, Vision, and Values of PHSS, ensuring coherence in our strategic efforts.*

**Note: By unanimous consent the Ontario geographic boundary was removed from the Vision statement.*

Next steps

1. Executive Leads develop Operational Plans (including metrics) to be presented to the Board (date to be determined).