



Strategic Plan & Balanced Scorecard 2011-2014

Building for the Future

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1. Executive Summary

Vision

A multicultural community that understands mental health and accepts mental illness.

Mission

Hong Fook Mental Health Association works with Asian communities to keep people mentally healthy and manage mental illness from recovery to wellness, through promotion and prevention, treatment, capacity building and advocacy.

Core Values

We embody these core values to fulfill our mission:

- Equity
- Diversity
- Cultural competence
- Empowerment
- Capacity building
- Community participation
- Self help
- Mutual support

Service Commitment

Our commitment is to serve our communities by being:

- Responsive
- Accessible
- Accountable
- Collaborative
- Integrated
- Innovative

Overall Goals and Strategic Objectives

Balanced Scorecard Quadrant	Goal	Objectives
Client/Consumer	1.0 Working together to reach one's potential	1.1 Provide a continuum of services through a culturally competent holistic approach
		1.2 Build capacity in our diverse communities to provide mental health leadership
		1.3 Empower consumers/clients and families to participate in the mental health system
		1.4 Provide system leadership and advocacy
Learning and Development	2.0 Establish a culture of continuous learning, creativity and growth	2.1 Empower our staff and volunteers to reach their potential
		2.2 Create a safe working environment for staff and volunteers
		2.3 Augment academic activities
Internal business processes	3.0 Integrate and strengthen operations	3.1 Strengthen internal and external communications
		3.2 Better integrate services
		3.3 Improve quality and effectiveness
Finance	4.0 Be fiscally responsible and	4.1 Maintain a balanced budget
		4.2 Diversify source of funding

Balanced Scorecard Quadrant	Goal	Objectives
	efficient	

2. Table of Contents

1. Executive Summary	2
2. Table of Contents	4
3. Background	6
4. Inquiry into Strengths (S)	9
5. Imagine the Opportunities (O)	11
6. Innovate to Meet Aspiration (A)	13
7. Mapping the Strategy	19
8. Inspire to Achieve Results (R)	19
9. Appendices	21
10. Appendix B: External Stakeholders Consulted	21

3. Background

About Hong Fook Mental Health Association

Hong Fook Mental Health Association (HFMA) is a community-based mental health agency established in 1982 to address mental health concerns in the East and South East Asian communities. We currently work with the Cambodian, Chinese (Mandarin and Cantonese-speaking), Korean and Vietnamese communities in the Greater Toronto Area. We aim to help people with linguistic and cultural barriers to gain access to mental health services.

HFMA currently provides services at two locations in the Greater Toronto Area. With an annual budget of \$3.7 million and over 50 full and part-time staff members, we provide the following services:

- **Community-based and culturally competent services to people with mental illness** including information services and referrals, short-term support and counseling, case management services and supportive housing for consumers
- **Self-Help initiatives** including social, recreational and physical activities, self-help and mutual support groups, education workshops, English as a Second Language, supportive employment and volunteering opportunities.
- **A Prevention and Promotion** program that include community education on mental health issues, stress management workshops, educational material in the languages of our target communities, groups and community events
- **A Volunteer Development program** that includes volunteer orientation, training, support and services

A summary of HFMA service statistics is described in the table below:

Table 1: Service Statistics 2010/11

Service Teams	Unique clients/ participants	Client/participant contacts/visits	Groups	Group sessions	Advisory Committees	Volunteers	Volunteer Hours
Intake and Consultation	1471	3950	14	24	-	-	-
Case Management	475	12976	7	105	-	-	-
Supportive Housing with Case Management	84	4491	6	47	-	22	-
Family Initiatives	112	728	6	62	2	11	310
Self Help	334	11140	17	621	-	40	2500
Supportive Employment	51	-	-	-	-	-	-
Prevention and Promotion	986	16449	14 groups/ 134 workshops	542	4	350	14900
Asian Clinic (6 physicians)	329 (new patients)	3301	-	-	-	-	-
Journey to Mental Health Training	233	422	9	18	2	-	-

HFMA has a number of formalized key strategic partnerships including:

- Mt. Sinai Hospital's Seniors Wellness Centre and Assertive Community Treatment Team
- University Health Network, Toronto Western Hospital pre-treatment program

- Asian Clinic for specialty psychiatric services
- Coordinated Access for Supportive Housing
- Access 1
- HFMHA Foundation

We continue to promote family and consumer involvement in all committees in policy development and service planning to further the mission of Hong Fook through the establishment of a number of Board and Service Advisory Committees such as:

- Service Development & Quality Improvement Committee
- Cantonese, Mandarin and Korean Community Service Advisory Committee
- Family Initiatives Advisory Committee

HFMHA has been a leader in advocating for mental health services broadly and for the populations it serves at various local, provincial and national planning bodies.

Setting the Context

From humble beginnings in 1982 Hong Fook Mental Health Association (HFMHA) has been at the forefront of providing community-based mental health services, initially for new immigrants from Hong Kong and Vietnam. With the growth of Asian and South East Asian newcomers to the Greater Toronto Area, the demand for our services has increased dramatically. To respond to the need, additional populations and service locations were added. Today, almost 30 years later, the demand for services has continued to increase while the supply of resources to meet the demand has remained flat. For the next three years, the challenges are clear: How can we:

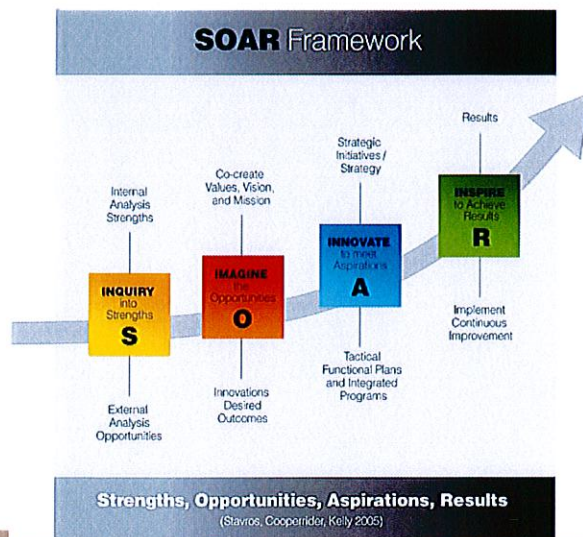
- Continue to meet the demands of its existing target populations with no increase in operating budget?
- Expand to serve new target populations without extending current resources?
- Develop the competencies of its staff to meet the increasingly complex conditions of consumers?
- Better integrate services internally to meet the needs of our clients?
- Embed ourselves more into the mental health and addictions community at large and as part of the continuum of care?
- Align with and support the Province and LHIN's priorities?

To address these challenges, we have embarked on a strategic planning process to recognize the successes and core competencies while building HFMHA to meet the needs of the community for the next three years (2011-2014). This document outlines our plan to build towards the future.

SOAR Strategic Planning Approach

The SOAR Planning Approach stands for Strengths, Opportunities, Aspirations and Results. The process invites all stakeholders into the conversation to learn and value HFMHA's history and culture, determine what HFMHA does

Figure 1: SOAR Strategic Planning Framework



well and what the collective values and aspirations are. The fundamental principles of the approach are to:

- Build on HFMHA's strengths, the positive core of what HFMHA does, to crowd out the "negatives"
- Discover tangible, realistic opportunities to build organizational capacity beyond existing boundaries
- Adopt a highly participatory approach that focuses on engaging staff, management, Board members and external stakeholders to invite buy-in and to build relationships
- Use an integrated approach that aligns and connects HFMHA's Vision, Mission, Values, Service Principles and Performance orientation that are built on HFMHA's already successful programs and services
- Implement a strategic plan that is dynamic, continuous and results-oriented that is build on the creation of new knowledge

The major components of the SOAR Strategic Planning approach includes:

- Inquiry into Strengths (S): An internal analysis of the strengths and aspirations of HFMHA combined with an external review of opportunities that have strategic implications for the next 3 years
- Imagine the Opportunities (O): Co-create HFMHA's Vision, Mission and Values that are strength-based and describe the desired outcomes.
- Innovate to meet Aspirations (A): Develop the strategy and strategic initiatives using a Balanced Scorecard approach for tactical and functional plans
- Inspire to achieve results (R): Implementation of the strategy for continuous results and improvements

From January through to April 2011, the SOAR process was implemented. Highlights of the process include:

- 6 management meetings fully dedicated to strategic planning
- 2 Board meetings to discuss strategy, including the Service Development and Quality sub-committees of the Board (membership includes clients and consumers)
- Strategic Planning Summit (1 day) with Board members and management¹
- Full staff meeting and program level consultation with staff
- 15 external stakeholders consulted including HFMHA's key partners and funders

The approach also builds on our previous work:

- Hong Fook's Continuum of Services Philosophical Framework
- Hong Fook's previous strategic plans
- Annual operational plan submissions to the Central LHIN
- Annual reports
- Existing initiatives

This strategic plan will serve as a framework for future decision-making. It will also serve as a method to align existing initiatives towards a common direction, assisting with internal benchmarking and performance monitoring. The plan will help stimulate positive change for HFMHA to build towards the future from 2011-2014.

¹ Please see Appendix F: Summary Notes from Strategic Planning Day for more detail

4. Inquiry into Strengths (S)

Internal Analysis of Strengths and Aspirations

As an organization, we have identified a platform of strength to build towards the future. Using this platform as a foundation for change will allow us to develop our strategic objectives while building on our core strengths:

- Meeting the unique needs of our communities:** Our strength lies in our ability to meet our target community's mental health needs. For 30 years, HFMHA has developed a reputation in the Asian/newcomer community as truly understanding culturally-competent mental health programs and services. This comprehensiveness of service creates a welcoming atmosphere that helps erode the stigma of mental illness.
- Our team is our greatest asset:** Our staff is caring, compassionate, hard working, committed and knowledgeable. We have developed a strong connection and engagement with the local community and stakeholders which is built on a sense of trust – a key enabler to recovery and developing resilience. Clients and consumers feel a sense of belonging and cultural connection that evolves into a long-lasting relationship.
- High quality programs and services:** Our multi-site access provides a one-stop shop to a set of comprehensive and integrated services across the continuum of care. The quality of programs and services is reflected in the fact that consumers who have recovered remain with the organization as volunteers to assist their peers through their own journeys. Together, we walk with our consumers as a means to develop community capacity and better mental health for all.

As an organization, we have a number of aspirations we wish to fulfill. These aspirations drive our work within our communities. We recognize that to achieve these aspirations requires thoughtful planning and priority-setting. We believe that these aspirations can be achieved in the coming three years. The table below summarizes those aspirations.

Table 2: Summary of Aspirations

<i>I hope that...</i>	<i>This is important to me because...</i>
<ul style="list-style-type: none"> Our consumers can function well 	<ul style="list-style-type: none"> I know somebody with mental illness
<ul style="list-style-type: none"> We never have to face stigmatization 	<ul style="list-style-type: none"> It really hurts and impedes recovery
<ul style="list-style-type: none"> Consumers can always feel safe, respected and supported 	<ul style="list-style-type: none"> It is a basic human right
<ul style="list-style-type: none"> We educate our community about mental health 	<ul style="list-style-type: none"> It will reduce stigma and improve awareness
<ul style="list-style-type: none"> We provide support which helps our consumers achieve a good quality of life 	<ul style="list-style-type: none"> It is a basic foundation
<ul style="list-style-type: none"> We expand services to serve a broader community 	<ul style="list-style-type: none"> There are gaps in the system
<ul style="list-style-type: none"> Our services are accessible 	<ul style="list-style-type: none"> Time is crucial

External Analysis of Opportunities

As part of the approach, the strategic planning process included an environmental scan that involves considering the factors that will influence our direction and goals. It includes consideration of both present and future facts that might affect HFMHA over the planning period (2011-14). Details of the environmental scan can be found in Appendix A: Environmental Scan. A summary of the key drivers include:

1. Demographic shifts
2. Mental Health and Addiction policy drivers
3. Immigrant/newcomer Mental Health and Addiction drivers
4. Central East Local Health Integration Network (CE LHIN) priorities
5. “Competitive” landscape of the Community Support Services sector as a whole

The table below summarizes the key drivers and their implications to HFMHA for consideration.

External Drivers	Key Opportunities for Hong Fook Mental Health Association
<p>1. Demographic shift: The population HFMHA serves is aging and diverse with a strong potential for increased growth, demand and complexity.</p>	<p>We will need to develop or expand innovative programming and partnerships to be able to meet the future demand.</p>
<p>2. Provincial Drivers: Aspects of the Province's and LHIN's Mental Health and Addictions policies will become a reality with a key focus in consumer survivors, early intervention and identification and peer support models. In addition the Excellent Care for All act will require greater organizational attention to quality.</p>	<p>We can play a significant role in supporting recovery of consumers and early intervention and identification through the use of family-based initiatives and a peer support model. Consumer participation has been at the heart of HFMHA and can be further expanded upon. Internal integration of services using a quality improvement approach will better position HFMHA to play a key role in the continuum of care with other stakeholders.</p>
<p>3. Ethno-cultural specific drivers for Mental Health and Addictions: There is a gap in mental health services specifically for newcomers and immigrants, particularly in the Scarborough area where the density of diverse cultures and background is prevalent. This target population has unique cultural attributes and challenges that traditional mental health programs and services do not address.</p>	<p>We are in a unique position being a key player in serving five key Asian communities. To date, we have been active at the policy tables and will continue to be engaged with key priorities moving forward to ensure funders and other key stakeholders recognize the specific circumstances and challenges of specific ethno-cultural communities.</p>
<p>4. LHIN-wide Priorities: The Central East LHIN (and other LHINs in the Greater Toronto Area) are focused on:</p> <ul style="list-style-type: none"> • Reducing Emergency Room wait times and Alternate Level of Care numbers • Reducing impact of vascular disease <p>Priorities are set against the Triple-Aim Framework that will require the collaboration from community based organization to support patients discharged from hospital to home.</p>	<p>We can play a key role in preventing inappropriate Emergency Room admissions and assist with improving patient flow in acute settings. To achieve this, there will be a greater need for a basket of practical and medical support services in the community to transition patients home faster in a safe manner. Strategic partnerships with other providers will be essential where HFMHA can leverage its cultural competence and peer leadership models.</p>
<p>5. Competitive landscape: Given the fiscal climate and competition for donor dollars, the community support service sector is crowded and competitive. Alternate revenue streams need to be considered to fund future projects.</p>	<p>We must differentiate ourselves to ensure a degree of “attractiveness” to donors and/or funders, pursue other funders from other sectors, work with the Foundation closely and to pursue alternative revenue streams.</p>

External Stakeholder Engagement

As part of the external analysis, 15 key stakeholders² were consulted to gain their insights and perspectives on HFMHA's strategy. A summary of key themes includes:

1. **Tell us who you are:** Many of the external stakeholders were familiar with HFMHA but were often identifying HFMHA with other agencies serving the Asian community. For those stakeholders that were aware of our organization, they were not aware of the full spectrum of services provided. To this end, we will need to better promote our programs and services to stakeholders and the general public.
2. **Pursue partnerships:** HFMHA has a relationship with many of the stakeholders contacted. Outside of a funding relationship, we have few formal relationships with other stakeholders. While time and resources are limited, developing formal relationships that are focused on shared goals will benefit both ourselves and external stakeholders through the exchange of knowledge and expertise to serve existing and new demographics/communities.
3. **Focus!** External stakeholders have observed that we tend to do everything for everybody. In particular, funders have indicated the need for us to focus on our key mandate, improve our internal operations and avoid spreading the organization too thinly.
4. **Build up your organizational structure:** Stakeholders have remarked that fast growth over the years has resulted in the increase in demand for services while the supply of staff and infrastructure to meet the need has not increased at the same rate forcing us to play organizational "catchup". Stakeholders were pleased to hear of the recent organizational realignment and hiring of a clinical manager.

Together the internal and external analysis forms the basis for imagining our future.

5. Imagine the Opportunities (O)

Together with staff and the Board of Directors, Hong Fook Mental Health Association has co-created a shared vision, mission, values and service principles that will leverage the past and build towards the future through action and results to achieve the desired outcomes. Our Vision, Mission, Values and Service Commitment is presented here:

Vision

A multicultural community that understands mental health and accepts mental illness.

Mission

Hong Fook Mental Health Association works with people in Asian communities to keep people mentally healthy and manage mental illness from recovery to wellness, through promotion and prevention, treatment, capacity building and advocacy.

² Please see Appendix B: External Stakeholders for a complete list of stakeholders interviewed

Core Values

Hong Fook's values are built on the organization's previous "Continuum of Services" Philosophical Framework³. The foundation of the service framework is a whole person approach to service that considers all aspects of a person: physical, mental, emotional and spiritual in the design of programs and services. Hong Fook embodies these core values to fulfill our mission:

- Equity
- Diversity
- Cultural competence
- Empowerment
- Capacity building
- Community participation
- Self help
- Mutual support

Each of these core values is described in detail in Appendix C.

Service Commitment

Our commitment is to serve our communities by being:

- **Responsive:** We will be responsive to our consumer's needs to ensure that from the initial point of contact to service delivery to follow-up is performed within an established timeline.
- **Accessible:** We will ensure that access to Hong Fook's continuum of services, whether sought by a new or existing consumer, client, or family member, reaches the most appropriate provider in the most appropriate setting – Every Door Leads to Service.
- **Accountable:** Each of our staff members will perform at the highest levels of consumer-oriented service and be accountable for the service quality received by our clients and consumers.
- **Collaborative:** We will take a collaborative approach to care by working with partners to ensure integrated physical and mental health services are provided in an equitable and culturally competent manner.
- **Integrated:** Our services will be integrated to ensure clients and consumers can interact with our services in an efficient and effective manner along their own personal journey.
- **Innovative:** We will continue to evolve our service delivery models, using and developing leading practices in culturally competent community mental health models through our research and education partnerships.

³ Please see Appendix C: Hong Fook Mental Health Association Continuum of Services Philosophical Framework

6. Innovate to Meet Aspiration (A)

Translating Hong Fook's aspirations to an operational and tactical level will be central to Hong Fook's success over the next three years (2011-2014). Hong Fook has developed a Balanced Scorecard as a tool to meet its aspirations. The Balanced Scorecard is a performance measurement system that considers not only financial measures but also customer, business process and learning measures. The Balanced Scorecard translates the organization's strategy into four key perspectives or "quadrants," with a balance between internal and external measures, objective measures and subjective measures and between performance results and drivers of future results.⁴

The four key perspectives include:

1. **Client/Consumer perspective** – includes measures such as client satisfaction, client service, meeting the needs of the client, client safety and others
2. **Financial perspective** – includes measures that are related to the financial health of the organization such as net operating income, cash flow, and managing expenses
3. **Internal Business Operations** – looks at the processes of the organization such as intake, triage, referral, assessment, service provision, monitoring and follow-up
4. **Learning and development perspective** – includes measures such as staff satisfaction, employee retention, staff competencies etc.

As part of the Strategic Planning exercise, Hong Fook developed its first Balanced Scorecard to translate its strategy into operations. For each of the quadrants, Hong Fook has described its strategic goals, objectives measures and tactics. Hong Fook's first Balanced Scorecard will evolve over time as new processes and data collection activities are initiated as part of the implementation of the Scorecard. Each of the four perspectives is summarized below. The full and detailed Balanced Scorecard is presented in Appendix E: Balanced Scorecard⁵.

1.0 Client/Consumer

Overall Goal #1: Working together to reach one's potential

The Client/Consumer quadrant is our core essence. Hong Fook works together with the client/consumer and other partners to provide a range of programs and services that range from promotion to wellness to intervention of illness. By working together, we provide a comprehensive continuum of care that moves beyond the provision of "piecemeal" solutions by building the full capacities of individuals and communities to promote and sustain wellness to reach one's potential.

Strategic Objective 1.1 – Provide a continuum of services through a culturally competent and holistic approach

⁴ Kaplan & Norton 1994, see Appendix D: Balanced Scorecard Overview

⁵ Please Appendix E: Hong Fook's Balanced Scorecard 2011-2014.

We will continue to evolve our continuum of services by implementing our recently approved Nurse Practitioner-Led Clinic. The bridge between primary care and community mental health provides a unique opportunity to truly consider the individual in a holistic manner. In addition, our new branch office in North York will further expand Hong Fook’s footprint to meet the demand for services. While we recognize the need to expand our service offerings to new populations (e.g. seniors and youth), we also recognize that we need to establish formal partnerships (rather than ad hoc relationships) to acquire the population specific knowledge. In turn, we would be able to share our expertise in culturally competent mental health services as part of the knowledge exchange to meet the needs of the community. Achieving this goal will support the Central LHIN’s Emergency Room and Alternate Level of Care strategy by improving transitions between care settings.

Client Overall Goal: Working together to reach one’s potential	
Strategic Objective 1.1 Provide a continuum of services through a culturally competent and holistic approach	
Measure/Target for Strategic Objective	Initiatives for Strategic Objective
<ul style="list-style-type: none"> Integration and implementation of Nurse Practitioner Led Clinic into Hong Fook’s core services Opening of new branch office 3 core community and non-community strategic partnerships formed 	<ul style="list-style-type: none"> Nurse Practitioner-Led Clinic and branch office opening Partnership strategy to review existing partnerships, develop key guidelines/criteria for partnering for new age cohorts, new programs Conduct detailed Community Need Assessment

Strategic Objective 1.2 – Build capacity in our diverse communities to provide mental health leadership

Over the next three years, our plan is to take a direct approach to building capacity in the community. One priority will be to better market our own programs and services. Greater awareness of Hong Fook will better position Hong Fook as a key community resource for individuals and families. With an increased focus on spreading greater awareness of culturally competent community mental health service to a larger audience on limited resources, the spread of our core assets such as our peer leadership model will help build capacity in our diverse communities.

Client Overall Goal: Working together to reach one’s potential	
Strategic Objective 1.2 Build capacity in our diverse communities to provide mental health leadership	
Measure/Target for Strategic Objective	Initiatives for Strategic Objective
<ul style="list-style-type: none"> Social marketing campaign to providers and community Spread peer leadership model to peers and consumers in the diverse sectors 	<ul style="list-style-type: none"> Marketing strategy and plan developed and executed “Spread” of knowledge plan developed and executed

Strategic Objective 1.3 – Empower consumers/clients and families to participate in the mental health system

We encourage community participation from people who have personal experience with mental illness and other mental health concerns, their families and friends and where appropriate, volunteers from the broader communities. In order to achieve this goal, we place an emphasis on wellness, health promotion and self-help. Our objective is to better measure the outcomes of empowering consumers/clients and families to participate in the mental health system. To this end, our efforts over the next three years will focus on outcomes measurement through a redesigned satisfaction survey.

Client Overall Goal: Working together to reach one’s potential
Strategic Objective 1.3 Empower consumers/clients and families to participate in the mental health system

Measure/Target for Strategic Objective	Initiatives for Strategic Objective
<ul style="list-style-type: none"> Overall client/consumer satisfaction survey results 	<ul style="list-style-type: none"> Establish baseline and administer survey on an annual basis to see improvement from the baseline.

Strategic Objective 1.4 – Provide system leadership and advocacy

System leadership and advocacy has been a traditional strength for HFMHA. Moving forward, we will continue this tradition by promoting diversity and mental health in the immigrant sector by participating at key tables such as the Ontario Council of Agencies Services Immigrants, Local Immigration Partnerships, United Way Community Hubs, Ontario Federation of Community Mental Health and Addiction Programs (OFCMHAP).

Client Overall Goal: Working together to reach one's potential	
Strategic Objective 1.4 Provide system leadership and advocacy	
Measure/Target for Strategic Objective	Initiatives for Strategic Objective
<ul style="list-style-type: none"> Participation at key provincial/funder/sector/other tables 	<ul style="list-style-type: none"> Continued participation at key tables

2.0 Learning and Development

Overall Goal #2: Establish a culture of continuous learning, creativity and growth in a safe environment

The Learning and Development quadrant describes our core asset – our staff and volunteers. The skills, talent, competencies and know-how of the organization reside with its staff and volunteers. HFMHA has benefitted from staff members who have been with the organization for a decade or more. The organization has also maintained a low turnover rate. Moving forward, to attract and recruit the brightest staff and to provide existing staff with new knowledge and skills, we are committed to establishing a culture of continuous learning, creativity and growth in a safe environment.

Strategic Objective 2.1 – Empower our staff and volunteers to reach their potential

Developing and maintaining staff teams that are confident, prepared and equipped to care for the consumer's needs is crucial to both staff happiness, organizational success. We aim to continue to create a standard of high quality training that directly translates into high quality care provided by capable staff. To attract and retain the best staff possible, training and knowledge of best practices, outcomes measurement and practice model have been identified as a priority and strategic objective. We also aim to offer training opportunities for volunteers (and volunteer Board members) as they are an important component of our service delivery model. Measuring staff, volunteer and Board satisfaction will determine if the specific initiatives to meet this objective are met.

Learning and Development Overall Goal: Establish a culture of continuous learning, creativity and growth in a safe environment	
Strategic Objective 2.1 Empower our staff and volunteers to reach their potential	
Measure/Target for Strategic Objective	Initiatives for Strategic Objective
<ul style="list-style-type: none"> Increase staff/volunteer/Board of Director satisfaction Average of 5 training days per staff per year Reduce staff turnover to 6% 	<ul style="list-style-type: none"> Staff/volunteer/Board of Directors survey tool Training plan Standard updated operations manual

Strategic Objective 2.2 – Create a safe working environment for staff and volunteers

The Occupational Health and Safety Act reinforces the need to create safe working environments for staff and volunteers. To this end, in compliance with the legislation and to ensure a happy working environment, we will update our Occupational Health and Safety Plan and gauge the level of security through the organization's Staff/volunteer satisfaction tool.

Learning and Development Overall Goal: Establish a culture of continuous learning, creativity and growth in a safe environment	
Strategic Objective 2.2 Create a safe working environment for staff and volunteers	
Measure/Target for Strategic Objective	Initiatives for Strategic Objective
<ul style="list-style-type: none"> • Increase staff satisfaction • Decrease critical incidents 	<ul style="list-style-type: none"> • Staff/volunteer survey tool • Occupational Health and Safety plan

Strategic Objective 2.3 – Augment academic activities

HFMHA has a tradition of research and education. We have taken students from different professional and non-professional programs as means to educate and create awareness of culturally competent mental health services. In addition, our staff members have presented to broad audiences and organize the Diversity and Equity in Mental Health and Addiction conference. We also receive a number of requests to participate in research studies. Moving forward, a research and education plan will formalize the organization's academic activities into a cohesive strategy so that staff members can contribute to the mental health dialogue, learn new practices and competencies and continue to innovate service delivery to meet the needs of the community.

Learning and Development Overall Goal: Establish a culture of continuous learning, creativity and growth in a safe environment	
Strategic Objective 2.3 Augment academic activities	
Measure/Target for Strategic Objective	Initiatives for Strategic Objective
<ul style="list-style-type: none"> • 6 students per year every year • 6 conferences to present at every year • 1 paper to publish • 5 research studies to participate in a year, every year 	<ul style="list-style-type: none"> • Overall research and education plan

3.0 Internal business processes

Overall Goal #3: Integrate and strengthen operations

Our continuous growth continues to push us into new domains to serve the community's needs. Over the years, our reputation in the community has grown as respected advocates of culturally competent mental health services. However, the infrastructure, key processes internal to the organization needs to “catchup” to better support the past and future growth.

To this end, over the next three years, a major goal will be to integrate existing programs and services to centralize key processes to improve productivity and efficiency. Central to the service integration will be to improve the quality of services through quality initiatives and to streamline access to our programs and services. We have already initiated a major organizational restructuring to cluster services under three programs: Clinical Services, Supportive Housing and a Nurse Practitioner-Led Clinic. In addition, a new clinical manager has been recruited to improve the overall quality of care and to move the HFMHA along the quality agenda in line with the Excellent Care for All Act. The additional objectives will support HFMHA to continue to perform at a high level in an efficient and effective manner.

Strategic Objective 3.1 – Strengthen internal and external communications

The external review revealed that many external stakeholders confuse HFMHA with other Asian community support services and the full breadth and depth of our programs and services are not well known. It will be crucial to the organization’s success and longevity to create general awareness and develop a rapport with both external stakeholders and the community at large. There will be ample opportunity to achieve this goal with our annual fundraising event, the upcoming 30th anniversary celebrations and the launch of the Nurse Practitioner-Led Clinic. These opportunities will strengthen the perception and awareness of our programs and services while at the same time addressing the stigma attached to mental health.

Internally, it has been identified that while there are mechanisms in place for staff communication and participation, there is an opportunity to further improve communications. Given the multi-site nature of the organization and the implementation of new programs it will be even more critical to ensure internal communication flows are frequent, consistent and engaging.

Internal Business Processes Overall Goal: Integrate and Strengthen Operations	
Strategic Objective 3.1 – Strengthen internal and external communications	
Measure/Target for Strategic Objective	Initiatives for Strategic Objective
<ul style="list-style-type: none"> • 4 newsletters/month (internal/external newsletters) • 1 staff meeting/month • 1 staff retreat/year 	<ul style="list-style-type: none"> • Integrated internal and external communication plan

Strategic Objective 3.2 – Improve integrated services

A key organizational need is to improve integrated services. Centralized intake will provide a single point of access for the organization that will help identify the individual/family’s needs at the first point of contact. Having a central access point will also facilitate referrals to other internal programs and services as well as to external providers. Better integration across programs and services will ensure that the notion of a continuum of care becomes a seamless experience for the client, consumer, family member and volunteer.

A key enabler for better integration of services will be information technology systems (IT systems). Currently the organization is exploring a new system that will facilitate the pending implementation of the provincial assessment tool for community mental health provides, the Ontario Common Assessment for Need (OCAN). An improved IT system will help reduce duplication, facilitate referrals between programs and services and improve data reporting and analysis. An IT strategy will lay the foundation for HFMHA over the three-year period to prioritize IT investments.

Internal Business Processes Overall Goal: Integrate and Strengthen Operations	
Strategic Objective 3.2 – Improve integrated services	
Measure/Target for Strategic Objective	Initiatives for Strategic Objective
<ul style="list-style-type: none"> • Centralized intake across organization • Information Technology Strategy 	<ul style="list-style-type: none"> • Internal integration plan • IT Strategy and Plan

Strategic Objective 3.3 – Improve quality and effectiveness

Quality improvement is the first step on the path to enhance care for consumers and practice for staff. It provides basic tools and knowledge for HFMHA to implement quality improvement initiatives that can improve

care, satisfaction and clinical/psycho-social outcomes. Service efficiency using process improvement tools will eliminate the duplication of activities and enhance value-added activities for staff and consumers. More importantly, our staff will be empowered to make process related changes creating a model for continuous improvement and eliminate waste. A quality improvement agenda is consistent with the Central East LHIN's priorities and approach taken by the Ontario Health Quality Council through the Excellent Care for All Act. Through the quality agenda, the process will better position HFMHA to seek accreditation in the future.

Internal Business Processes Overall Goal: Integrate and Strengthen Operations	
Strategic Objective 3.3 – Improve quality and effectiveness	
Measure/Target for Strategic Objective	Initiatives for Strategic Objective
<ul style="list-style-type: none"> 6 major processes improved using a quality improvement approach 	<ul style="list-style-type: none"> Develop quality improvement plan as part of each program plan

4.0 Finance

Overall Goal #4: Be fiscally responsible and efficient

In recognizing the continued financial constraints witnessed by the healthcare sector and the potential financial risks for the Community Support Service sector more broadly, we will need to continue to manage our resources in a fiscally responsible and efficient manner in order to continue to “do more with less.”

Strategic Objective 4.1 - Maintain a balanced budget

As a non-profit organization, we recognize the need to balance revenues with expenses so that we can operate on a balanced budget. Considering the potential costs for various initiatives and unknown circumstances that the organization may face in upcoming years, a balanced budget will be critical. Central to maintaining a zero variance will be to develop and refresh a risk management plan which will highlight key financial risks and actions to mitigate that risk.

Finance Overall Goal: Be fiscally responsible and efficient	
Strategic Objective 4.1 – Maintain a Balanced Budget	
Measure/Target for Strategic Objective	Initiatives for Strategic Objective
<ul style="list-style-type: none"> <5% variance in budget >3 months available in reserve 	<ul style="list-style-type: none"> Updated risk management plan

Strategic Objective 4.2 - Diversify source of funding

Our current funding sources have little or no increases over the next three years and may not be relied upon with absolute certainty for the future. One of the key findings of the external and internal review includes the need to consider alternate revenue sources to complement existing and traditional funding sources. We recognize that further exploration is required to develop a social enterprise strategy and ongoing dialogue with the Hong Fook Foundation to secure additional corporate sponsorship. Other funding envelopes outside of health may be a mechanism to secure new base funding, such as Education and Settlement Services.

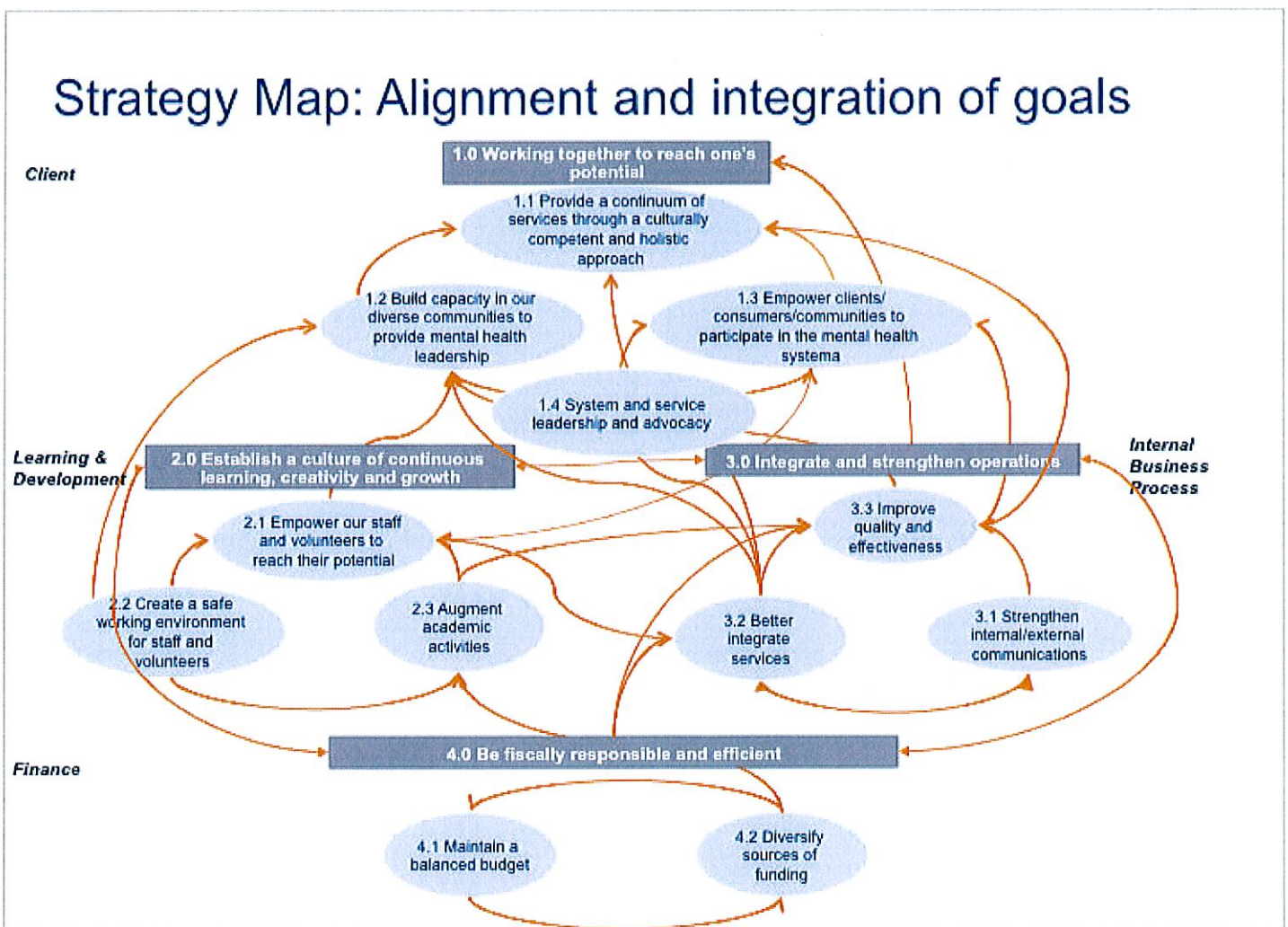
Finance Overall Goal: Be fiscally responsible and efficient	
Strategic Objective 4.2 – Diversify source of funding	
Measure/Target for Strategic Objective	Initiatives for Strategic Objective

<ul style="list-style-type: none"> • 3% increase in overall revenue from current base funding 	<ul style="list-style-type: none"> • Increase base with current funders • Broader funding strategy from other non-health sectors • Explore social enterprise model, Foundation
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7. Mapping the Strategy

The Strategy Map below highlights the alignment and integration of goals and objectives. The map articulates the balanced approach to strategic planning. If one objective is affected, there will be a ripple effect in other quadrants. As a result, careful execution along all dimensions of the quadrant will ensure a balanced and successful execution of our strategy.

Figure 2: HFMHA's Strategy Map



8. Inspire to Achieve Results (R)

HFMHA has been very successful to date in realizing its vision and meeting the needs of our diverse communities. In developing this refreshed 3 year strategic plan for 2011-2014, we have identified some key areas of focus and plans to hone in on a few specific initiatives in order to continue to thrive and maintain a competitive edge. In moving forward with this strategic plan, there are a number of considerations:

- **Alignment with core initiatives and strengths:** As part of this process, we have ensured that current initiatives have been embedded into the measures, targets, suggested initiatives and balanced scorecard strategic quadrants as a whole. To this end, in moving towards the action phase and roll out of various initiatives, we will continue to ensure its alignment with core initiatives to be efficient and future thinking.
- **Commitment to the Balanced Scorecard:** The Balanced Scorecard will serve as an ongoing tool to guide the organization in tracking its progress and achieving various accomplishments for the select initiatives agreed upon. If HFMHA is faced with any additional changes or challenges throughout the upcoming years, the balanced scorecard can be adjusted to reflect the continued direction and progress as we grow and develop.
- **Engaging staff and providing guidance:** Executing the strategy is not just the responsibility of the Executive Director. Responsibility falls to the entire organization to mobilize and support the execution of the strategy. To this end, our staff will continue to be engaged on a consistent and frequent basis. Executive and management support will provide the necessary guidance and incentives to fulfill HFMHA's vision.
- **Staying flexible and adapting to the environment:** The Balanced Scorecard is not static. As the environment changes, so do the measures and targets. Constant evaluation of the appropriate objectives will ensure that we succeed in fulfilling our vision.

9. Appendices

Appendix A: Environmental Scan (see attached document)

Appendix B: List of External Stakeholders consulted

Appendix C: Continuum of Services Philosophical Framework (see attached document) – note Vision/Mission are outdated.

Appendix D: Balanced Scorecard 101 (see attached document)

Appendix E: HFMHA Balanced Scorecard 2011-2014 (see attached document)

Appendix F: Summary of Notes from Strategic Planning Day (see attached document)

10. Appendix B: External Stakeholders Consulted

Name	Organization	Role
Mr. Steve Lurie	CMHA Toronto Chapter	Executive Director
Dr. Peter Chang	Hong Fook Foundation	Board member
Ms. Jan Lackstorm	UHN, Toronto Western Hospital	Clinical Director, MH&A
Mr. Thomas O'Shaughnessy	Central LHIN	Director of communications
Ms. Victoria Van Hermert	Central LHIN	Senior Director Planning, Integration and Community Engagement
Ms. Mary Compton	Saint Elizabeth Healthcare	Director, Crisis Services
Ms. Ashley Bradimore	Citizenship and Immigration Canada	Settlement Officer
Ms. Rosario Pascua	United Way	Community Investment Manager
Dr. Melyn Lesczc	Mt. Sinai Hospital	Psychiatrist-in-Chief
Ms. Helen Leung	CareFirst	Executive Director
Ms. Susan Engel	The Scarborough Hospital	Director, MH&A
Ms. Jeannie Joaquin	Scarborough Centre for Health Communities CHC	Executive Director
Mr. Tariq Asmi	Ontario Shores	VP Regional Services
Mr. James Meloche	Central East LHIN	Senior Director System Design and Implementation
Ms. Jai Mills	Central East LHIN	MH&A Lead