



CASEY HOUSE

**The Evolution of Excellence
Casey House's Strategic Plan Renewal: 2011 to 2013**

October 2010

Executive Summary

Casey House's 2007-2010 Strategic Plan put the organization on a path of excellence in the delivery of our mission: Exemplary Treatment, Support and Palliative Care for people affected by HIV/AIDS, in Collaboration with our Communities.

In each year between 2007 and 2010, almost 1,000 people have been newly-diagnosed with HIV in Toronto and epidemiological experts tell us that this rate is going to continue. In the years to come, Casey House is creating the benchmark of excellence that will be needed to meet the healthcare requirements of not only those 3,000 people but also the needs of the estimated 18,000 people who are currently living with HIV in Toronto today.

After careful consideration, the Board of Directors has determined that the six strategic directions established in 2007 (i.e. Exemplary Care and Services, Effective Partnership, Research, Knowledge Transfer and Exchange, Healthy Workplace, Facilities Redevelopment and Enhanced Fundraising) continue to be relevant in 2010 and for the next three years. This document outlines the key accomplishments achieved since 2007 and presents Casey House's plan for continued innovation through until 2013 to further address the evolving health care needs of diverse populations living with HIV/AIDS in Toronto.

Input Channels Established Since 2007

Since 2007, Casey House's commitment to effective communication and collaboration with all stakeholders (i.e. clients, families, staff, volunteers, AIDS service organizations and health care partner organizations) has resulted in the establishment of the following input channels:

- CEO Forums for staff
- Resident and client satisfaction surveys
- Weekly resident meetings
- Staff and volunteer satisfaction surveys
- Community Advisory Committee
- Day Health Steering Committee

Accomplishments Since 2007

In delivering on the Strategic Plan of 2007, numerous deliverables have been achieved. The most significant are the launch of a quality and risk management plan, the development and implementation of a harm reduction policy, meaningful collaboration and real partnerships with AIDS service organizations, an increase in client throughput with no staff reductions (in an era of reduced funding), a vibrant volunteer program enhanced donor stewardship and communication, and the establishment of a strategic management system using annual business plans and a balanced scorecard. There has been widespread recognition of our efforts and strong support to continue on the existing path.

Goals for 2011-13

The following are the key deliverables to be achieved in delivering on Casey House's Strategic Plan 2011-2013.

Exemplary Care and Service

- Continue to improve quality via a comprehensive quality and risk management plan using a safety first philosophy
- Enhance the client voice in care
- Publish annual Quality Improvement Plans
- Prepare for the Day Health Program to serve 200 clients
- Connect to the St. Michael's electronic patient record

Effective Partnership

- Continue existing positive relationships
- Continue the Community Advisory Committee
- Continue the Day Health Program Steering Committee
- Ensure three key partnerships associated with the Day Health Program are ready for opening: a Harm Reduction Case Manager, a Women's Case Manager and a Mental Health Therapist

Research, Knowledge Transfer and Exchange

- Continue education of health care professionals and ASO staff re HIV/AIDS:
 - Student placements
 - Two symposia, a mental health series and a physician series
 - Partnerships with other health care organizations
- Focus on our role as a unique player in HIV/AIDS health care with participation in research
- Establish infrastructure and staff support for research
- Prepare for the research component of the Day Health Program

Healthy Workplace

- Strengthen the role of the Joint Occupational Health and Safety Committee and the Healthy Workplace Committee in initiatives to enhance staff satisfaction
- Openly discuss and support staff re: diverse clients with complex physical and mental health issues
- Continue the harm reduction weekly discussion group, weekly nursing forum and periodic ethics rounds
- Introduce a formal orientation program
- Continue enhancements to the volunteer program

Facilities Redevelopment

- Obtain timely Ministry of Health and Long-Term Care approval at each stage in planning the new building
- Obtain municipal approval
- Begin construction of a new building

Enhanced Fundraising

- Continue strengthening donor stewardship
- Raise \$2.4 million per annum to fund annual program needs
- Continue to host three Special Events
- Conduct a \$10 million Capital Campaign
- Implement a Planned Giving Program
- Embrace fundraising partnerships

Vision 2013

As Casey House closes the year 2013, it will actively demonstrate an ongoing commitment to evolving excellence, transparency and accountability. The organization will be firmly entrenched in the provision of excellent HIV/AIDS care while working towards a Day Health Program which will expand our continuum of care. There will be a strong PHA (people living with HIV/AIDS) voice driving care. Casey House will be recognized as a true partner in health care for people living with HIV/AIDS and there will be well-established infrastructure for research (especially for Day Health Program). We will be considered a workplace of choice. Construction of the new building will be on-track with commitments received for the \$10 million capital campaign. Finally, a Planned Giving Program will be in-place to provide a sustainable source of funds in future decades.

Conclusion

Casey House is a dynamic and vibrant organization that is meticulously working to carry out the strategic directions established in 2007. As Casey House enters the third decade of living with HIV/AIDS, it will continue to evolve to respond to the changing healthcare needs of our clients. With the progress achieved to-date in the six strategic directions, a solid foundation has been laid. Casey House will stay the course to ensure the continued delivery of excellent compassionate healthcare to people living with HIV/AIDS.

Introduction

Casey House's 2007-2010 Strategic Plan put us on a path of excellence in the delivery of our mission: Exemplary Treatment, Support and Palliative Care for people affected by HIV/AIDS, in Collaboration with our Communities.

We respond to the complex healthcare needs of our clients while continuing to be guided by the Strategic Plan, which provides the structure upon which all Casey House activities are directed. The performance of our organization is measured by a Strategic Management System that includes Annual Operational Business Plans and a Balanced Scorecard, which is shared with the public on our website. The six strategic directions established in 2007 continue to be relevant in 2010 and for the next three years. These six strategic directions are Exemplary Care and Services, Effective Partnership, Research, Knowledge Transfer and Exchange, Healthy Workplace, Facilities Redevelopment and Enhanced Fundraising. This document outlines key accomplishments achieved since 2007 and presents our plan for continued innovation through until 2013 to further address the evolving health care needs of the diverse populations living with HIV/AIDS in Toronto.

In each year between 2007 and 2010, almost 1,000 people have been newly-diagnosed with HIV in Toronto and epidemiological experts tell us that this rate is going to continue. Casey House is creating the benchmark of excellence that will be needed to meet the healthcare requirements of not only those 3,000 people but also the needs of the estimated 18,000 people who are currently living with HIV in Toronto today.

The June 2010 approval by the Ontario Ministry of Health and Long-Term Care to proceed with planning our new building which will include an innovative Day Health Program is the centre piece of our achievements to-date. We will consolidate Casey House's programs and services under one roof with the development of a new building fronting on Jarvis Street and extending along Isabella Street. The new Day Health Program will enable us to expand our continuum of care beyond our residential and community programs, providing us with the foundation to meet the complex healthcare needs of our clients.

Casey House achieves leadership and excellence in healthcare delivery by providing a strong, healthy workplace environment for our staff and volunteers together with distinctive accountability for our programs that rely on the generosity of our supporters. We will continue our emphasis on leading the field with a healthy workplace and concentrate on achieving success in our Capital Campaign to accomplish the vision of our renewed facilities.

We keep our sights on the heart of Casey House: the delivery of a unique, first-in-class approach to healthcare – fully consistent with the vision and values of our Founders. The focus of Casey House over the next three years: our approach to care, the preparations for our Day Health Program, facilities redevelopment including the Capital Campaign, targeted community partnerships, a vibrant and healthy workplace, and an innovative research program will be driven by a professional and passionate

commitment to meeting the evolving and increasingly complex healthcare needs of people living with HIV/AIDS in Toronto.

Excellence in Care and Services

In the 2007 Strategic Plan, Casey House reinforced our commitment to our approach to care, which embraces stronger collaboration and integration, expanded networks and partnerships, increased support for clients, and supportive case management practice. Casey House also stated that we would improve our communication with other health service organizations, with particular attention being paid to admission policies and processes, and inter-professional discharge planning.

Feedback from people living with HIV/AIDS, who depend on us to assist in their healthcare needs, has been central to our success over the last three years, and fundamental to our approach for the future. The implementation of a structured approach to understanding the impact of our services through client satisfaction surveys to both residential and community clients, conducted in 2007/08 and again in 2009/10, positions us to respond quickly and effectively to changing and often complex healthcare requirements. Consistent measurement completed at standardized intervals keeps us on track and accountable in our approach to care. To ensure that we are accountable for our approach to the highest standards of care, we will post our Quality Plan in 2011.

Our approach to care constantly evolves, allowing us to be flexible and responsive to the needs of our most vulnerable clients. Our partnership with Prisoners With AIDS Support Action Network (PASAN) has been central to Casey House's adoption and implementation of a harm reduction approach to care. The approval of our harm reduction policy and our strategies for implementation, have resulted in 95% of staff having been trained to provide care using a harm reduction philosophy. A weekly harm reduction discussion group is conducted to ensure Casey House staff and volunteers utilize the most up-to-date strategies to care for our clients who use substances and who may also have mental health issues.

In response to our commitment to care, since 2007, we have accomplished a number of structural and service changes:

- Establishment of an Infection Control program including policy, protocols and a program of staff education.
- Integration of electronic health records via introduction of the new Drug Profile Viewer Tool, which assists in medication reconciliation; and, implementation of electronic referrals from community care access centres (CCACs).
- Enhancement of the role of social work in discharge planning with the establishment of a working group that has developed a framework, clarified roles, and developed associated assessment and documentation tools.
- Redesign of the admission process and related documentation, including an Admission Orders Policy and Checklist, and a Do Not Resuscitate (DNR) Policy with related training.

- Improvement in the quality of food and related care for clients. Kitchen facilities have been overhauled and there is a greater emphasis on home-cooked and fresh food with increased client input into their diet.
- Establishment of a weekly facilitated community meeting of residential clients to respond in a timely manner to client issues and concerns.
- Establishment of ethno-racial programming (e.g. aboriginal drumming in a recreation therapy program) to reflect the diversity of our clients.

Casey House is immensely proud of acquiring the commitment of the Ontario Ministry of Health and Long-term Care and the Toronto Central Local Health Integration Network (LHIN) to our Day Health Program: a vision of innovation and exemplary model of healthcare. This new program presents a unique opportunity for healthcare advancement, involving a client group with long-term complex needs. The Day Health Program, in concert with our residential and community programs, will serve as a new modality of health care delivery as Ontario's health care system faces increasing challenges with cost management and healthcare human resource shortages. Casey House's resultant expanded continuum of care will provide even better care for our clients living with HIV/AIDS, and supports the Ontario government's goal of a more efficient and effective healthcare system.

In the years to come, Casey House will prepare for the opening of a day health program for 200 registered clients – with an operating funding commitment from the Ministry of Health and Long-Term Care and the Toronto Central LHIN – when the building opens. Yet the need for a Day Health Program remains urgent today, therefore Casey House will continue to advocate for operating funding to open a small program as soon as possible.

Over the next three years Casey House will continue to emphasize quality care, consistent with the directions of the Ontario Ministry of Health and Long-term Care. The work to establish a link with St. Michael's electronic patient record will continue, as will the medication reconciliation system and enhancements to admission and discharge processes. We will continue to strive to develop new processes and structures that enhance the voice of people living with HIV/AIDS (PHAs) in their own healthcare. We move forward towards achievement of a new paradigm in the delivery of programs and services.

Effective Partnership

Collaboration is an important approach in the delivery of quality patient care and plays a critical role in the advancement of knowledge. Casey House is committed to community-wide planning and integration within the HIV/AIDS sector, and the broader health care system, including LHIN initiatives and those of the Toronto HIV/AIDS Network.

Both community and clinical partnerships have been at the centre of our evolution to our approach to care. Our in-depth, formal partnership with PASAN has been critical to the success of our innovative harm reduction strategies.

Casey House has a world-renowned reputation that allows us to be responsive to local needs. When community agencies such as Fudger House (a long-term care facility), reach out to us for support we are able to quickly bring the right people to the table to develop training and support programs for their staff to better respond to their clients who are living with HIV/AIDS and to support staff well-being. A similar partnership with Fife House's volunteer program enhances volunteer training and development through cost sharing.

Our relationship with St. Michael's is strong. We have enhanced clinical and non-clinical collaboration with a number of services based at St. Michael's including the electronic patient record project, and a purchase of service agreement with St. Michael's Corporate Health (e.g. provision of on-site vaccinations).

The Community Advisory Committee was established in January of 2009 and provides a voice for our clients and community partners. This committee is critical to ensuring that our programs and services are shaped through input and feedback, so that we can provide responsive, effective, client-centred healthcare for people living with HIV/AIDS. The committee meets regularly, and its first annual report was submitted to the Quality Committee of the Board of Directors for review in May 2010.

Looking ahead, in the spirit of community collaboration and community-wide planning, Casey House will continue to explore the development of partnerships and potential opportunities for knowledge exchange with other organizations to address the complex bio-psychosocial issues faced by our clients (e.g. mental health and substance use). A key focus of our partnership efforts will be on two new partnerships for the Day Health Program. Casey House will work with Mount Sinai Hospital to establish a mental health therapist position and with women's-focused organizations to establish a women's case manager position. As more women living with HIV/AIDS depend on Casey House to meet their healthcare needs, our close working relationships with Women's College Hospital, the Ontario Women's HIV/AIDS Initiative and Women's Health in Women's Hands will provide critical guidance, support and integrated care to a very vulnerable population. Finally, the Day Health Program Steering Committee will serve as a forum for ongoing feedback from community partners, AIDS service organizations and clients as we plan for and implement this program.

Research, Knowledge Transfer and Exchange

In the 2007 Strategic Plan, Casey House recognized the critical importance of creating and sharing new knowledge in the improvement of the health of people living with HIV/AIDS. As the nature of HIV/AIDS continues to change and PHAs become increasingly diverse, the issues they face are increasingly complex. Rigorous, relevant, clinical and community-based research is the key to ensuring that program decisions are evidenced-based.

To guide the development of our research plan, Casey House brought together an extensive team of HIV/AIDS researchers in Ontario to form a Research Planning Task Force in March 2009. The plan was developed in partnership with community-based agencies, research funders, clinicians, and people living with HIV/AIDS and was approved by the Board of Directors in March 2010. The plan calls for Casey House to develop its unique role in research via participation in a limited number of external projects and internal studies.

To provide practical evidence-based education to health service providers to improve their clinical skills with respect to HIV/AIDS, in each of the past three years two major initiatives were held: two symposia with approximately 100-person attendance at each, and an eight-session seminar series on mental health and HIV/AIDS. Most recently, a physician education series on HIV/AIDS was established with increasing attendance.

Casey House also exceeded our student placement goals in 2009/10, with nine nursing, two social work, one recreation therapy, and thirteen medical student/trainee placements, for a total of 570 student days.

Over the next three years, Casey House will focus its contribution to research, knowledge transfer and exchange via its role as a unique player in HIV/AIDS health care. By concentrating on achieving success for our current projects, working with our research committee and building internal capacity through the hiring of a research coordinator (largely funded by a new three-year grant from an outside Foundation), we will evolve our research capacity in preparation for the significant, innovative, research potential of the Day Health Program.

Over the next three years, given our role as a unique player in HIV/AIDS health care, Casey House will participate in research. The organization will develop its research capability by succeeding in our current projects, by working with our research committee, and by building internal capacity through the hiring of a research coordinator (largely funded by a new three-year grant from an outside Foundation). We will prepare for the opening of the Day Health Program which presents significant innovative research potential.

Healthy Workplace

At Casey House, we recognize how important a positive work experience is for staff and volunteers to continue to ensure the provision of exemplary care and service. Like many others in the healthcare sector, we particularly know that we could not accomplish our mission without the support and dedication of our staff and volunteers.

To better understand the needs of our staff, workplace satisfaction surveys were conducted in the fall of 2007 and 2009, which resulted in the development of a collaborative plan of action that produced an organization-wide approach of putting Safety First for everyone. Casey House will continue to build on its success by establishing strong links between the outcomes of the staff satisfaction surveys and standing committees such as the Joint Occupational Health and Safety Committee and the Healthy Workplace Committee. This ensures that Casey House takes a 360 degree approach to maintaining a workplace which is safe, healthy, and responsive to staff and volunteer needs.

Cultural sensitivity training has been linked to our harm reduction training program to enhance opportunities for professional development. Four forums were established to support staff by creating opportunities for dialogue with respect to clinical challenges: nursing forums, ethics sessions with a St. Michael's ethicist, clinical supervision group for the community program team, and a weekly harm reduction discussion group. Casey House will continue to enhance a workplace environment that openly discusses and supports staff who are working with clients with complex medical and psychosocial issues within a culturally rich environment.

Another important aspect of staff and volunteer satisfaction is acknowledgement. Throughout the past three years, Casey House has developed a strong reward and recognition program. A number of recognition activities were held and evaluated, including: Nurses Week, Interprofessional Week, Healthy Workplace Week, summer BBQs, and a December holiday party.

Over the next three years Casey House will establish a formal staff orientation program, including initial and annual certifications, while also ensuring we continue to recognize the valued contribution of our volunteers.

Facilities Redevelopment

In 2005, Casey House identified the need for updated physical facilities to ensure its ability to deliver current and future programming. Since then, our efforts have been focused on achieving funding construct a new building on the Jarvis and Isabella block which houses all programs and services (i.e. residential program, Day Health Program, home-care program, and administration) under one roof. Given the June 2010 approval of the Ontario Ministry of Health and Long-Term Care to proceed with planning

a new building, our plans for facility renewal can now proceed. Our commitment to a beautiful, warm and home-like setting for the delivery of exemplary health care for people living with HIV/AIDS will continue to guide our vision. The building planning process requires approval from government partners at all stages, so it is not yet possible to estimate the date on which we will break ground.

Enhanced Fundraising

During the period of our Strategic Plan, we have been working to strengthen donor stewardship, prepare for a new Capital Campaign, and execute our annual fundraising efficiently and effectively. We continue to be exceedingly grateful to our generous donors who support our mission of exemplary health care for people living with HIV/AIDS. Without such generosity, our work, particularly in the community program, could not continue.

While recent economic factors have affected our annual fundraising, the net revenue goal for grants was achieved and a Major Gifts program was launched. Our program of special events creates unique opportunities for introductions to new relationships and allows people to learn of the critically important work that is achieved at Casey House. Whether it's a special event, a major gift or a third-party fundraiser, Casey House is watching the bottom line with each initiative to ensure that our target ratio of cost to revenue is as low as possible.

We believe that a collaborative approach to fundraising, such as Voices of Hope, where charitable organizations share resources and costs to execute events, demonstrates respect for our donors and supporters who want us to be as efficient as possible with how we spend money to raise money.

Art with Heart, SnowBall and Voices of Hope are important to Casey House not only for the funds each one raises, but also for raising awareness for the need to support our cause within our existing constituents and our newest relationships.

Over the next three years, we will build on our successes in donor stewardship and communication and work toward our vision of long-term financial sustainability. The new message of government support for a new building with a Day Health will help excite donors about Casey House's ongoing relevant role in meeting the unmet health care needs of people living with HIV/AIDS. While continuing our fundraising efforts to acquire funding for critical annual programming, our efforts will be expanded to include a \$10 million Capital Campaign and a Planned Giving Program. We are poised to achieve these fundraising goals, ensuring that our vision for the future is achieved.

Achieving Excellence in the Future

Casey House must remain focused on its strategic goals to achieve success over the next three years. We must also be conscious of the continuing challenges that we face:

- Base funding increases from the Ontario Ministry of Health and Long-term Care do not keep pace with cost increases, thereby putting more pressure on our donors to bridge the gap
- Fundraising in an era following the worst economic downturn in 75 years with a waning public awareness of the importance of supporting domestic HIV/AIDS causes
- Providing palliative care juxtaposed with sub-acute care
- An increase in the number of PHAs who face complex health care needs such as mental health diagnoses and homelessness
- An increasingly diverse population of PHAs, with a growing number of women and people from countries where HIV is endemic
- An increasingly aging population such that by 2015, 50% of PHAs in Canada will be over the age of 50.

We will continue to be held accountable for the level of success of this renewed strategic plan by the development of annual business plans and we will regularly communicate our progress using a Balanced Scorecard, newsletters and presentations, as well as regular CEO forums for staff.

Conclusion

Casey House is a dynamic and vibrant organization that is meticulously working to carry out the strategic directions that were established in 2007. In delivering on the 2007 Strategic Plan, Casey House has achieved the development and implementation of a harm reduction policy, the development and implementation of a quality and risk management plan, the implementation of client satisfaction and staff satisfaction surveys, a vibrant volunteer program, and the creation of meaningful partnerships with a number of AIDS service organizations and healthcare institutions. All of this demonstrates an ongoing commitment to evolving excellence, transparency and accountability.

Casey House's integrated, innovative approach to management and to care delivery over the Strategic Plan timeline of 2011 to 2013 will continue to guide planning, as the organization moves from vision to implementation. We have established professional systems and processes that improve not only patient care, but also staff and volunteer management. There are targeted community and hospital partnerships that are beneficial for our client care, in the context of both the HIV/AIDS community and the hospital/healthcare network. We are working closely with government to achieve results and establish programs that will benefit the healthcare system as a whole.

The expansion of our care delivery model to include the new Day Health Program will position Casey House at the forefront to meet the complex healthcare needs of people living with HIV/AIDS who depend on us.

Building on the dedicated efforts of our Founders, the redevelopment of our facilities will create an environment that will improve quality of life not only for our clients but also for staff and volunteers. The funds raised through the Capital Campaign will help to create a centre of excellence for HIV/AIDS care in Toronto, enhancing our ability to provide the best environment for our programs and services, keeping compassion and respect at the centre of our heart.

As Casey House enters the third decade of living with HIV/AIDS, we will continue to evolve to respond to the changing healthcare needs of our clients. With the progress achieved to-date in our six strategic directions, a solid foundation has been laid and now we must renew our commitment to those directions and focus every effort to achieve continued success. We will stay the course to ensure the continued delivery of excellent compassionate healthcare to people living with HIV/AIDS.