



ROAD TO 2020

2017-2020
Strategic Plan Overview

A Message from the CEO



The best strategic plans come from knowing your clients, listening to your staff, consulting with community partners and working together to create a path toward a brighter future. This was our intention as we developed Lutherwood's 2017-2020 Strategic Plan: *Road to 2020*.

Every three years, we revisit Lutherwood's vision, mission and value statements as we create a new strategic plan. This time, we expanded the scope to include not only our children's mental health, employment and housing services, but also the important work of our Foundation and Luther Village on the Park. The result is a revised vision and mission statement for each entity, a common set of values and a comprehensive plan to guide our decisions, energy and resources over the next three years.

The *Road to 2020* has three strategic directions:

1. to improve client experiences and outcomes,
2. to build an integrated and responsive mental health system,
3. and to enhance our organizational capacity and excellence.

By focusing on these directions, we can balance our important services to the community with our lead agency responsibilities to transform the children's mental health system in Waterloo Region.

One of the most valuable aspects of strategic planning is that it gives us an opportunity to explore the intersection of our past, present and future. Our history is one of bringing together services for the benefit of our clients; using social enterprise and innovation to give us financial strength and stability; and maintaining strong human values to guide our work. Today we work closely with funders and community partners to improve our services and transform the systems within which they operate. As we look ahead, we see many more opportunities to embrace change, use technology and work collaboratively to enhance services, improve systems and better serve our community.

While there will be challenges, Lutherwood is strong, healthy and well-positioned to meet those challenges and take advantage of the many opportunities that lie ahead. I look forward to working with you on our strategic plan, as we move closer to celebrating 50 years of community service at the end of the *Road to 2020*.

John Colangeli
CEO



Developing Our Strategic Plan

The 2017-2020 Strategic Plan describes what Lutherwood will work on and achieve in the next three years. It provides a common focus for our boards, leaders and staff and helps guide priority-setting and decision-making to ensure that our programs and services address the changing needs of our community.

Our strategic planning process provided many opportunities for our board members, staff, funders, community partners, volunteers, donors and clients/residents to offer their perspectives on the issues and priorities that matter most to them. Information was gathered through 28 focus groups, an online survey and research. Through these methods more than 300 people participated and we gathered great information about key issues and priorities to help us plan for the future.



Strategic Findings

Strategic plans must set the direction for an organization, and be dynamic and flexible in order to accommodate the many changes that can occur during its course. The *Road to 2020* takes into consideration changes in the operating environment, organizational opportunities and risks, and most importantly, the evolving needs of our community. The following highlights a few of the more significant strategic findings of our environmental scan:

Community Diversity

Waterloo Region is one of the most popular immigrant destinations in Ontario. In addition, there is a need to better serve Indigenous and LGBTQ communities. These communities need support as they face challenges in language, culture, acceptance, employment, housing and mental health.

Community Partnerships

Strong community partnerships are critical in today's health and social services system. Lutherwood enjoys good relations with many community partners and plays an active role in local system planning.

Complex Client Needs

The growing complexity of client needs being seen in all service areas including Luther Village, is placing greater pressure on staff abilities and resources and needs to be addressed.

Transitions

Supporting clients as they move between agencies and programs continues to be a well-recognized issue across the sector. Continued focus on improving service transitions will enhance service experiences and treatment outcomes.

Government Policy Changes

Governments are making significant changes in policy and funding in all three of Lutherwood's service areas. While this constant change can be difficult to navigate, the changes represent significant efforts to transform service delivery.

Competition

Health and social service organizations are constantly competing for funds, donations and staff, and Luther Village operates in a competitive market. Working with community partners to fill gaps and reduce overlaps in service and ensuring Luther Village continues to stay sustainable are critical areas of focus.

Charitable Giving

Overall giving to charities has stagnated and there are more charities and more donation options vying for a share of the donor wallet. Our Foundation will work to attract and engage more youthful donors and use more sophisticated fundraising technological supports.

The Funding Environment

Governments are consolidating funding for like services across ministries. Lutherwood will need to continue to diversify funding sources, reduce operating costs and reduce reliance on government funding.

Technology

Information technology is constantly and rapidly evolving. There is an increasing need for sharing data and client information between services and agencies, use of common assessment tools, and improved data collection, quality and analysis to better support staff and improve client services.

The *Road to 2020* offers a collaborative approach to address these findings as we strive to meet the evolving needs of our clients, residents and community.



The 2017-2020 Strategic Plan

Our strategic plan framework includes the Vision and Mission for Lutherwood, the Lutherwood Child and Family Foundation and Luther Village on the Park, as well as the organization's Values, Strategic Directions and Goals.



OUR VALUES

Respect for Others

We treat people with dignity and understanding, and without judgement.

Care

We provide excellent service because we care about the people we serve.

Working Together

We strengthen our ability to achieve our visions, missions and goals by working together.

Accountable

We earn the trust of our clients by being accountable, reliable and honest.

Our Strategic Directions and Goals

In reviewing the current strategic plan and using the information that emerged from the research and environmental scan, three Strategic Directions emerged. For each Strategic Direction, we identified a series of Strategic Goals which describe specific aspects of the direction that we must focus on in the next three years.

Strategic Direction 1

Improve Client Experiences and Outcomes

We will focus on the needs of our clients, residents and donors in order to improve our services, their experiences with our services and the results of our services.

Strategic Goals:

- 1) Expand services to better support underserved populations and our current clients
- 2) Reposition Lutherwood Mental Health Services to support current and future needs
- 3) Leverage technological opportunities to support clients
- 4) Evaluate and align staffing models to meet increasingly complex/demanding client needs
- 5) Improve donor acquisition and retention

Strategic Direction 2

Build an Integrated, Responsive Mental Health System

Reflecting our responsibilities as Lead Agency for Waterloo Region, Lutherwood will engage and work together with core service agencies, partners, and the Lead Agency Advisory Council, families and clients to build a mental health system that meets the needs of our communities.

Strategic Goals:

- 6) Improve community mental health service support and coordination
- 7) Enhance opportunities for stakeholder engagement in system transformation
- 8) Support other local agencies providing services to vulnerable kids

Strategic Direction 3

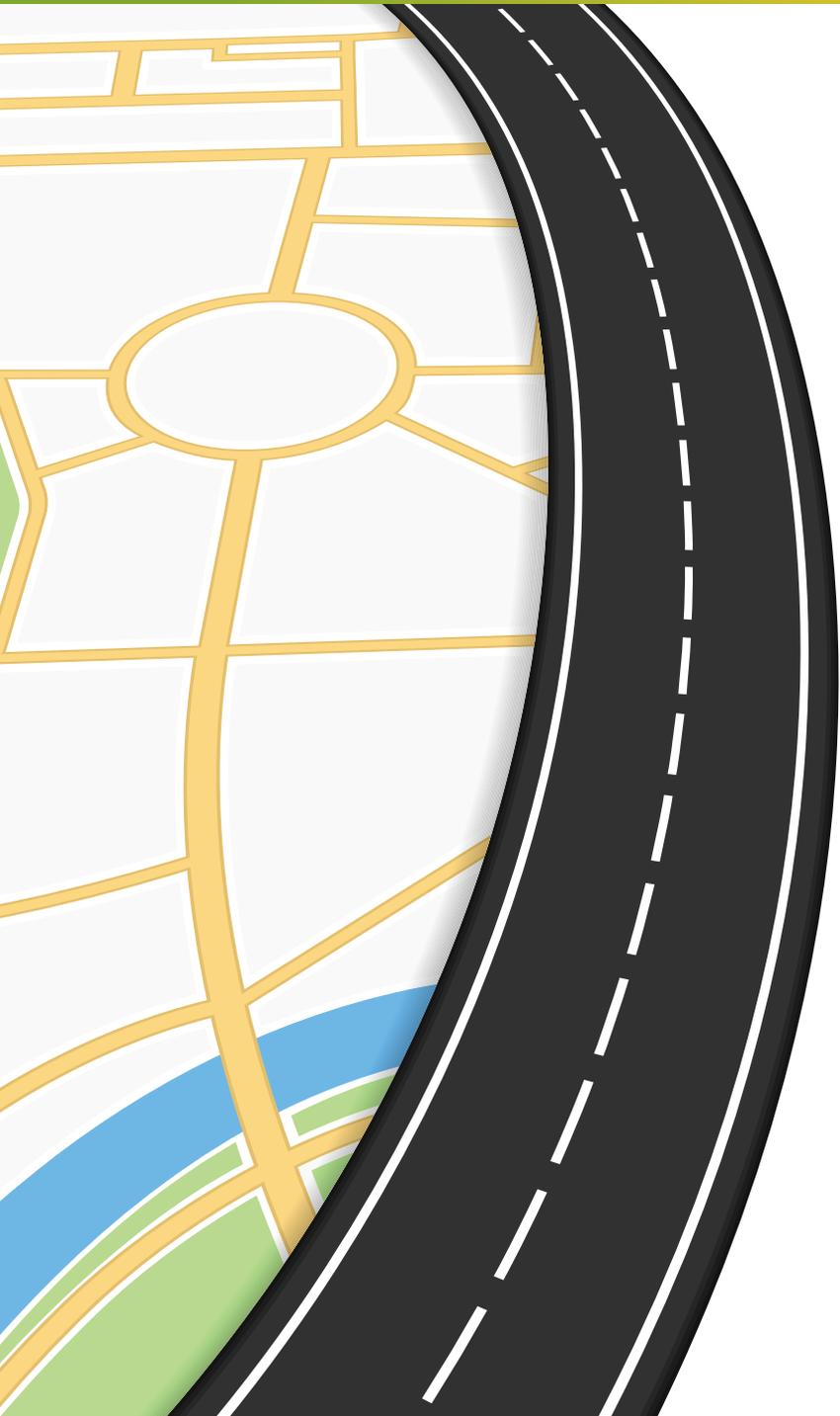
Enhance Organizational Capacity and Excellence

We will continue to be attentive to the human, financial and infrastructure resources that enable us to successfully deliver on our vision, mission and responsibilities to the communities we serve.

Strategic Goals:

- 9) Simplify the Luther Village and Foundation governance structure
- 10) Boost the organization's innovative capacity
- 11) Embrace Diversity and Inclusion across the agency
- 12) Build on the strengths and relationships to inspire, motivate and engage staff
- 13) Leverage technology to ensure internal systems are efficient, effective and free up staff time and client dollars
- 14) Diversify, stabilize and strengthen financial resources

Bringing Our Plan to Life



The *Road to 2020* maps our course for the next three years. In order to be successful in achieving our strategic plan, it will be integrated into our operations as follows:

- each strategic goal will be supported by more detailed tactics that will be spelled out in our annual operational plans
- each employee will see personal goals based on the above tactics incorporated into their performance appraisals
- a dashboard will be created that will enable the boards and staff to follow our progress on our strategic directions and goals.

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