



# A Message from the CEO

The year 2020 seems like a particularly special year. Not only is it the start of a new year and new decade, it is also the start of Lutherwood's semi-centennial. Founded in June 1970, Lutherwood is fortunate to have grown, thrived and succeeded in many ways. From our humble beginnings as a residential children's mental health centre for 14 troubled boys, to today's health and social service agency that offers children's mental health, employment, housing and seniors' services to more than 19,000 people annually.

This incredible milestone was achieved because hundreds of people in our community, from staff to board members, from clients to students, and from volunteers to donors, brought their caring hearts to the table and put their trust in us to make our community stronger.

It was also achieved because we continuously listen to our community to understand its needs and then every three years we review Lutherwood's vision, mission and values as we refresh our strategic plan to guide our decisions, energy and resources with the ultimate goal of strengthening lives in our community.

Our new strategic plan, 50 Years and Growing, has four strategic directions:

1. to improve client experiences and outcomes,
2. to influence and adapt to system and competitive changes
3. to enhance our organizational capacity and excellence, and
4. to enhance and grow Foundation assets.

To be successful, we will work closely with funders and community partners to improve our services, embrace changes and improve systems to better serve our community. This will come with challenges like those we have seen in the past five decades, but we are strong, healthy and well-positioned to meet those challenges and seize opportunities to serve our community for another fifty years.

John Colangeli  
Chief Executive Officer



# Developing Our Strategic Plan

The 2020-2023 Strategic Plan describes what Lutherwood will work on and achieve in the next three years. It provides a common focus for the boards, leaders and staff of this broad organization, and helps guide priority-setting and decision-making to ensure that our programs and services address the changing needs of our community.

The strategic planning process provided opportunities for our community partners, funders, volunteers, donors, clients, staff and Board members to offer their perspectives on the issues and priorities that matter most to them. Information was gathered through 8 focus groups, 52 external survey responses and additional research. More than 280 people offered helpful perspectives on key issues and priorities that helped us build this plan.



# Strategic Findings

Strategic plans must set the direction for an organization, but also be dynamic and flexible to accommodate the many changes that can occur during its course. The following are some of the key strategic insights that factored into this strategy.

## Political Environment

Since our last strategic plan, we have seen a provincial and federal election. This resulted in changes and future uncertainty in both policy and funding. Changes include implementing different service models and changing portfolios, increased risk of funding reductions, and higher turnover of key government staff making it difficult to maintain relationships.

## Increased Competition

The competitive landscape is constantly evolving in all sectors. Children's Mental Health funding has moved to a larger Ministry increasing competition for funds, Employment Services is seeing a shift to a Service System Manager model adding for-profit competition, Luther Village operates in a market of well-capitalized and expanding for-profit companies, and our Foundation is experiencing increased competition with more charities and fewer donors.

## Technological Advances

Disruptive technology is changing how we deliver client care, how we operate in our workplace, how we gather and report information, and how we support clients with direct service. Success in technology is founded on a need for increased sharing of data and client information, but this also raises privacy issues and risks.

## Community Diversity

Waterloo Region expects to see continued high rates of immigration. This is increasing the need to put services in place that will effectively serve BIPOC and LGBTQ+ communities as they face challenges in language, culture, acceptance, employment, housing and mental health.

## Community Partnerships

Community partnerships are critical to function effectively in today's world. While Lutherwood enjoys good relationships in the community, increased competition will strain these relations as we work together to improve local systems and better serve our community.

## Complex Client Needs

The growing complexity of needs in mental health, employment and housing clients as well as Luther Village residents is placing greater pressure on staff abilities and resources.

*50 Years and Growing* offers a collaborative approach that uses these Strategic Insights to meet the evolving needs of our clients/residents and community.



# The 2020-2023 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

Embracing inclusion and diversity, we treat people with empathy and dignity, and without judgment.

### Compassion

We inspire hope and optimism by being positive and demonstrating a desire to help.

### Working Together

We strengthen our ability to achieve our Vision and Mission by working closely with community partners and each other.

### Growth

Our growth mindset enables us to evolve both as individuals and as an organization.

### Excellence

We deliver excellence by being innovative in problem-solving, committed to continuous improvement and accountable for results.

# Our Strategic Directions and Goals

Using the strategic insights that emerged from the research and environmental scan, four strategic directions became clear: Improve Client Experiences and Outcomes, Influence and Adapt to System and Competitive Changes, Enhance Organizational Capacity and Excellence and Enhance and Grow Foundation Assets. 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 Results

Focusing on the needs of our clients and residents, we will improve our services, their experiences with our services and the results of our services to improve outcomes, targets and occupancy.

### Strategic Goals:

- 1) Modify, expand and diversify services to better meet changing client/resident needs
- 2) Reduce barriers to service access and flow
- 3) Leverage technology to enhance client services, experiences and results

## Strategic Direction 2

Influence and Adapt to System and Competitive Changes

Working together with our funders and community partners, we will ensure that Lutherwood is well-positioned to meet the challenges of an increasingly competitive, rapidly changing operating environment.

### Strategic Goals:

- 4) Expand children's mental health and housing services within the Ontario Health Team model
- 5) Transition employment services into the new Service System Manager model
- 6) Collaborate with our funders and community partners to enhance housing system services
- 7) Develop/maintain strong collaborative relationships with new funders, donors and Foundations

## Strategic Direction 3

Enhance Organizational Capacity and Excellence

Using a business approach to human services, we will be attentive to the human, financial and infrastructure resources that enable us to successfully deliver on our visions, missions and responsibilities.

### Strategic Goals:

- 8) Deepen the culture of diversity and inclusion across the agency
- 9) Align staffing models, recruitment and training to address current and future needs
- 10) Transform organizational workflow through technology
- 11) Enhance organizational culture to embrace innovation, technology and data

## Strategic Direction 4

Enhance and Grow Foundation Assets

We will strengthen and grow the Lutherwood Child and Family Foundation's strategic assets (including Luther Village) to meet the future needs of Lutherwood and its clients.

### Strategic Goals:

- 12) Market Luther Village services to maintain or exceed occupancy targets
- 13) Leverage Luther Village's competitive advantage within the local retirement market
- 14) Invest in the campus to remain competitive, improve service and reduce environmental impact
- 15) Complete strategic asset review and set long-term growth goals to maximize returns
- 16) Complete a Foundation granting framework to establish and meet future priorities
- 17) Stabilize/increase fundraised revenue while decreasing expenses

# Bringing Our Plan to Life

50 Years and Growing maps our course for the next three years. To be successful, we will integrate it 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 appraisal process
- a dashboard will be created that will enable the boards and staff to follow our progress on our strategic directions and goals

## For more information:

Chris Sellers  
Director, Communications, Marketing & Strategy  
285 Benjamin Road  
Waterloo, ON N2J 3Z4  
519-707-1958 ext. 1237  
csellers@lutherwood.ca

