

# Thriving and Growing:

Wing Kei Strategic Plan Overview 2016-2020

## Wing Kei: honouring seniors

Wing Kei creates nurturing communities where seniors find social and emotional fulfilment, belonging and safety, regardless of their health and personal care needs.

### **Since our inception, we have been thriving.**

Our staff and family satisfaction scores are among the highest in the province; our infections, sick time, staff turnover are among the lowest. We continually receive Exemplary Standing from Accreditation Canada—the highest ranking—and have no recommendations on audits.

We are a faith-based, not-for-profit charitable organization offering culturally appropriate care for seniors. Our approach to care emphasizes independence: we encourage seniors to make decisions, be mobile, participate in activities and connect with their loved ones regularly. Since opening, and with the trust and support of Alberta Health, Alberta Health Services and our community, we have grown to provide long term care, supportive living, an adult day program focused on dementia care and, for several years, home care.

### **The Wing Kei Spirit**

Wing Kei was established in 1996 by a group of dedicated volunteers, many of whom are still involved with Wing Kei today. Our culture of love and service—the Wing Kei spirit—permeates our facilities, inspires our staff and volunteers, and nurtures our residents and their families. Together, we build a home, a place filled with love and familiarity.

### **Growing to serve**

Over the past two decades, we have grown our programs in response to a steadily increasing aging demographic in Calgary. We started from humble beginnings with 30 seniors care spaces at the Bethany Care Centre in 1997. The spaces were filled almost immediately and demand for culturally appropriate care continued to rise. In response, our founders began an intensive fundraising campaign and, in 2005, Wing Kei Care Centre (Crescent Heights) opened as a self-contained care center offering culturally appropriate long term care services. Since then, we've expanded our services to include adult day programs and, between 2008 and 2014, home care services.

In 2008, with a constant and continually growing waitlist, the Wing Kei Board approved the development of Wing Kei Greenview. Greenview creates a culturally inclusive space promoting the concept of aging in place. Aging in place recognizes that the health and personal care needs of seniors changes and requiring differing levels of care over time. Centres that promote aging in place include various levels of care within the same complex, enabling seniors to be cared for in a familiar community.

Greenview opened in 2014 with supporting living services for 95 seniors. Supportive living is designed for residents who are medically stable and where support is focused on seniors maintaining as much independence and autonomy as possible with the assistance of daily nursing and personal care. Greenview is a solution in the health system, providing more community beds, shortening wait times and acute care hospital stays and advancing the aging-in place concept. The second phase of the building, opening in November 2018, adds 80 long term care spaces to the health system.

### **Cherished communities**

A space that includes people of varying backgrounds and ages creates a dynamic, energizing and relationship-oriented community, one where the notion of diversity is embraced as a strength and where people laugh, cry, play, sing, commiserate and celebrate together. Building such communities is a deliberate process, particularly within the context of health care—and it's a process that Wing Kei embraces wholeheartedly.

### **Quick glance**

Wing Kei Crescent Heights  
145 long term care residents

Adult Day Program  
64 participants

Wing Kei Greenview  
95 supportive living residents

Wing Kei Greenview  
80 long term care residents

## Our mission

We provide extended care services and facilities to meet the physical, social, emotional and spiritual needs of seniors in a Christian environment.

## Our vision

To preserve and improve the quality of life for seniors with Christian love.

## Our values: FIRST

### **Fairness**

We are generous with each other; we are candid in our decisions; everyone in our Wing Kei family is treated equitably

### **Integrity**

We trust each other to do what's right; we live our mission in our words and actions

### **Respect**

We listen and value each other's ideas and opinions

### **Service**

We are compassionate with each other; we serve everyone

### **Teamwork**

We are accountable to one other; we work as an integrated group for the greater good

# Strategic plan

Our strategic plan is built on a series of consultations with our community where we gained insights into people's perceptions and understanding of the value we bring to their lives and to the health care system. These insights informed our board planning retreats and resulted in three strategic directions to guide our work until 2020.

## Our strategic directions (2016-2020)

1. Growth through new facility development
2. Growth through new programs and services
3. Increased organizational effectiveness

### Emerging consultation themes

Wing Kei enjoys a strong, trusting relationship with the community. Leading up to the development of the strategic plan, we facilitated discussions with representatives from our various internal and external stakeholder groups to gain their perspective of the culture of our organization, our existing programs and services and our future as a care provider. Discussion group participants included families, donors, funders, partner organizations, post-secondary institutions, and cultural and church groups

A loud and consistent theme was to find ways to grow so we could serve the community even more. Discussion groups emphasized that our focus on quality, safe care and fostering a culture of wellbeing among seniors are non-negotiables in any future growth. Stakeholders encouraged us to serve a diverse population, recognizing that seniors from all ethnicities would benefit from culturally appropriate care. Another emerging theme was to be responsive to the needs of those who will require seniors services 10, 15 and 20 years from now—people who enjoy tremendous freedom and independence and whose expectations of aging and seniors care may be different than that of seniors today.

## Meeting the challenge

The Wing Kei Board built on the discussion group themes to analyze strengths and opportunities:

Strengths	Opportunities
Strong Wing Kei culture of service	Sustain and strengthen the Wing Kei culture through change and growth
Exceptional staff and volunteers	Respond to increased focus on providing community-based care and mental health programs
Excellent relationship with funders and government	Determine feasibility of offering home care as a fee for service
Trusting, supportive relationships with influencers and stakeholders	Purchase land with the aim to build an intergenerational campus of care
History of resourcefulness in growing facilities, programs and services	Maintain fiscal stability while diversifying funding sources and growing the donor base
Collaboration with like-minded organizations	Enhance organizational effectiveness, particularly within the areas of long term human resources planning, communications and community relations, and staff engagement
Unwavering commitment to safe, quality care	Increase integration across teams
Excellent approach to mental health with proven results	Continue to recruit for fit and skill, paying close attention to recruitment challenges through a period of organizational growth
Strong person and family centred care framework developed through consultation	Collaborate with like-minded organizations towards common goals (e.g., mental health initiatives)
Niche in providing culturally appropriate care	Further relationships with post-secondary institutions towards common research initiatives
High achievement in all audits	
Satisfied staff and families, based on survey results	
Proven track record in being responsive to community needs	
Year over year balanced budget	

# 1. Growth through new facility development: extending the impact of our expertise and excellence

Wing Kei will focus on progressive capital development to extend our ability to provide long-term care and supportive living residential services for seniors. This plan will enable us to serve over 200 new residents and their families.

## 1.1 Greenview Phase 2

We will begin building the second phase of Wing Kei Greenview consisting of 78 Long Term beds in Fall 2016. We have received a development permit and a signed commitment letter with Alberta Health Services. *Assumptions: Construction costs estimated at 18.5M funded by 5M ASLI grant and a 9M loan from TD (another commitment).*

## 1.2 Land Acquisition for Future Growth

By 2017 Wing Kei will secure land in strategic locations for future development. This strategy is intended to serve both short-term (5 years) and long-term (10 years) growth. *Assumptions: Estimated funds from cash reserves are 6M as of December 31, 2015. Purchase price will be up to 8M funded through 50% equity and 50% debt.*

## 1.3 Affordable Supportive Living Initiative (ASLI) Grant

Wing Kei will apply to secure a Government of Alberta ASLI grant to fund a new supportive living or long term care facility to be built on new land that we will acquire in 2016-2017. *Assumptions: The current provincial government has committed to building 2000 new beds in the next four years; Wing Kei will prepare a funding proposal in 2017-2018.*

## 1.4 New Long Term Care/Supportive Living Centre

With successful funding in place we will build a new long term care and/or supportive living facility with approximately 150 beds. This could include a mix use plan combining independent living and residential care. Construction could begin as soon as 2019 and opening later in 2020. *Assumptions: A successful ASLI grant will fund one third of construction costs with financing covering the remaining balance. Fundraising will be targeted to reduce debt costs.*

## **2. Growth through new programs and services: expanding services to improve the quality of life of seniors living in the community**

### **2.1 Expand Adult Day Program**

Since 2012, Wing Kei has been offering an Adult Day Program providing cognitive support to seniors and respite for their caregivers. We will review the current Adult Day Program and evaluate the potential for expanding these services.

### **2.2 Explore Opportunities to Provide Home Care Services**

Wing Kei supported seniors to continue to live in their communities by providing superior and cost-effective home care services between 2008-2014. The Government of Alberta has indicated that an expansion of home care services is a critical aspect of the provincial seniors strategy and will likely release a new Request for Proposal in 2017 to provide publicly funded home care services. Wing Kei will review this request and consider alternate funding models to provide home care services.



### **3. Increased organizational effectiveness:**

Continuously improving quality and safety; enhancing leadership development, human capacity, and financial diversification

#### **3.1 Awareness of Changing Community Needs**

The City of Calgary expects the number of seniors to double in less than twenty years. The number of Calgarians who are 75 or older will double by 2024. Included in this demographic wave will be a significant increase in people living with dementia and the frail elderly. This dramatic change will mean a significant increase in the need for residential care and community-based programs and services that Wing Kei excels at providing. It also presents an opportunity for us to expand our services to support culturally diverse residents and families. We will adapt how we provide care and services to ensure our approach is person-centred and culturally-appropriate, strengthening the Wing Kei spirit that is grounded in the healing ministry of God's love.

#### **3.2 Financial Resources**

Over the past ten years we have built a solid financial foundation to support a growing level of care and service. We will build on this by developing a strong financial plan to support a progressive capital development strategy and an expansion of community-based programs and services. This plan will be based on a five-year financial forecast supported by a ten-year financial history.

#### **3.3 Fund Development Strategy**

As we embark on a period of growth, the need for a comprehensive and expanded fundraising strategy is critical. Building on the success of the past five years, we will renew our commitment to expanding our donor base, develop and steward relationships, and raise new funds to support this strategy. A key component will be building the Board's capacity to take a leadership role in this work.

#### **3.4 Human Capital Readiness**

To support anticipated growth over the next five years we will develop an agile and responsive human resource strategy to ensure we recruit, retain and prepare our dedicated team of staff and volunteers to respond to the

challenge of caring for over 200 new, diverse residents across multiple sites and to provide community support for many new potential clients.

### **3.5 Organizational Effectiveness**

Our organization structures and processes must grow and develop to keep pace with, and continue to support, growth in personnel, services and facilities. Three areas that of particular importance are: (i) continuing to monitor and ensure expectations for quality and safety excellence are met and exceeded, (ii) continuing to improve governance processes, shared purpose and strategic alignment between shareholders, board members and senior leadership, and (iii) reviewing and planning for a new management structure that support growth.

## Advancing our strategic plan: operational plan summary

Our mission-driven, ambitious strategic plan will be accomplished through the development of a sound operational plan determined by the leadership team based on their experience, expertise and insights.

**Our operational plan is a roadmap, providing a clear path to achieving the strategic plan.** It is realistic and purpose-driven, with everything directly connecting to the vision, mission and strategic directions. Importantly, the operational plan contributes to decision-making. Opportunities will arise and unexpected turns will happen. The plan allows for informed conversations about priorities and return on investment so that decisions can be made with forethought recognizing what might be compromised when the course temporarily changes.

Priorities were assessed based on four criteria: the extent to which the priority advances the strategic direction, the degree to which the priority is foundational for organizational sustainability, the extent to which we will have a balanced return on investment and, the urgency of the priority based on an environmental scan. *See the Wing Kei Operational Plan for goals, actions and timelines to advance our Strategic Plan.*

For the purposes of the operational plan, the strategic directions focused on growth have been combined. *Note: the full 18-month operational plan, including actions and the work breakdown is available in a supplementary document.*

## Priority initiatives for strategic direction: Growth in programs, services and facilities

To continue to serve seniors and extend our impact further, we will:

Priority initiative	Long term goals
Implement and evaluate the commissioning and transition plan for Wing Kei Greenview's second phase	<ul style="list-style-type: none"> <li>Lead with our values; create an intergenerational community of care</li> <li>Model best practice in person and family centred care</li> </ul>
Create, implement and evaluate a donor relations and fund development plan	<ul style="list-style-type: none"> <li>Contribute to diversified funding model</li> <li>Growth and increased diversity in donor base</li> <li>Increase in ambassadors who seek support on behalf of WK</li> </ul>
Further develop an integrated leadership and management team with clear roles, responsibilities, accountability and authority	<ul style="list-style-type: none"> <li>Strong, responsive, adaptable, innovative and competent leadership team</li> <li>Clear, long term leadership structure with flexibility for growth</li> <li>Excellent, effective, efficient, engaging, expanding leadership team</li> </ul>
Create and implement a government relations plan to support continued partnership and growth	<ul style="list-style-type: none"> <li>WK regarded as the go to provider by funders and government</li> <li>Exceptional relationships with funders and government</li> </ul>
Build and implement a consultation plan to engage stakeholders in discussion for the new campus of care	<ul style="list-style-type: none"> <li>Build an innovative campus of care based on community input and sound resource management</li> </ul>

# Priority initiatives for strategic direction: Increased organizational effectiveness

To continuously improve quality and safety and enhance leadership development, human capacity and financial diversification, we will:

Priority initiative	Long term goals
Build and implement a long term human resources plan including recruitment, retention and succession planning	<ul style="list-style-type: none"> <li>Stability and sustainability in HR</li> <li>Mission-driven culture flourishes</li> <li>The right people in the right positions</li> <li>Formal mentorship and coaching in place</li> </ul>
Create, implement and evaluate a staff engagement plan	<ul style="list-style-type: none"> <li>Wing Kei regarded as a premier place to work in Calgary</li> <li>Wing Kei recognized for its workplace culture and highly engaged team</li> <li>Staff actively involved in decisions that impact them</li> <li>Continued high results in staff satisfaction surveys</li> </ul>
Develop a five-year safety and quality plan, recognizing today’s needs and planning for future growth	<ul style="list-style-type: none"> <li>Continued Exemplary Standing with Accreditation Canada and high results in other audits</li> <li>Seamless and consistent quality initiatives, indicators and results across Wing Kei</li> <li>Consistently high results in resident and family satisfaction surveys</li> </ul>
Build, implement and evaluate a robust communications, marketing and community relations plan to support visibility, advocacy and growth	<ul style="list-style-type: none"> <li>Brand is relatable, modern and accurately reflects culture</li> <li>Broadly recognized name in seniors care, including increased media exposure</li> <li>Clear, consistent, progressive and responsive approach to communication</li> <li>Growth and increased diversity in people who support Wing Kei (ambassadors)</li> </ul>
Build a financial sustainability plan, outlining opportunities for diversifying funding	<ul style="list-style-type: none"> <li>Diversified funding model</li> <li>Stability of capital and financial resources</li> <li>Continued balanced budget</li> <li>Financial ability to continue to grow</li> </ul>

## Thriving and growing

When you walk into our centres, there is an immediate sense of tranquility and welcome. There is generosity and a feeling of openness. It is obvious that the people who enter and the people who live with us are loved and cared for.

We pay close attention to detail, we take time to talk with each other, we rally behind one another's ideas. Every person on our team, regardless of their role, leads with the intention to serve. One person on our team calls it the Wing Kei Magic. We are blessed to be thriving and growing. Our strategic plan builds on the strength of the Wing Kei Magic. It is most certainly ambitious. And we will achieve it.