



## **Loch Lomond Villa Foundation Inc.**

2017-2020

Strategic Plan

Organization Frameworks

Supporting Documentation

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## **EXECUTIVE SUMMARY**

The purpose of this document is to provide Loch Lomond Villa Foundation Inc. with a focused directional framework with which to help make future decisions and to help drive success for goals and outcomes over the next four years.

Loch Lomond Villa Foundation Inc. has an opportunity to strategically place itself in a leadership role in providing funding support to Loch Lomond Villa Inc. and its partners who share the common goal of supporting seniors and growing age friendly communities.

Loch Lomond Villa Foundation Inc. believes all adults have the right to be cared for with dignity, respect and receive the highest level of care. Through effective and efficient fundraising activities, the Foundation has supported, not only major capital projects over the past 20 years, but program initiatives, recreational activities and equipment purchases, all of which have served the population in Loch Lomond Villa with an enhanced quality of life.

The Foundation's goal with this strategy is to build the financial capacity to give support to adults within Loch Lomond Villa Inc. and to support the rapidly growing senior population within the community through Loch Lomond Villa partnerships. To achieve this, the Foundation's focus will expand from solely supporting Loch Lomond Villa nursing home residents, to partnering with Loch Lomond Villa in its outreach program initiatives and goals.

As an organization, the priority will always be primarily dedicated to ensuring that Loch Lomond Villa has the funding required to remain the industry leader in providing outstanding service and excellence in care to its clients, families and the community. With the current provincial challenges regarding the senior's population, the time to start planning for that new future, is now.

The Foundation, in partnership with Loch Lomond Villa's objectives, will reach out in support of providing support and resources to seniors as well as looking at how they can fill the gaps in the community. The five main areas to provide funding will fall under the following areas: education, research, capital investments, program initiatives, and personal comforts. In order to make this a reality, the Foundation will develop a detailed case for support, conduct an organizational readiness audit, develop appropriate policies and procedures and work on becoming a recognized and accredited charity under Imagine Canada. Growing the culture of philanthropy in and out of Loch Lomond Villa, will open up opportunities to receive additional funding sources and partnerships to make an immense, collective difference in the lives of seniors. The Foundation is comprised of individuals who are committed to making life the best it can be for the senior population. Together, working for quality, they can make even greater things happen and be the change!

# **LOCH LOMOND VILLA FOUNDATION INC.**

“Together, working for quality”

## **OUR MISSION**

“Improving quality of life for the residents and families of Loch Lomond Villa.”

## **OUR VISION**

“Enriching the lives of seniors by supporting Loch Lomond Villa in providing care and support and in their community initiatives.”

## **OUR VALUES**

Respect for all who support the Foundation

Excellence in fundraising, providing exemplary stewardship to supporters

Accountability and transparency to our donors and the community

Collaboration with all internal and external stakeholders

Engagement with all donors, staff and volunteers

## **KEY RESULT AREAS**

### **Funding Support**

“Provide funding support to Loch Lomond Villa to optimize and improve quality of life services and activities for seniors with measurable outcomes.”

### **Donor Experiences**

“Create exceptional donor-centered experiences that exceed expectations and build a culture of philanthropy.”

### **Organization Strength**

“Ensure organizational success through efficiency, ethical decision making, financial growth and stability.”

### **Community**

“Support innovative initiatives by Loch Lomond Villa to improve the health and well-being of seniors.”

## **AREAS OF SUPPORT**

Capital Investment, Program Initiatives, Research, Education, Personal Comforts

## **ORGANIZATION DESCRIPTION**

Loch Lomond Villa Foundation Inc. began as an additional source of funding for capital items that Loch Lomond Villa Nursing Home required, but that were not covered under the annual provincial operating budget for the home. The mission was to help improve the quality of life for the residents and families of Loch Lomond Villa. Over the years it has evolved with Loch Lomond Villa from solely supporting the nursing home to other areas of the complex. It now includes support for program initiatives, capital building infrastructure, education, research and resident support services.

## **EXTERNAL ANALYSIS**

In these days of profound financial challenges in the province, New Brunswick is also struggling with having a rapidly growing number of seniors in Canada.

In 2001, New Brunswick's population began to change as the province felt the combined triple impact of working-age baby boomers, a lower birth rate and youth outmigration. By 2030, the combination of New Brunswick residents over the age 65 and those under the age of 14 will outnumber working-aged adults. (Canadian Medical Association, 2015)

About 16 per cent of New Brunswickers are currently over the age of 65, slightly higher than the national average, which sits at 14 per cent. If this trend continues it could double over the next 20 years. (Canadian Medical Association, 2015)

The most interesting statistic of all is that only 8 per cent of seniors in our province are living as nursing home residents. Understanding the desires of the other 92 per cent is key to creating policies and programs that serve older adults in our province. (Canadian Medical Association, 2015) For older adults, maintaining their independence and remaining in their communities is paramount; therefore, it should be a goal for all.

Seniors have consistently stated that they have an overwhelming desire to stay at home and in their communities for as long as possible. They want to continue to be active contributors to their communities. But currently, we lack the proper support requirements in place to allow them to do so.

## **STRATEGIC PLAN 2017-2020**

In January 2016, Loch Lomond Villa Inc. held a strategic planning session to develop a four-year strategic plan and accompanying strategic goals. It is the optimal time for the Foundation to strategically align itself with Loch Lomond Villa in an effort to grow a more collaborative partnership.

One of Loch Lomond Villa's key result areas is Community Catalyst which will help Loch Lomond Villa branch into the community with outreach programs and initiatives. The Foundation identified this as a key area where the two can work together on establishing programs and initiatives.

Previously organizations worked in silos and often as rivals. Over the past decade groups are starting to communicate, share information and work together to develop strategies and services with mutual benefit. This is the model to follow to help facilitate a healthy culture of aging in New Brunswick.

Loch Lomond Villa Foundation has an opportunity to support the development of Loch Lomond Villa as the industry leader for providing seniors care, not only within Loch Lomond Villa infrastructure, but out in the community.

The intent of the framework and goals included in this document is for Loch Lomond Villa Foundation to develop the ability to increase unrestricted funds through sustainable fund development programs, using effective and efficient planning, communications and marketing.

The Foundation aims to influence a wider range of donors/funders who may not have directly benefitted from the services offered within Loch Lomond Villa only, but by one of their community outreach programs and initiatives.

Messaging and marketing are key as the ultimate goal is to effectively fundraise by increasing visibility, improving awareness and promoting healthy-aging on which Loch Lomond Villa is already a centre of excellence.

Engagement is the key to our success. The Foundation is committed to being transparent and accountable to ongoing collaboration with our stakeholders, staff, and donors, who are essential partners in our success. Continued engagement and involvement matters!

With this new strategic focus our most crucial goal is to build a strong financial base for the Foundation for future needs through programs like planned and major gifts. Each year Loch Lomond Villa provides a list of funding requests to sustain or initiate programs, replace or purchase new equipment and partner in capital initiatives. Growing a more permanent fund because the status quo will not sustain or allow the Foundation to move forward and grow with the future needs of Loch Lomond Villa.

We have a responsibility to donors to ensure that we are spending their generous gifts on initiatives and purchases that are appropriate to the mandate of Loch Lomond Villa, the Foundation, and that are fiscally responsible.

## **S.O.A.R ANALYSIS**

### **Process**

Loch Lomond Villa Foundation Inc. Board of Directors met offsite on Saturday April 9<sup>th</sup> to discuss and work through a SOAR Analysis. S.O.A.R standing for Strengths, Opportunities, Aspirations, Results. The results were quite surprising in that they mirrored Loch Lomond Villa's SWOT analysis. These have been highlighted in bold below.

### **Strengths:**

- 1. Strong brand of being a leader in providing quality and excellence in elder care.**
- 2. Brand new infrastructure buildings.**
- 3. Highly trained staff, leadership, and board volunteers leading the organization.**
4. Industry and community Leader in providing Person-Centered Elder Care and long-term care for adults in need of support
5. Highly trained and skilled professionals
6. Management, Staff and Board
7. Accreditation/Planetree
8. Dedicated and committed volunteers and supporters

### **Opportunities:**

- 1. NB's rapidly aging population, people living longer and requiring higher level of care for longer.**
- 2. Partnerships with Loch Lomond Villa supporting seniors.**
- 3. Increase in outreach program funding, branching out from only funding nursing home.**
4. Serving the region's rapidly seniors over the next 20 years+
5. People living longer and requiring a higher level of quality care
6. Partnerships with other organizations through Loch Lomond Villa objectives
7. Pool and leverage funds with other Foundations/ Organizations through partnership and collaboration to advance elder care
8. Alignments with LLV new strategic plan model
9. Foundation Board and Staff to build new Culture of Philanthropy, in partnership with LLV
10. Build on LLV to grow outreach support programs and programs supporting external community
11. Increase LLVF scope of purpose/support creates new and sustainable fund development/ financial resources

### **Aspirations:**

1. Enhance LLVF reputation through accreditation by Imagine Canada
2. Partner with LLV to develop new LLVF, 4-year Strategic Plan to support new projects/ projects in and outside of LLV nursing home

3. Increase partnerships with health and social charities/organizations, government, corporate and community groups
4. Create new LLVF brand/identity aligned with LLV, but distinctive to utilize new technology, online donation platforms and new fund development practices
5. Provide support to seniors through LLV initiatives in the community
6. Create transformation and change in providing quality of life in caring for Saint John's seniors

**Results:**

1. Greater organizational readiness for LLVF to empower Culture of Philanthropy and Donor-Centered Fundraising
2. Stronger and sustainable partner relationship
3. Improved Brand/identity for greater visibility and profile, community awareness and fundraising
4. New Mission and Vision statements to support Case for Support to achieve strategic and fundraising goals
5. Increase financial stability/sustainability to support new projects/programs/activities
6. Increase LLVF's resources to support staff to acquire new knowledge and skills
7. Create endowment fund
8. Establish new Planned & Major Gifts programs
9. Apply SMART goals to achieve outcomes



## **REFERENCES**

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