

# ASSISTING FAMILY HEALTH TEAMS DURING 2019



## A: BOARD TRAINING:

**"Governance Review & Real-World, Enjoyable Board Training"**

**Step 1:** Phone review with E.D. and Lead MD/Board Chair re: current state of Board and all FHT committees/working groups.

**Step 2:** 3 hour training session with Board to train best practice FHT governance. Very engaging session. The Board is provided with a customized best practice resource package.

## B: STRATEGIC PLAN CREATION:

Low-stress, high-engagement process starts by involving all FHT staff and physicians/board in small groups for Day 1. Day 2 occurs 30-60 days later with smaller core group. This process will build a stronger team environment and long-term Plan buy-in. The "living" template can be constantly updated by you, it has customized graphics and uses colour coding. Contact David to see template.

## C: RISK MANAGEMENT PLAN:

We review 11 FHT-specific risk areas (including privacy, governance structure and staff culture) and create a "living" template which can be constantly updated. It identifies each risk, its risk "score", plans for improvement, ownership and has a colour progress bar. Contact David to see template.

**FULL COST:** Governance **\$2,900**. Strategic Plan **\$7,900** for general 2-stage process. Risk Document **\$4,900**. (Plus travel expenses. Rate increases if travel time is greater than 2 hours from our location near Pickering.)



I have been doing strategic plans with organizations for over 20 years in 2 countries and this is the best process for a strategic plan that I have ever gone through. It is fast, it is kinetic, it is highly engaging and your process of weighted scoring to reach priorities is excellent. **CLAUDIA MIOR, EXECUTIVE DIRECTOR, STRATFORD FAMILY HEALTH TEAM (THIS TESTIMONIAL GIVEN FEBRUARY 13, 2019, MINUTES AFTER THE COMPLETION OF OUR "DAY TWO" SESSION)**

Thanks David for the insightful training session. Great use of the board's time and a valuable tool to migrate to being a "great" board. Much appreciated. **DR. TOM RICHARD, 2019 AFHTO BOARD VICE-PRESIDENT AND PETERBOROUGH FAMILY HEALTH TEAM BOARD**

Having spent a significant amount of time learning about best practices for governance in the past I know that this is typically a very dry topic. Thankfully, David provided a dynamic and engaging review of the issues facing charitable board in the health care setting. His knowledge was impressive. He encouraged interaction without pressure. His blunt style called us out and pushed us ahead in reviewing our structure of meetings and the board. To put things simply: I left the presentation feeling that my time, which I value highly, was well spent. **NATHAN BAKER, BARRISTER & SOLICITOR, 2019 BOARD MEMBERSHIP, FEDERATION OF ONTARIO LAW ASSOCIATIONS AND PETERBOROUGH FAMILY HEALTH TEAM**

David Hartley is an excellent presenter who's experience working with dozens of FHTs shines through. His enthusiasm is contagious and he offers a real world evaluation and suggestions for improvement regarding Board governance. We feel a lot better equipped to manage many of our issues thanks to his well attended risk management review and strategic planning sessions with our FHT. I highly recommend him to any organization looking to improve their governance structure or organizational focus. **DR. ANIL MAHESHWARI, LEAD PHYSICIAN, GRANDVIEW MEDICAL CENTRE FHT**

[Strategic Planning was] An incredible experience. David has been a wonderful facilitator, he helped guide our team through a great process to help us achieve what we had set out to do. He was on point, funny, considerate, expert and really knows his stuff. I wasn't hesitate to have him back or to recommend him to any other Family Health Team. **JOE DA SILVA, EXECUTIVE DIRECTOR, HEALTH FOR ALL FHT**

## WHO IS DAVID?

Since 2007, David Hartley has assisted hundreds of nonprofits, charities and health facilities in over 160 Canadian towns and has trained over 20,000 staff or Board members. David has his Canadian Risk Management designation from the University of Toronto. He directed Ontario's Insurance & Liability Resource Centre for Nonprofits for 5 years and prior to this trained brokers for 2 of the 3 largest P&C insurers in Canada. See over 200 references at [www.nonprofithelp.ca](http://www.nonprofithelp.ca)

I am incredibly pleased with your recent facilitation of our strategic planning session. You are energetic and you made the session entertaining yet productive and focused. Your ability to relax the group and to motivate everybody to fully participate was impressive. I have attended a number of strategic planning sessions over the years and your efforts on our behalf exceeded all expectations. You did a stellar job! I will be highly recommending you to other organizations. **MERRILL BAKER, BOARD CHAIR HARROW FHT, LAWYER WITH SORENSEN BAKER PROFESSIONAL CORPORATION**

The time we spent together was great! You met our team "where they are at" with varying knowledge of and experience with strategic planning. You have been innovative and creative in the strategies you have used to engage team members. **LIANNE DAVIES, DUFFERIN AREA FHT EXECUTIVE DIRECTOR**

I can without a doubt say that I got the best bang for my buck hiring you. You had the physicians, allied health and admin staff all engaged and you made them feel like their voice mattered and their suggestions counted. **LYNNE DAVIES, COUCHICHING FHT EXECUTIVE DIRECTOR**

David helped us zone in on what is important to us. He facilitated an inclusive, energetic and meaningful process in which 96% of the [over 40] staff and physicians rated as good to a very good use of their time. I love the visuals and the one page per year approach. **SHERRY KENNEDY, EXECUTIVE DIRECTOR, TADDLECREEK FAMILY HEALTH TEAM**

I just wanted to share with you a contact that I have had great success with. We have just spent some time with David Hartley, working both with our board and our FHT staff doing strategic planning. We found David's style to be perfect for our culture, with such diverse groups and different personalities, he has the ability to appeal to the majority and the fun factor runs high. He understands the FHT environment and challenges very well, and is results oriented. Given the pace of change at the moment, particularly with where governance is headed, it might not hurt to be aware of somewhere you can reach for assistance. I think his rates are reasonable for very high quality work. **MARIE LAROSE, EXECUTIVE DIRECTOR, GEORGIAN BAY FAMILY HEALTH TEAM**



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