

ASSISTING FAMILY HEALTH TEAMS

FALL 2016 TO SPRING 2017



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 **\$3,000**. Strategic Plan **\$7,500** for 2-stage process. Risk Document **\$5,000**.
(Plus travel expenses. Rate increases if travel time is greater than 3 hours from our Toronto location.)



DR. ANIL MAHESHWARI, LEAD PHYSICIAN, GRANDVIEW MEDICAL CENTRE FHT: "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. CAROLINE BOWMAN, LEAD PHYSICIAN AND BOARD CHAIR, GEORGIAN BAY FHT: "Thank you so much for organizing our FHT strategic planning sessions. Not only was it an incredibly useful process, it was also a lot of fun! I have been part of strategic planning before and this experience was completely different."

DR. MARTIN KANE, LEAD PHYSICIAN: "David has been instrumental in providing experienced, enthusiastic and educational sessions ... Extremely valuable for the evolution of our Board and Governance Model Development."

DR. SARAH SHAW, PHYSICIAN: "I want to thank you. It was the best visioning process we'd had in the 7 years I have been with the FHT. It was inclusive, very-focused, very task-oriented. The process really kept us going and also I really liked how we moved from activity to activity, so no one ever got bored, you actually keep focused all while mixing with people that you don't always get to see."

DR. JIM SUGIYAMA, PHYSICIAN: "The strategic planning process has been a wonderful, fun, useful, practical experience".

LIANNE DAVIES, FHT EXECUTIVE DIRECTOR: "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."

DR. ALISSIA VALENTINIS, PHYSICIAN: "Really enjoyed the pace of the strategic planning time, normally these things are really dragged out, boring, the energy in the room was excellent, really due to the facilitator".

MICHELLE MCLAUGHLIN, FHT RN: "The process was very valuable to evaluate where we are at and where we want to move to as a team. I like that there was representatives from all different areas of the FHT: physicians, nurses and all allied health, in order to bring their perspectives."

LYNNE DAVIES, 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."

SHERRY KENNEDY, EXECUTIVE DIRECTOR, FAMILY HEALTH TEAM: "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."



WHO IS DAVID?

Since 2007, David Hartley has assisted hundreds of nonprofits, charities and health facilities in over 130 Canadian towns and has trained nearly 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 100 references at www.nonprofithelp.ca



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