

ONTARIO FAMILY HEALTH TEAMS



PATIENT ENGAGEMENT AND/OR STRATEGIC PLANNING

NEW IN 2024: 1. GRAPHICALLY-PLEASING SUMMARY DOCUMENT FOR YOUR WEBSITE; 2. PATIENT AND PARTNER SURVEYS.

**DAVID HAS ASSISTED OVER
49 ONTARIO FAMILY HEALTH TEAMS TO DATE**

“David has been instrumental in our 2024-2027 strategic planning process and has done an amazing job of engaging both staff and physicians. We love his practical approach and his tenacity to help us get to what really matters in our plan.”

STEVE SHELDRIK, C.E.O., QUEEN SQUARE FAMILY HEALTH TEAM

PREPARED FOR: Ontario Family Health Team Executive Directors/CEOs & Board Chairs

PREPARED BY: David Hartley, Facilitator, Hartley Nonprofit Consulting Inc.

OUR WEBSITE: www.nonprofithelp.ca

OUR FOCUS: Small and mid-sized nonprofits and charities (including health facilities) across Canada



nonprofithelp 

DAVID HARTLEY

EMAIL david@nonprofithelp.ca



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MORE TESTIMONIALS AFTER DOZENS OF F.H.T. STRATEGIC PLANS

KINCARDINE FAMILY HEALTH TEAM

"We really enjoyed working with you on this. This was a wonderful opportunity for our staff, Board, and physicians to work together on a [2024-27] plan that will benefit our community. You and your team did a wonderful job and we appreciate having it ready ahead of schedule."

PAM RANTZ, EXECUTIVE DIRECTOR

STRATFORD FAMILY HEALTH TEAM

"I have been doing strategic plans with organizations for over 20 years in 2 countries and this is the best process 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

MARKHAM FAMILY HEALTH TEAM

"David's energy and enthusiasm for strategic planning inspired us to step back from our daily operations and deeply engage in planning for the important work we need to do. We have developed priorities to better position us to meet our patients' primary care needs as a result of his facilitation."

RAJ SOHI, EXECUTIVE DIRECTOR

SUNSET COUNTRY FAMILY HEALTH TEAM

"I've been through many, many strategic planning processes. Your process is really good – it made sense, it was logical and it had great engagement from patients to doctors to staff. The simple [final template] will be put to good use."

COLLEEN NEIL, EXECUTIVE DIRECTOR

NIPIGON FAMILY HEALTH TEAM

"I expected to be sitting around a boardroom, fighting to stay awake, but this process was really engaging. It truly felt like everyone was working as a team on this and yes, a great use of my time."

DR. DOUG SCOTT

GEORGIAN BAY 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 F.H.T. 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 F.H.T. 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. Thought I would pass his name along, I think his rates are reasonable for very high quality work."

MARIE LAROSE, EXECUTIVE DIRECTOR

WILLIAM OSLER HEALTH SYSTEM FOUNDATION

"David is a master of engagement. In a well-designed session, he helped an opinionated group with a wide range of experiences and perspectives coalesce around a plan and priorities that everyone felt proud of and vested in."

KEN MAYHEW, PRESIDENT & CEO



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HARROW FAMILY HEALTH TEAM

"I am incredibly pleased with your recent facilitation of the Harrow Family Health Team's 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!"

MERRILL BAKER, BOARD CHAIR (AND WINDSOR ONTARIO LAWYER WITH SORENSEN BAKER PROFESSIONAL CORPORATION).

DUFFERIN AREA FAMILY HEALTH TEAM

"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 BARBOUR, EXECUTIVE DIRECTOR

TADDLE CREEK FAMILY HEALTH TEAM

"David helped us zone in on what is important to us in our strategic plan. He facilitated an inclusive, energetic and meaningful strategic planning process in which 96% of the staff and physicians rated as good to a very good use of their time. He has the ability to engage a group in a warm yet direct manner infusing humour to keep everyone alert and involved. He is very professional, knowledgeable and trustworthy. We are looking forward to implementing our plan immediately. [And as far as the final Strategic Plan document] I love the visuals and the one page per year approach."

SHERRY KENNEDY, E.D., TADDLE CREEK FAMILY HEALTH TEAM, BAY/BLOOR STREETS, TORONTO

PHYSICIAN

"I want to thank you. It was the best visioning process we'd had in the 7 years I have been with the F.H.T.. 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. SARAH SHAW, TADDLE CREEK FAMILY HEALTH TEAM

LEAD PHYSICIAN

"Thank you so much for organizing our F.H.T. 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. CAROLINE BOWMAN, LEAD PHYSICIAN AND BOARD CHAIR, GEORGIAN BAY FAMILY HEALTH TEAM

REGISTERED NURSE

"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 were representatives from all different areas of the F.H.T.: physicians, nurses and all allied health, in order to bring their perspectives."

MICHELLE MCLAUGHLIN, F.H.T. RN



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OUR 2024 F.H.T. STRATEGIC PLANNING PROCESS



STAGE 1: PATIENTS FIRST

- We have a strong online survey to reach a large number of your patients
- David facilitates two fun in-person sessions (afternoon and evening) for in-depth questions



STAGE 2: PARTNERS SECOND

- We have a short and sweet online survey for our community partners



STAGE 3: STAFF, BOARD & M.D.s

- 7 hour engaging in-person day
- Small group morning, full group afternoon



STAGE 4: BOARD, STAFF & M.D. LEADERSHIP

- Within 60 days of prior stage, smaller group finalizes priorities and strategies
- Unique to us: Core Staff/MDs determine Year 1, 2 and 3 actual work tasks



STAGE 5: COMPREHENSIVE DOCUMENTATION

- Internal document: customized, easy-to-update, progress-focused
- External document: mission, vision, priorities and strategies

OUR UNIQUENESS

Stage 3 brings together your FHT Board & Staff and M.D.s in a fun process.
Stage 4 removes the E.D. workload of a second process to create workplan.



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