

## 2026 FAMILY HEALTH TEAM GUIDANCE

# DASHBOARD 1: THE ROADMAP

### CREATING A STRATEGIC PLAN FOR YOUR FAMILY HEALTH TEAM

*“David has been instrumental in our 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 DOCTORS & FAMILY HEALTH TEAM

### OUR 3- STEP PROCESS

**STEP 1: Patients come first** — a comprehensive online survey followed by two live short patient sessions (one in-person and one virtual) to learn more and prioritize.

**STEP 2: In-Person Session 1** — FHT staff, and as many of your board and physicians as possible, together in an engaging 7-hour session. A fun morning of brainstorming in mixed small groups and an afternoon of full group discussion and voting.

**STEP 3: In-Person Session 2** — within 60 days of that first day, the Board and a smaller leadership group finalize priorities and strategies in the morning; and this smaller group then creates first draft of Year 1, 2, 3 operational tasks and SMART targets in the afternoon

**Option: add a Partner Survey (no charge)** — short online survey for community partners so their voice shapes your plan in advance of that first session

**Option: Mission, vision, and values** refreshed or created collaboratively

**Option for large FHTs:** We have a plan for those few FHTs that need a larger process.

### WHAT YOU RECEIVE

- **Comprehensive Patient Engagement** — survey and in-person. Detailed analysis.
- **Document #1: Strategic Plan Dashboard** — an internal progress-tracking, easy-to-update, progress dashboard for your Board’s quarterly review with a detailed internal workplan with Year 1, 2, and 3 tasks, SMART targets, timelines, and ownership
- **Document #2: A polished External Summary** for your website and stakeholders which includes your mission, vision and values statements.



**DAVID HAS ASSISTED OVER 54 ONTARIO FAMILY HEALTH TEAMS TO DATE**

## TESTIMONIALS

### 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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## TESTIMONIALS

### 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**

Your Board needs a clear, visual, colourful roadmap that shows strategic priorities, goals, and progress — reviewed three to four times per year. Not a 40-page document that sits on a shelf.

I build your **Strategic Plan Dashboard** — a practical, colourful, progress-focused set of tools your Board and team will actually use.

We bring your local **Ontario Health Team** or other partner priorities into the process.

## 2 DASHBOARDS = PROACTIVE GOVERNANCE



### DASHBOARD 1: THE ROADMAP

Strategic Plan Dashboard (we build this)

Reviewed 3–4 times per year

Shows priorities, goals, and progress

*Where the FHT is going*



### DASHBOARD 2: THE GUARDRAILS

ERM Scorecard (we build this now too!)

Reviewed ~2 times per year

Shows top risks, ratings, mitigation, and owners

*What could derail the plan*



### 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.

### READY TO BUILD YOUR STRATEGIC PLAN DASHBOARD?

Let's have a short zoom call to look at real samples of our documents & discuss anything you like.



### WHY WORK WITH DAVID HARTLEY, C.R.M.

- Canadian Risk Management Designation (University of Toronto)
- 5 years Director, Insurance & Liability Resource Centre for Nonprofits, Imagine Canada (2007–2012)
- Contracted by 55+ Ontario Family Health Teams
- 28,000+ nonprofit leaders trained across Canada in governance and risk
- 19 years helping nonprofits and healthcare organizations manage risk (2007–2026)