



**MNP**  
LLP

**Oxford County**

**Woodingford Lodge  
Service Review  
Options Analysis  
July 31, 2013**

**Confidential Draft**

**RELEASED**

# Executive Summary

The County of Oxford’s Social Services and Housing business area operates the not-for profit long term care facility Woodingford Lodge (WFL), which provides 228 beds in three locations in the County: Woodstock, Ingersoll, and Tillsonburg. Woodingford Lodge employs 195 full-time equivalents at an annual budget of \$24.4 M, of which \$7.82 M is contributed by the County to close the funding gap between revenues and expenses.

In light of concerns about the costs to the County, and the sustainability of the current operation, an assessment of the efficiency and effectiveness of the current operation was completed and a range of service delivery options identified to meet future service demands while reducing the tax burden to the County. The Service Review found that the WFL operating budget is likely to continue putting significant pressure on Oxford County, and that alternative service delivery models, potentially coupled with efficiency opportunities, may provide future savings to WFL.

A continuum of options exist for potential cost savings, which are generally grouped for further consideration by the following titles:

1. Status Quo
2. Decrease Costs
3. Single Facility
4. Revenue Creating Opportunities
5. Outsource
6. Partnership (“Phase out”)
7. Sell and Lease Back Buildings

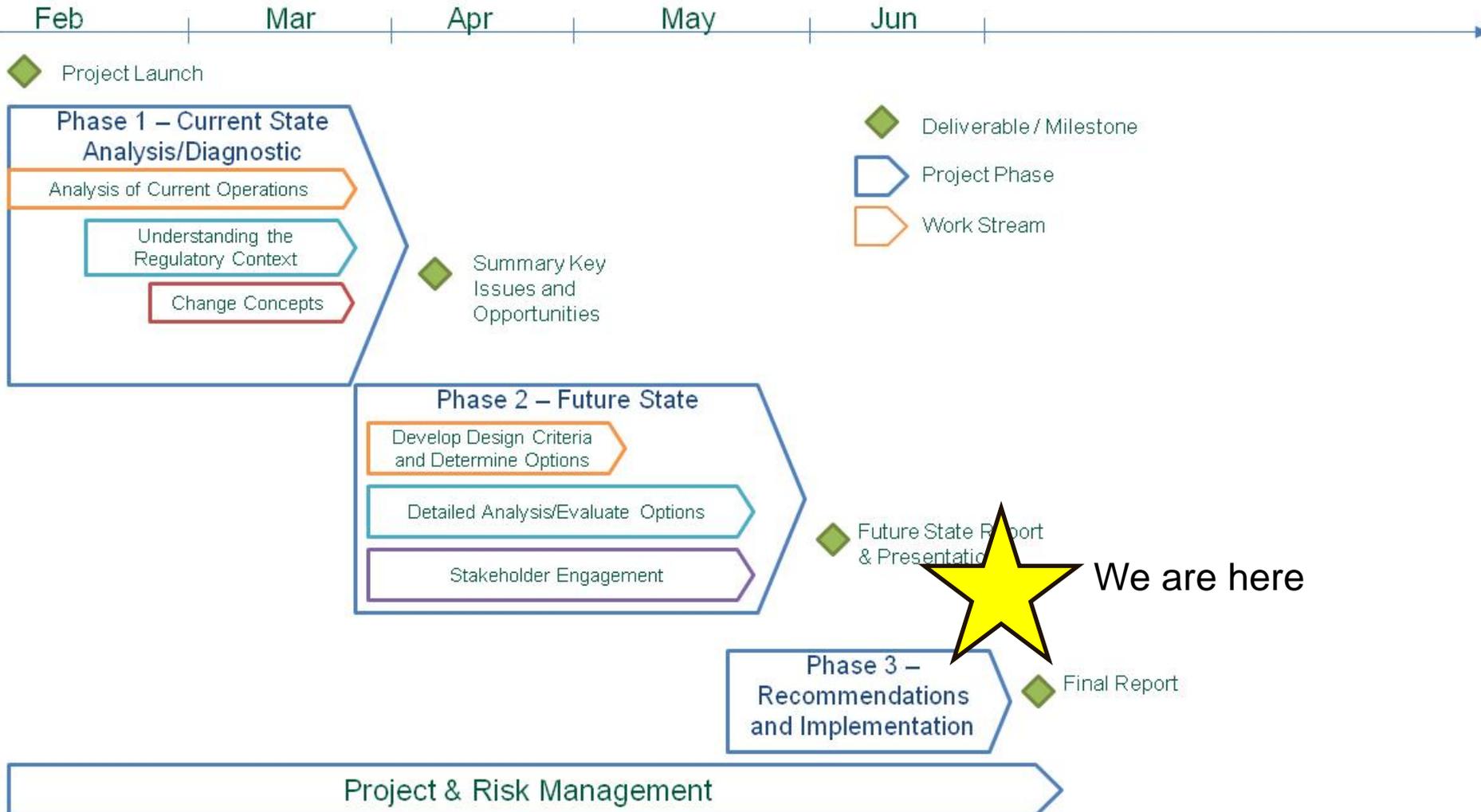


\*Sale of building and lease back is an option that can be included with any of the alternate options.

The options were reviewed with Ad Hoc Committee and two were selected for further analysis and development of an implementation strategy: Single Facility and Phase out”.

The next steps are to meet with the MoHLTC and SWLHIN to review the options and gain their insights, finalise the report with the Ad Hoc Committee and present to Council.

# Project Approach



# Project Approach



- A review of Woodingford Lodge was undertaken to clearly understand and articulate the current state and to identify opportunities for efficiency and for future state service delivery options.
- The approach to this assignment was based on a methodology of reviewing and assessing organizations that has been utilized successfully on many similar projects by the consultants. The methodology is founded on fundamental organizational efficiency principles and best practices, and a broad base of similar project experience in the public sector.
- In conducting the analysis, the consulting team relied on their expertise and experience in operational efficiency, organizational effectiveness, alternative service delivery model as well as knowledge of the public health sector. This experience was gained through working with numerous clients in provincial and municipal government, agencies, LHINS and CCACs, other health service providers and community health centres. In addition, the consulting team has experience working within these sectors in strategic and operational roles.
- Relevant background information (See Appendix A for list of materials reviewed) was reviewed and individual interviews were held with the organization's managers, selected Oxford County leadership and selected stakeholders. From the review of the context in which Woodingford Lodge operates, the "Factors of Influence" were defined; this included regulatory, and funding, amongst other factors. This first phase of the project focussed on two key areas - collection and analysis of information to describe the current state of the organization, including articulation of the strengths, issues and challenges, followed by analysis of findings.

# Project Approach (continued)



- The interviews took place in March - May 2013. The interviews provided an opportunity to understand the current state of the organization as well as to collect perspectives about opportunities for improvement. Interview questions and participants are included in the Appendix B
- The interview results were reviewed and findings and their proposed opportunities to address were defined. A review of comparable organizations was conducted, including efficiency opportunities and alternate service delivery options for municipal long term care. An analysis of Woodingford Lodge's historical financial data was conducted, especially looking at per diem amounts
- The second phase of the project included an assessment of potential alternative service options based on best practices, knowledge of the consultant and considering the factors of influence. From there, recommendations were developed for consideration. A report of results of the analysis of the current state and future options for Woodingford Lodge was prepared for review with Oxford County representatives and the Ad Hoc Committee of Council. The Ad Hoc Committee selected two options for further assessment and development of an implementation strategy.
- This report includes an assessment and an implementation strategy for the two selected options (Single Facility and Phase out). Recommended next steps (outside the scope of this project) are development of a detailed Business Case for each option, including risk assessment, and cost benefit analysis.

# Project Principles



- There is a strong desire by all stakeholders to maintain the LTC beds in the County
- There is limited appetite to sustain the status quo from an operating budget perspective and the requirement for subsidy by Oxford County
- Alternative service delivery models as well as efficiency opportunities will be considered as part of the Service Review (e.g. partnerships with other municipalities, health care providers, private, shared services, outsourcing)
- The results of Oxford County's Service Review will provide an opportunity for dialogue with a full range of stakeholders including the South West Local Health Integration Network (SW LHIN) and MoHLTC regarding the current state and future sustainability of municipal LTC homes

# Single Facility



## Description:

Oxford County will operate a single, consolidated 228 bed facility at the Woodstock location through expansion of the existing building, transferring the Tillsonburg and Ingersoll beds to Woodstock and either disposing of the satellite facilities or leveraging for non-LTC service provision.

	Benefits	RISKS
	<p>Reflects positive attributes of the alternative that contribute to likelihood of business success as determined by decision criteria (guiding principles) to lower operating costs, keep total beds, and deliver good service</p>	<p>Reflects known negative or complicating attributes related to guiding principles. In addition, captures a selection of risk themes according to perceived likelihood and impact on Woodingford Lodge operations and Oxford County's oversight role</p>
OPERATIONAL	<p><b>LTC Service Provision</b></p> <ul style="list-style-type: none"> <li>Residents and families can expect continuity with familiar living environment</li> <li>Oxford County maintains operational control over 228 beds</li> <li>Continued provision of current standard of service for 228 beds</li> <li>Continued pride in protecting a highly regarded public service for the County</li> </ul> <p><b>Resourcing</b></p> <ul style="list-style-type: none"> <li>Through economies of scale, fewer resources will be required for certain areas of the operation, such as administration and maintenance</li> <li>Consolidation of resources may provide staff scheduling efficiencies</li> <li>Ability to leverage Woodstock services for all 228 beds, such as food and laundry, thereby reducing duplicative services currently required at the satellites</li> <li>Opportunities for resourcing for programs or services offered from the satellite facilities should Oxford County maintain the assets</li> <li>Requirement to maintain all three facilities during the expansion of Woodstock, in addition to project and change management teams</li> </ul>	<p><b>LTC Service Provision</b></p> <ul style="list-style-type: none"> <li>Temporary interruption/inconvenience to Woodstock facility operations through expansion/business continuity</li> </ul> <p><b>Resourcing</b></p> <ul style="list-style-type: none"> <li>Culture and ability to implement change within Woodingford Lodge may not be supportive of the required transformation – also, steps to manage change may be insufficient to ensure a successful outcome</li> <li>Planned reduction in total number of staff following consolidation of the three facilities</li> <li>Woodingford Lodge staff may be dissatisfied with their working conditions during the expansion, creating an inability to develop and maintain a productive work force, and could lead to increased staff turnover</li> </ul> <p><b>Expansion Project</b></p> <ul style="list-style-type: none"> <li>Feasibility of physical expansion of existing Woodstock facility and impact on current operation</li> <li>Contractors may not be appropriately identified/managed, which could lead to adverse consequences due to poor performance /negative public image – also, possible that contractor may not adhere to it's contractual obligations</li> <li>Contractual obligation regarding the satellite facilities, e.g. with local hospitals may constrain opportunities</li> <li>Demands compliance with building /environmental regulations governing land-use</li> <li>Transformation may fail to achieve the benefits projected in the business case that supported this option</li> </ul>
FINANCIAL	<p><b>Potential Savings (projections based on 2012 actuals)</b></p> <ul style="list-style-type: none"> <li>Reduce non-nursing staff hours, estimate potential 33% cost savings (up to \$252K/yr (PSS) and \$198K/yr)</li> <li>Reduce operational support costs by bringing services into Woodingford Lodge/outsourcing; estimate 20% savings (up to \$190k)</li> <li>Reduce reserve (up to \$455K/yr (NPC) and \$106K/yr) based on efficiencies</li> <li>Eliminate dietary purchased services (up to \$768K/yr)</li> <li>Eliminate laundry purchased services (up to \$102K/yr)</li> <li>Reduce debt repayment (up to \$897,000/decreasing yearly)</li> </ul> <p><b>TOTAL: \$3.0M</b></p> <p><b>Potential One Time Cash Benefit</b></p> <ul style="list-style-type: none"> <li>Gain cash value from disposal of the satellite facilities (market value)</li> </ul> <p><b>Potential Revenue</b></p> <ul style="list-style-type: none"> <li>Should Oxford County maintain the satellite facilities, there are revenue-generation opportunities through leasing or provision of funded programs</li> </ul>	<p><b>Potential Savings</b></p> <ul style="list-style-type: none"> <li>May be considerably less than estimated</li> <li>May be unable to identify buyer for satellite facilities</li> </ul> <p><b>Costs</b></p> <ul style="list-style-type: none"> <li>Must secure the necessary financing to expand the Woodstock facility</li> <li>Potential for increased costs to existing operation during expansion</li> <li>Selling the satellite facilities and existing their capital loans may trigger a financial penalty depending on contract details</li> </ul> <p><b>Impact on Funding</b></p> <ul style="list-style-type: none"> <li>May trigger loss of \$10.50 per diem debt repayment revenues from the Ministry for each of the satellite facilities, i.e. Uncertainty regarding transferability of capital debt subsidy from the satellites to the expanded facility</li> <li>Consolidation may impact per diem revenues from the Ministry</li> </ul>
STAKEHOLDERS	<p><b>LTC Service Provision</b></p> <ul style="list-style-type: none"> <li>Positive impact on community stakeholders as continue to run 228 beds in the community</li> <li>Presence of existing private operators in Ingersoll and Tillsonburg may reduce local service impact of moving beds to Woodstock</li> </ul> <p><b>Resourcing</b></p> <ul style="list-style-type: none"> <li>Repurposing of satellite facilities has potential to enhance the continuum of care with related services for local residents</li> <li>Renovation and expansion activities provide temporary employment opportunity to contractors in the community</li> </ul>	<p><b>LTC Service Provision</b></p> <ul style="list-style-type: none"> <li>Residents will need to move and adapt to entirely new surroundings</li> <li>Residents and families may not be satisfied with the services provided in a larger facility</li> <li>Transition to single facility may not be aligned with and reflective of the demographic trend of the population served</li> <li>Adverse public opinion or media coverage regarding Woodingford Lodge may arise from discontent</li> </ul> <p><b>Resourcing</b></p> <ul style="list-style-type: none"> <li>Facility expansion may involve decreased parking, increased traffic and other impacts to community</li> <li>Bargaining agent impact on decreasing number of staff</li> <li>Volunteers (eg those currently working at satellite will work in Woodstock)</li> <li>Direct service providers to satellite facilities will be affected</li> <li>Cost savings and service level will likely be scrutinized by public and other government departments</li> </ul>

# Single Facility

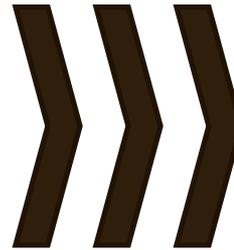
## Key Considerations

Expansion of Woodstock to accommodate 228 beds is conditional on land use, building and environmental considerations as well as capital investment

Impact and opportunities for satellite facilities

Expansion will require an investment of resources (costs/time/effort), especially planning capacity to sequence continued service and expansion

Cost savings and service level will likely be scrutinized by public and other government departments



## Implementation Priorities

Develop the Business Case - Engage appropriate staff and produce a strong business case that includes facility, operational and capital feasibility as well as project benefits and risks

Develop the Project Plan: expansion activities require considerable planning and project management

Develop the Change Management and Communications Plans: This is key for staff, residents and all stakeholders

### **Recommendation:**

**This option meets the explicit guiding principles: (i) maintain 228 beds; (ii) decrease operating costs. Also meets the implicit guiding principle: (iii) does not compromise service.**

**Compared to the status quo, decrease costs, and revenue generating options, it offers the potential for a desirable level of cost savings that become inherent to the lodge's service delivery operations. Unlike outsourcing and phasing-out options, which involve a degree of uncertain service satisfaction and no guarantee of keeping all 228 beds, this option works with known factors and ensures that Oxford County maintains full control of the beds.**

**Moving ahead with an initial implementation plan will require a multi-year outlook – from the next 3 months progressing to the 5 year mark. Although the next step should involve solidifying the business case for the option with a thorough risk analysis, stakeholder consultations and more detailed financial analysis, it is advisable to start with an Implementation Roadmap to guide further action.**

# Single Facility – Woodingford Lodge Implementation Roadmap

## Summary

The Implementation Roadmap provides a high-level 5 year strategy with high-level action initiatives that will guide Oxford County in moving the project forward and focusing its efforts on actions that will aid Woodingford Lodge into becoming a single facility home. At the 60 month point, the Woodingford Lodge is past the initial 'implementation stage' – where change management and its elements are introduced - and will have entered into the 'sustain momentum stage' – where the project should be positioned to assess what is necessary to close out the project and finalize the transition.

## Legend

The colours used in the roadmap are meant to help to delineate the different areas of consideration that each initiative falls under. These areas are consistent with those used in the Options Analysis performed for Oxford County.

Accountability
Administrative
Operational
Financial
Operational/Stakeholder

## Single Facility – Woodingford Lodge Action Initiatives

0-3 months	3-12 months	12-36 months	36-60months
Determine Sell or Repurpose: Work with stakeholders to determine the feasibility and will to sell the Woodingford Lodge facilities in Ingersoll and Tillsonburg.	Sell: Identify interested buyer(s) of Ingersoll and Tillsonburg facilities and complete process for phased legal sale of buildings (taking into account the sequence of selling one or both facilities at once, and the completion timelines of the expanded Woodstock facility).	Support Staff Transition: Work with Unions/bargaining agents and municipal staff from finance, HR, etc to manage and support transition of affected staff members to new employment opportunities	Report Success Story: Compile information and use a baseline year to show success of quality service and cost savings to Oxford County.
Council Approval: Develop communications to engage Council and seek support for decision based on findings of feasibility to sell buildings.	Re-purpose (Alternative): If sale is not possible, determine a desired alternative use for Ingersoll and Tillsonburg facilities and develop business case/implementation plan for repurposing these facilities.	Ensure Timely Completion of Expansion and Transfer: Monitor progress and performance of construction contractors, and arrange for transfer of residents and material from satellite facilities to new Woodstock facility. Address any shortcomings in contractor performance that might affect implementation timeline, quality of service to residents or work environment for staff involved in ongoing operations.	Review Lessons Learned and Address Any Lingering Inefficiencies: Review lessons in operating an expanded facility and continually strive to streamline processes and iron-out inefficiencies. Pay attention to trends in staff morale and ensure to performance is managed – poor performance corrected and strong performance rewarded.
Get Organized: Appoint a lead individual in charge of the transformation project, determine who will participate in the project team and convene members to launch the project with a charter that clearly outlines roles and responsibilities.	Award the Construction Contract: Craft requests for proposal to expand Woodstock facility and award contract(s) and collaborate in plans with contractors to minimize interruption/disturbance and inconvenience to residents and staff both during for ongoing operation of Woodstock facility during build work phase.	Sustain Service Delivery During Transition: Anticipate potential increase absenteeism among staff and options for adjusting operations at satellite facilities. Maintain quality standards and ensure resident care remains center focus of ongoing operations. Work with contractors to minimize impact of expansion activities on resident experience (Woodstock). Provide staff with orientation and increased management support as move date approaches. Keep operating support departments informed of changes in administration.	Compile Cost Savings: Demonstrate financially how much cost-savings were achieved (if any) during the transition period to a single facility. Also, capture the forecasted enduring cost-savings on an annual basis using 2012 actual figures as the baseline for analysis Provide this information to administration as required and as a strong evidence base for future discussions.
Strategic Engagement: Engage early with Unions/bargaining agents and focus on transparency and building on relationship of trust.	Develop Expansion Requirements: Work with administration to identify and plan to meet requirements for expanded infrastructure, programs and miscellaneous requirements that would allow the Woodstock facility to extend its service delivery to 68 additional beds from the satellite facilities (while taking into account sequence of activities to minimize interruption and disruption of ongoing services to current 160 residents, families and staff in Woodstock facility).	Incorporate expanded Program/Service Delivery: Work with program leads to ensure that the full compliment of residents have equal access to programs and services after the transition of additional beds occurs. Schedule and provide opportunities for integration of all residents at Woodstock home with an aim to ease adaptation to new people and new surroundings for original and new residents alike.	Conduct Survey of Families//Community: Conduct survey of Woodingford Lodge families and the surrounding community (including former Ingersoll and Tillsonburg facilities) to better understand the impacts on the client base (cost to economy, perceived inconvenience to residents, etc.).
Ensure Availability: Determine available space or property for expanding Woodstock infrastructure capacity to operate 68 more beds, and check with regulations to address issues like building permits, environmental rules, etc.	Enable Management for Success: Schedule and hold meetings with management for all facilities to raise awareness for change - provide information and equip management with the information and confidence to manage change.	Financial Performance Measures for Transition: Establish and track financial performance (cost savings, budget vs. actual, and any unexpected costs) of transition to a single facility. Perform assessment during budgeting process for any probable inefficiencies or contingencies.	
Better Understand the Numbers: Perform a preliminary cost and benefit analysis of selling the buildings and transitioning to a single facility at Woodstock; also considering the repurpose alternative.	Enable Staff for Success: Schedule and hold meetings with staff at all facilities to raise awareness of change, answer questions and share available information and direction for change along timeline	Work with Banks: Collaborate to ensure that debt repayment is managed and that the interest rates do not increase as a result of transition to a single facility.	
Prepare Messaging: Prepare communication for residents , families and website to explain the results of the Service Review and the future direction for Woodingford Lodge.	Detail Financial Impacts: Determine detailed costs of contracting expansion and transition of residents and material to Woodstock facility and advise senior management of any concerns related to budget and ability to meet contractual-financial obligations; determine feasibility of desired alternative use for Ingersoll and Tillsonburg facilities (Alternative) . Is there an acceptable revenue source for repurposing the facilities? Use financial data to help decide on repurpose use (if necessary).	Mitigate Risk of Negative Publicity: Monitor news outlets and build on relationships with contacts to ensure balanced and positive message is being heard. Update internet site to keep information current on progress and the fundamentals of Woodingford Lodge's new single facility.	
	Formulate Dialogue with Residents and Community: Implement	Perform Outreach to Families: Personally contact families of	

# Phase out



**Description:** Steadily reduce the number of LTC facilities owned and operated by the county with a view to eventually privatizing all three facilities of Woodingford Lodge. Using a phased approach, sell one satellite facility at a time, or partner with a private operator, with end goal for Oxford County to exit the LTC business.

	Benefits	RISKS
OPERATIONAL	<p>Reflects positive attributes of the alternative that contribute to likelihood of business success as determined by decision criteria (guiding principles) to lower operating costs, keep total beds, and deliver good service</p> <p><b>LTC Service Provision</b></p> <ul style="list-style-type: none"> <li>Residents and families could expect continuity with familiar living environment if same facilities were maintained by new operators</li> <li>Continued provision of current standard of service for 228 beds</li> </ul> <p><b>Resourcing</b></p> <ul style="list-style-type: none"> <li>Opportunities for resourcing for programs or services offered from the satellite facilities should Oxford County maintain the assets</li> </ul>	<p>Reflects known negative or complicating attributes related to guiding principles. In addition, captures a selection of risk themes according to perceived likelihood and impact on Woodingford Lodge operations and Oxford County's oversight role</p> <p><b>LTC Service Provision</b></p> <ul style="list-style-type: none"> <li>Oxford County phasing out of business of LTC operations</li> <li>Partnership introduces new operational variables that will influence service delivery</li> </ul> <p><b>Resourcing</b></p> <ul style="list-style-type: none"> <li>Culture and ability to implement change within Woodingford Lodge may not be supportive of the required transformation – also, steps to manage change may be insufficient to ensure a successful outcome</li> <li>Impact on staffing (bargaining agent): Pay structure and difference between union/non-union workers would be barrier for private operators or partnerships.</li> <li>Woodingford Lodge staff may be dissatisfied with their working conditions during the changes, creating an inability to develop and maintain a productive work force, and could lead to increased staff turnover</li> </ul> <p><b>Procurement Project</b></p> <ul style="list-style-type: none"> <li>Requirement to develop RFP selection criteria</li> <li>Feasibility of changes and impact on current operations</li> <li>Contractual obligation regarding the satellite facilities, e.g. with local hospitals may constrain opportunities</li> <li>Transformation may fail to achieve the benefits projected in the business case that supported this option</li> </ul>
FINANCIAL	<p><b>Potential Savings (projections based on 2012 actuals)</b></p> <ul style="list-style-type: none"> <li>Eliminate net budget of both satellite facilities (up to \$2.96M/yr), then eventually Woodstock also (up to \$7.28M/yr)</li> </ul> <p><b>Potential One Time Cash Benefit</b></p> <ul style="list-style-type: none"> <li>Gain cash value from disposal of the facilities (market value)</li> </ul> <p><b>Potential Revenue</b></p> <ul style="list-style-type: none"> <li>Should Oxford County maintain the satellite facilities, there are revenue-generation opportunities</li> <li>Potential to stimulate revitalization of facilities through leasing or provision of funded programs</li> </ul>	<p><b>Potential Savings</b></p> <ul style="list-style-type: none"> <li>May be considerably less than estimated</li> <li>May be unable to identify buyer for the facilities and operations</li> </ul> <p><b>Costs</b></p> <ul style="list-style-type: none"> <li>Selling the facilities and existing their capital loans may trigger a financial penalty depending on contract details</li> <li>Depending on private operator arrangement, the County may incur transaction costs or management fees</li> <li>Severance and exit costs not defined</li> </ul> <p><b>Impact on Funding</b></p> <ul style="list-style-type: none"> <li>May trigger loss of \$10.50 per diem debt repayment revenues from the Ministry for each of the satellite facilities, i.e. Uncertainty regarding transferability of capital debt subsidy from the satellites to the expanded facility</li> <li>Consolidation may impact per diem revenues from the Ministry during the transition</li> </ul>
STAKEHOLDERS	<p><b>LTC Service Provision</b></p> <ul style="list-style-type: none"> <li>Positive impact on community stakeholders should the 228 beds remain in the community</li> <li>Build on current presence of existing private operators in the County</li> <li>Potential to increase number of beds in the County through leveraging impact of recent bed number shifts in the SW LHIN area</li> </ul> <p><b>Resourcing</b></p> <ul style="list-style-type: none"> <li>Repurposing of satellite facilities has potential to enhance the continuum of care with related services for local residents</li> </ul>	<p><b>LTC Service Provision</b></p> <ul style="list-style-type: none"> <li>Residents could need to move and adapt to entirely new surroundings</li> <li>Residents and families may not be satisfied with the services provided by the new operators</li> <li>Risks that MOHLTC shifts the beds out of the County</li> <li>Adverse public opinion or media coverage may arise from discontent</li> </ul> <p><b>Resourcing</b></p> <ul style="list-style-type: none"> <li>Bargaining agent impact on changes</li> <li>Volunteers may no longer be required by new operators</li> <li>Direct service providers to satellite facilities will be affected</li> <li>Cost savings and service level will likely be scrutinized by public and other government departments</li> </ul>
LEGISLATION/ REGULATION	<ul style="list-style-type: none"> <li>Opportunity to leverage system wide changes (i.e. capital improvement projects for LTC)</li> <li>Risk that MOHLTC could shift beds elsewhere in the province</li> </ul>	<ul style="list-style-type: none"> <li>Requirement for Ministry and LHIN approval</li> <li>Collaboration with bargaining agent for impacted workers will influence decisions</li> <li>Property Contracts with Alexandra Hospital and Tillsonburg Memorial Hospital may restrict decisions on disposal of assets</li> </ul>

# Phase out

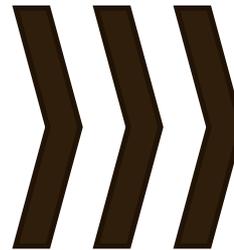
## Key Considerations

Phasing out the LTC business is conditional agreement from the MoHLTC and SW LHIN

Impact and opportunities for satellite facilities

Phasing will require an investment of resources (costs/time/effort), especially planning capacity to sequence continued service and expansion

Complexity and uncertainties involved are high; anticipate much stakeholder involvement



## Implementation Priorities

Develop the Business Case - Engage appropriate staff and produce a strong business case that includes facility, operational and capital feasibility as well as project benefits and risks

Develop the Project Plan: expansion activities require considerable planning and project management

Develop the Change Management and Communications Plans: This is key for staff, residents and all stakeholders

### Recommendation

**This option meets the explicit guiding principles, but with some degree of uncertainty: (i) could maintain 228 beds; (ii) decrease operating costs. Also likely to meet the implicit guiding principle: (iii) does not compromise service. Of options considered, Phase-out accepts certain risks regarding no guarantee of keeping all 228 beds in the County, and best meets the financial concerns with the operating costs of the facilities.**

**Compared to the status quo, decrease costs, and revenue generating options, it offers the potential for a significant level of cost savings. It is a broader alternative so it's possible to work outsourcing and sell and lease back into the solution at various phases, which is also provides the advantage of providing time for course adjustments and more informed decisions as the phases are implemented. Unlike the single facility option, there is no requirement for securing funds to allow renovation at Woodstock and potential to have any combination of reduced costs and partnership in service delivery.**

**Moving ahead with an initial implementation plan will require a multi-year outlook – from the next 3 months progressing to the 5 year mark. Although the next step should involve solidifying the business case for the option with a thorough risk analysis, stakeholder consultations and more detailed financial analysis, it is advisable to start with an Implementation Roadmap to guide further action.**

# Phase Out – Woodingford Lodge Implementation Roadmap

## Summary

The Implementation Roadmap provides a high-level 5 year strategy with high-level action initiatives that will guide Oxford County in moving the project forward by focusing efforts on actions that will aid in ‘Phasing-out’ operation of Woodingford Lodge and completely privatizing Long Term Care in the county. At the 60 month point, the Woodingford Lodge is past the initial ‘implementation stage’ – where change management and its elements are introduced - and will have entered into the ‘sustain momentum stage’ – where the project should be positioned to assess what is necessary to close out the project and finalize the transition.

## Legend

The colours used in the roadmap are meant to help to delineate the different areas of consideration that each initiative falls under. These areas are consistent with those used in the Options Analysis performed for Oxford County.

Accountability
Administrative
Operational
Financial
Operational/Stakeholder

## Phase Out – Woodingford Lodge Action Initiatives

0-3 months	3-12 months	12-36 months	36-60months
Determine Sell, Partnership or Repurpose: Work with stakeholders to determine the feasibility and will to find a cost-sharing partner in offering service delivery for the Tillsongburg or Ingersoll facility; or alternatively to sell or repurpose the facility and reduce service by 34 beds.	Sell: Identify interested buyer(s) of satellite facilities and complete process for phased legal sale of one building.	Support Staff Transition: Work with Unions/bargaining agents and municipal staff from finance, HR, etc to manage and support transition of affected staff members to new employment opportunities.	Assess Opportunities to Transition to Sell, Partner or Repurpose second satellite facility (Alternative): At the 38 month mark, begin dialogue about when to transition to a single facility or to completely phase-out of LTC business.
	Partner (Alternative) : Identify interested partner(s) to jointly share cost-burden and complete process to enter agreement into partnership for one satellite facility.		
Determine Status Quo or Sell and Lease Back: Work with stakeholders to determine the feasibility and will to sell and lease back one or both of the remaining facilities (Satellite or Satellite plus Woodstock).	Re-purpose (Alternative): If sale is not possible, determine a desired alternative use for Ingersoll and Tillsongburg facilities and develop business case/implementation plan for repurposing these facilities.	Strong Coordination: provide strong coordination efforts between departments, council, and SW LHIN and Ministry to keep abreast of changes in the legislative and regulatory realm that might have considerable impact on the success of privatizing LTC in Oxford County.	Review Lessons Learned and Address Any Lingering Inefficiencies with Partnership/Repurpose (Alternative): Review lessons in operating an expanded facility and continually strive to streamline processes and iron-out inefficiencies. Pay attention to trends in staff morale and ensure to performance is managed – poor performance corrected and strong performance rewarded.
Council Approval: Develop communications to engage Council and seek support for decision based on findings of determining ability to Sell or enter a Partner Repurpose Sell and Lease Back buildings.	Sell and Lease Back (Alternative): Identify interested buyer(s) of satellite facilities and complete process to sell the building and lease it back to continue providing service as an Oxford County operated LTC home.		
Strategic Engagement: Engage early with Unions/bargaining agents and focus on transparency and building on relationship of trust.			Compile Cost Savings: Demonstrate financially how much cost-savings were achieved (if any) during the transition period to a single facility. Also, capture the forecasted enduring cost-savings on an annual basis using 2012 actual figures as the baseline for analysis Provide this information to administration as required and as a strong evidence base for future discussions.
Get Organized: Appoint a lead individual in charge of the transformation project, determine who will participate in the project team and convene members to launch the project with a charter that clearly outlines roles and responsibilities.	Partnership Orientation (Alternative): If entering a cost-sharing partnership at one facility, schedule planning meetings between management at satellite facility and partner organization. Agree on action plan and time frame to implement new partnership arrangement. Allow for learning curve, but also emphasize goals for quality standards.	Sustain Service Delivery During Transition: Anticipate potential increase absenteeism among staff and options for adjusting operations at satellite facilities. Maintain quality standards and ensure resident care remains center focus of ongoing operations. Provide staff with orientation and increased management support as key milestone dates approach. Keep operating support departments informed of changes in administration.	Conduct Survey of Families//Community: Conduct survey of Woodingford Lodge families and the surrounding community (including former Ingersoll and Tillsongburg facilities) to better understand the impacts on the client base (cost to economy, perceived inconvenience to residents, etc.).
Enable Management for Success: Schedule and hold meetings with management for all facilities to raise awareness for change - provide information and equip management with the information and confidence to manage change.	Sell and Lease Back Orientation (Alternative): If selling one or more facility and leasing it back for operations, schedule planning meeting between management and staff to address to introduce new owners and address any specific changes in licence agreement that affects operations.	Mitigate Risk of Negative Publicity: Monitor news outlets and build on relationships with contacts to ensure balanced and positive message is being heard. Update internet site to keep information current on progress and the new arrangements (be they partnership, sale, etc).	
Better Understand the Numbers: Perform a preliminary cost and benefit analysis of selling or repurposing one of the satellite facilities; Assess financial implications for cost-sharing partnership.	Enable Staff for Success: Schedule and hold meetings with staff to raise awareness of change, answer questions and share available information and direction for change along timeline.		
Better Understand the Numbers (II): Perform a preliminary cost and benefit analysis of selling and leasing back one of the satellite facilities as well as Woodstock and one of the satellite	Detail Financial Impacts: Determine detailed costs of chosen method of transitioning to two county-operated facilities (sale, partnership) and advise senior management of any concerns related to budget and ability to meet contractual-financial obligations; With the remaining two facilities, determine accurate costs and benefits of selling and leasing back either the satellite facility alone or both the satellite facility		