



PRESBYTERIAN AGED CARE  
NSW AND ACT

## PAC Strategic Plan 2007-2012

Mid-Term Review December 2009



## Foreword

Four years on from the creation of Presbyterian Aged Care NSW & ACT (PAC), we reflected on the successful creation of a unified organisation to take forward the work of the Presbyterian Church in caring for older people across New South Wales and the Australian Capital Territory.

Going forward, we agreed to build effectively on what has been achieved, recognising some significant challenges ahead as our population ages and government policies on ageing and aged care continue to evolve.

This Strategic Plan reaffirms the integral link between the services provided by PAC and the broader Presbyterian Church and Congregations. The Plan is based on a commitment to growing the services we provide for older people and their carers and diversifying to ensure a viable and sustainable organisation into the future. It sets our broad strategic directions for the 5 years from 2007 to 2012.

The Strategic Plan 2007-2012 was subject to mid-term review in late 2009. The review involved consultation on the overall framework and the four identified strategic objectives, conducted at sessions with:

- PAC Managers and key staff, at the PAC Conference 22 October 2009
- PAC Committee, at the PAC Committee meeting 9 November 2009

Feedback gathered at these consultations, and additional input from senior staff, was used to update the Plan.

We commend the Strategic Plan to you. The PAC Committee and Management look forward to working with our residents, clients, their families and our staff and volunteers to make it happen.

Rev Bruce Christian  
Convenor  
PAC Committee

Paul Sadler  
Chief Executive Officer

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# 1 Introduction

The creation of Presbyterian Aged Care NSW & ACT (PAC) as a unified organisation has been a significant achievement over the past four years. This period of consolidation has included the development of standardised management policies and procedures, consistent approaches to service operations and improved financial performance. PAC has also provided assistance to Congregational aged care / self care programs. The achievement is a result of God's will and the commitment of the PAC Committee, Management Team and Staff who have successfully steered PAC through a period of organisational and cultural change.

This Strategic Plan reflects PAC's next challenge, which is to retain and embed our values and strengths, while looking to service growth and diversity to ensure a viable and sustainable organisation into the future.

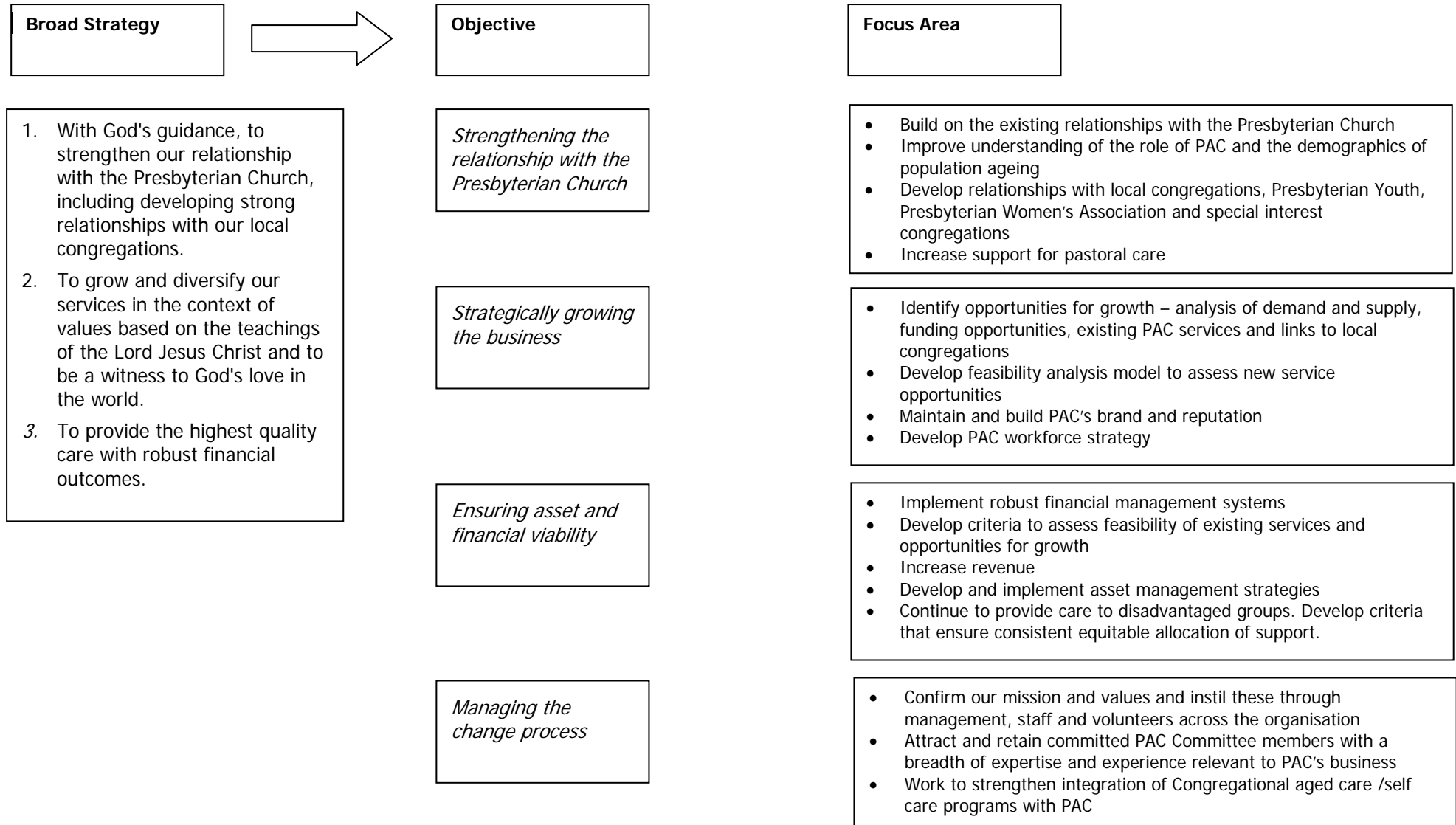
This plan reflects the broad strategic directions for the 5 years from 2007 to 2012. The Strategic Plan reaffirms the integral link between the services provided by PAC, the Presbyterian Church and Congregations.

The Strategic Plan focuses on:

1. Building the relationship between Presbyterian Aged Care (PAC) and the Presbyterian Church
2. Strategically growing the business
3. Ensuring asset and financial viability
4. Managing the change process

Review of the Plan in late 2009 confirmed the importance of these four objectives as the core of the PAC Strategic Plan and recorded the significant progress which had been made towards achieving them.

## 2 Strategy Summary



# 3 S1 - Strengthening our Relationship with the Presbyterian Church

## 3.1 Strategy Statement

### ***Strengthen the relationship between Presbyterian Aged Care and the Church***

Our broad strategic directions can be summarised as follows:

- Our organisation seeks to provide care to older people with values based on the teachings of the Lord Jesus Christ. Aged care is an important part of the ministry of the Church; we need to raise awareness of PAC and our mission within the wider ministry of the Church. We need to improve understanding of the challenges of an ageing population and identify ways in which the Church and PAC can meet these challenges. Realising our future vision for PAC and the services we provide requires the active support of the Presbyterian Church and God's guidance.
- Where appropriate, we seek to involve local congregations in the provision of services to older people through employment opportunities and voluntary activities. This can be facilitated by fostering close links with local Ministers and representatives of Presbyterian Youth (PY) and the Presbyterian Women's Association (PWA).
- We need to provide opportunities for Christian young people to learn about and become involved in PAC through scholarships, educational opportunities and involvement of young people in setting the direction of PAC services. This is important to our long term sustainability and organisational capacity.

- We need to strengthen the commitment to pastoral care and the commitment to Christian values through the organisation and within PAC services. This is what sets a church aged care organisation apart from other aged care providers and underscores our caring role.

## 3.2 Focus Areas

These broad strategies should inform action plans for each of the following priority focus areas:

- Relationship with the Church - Build awareness and understanding of the issues of an ageing population and the role of PAC as part of the ministry of the Church.
  - Build on the existing links both at Statewide and local congregation level.
  - Help the broader Church community understand the impact of demographic ageing.
  - Develop relationships with special interest congregations to respond to the increase in non-English speaking older people.
- Congregation involvement – Where appropriate, actively foster local congregation involvement with aged care.
  - Integrate ministries of local churches and PAC – e.g. shared staffing with churches.
  - Provide reports on local PAC services to local Church congregations.
  - Set aside money to fund partnerships (e.g. for community care) between PAC and local churches.
  - Foster relationships with PWA.
- Involvement of young people - Strengthening the involvement and providing opportunities for young people to engage with PAC services.
  - Create career opportunities for Christian young people in PAC (e.g. incorporate Aged Care Certificate into training, create opportunities for young Christian professionals to train with PAC).
  - Foster relationships with PY – e.g. camp visits, involvement in PAC Committee.
  - Consider educational grants from PAC – for aged care outreach.

- Pastoral Care and Christian Values.

- Appoint Christian senior PAC staff.
- Develop pastoral care courses within PAC for interested staff and volunteers.
- Expand teaching on pastoral care/ aged care ministry in theological education.

### 3.3 Lead

PAC Committee Members and Management Team

### 3.4 Action Plan

Focus Area	Action ('New' actions added at mid-term review)	By Whom	Status at mid-term review
Relationships with the Church	Provide overview of demographics of ageing and PAC strategic directions to the Board of Trustees.	PAC Committee	Completed
	Identify opportunities for further support, partnerships.		Ongoing
Congregation Involvement	<i>New:</i> Conduct a strategic review of relationships between PAC and the Presbyterian Church.	Management Team, PAC Committee	June 2010
	Work with Local Advisory Groups to develop profiles of community needs, barriers and opportunities and to strengthen relationships between congregations and PAC at the local level.	Management Team, PAC Committee, Managers	Ongoing
Young people	Seek involvement of PY on the PAC Committee.	PAC Committee	Approach completed 2008
	Establish links with theological colleges through invitations to visit services, placements, or PAC presentations/discussions with students.	Management Team, PAC Committee	Completed
Pastoral Care	Undertake assessment of current resource commitments to pastoral care in services.	Management Team	Completed
	Determine opportunities to increase commitment through volunteering or increased budget commitment.	PAC Committee, Management Team	Completed
	Raise the profile of pastoral care with all Managers and service staff.	Management Team, Managers	Ongoing
	<i>New:</i> Prepare training program for volunteers	Senior Chaplain	April 2010

## 4 S2 - Growing the business: 'Diversification with a purpose'

### 4.1 Strategy Statement

***Seek opportunities to grow our operations (residential care, community care and self care) where these opportunities are consistent with PAC mission and values, build upon existing service infrastructure, strengthen relationships with local congregations and are financially viable. Recognise that growth in quality and standards is as important as growth in size, and that growth is not desired for its own sake, but to enable PAC to provide the services and models it chooses.***

Our broad strategic directions can be summarised as follows:

- There are significant opportunities for growth in the aged care service sector. Meeting the needs of older people into the future requires a policy and service delivery shift, away from a predominance of residential care services, to services that support ageing in place, healthy ageing and independence. Increasingly funding opportunities will target community care and programs that enable ageing in place.

Government funding is inadequate to develop traditional high care facilities or to support the lowest levels of residential care, so alternative models of accommodation and care are required. Given its position within the church ministry and the support of local congregations, PAC is well placed to diversify through provision of community care and self care services. Growth will not be for growth's sake, but will have a broader purpose to strengthen relationships with the church and local congregations and to seek to provide care for older people within a framework of Christian values.

- Further work will be required to ensure an effective approach to providing community and self care is developed and interactions with current PAC

services, policies and procedures are assessed. PAC will need to ensure sufficient management capacity is dedicated to supporting new service development.

- Workforce shortages in the future have been identified as an outcome of changing population demographic. PAC has identified existing challenges in securing staff in some services. A thorough analysis of existing and future workforce requirements in the context of potential service growth and shortages in some professions will require PAC to develop a strategic and innovative approach to attracting and retaining staff.
- While PAC may not be one of the 'big players' in the aged care sector, it is not a small player either. Developing a sense of the PAC 'brand' and the values and care that set PAC apart from other providers will be critical in garnering the active support of the Church and local congregations. It will also provide older people and their families with the information they need to choose PAC services.

### 4.2 Focus Areas

These broad strategies should inform action plans for each of the following priority focus areas:

- Grow and diversify PAC services through expansion of residential, community and self care. Assess opportunities in related areas such as health and disability services as appropriate. Stay abreast of trends in consumer choice and government policy.
- Develop the capacity to manage community and self care programs effectively.
- Establish clear criteria (covering finances, workforce implications, management capacity etc) by which to identify and evaluate opportunities for growth.
- Maintain and improve PAC's reputation and 'brand' recognition – public profile, Christian values, high quality care and accommodation.
- Establish PAC workforce strategy to include recruitment, training, conditions, etc, and a focus on attracting and retaining younger staff.

### 4.3 Lead

Management Team

### 4.4 Action Plan

Focus Area	Action ('New' actions added at mid-term review)	By Whom	Status at mid-term review
Grow and diversify PAC services	Develop criteria and feasibility models to evaluate new service opportunities that includes: <ul style="list-style-type: none"> <li>- consideration of site mix</li> <li>- evaluation of revenue opportunities on new sites.</li> </ul>	Management Team, PAC Committee, Managers	Completed
	Project to review community needs and identify opportunities including repositioning service capacity according to geographic needs (e.g. church land, local congregation interest, partnership possibilities).	Consultants as required	Completed
	Develop and implement 'Growth' Plan including prioritisation of growth opportunities: <ul style="list-style-type: none"> <li>- Paddington</li> <li>- Ashfield</li> <li>- Congregational ILUs</li> <li>- Community care.</li> </ul>	Management Team, PAC Committee, Managers	Implementing
	<i>New:</i> Review Growth Plan, reconfirm goals, targets and criteria for evaluating opportunities.	Management Team	August 2010
	<i>New:</i> Develop strategy for expanding service provision to culturally and linguistically diverse communities.	Management Team	August 2010
Maintain and improve reputation of PAC	Develop and implement a strategic communications and marketing plan, including a clear, well-tested PAC brand.	Management Team, Consultants as required	Completed
	Refine and implement quality improvement processes including service audits, staff and resident interviews to monitor and continuously improve quality of care. Review quality benchmarks for residential aged care, in conjunction with implementation of care management software.	Management Team	Ongoing
	<i>New:</i> Extend benchmarking and audit tools into community care.	Management Team	June 2010

Focus Area	Action ('New' actions added at mid-term review)	By Whom	Status at mid-term review
	Develop printed newsletter, PAC website, online marketing, and PAC conference.  <i>New:</i> Review internet marketing strategy.  <i>New:</i> Develop brand and strategy for promoting ILUs.	Management Team  Management Team  Management Team	Completed  March 2010  2010-11
Develop the capacity to effectively manage community and self care programs	Review service delivery models for community and self care programs and identify a preferred model that represents 'best fit' for PAC.  Develop and implement community care / seniors' housing policies and procedures, including: <ul style="list-style-type: none"> <li>- Community care procedures</li> <li>- ILU policies (to meet Retirement Villages Act amendments).</li> </ul> Recruit community programs manager to Senior Management Team.	Management Team  Management Team  Management Team	Completed  December 2010  Completed
Establish PAC workforce strategy	Develop and implement HR policies and procedures.  Develop and implement a workforce strategy that aligns with growth opportunities, community and self care programs and includes targeted partnerships around training and recruitment.	Management Team  Management Team, Managers and staff, Consultants as required	June 2010  2008-11

## 5 S3 - Ensuring financial and asset viability

### 5.1 Strategy Statement

***To maintain PAC financial and service viability through robust financial and asset management.***

Our broad strategic directions can be summarised as follows:

- We cannot achieve PAC's mission and commitment to quality care without a strong and consistent focus on financial and asset viability.
- PAC is now well informed through feedback from Wallace Mackinnon & Associates and ACS Consultancy to assess our current financial performance across residential care, community care and self care services. This information, together with further work within the management team will enable us to develop robust financial models for future service delivery.
- Opportunities to maximize our revenue (e.g. through accommodation bonds) have been identified and will be pursued.
- PAC's foremost objective is to deliver quality aged care services in accordance with our Christian values. This objective and our fundamental values will ensure PAC continues to provide for disadvantaged groups. Criteria will be established to ensure we can provide this support in a sustainable way and that processes to determine the allocation of support are consistent, transparent and equitable.
- An asset management and maintenance strategy will be developed and will include annual reviews of all PAC buildings, regular maintenance audits and forward planning to enable accurate budgeting for asset-related costs.

- The outcomes of our needs and opportunities assessment (included in Growth - S2) will include an assessment of the future of current sites. The development of feasibility criteria will ensure this occurs in a consistent, planned manner that supports the long-term viability of PAC services while being cognisant of PAC's mission and links with local congregations.
- A key component of improving efficiency will be making use of new assistive technologies, care and management software and information management systems.

### 5.2 Focus Areas

These broad strategies should inform action plans for each of the following priority focus areas:

- Service viability – Continue to identify opportunities for financial efficiencies and quality improvement.
- Maximise revenue – Pursue introduction of market-linked bonds, identify and assess new funding opportunities (linked to S2).
- Develop and implement asset management and maintenance plan.
- Develop feasibility criteria for existing services and future growth.
- Develop criteria for allocation of support to disadvantaged groups.
- Analyse existing systems to ensure efficiency and effectiveness of organisation.
- Identify and implement new technologies to improve efficiency and quality of care outcomes.

### 5.3 Lead

Management Team

## 5.4 Action Plan

Focus Areas	Action ('New' actions added at mid-term review)	By Whom	Status at mid-term review
Ensure service viability	Maintain and improve efficiency by regularly reviewing service budgets and performance. Implement efficiency improvements where identified.	Managers, Management Team	Ongoing
Maximise revenue	Establish new policy on accommodation payments - set pricing on an individual room basis.	Managers, Management Team	Completed
	Establish and implement effective strategies to maximise revenue from the ACFI and other new government funding arrangements.	Managers, Management Team	Completed
	<i>New:</i> Develop resident administration policy and procedures manual and manual for handling ACFI assessments and reviews. Implement training for staff at all sites.	Management Team	June 2010
Establish asset management and maintenance plan	Maintain value of assets (buildings) - establish building checklist (repair) and annual review (eye to future, meeting needs of residents) - ongoing asset management.	Managers, Management Team, Building consultants as required	Completed, annual review in line with service growth strategy
Develop criteria for support to disadvantaged people/groups	In consultation with service managers, develop criteria to guide the equitable allocation of accommodation and care to those needing additional financial assistance/waiver of fees or access to in-kind support services.	Management Team, Managers	February 2010
Identify and implement new technologies to improve efficiency and care outcomes	Review opportunities for improved efficiency and care outcomes through adoption of new technologies and implement as required in areas such as assistive technologies, care and management software and information management systems.	Management Team, Managers	Completed (payroll, rostering)
	IT review	Management Team	February 2010
	<i>New:</i> Implement new care management software	Management Team, Managers	2010-2012

## 6 S4 - Managing the change process

### 6.1 Strategy Statement

***To effectively manage the change process and retain our strong Christian values as PAC services diversify and the organisation's staff, services and the number of people we care for and support grows.***

Our broad strategic directions can be summarised as follows:

- PAC's mission statement continues to reflect the fundamental objectives and commitments guiding the organisation. However the strategic planning process presents the opportunity to ensure that the PAC mission and value statements reflect our future directions and that the promises made to residents / clients and their loved ones can be honoured.
- As we seek out opportunities to grow and diversify the organisation, the process of organisational change that commenced with the unification of PAC NSW & ACT will continue. PAC has managed change very well in recent years. It is imperative we ensure open, two-way communication between all staff and families and residents / clients are kept up to date and informed of any service changes or new developments. Communication with Church congregations will also be critical.
- Over recent years the PAC Committee has been well served by committed members. At times, we have also experienced challenges in attracting and retaining the full quota of committee members. Meeting our strategic objectives will require a full Committee membership with a cross section of expertise and experience in order to support the organisation through the future period of growth and service development.
- Strengthening our relationships with local congregations is a key objective for the next 5 years. Ensuring our services provide consistent high quality care in keeping with Government regulations and licensing requirements is also

essential. Further integrating congregational aged care and self care services with PAC provides an opportunity to consolidate all Presbyterian aged care services and ensure efficient management and operational support can be provided across the business.

### 6.2 Focus Area

These broad strategies should inform action plans for each of the following priority focus areas:

- Confirm our mission and values and instil these through management, staff and volunteers across the organisation. Ensure mission and values are easily understood and widely promoted within both PAC and the Church.
- Work to promote awareness of PAC Committee membership within PAC and connections between PAC Committee and local levels of organisation.
- Strengthen linkage role of Local Advisory Committees, especially with respect to special interest congregations.
- Work to strengthen integration of Congregational aged care /self care programs with PAC.

### 6.3 Lead

Management Team

## 6.4 Action Plan

Focus Areas	Action ('New' actions added at mid-term review)	By Whom	Status at mid-term review
Confirm PAC's mission and values	The monthly managers' forum will review the existing mission statement and covenant and provide feedback to the PAC Committee in regards to values and principles to be considered in the review of the mission statement. The PAC Committee will develop a revised mission and value statement for consultation with families and residents / clients. The PAC Committee will endorse the revised mission and value statement.	Management Team, Managers, PAC Committee	Completed
Promote our mission and values across the organisation	Revised mission and values statement will be communicated to all staff, residents / clients and families.  <i>New:</i> Design and implement a training and communications program to support dissemination of mission and values, including a simplified version of values statement.  Regular written communications will be distributed to ensure that all staff are included in change processes.  Opportunities for networking and knowledge sharing between services (in addition to existing managers meetings) will be explored.	Management Team  Management Team  Management Team  Management Team	Completed  July 2010  Ongoing  Ongoing
Work to attract and retain a diverse range of PAC Committee Members	S1 sets out key actions for strengthening the relationship with the Presbyterian church, these actions may also provide opportunities to engage with future PAC Committee members.  A PAC Committee strategy will be developed and implemented, identifying the skills and experience required to support PAC achieve the strategic objectives set for next 5 years. The strategy will target members of the Church and members of the community with strong Christian values and the required expertise or experience.	PAC Committee, Management Team, consultants as required	Ongoing
Work to strengthen the integration of the congregational and self care programs with PAC	Integration of Wollongong residential care service and self care units into PAC.  Complete relationship agreement and provide ongoing support to St Andrew's Village, Canberra.  Support other congregational self care units as required.	PAC Committee, Management Team	Completed  Review June 2010  Ongoing