



New Path Foundation

Strategic Plan
2021-26

We have finalized the Vision, Mission and Guiding Principles for New Path Foundation from comments following the May Board Meeting

Our Vision - Innovative approaches supporting compassionate communities leading to better futures

Our Mission

New Path Foundation seeks to lead in the development and empowerment of strong compassionate social communities through innovative shared services. New Path Foundation shall expand to new locations while continuing to enrich the services we currently provide to existing communities.

New Path Foundation seeks to inspire and empower change in the following areas:

- To encourage organizations to operate efficiently and effectively
- To mobilize community support to meet local community identified needs
- Through the development and management of philanthropic investment

New Path Foundation is committed to provide:

- **Social Purpose Real Estate Development** that improves the efficiency of social and charitable organizations through the operation of shared facilities and support services;
- **Social Capacity Development** through the allocation of resources to support coaching, strategic advice, training consciousness shifts or services that further enhance the work of the social services sector to respond to community needs;
- **Social Enterprise Development** through our Ventures Service which continues to explore better ways of supporting our stakeholders and community with an eye on fiscal reinvestment.

Our Guiding Principles

- Leadership - We actively seek to influence change in our communities, while also assisting other communities in this change.
- Integrity - We value diversity, and treat everyone with respect, compassion and dignity.
- Stewardship - We are committed to transparency and are accountable to, and hold a privileged position of trust with, our donors, staff and community partners.
- Entrepreneurship - We are comfortable with measured risk, learn from our successes and challenges, and embrace opportunities that will maximize our impact.
- Collaboration - We actively encourage, support and invest in partnerships.
- Excellence - We are committed to personal, professional and organizational development leading to the delivery of the highest quality philanthropic investment and community support.
- Advocacy - We champion the-needs of vulnerable children, youth and families.
- Sustainability – We are committed to the long-term health and sustainability of the organization and ensure that all decisions reflect this intent.

We reviewed and discussed a set of Strategic Goals for the period (2021-2026). While these may need further refinement, we will use them to define changes to the Operating Model needed to achieve these goals

1. **Double Locations** - We will double the number of locations over the next five years from the current three locations to six – either through facility ownership OR purchase of service agreements for management support. At least one of these locations will be outside of the current Simcoe County catchment area
2. **Extend Services** - We will extend our Venture Services offerings from the current reception and maintenance services to include new services such as administration, finance and accounting, fundraising and information technology services. New services will be provided as needed to existing clients as well as new ones both within the common roof model and externally.
3. **Increase Revenue/USG** - We will continue to increase our annual revenue from \$1.45M in 2019/20 to \$2.5M in 2025/26. During this period we will increase the percentage of revenues returned to our clients through USG from its current 6% of total revenue to 8% through continuous improvement in the efficiency of our work.
4. **Add Partners** - We will increase the number of Partnership Agreements by organizations within the common roof model to a minimum of at least 50% of the total Tenancies at each location over the next five years.
5. **Increase Fund Development** - We will increase our annual fund development specific to the New Path Foundation in support of operations from \$26K in 2019/20 to \$100K in 2025/26.
6. **Formalize Common Roof Model** - We will formalize The Common Roof Operating Model for presentation to the Ontario Government to obtain their support for further replication of the model in other parts of the Province

At the highest level, we can see how the achievement of our Strategic Goals necessitates changes to various elements of the Operating Model to reduce gaps

Gap size – Large, Small, None

Strategic Goal/ Op Model Elements	1. Double locations	2. Extend services	3. Increase revenue/USG	4. Add partners	5. Increase fund development	6. Formalize Common Roof model
Client/Community Experience	L	L	S	S	L	L
Service Delivery	L	L	L	S	S	L
Locations and Assets	L	L	L	N	N	L
Funding and Finances	L	L	L	S/N	L	L
Partnerships and Sourcing	S	S	N	L	N	S
Human Resources	L	L	S	S	L	S
Infrastructure and Technology	L	L	S	N	S	L
Leadership, Organization and Governance	L	L	S	S	L	S
Performance Metrics	S	L	L	S	S	L

Implications of Strategic Goals on Client/Community Experience

1. Double locations	2. Extend services	3. Increase revenue/USG	4. Add partners	5. Increase fund development	6. Formalize Common Roof model
<p>A comprehensive environmental scan will be undertaken to identify expansion targets – both at the client and community level.</p> <p>An understanding of our planned client/community experience – both in terms of current and future needs - will be developed and implemented as we add locations to ensure that we are “client first” in our approach and align with identified community needs.</p> <p>Use our most recent project in Collingwood to document the NPF client/community experience for use and refinement to support future location expansion.</p>	<p>Service gaps/needs assessment with Clients will be undertaken to identify areas of potential service development.</p> <p>Identified service gaps/needs will be reviewed to ensure “fit” within the common roof or Ventures model.</p> <p>Service development and implementation will be designed to ensure alignment and support of the overall client/community experience with clear return on investment (ROI) strategies outlined.</p>	<p>Through continual cost containment and revenue generation approaches, increased funds for USG will be realized.</p> <p>Improving overall efficiencies and returning a higher percentage of USG to our Partners will ensure an overall enhancement to our client/community experience.</p>	<p>Updated Partnership Agreements with clear identification of expectations and benefits will allow for better solicitation of organizations.</p> <p>Ensuring a clear delineation between Partners and other client organizations (Tenants) along with their relationship to the Foundation, will be an important strategy in maintaining retention and ensuring a positive experience with all organizations.</p>	<p>Increasing fund development, especially at new locations, will be highly dependent on the effectiveness of our client/community experience. This is especially true with respect to our visibility in the local community.</p> <p>Community Animation should be a key underpinning of our work in community experience development as it effectively engages the community in our work.</p>	<p>The client/community experience model needs to be refined and documented as a key underpinning of our common roof™ model.</p> <p>Content and use of our Client Satisfaction Survey will be reviewed and updated to ensure that we are tracking key performance indicator data points to inform our work in this area.</p>

Implications of Strategic Goals on Service Delivery

1. Double locations	2. Extend services	3. Increase revenue/USG	4. Add partners	5. Increase fund development	6. Formalize Common Roof model
<p>New service approaches will be identified and provided as needed as part of our new location development strategy in consultation with incoming clients.</p> <p>An adaptive model will be used - either through direct ownership or a purchase of service agreement for onsite management using the common roof™ model.</p>	<p>Shared Services will be the overall approach for all services offered through the New Path Foundation.</p> <p>The development of an updated menu of services including consultation, information technology, office administration and finance services - among others - will be created with clear cost/revenue guidelines for service provision.</p> <p>Investigation of a catalyst hub/maker space will be considered as a service offering at all locations with a clear model developed to support not only revenue growth but client/community access and engagement.</p>	<p>New services will generate additional fee revenue supporting overall operations.</p> <p>Income from these services will need to generate a relative higher rate of income if we are to increase the USG percentage returned to our Partners.</p>	<p>New services will be provided as needed to clients – both within common roof™ locations as well as in the community at large.</p> <p>Enhanced service offerings will be incorporated within the Partnership Agreement as a client moves into a Partnership role as a foundation of the common roof™ model.</p>	<p>Through our network and associations with multiple organizations and community groups/tables, investigate the potential to provide fund development services as part of our overall shared service offerings.</p>	<p>All services will need to be well defined as part of the common roof™ operating Model in order to present a clear benefit and value to our current and future clients as well as for presentation to the Ontario Government for their support.</p>

Implications of Strategic Goals on Locations and Assets

1. Double locations	2. Extend services	3. Increase revenue/USG	4. Add partners	5. Increase fund development	6. Formalize Common Roof model
<p>Expansion from current site locations to 1-2 other Simcoe County locations as identified.</p> <p>Targeting of at least one new location outside of the Simcoe County catchment area; perhaps to align with Ministry of Health goals, consideration of a Central Region location (includes North Simcoe Muskoka, Central, Central West, Mississauga).</p> <p>Consideration for the development of Phase 2 at Barrie Common Roof based on a comprehensive community needs assessment to ensure readiness and buy-in.</p>	<p>New service enhancements may necessitate additional facility upgrades, resources and assets (I/T infrastructure, fiber optic lines, electrical requirements, etc.).</p> <p>Proactively work with existing Partners and Tenants to investigate their current NON common roof™ location assets and the possibility of transitioning to a common roof™ owned or managed facility.</p> <p>Also to work with existing Partners and Tenants around additional space need requirements for further site expansion opportunities.</p> <p>Mapping of all client locations.</p>	<p>Continued focus on cost containment and shared collaborative strategies at all common roof™ locations will continue to support an increase in the USG available to all Partners.</p>	<p>Little to none at this time.</p>	<p>Little to none at this time.</p>	<p>Need to focus on the development of key criterion around our common roof™ model in terms of identifying locations, assets required, financing and ROI to for approval and implementation.</p> <p>Engagement of Provincial and local municipal support for the common roof™ model will be a key underpinning for expansion initiatives.</p>

Implications of Strategic Goals on Funding and Finances

1. Double locations	2. Extend services	3. Increase revenue/USG	4. Add partners	5. Increase fund development	6. Formalize Common Roof model
<p>Of the \$1M goal for increasing revenues in five years time, \$750K of that (or roughly a 50% increase in 2020 revenue) should be allocated to the expansion to the doubling of new locations as a strategic investment fund.</p> <p>Investigations into other financing tools will need to be a part of any expansion approach – Infrastructure funding at the Federal or Provincial level, Municipal contributions or abatements to support development, etc.</p>	<p>Of the \$1M goal for increasing revenues in five years time, \$250K of that should be reinvested to support the expansion of services offered to existing clients and to new clients coming onboard at new locations.</p> <p>Fee revenue generated from shared services will support ongoing operational needs as identified including supporting USG enhancements or the creation of a rent subsidy to support onboarding of smaller grass roots organizations.</p>	<p>Continued focus on cost containment and shared collaborative strategies at all common roof™ locations will continue to support an increase in the USG available to all Partners along with holding operational expenses in line with budgeted expectations.</p>	<p>Increased revenue generation will allow for an increase in the USG to Partners and work as an effective tool for retention.</p> <p>Increased USG funds will entice other Tenant clients to become partners themselves thus continuing to build the overall Partnership approach that is a fundamental piece of the common roof™ model.</p>	<p>Achieving this goal will require further development and refinement of our fund development model. This includes general fundraising, third party events and fund development to support specific initiatives (i.e. Newby Scholarship).</p>	<p>The funding and finances model will need to be defined as part of the overall common roof™ model for presentation to the Ontario Government as well as to prospective clients.</p> <p>A focus on “effective use of scarce resources” coupled with ROI impact examples will be needed.</p>

Implications of Strategic Goals on Partnerships and Sourcing

1. Double locations	2. Extend services	3. Increase revenue/USG	4. Add partners	5. Increase fund development	6. Formalize Common Roof model
<p>As part of any expansion initiative, key Partnership Agreements need to be sought out and secured.</p> <p>Partnership agreements need to be formalized and in place at the start of any new build or management approach.</p>	<p>We should consider whether or not being a Partner includes certain “premium” services not available to other tenants, or potentially provided at “no cost”.</p> <p>Core shared services as a part of all common roof™ locations need to be identified and incorporated in all Partnership Agreements (i.e. Reception Services).</p>	<p>Little or none</p>	<p>Investigation into other Partnerships outside of ccommon roof™ client “tenants” such as:</p> <ul style="list-style-type: none"> - Ontario Health Regions - Family Health Teams (smaller orgs, HQ facilities) - Georgian College - Service Clubs <p>Consolidated approach to sourcing of services across all locations to improve economies of scale e.g. telecom (Rogers vs. Bell), maintenance subcontracts, etc.</p> <p>Investigate the role of the NPF for Advocacy in support of Partners and our goal of supporting community development.</p>	<p>Little or none</p>	<p>Overall need to revise the Partnership Agreement as a key part of the common roof™ operating model to include onsite and external partners.</p> <p>Ongoing need to continually assess Partnership model for gaps and target as appropriate to support the operational model.</p>

Implications of Strategic Goals on Human Resources

1. Double locations	2. Extend services	3. Increase revenue/USG	4. Add partners	5. Increase fund development	6. Formalize Common Roof model
<p>Need to establish a core organizational model for the NPF as well as each new location that is brought onboard. This model will need to consider which tasks remain centralized (e.g. CEO, Finance Manager, I/T) vs. distributed onsite by location (e.g. Administration, Cleaning, Trades, Reception).</p> <p>Additional staffing resources need to be identified for both current operations as well as projected. Sourcing of resources needs to occur as demand and services increase.</p> <p>Training and documentation will be needed for all new locations.</p>	<p>Need to establish the correct “mix” for new services to be offered overall as part of our menu of shared service options.</p> <p>As per specific locations, this model will also need to consider which tasks should be centralized vs. distributed by location based on need and resources available.</p> <p>Training and documentation will be needed for all new locations.</p>	<p>Continued development of our human resources model will need to ensure that personnel are available at labour rates that support the increased USG and operational targets.</p>	<p>Consideration should be given to identifying which staff member(s) will drive the Partnership goal with a focus remaining on community animation.</p>	<p>Consideration should be given to hiring a full time fund development manager to at least increase the funds raised from \$25K to \$100K annually, but also to raise that target significantly and potentially development a fundraising service for our clients.</p>	<p>The human resources model needs to be refined and documented as part of the common roof™ model.</p> <p>An Employee Satisfaction Survey should be developed and implemented as part of our overall human resources strategy.</p>

Implications of Strategic Goals on Infrastructure and Technology

1. Double locations	2. Extend services	3. Increase revenue/USG	4. Add partners	5. Increase fund development	6. Formalize Common Roof model
<p>Doubling locations should result in a profound rethink of our infrastructure and technology currently deployed at all sites. As we expand our footprint, new choices may provide opportunity for cost savings and operational efficiencies as well as consolidate our core shared service offerings.</p> <p>The continued push for more remote options necessitates further investigation into what Tenant client needs will be in this area moving forward.</p>	<p>One service that we may decide to offer to our clients is to manage their information and technology services, thus allowing them to focus on direct service delivery.</p> <p>Discussions with our current Partners – specifically New Path and Catulpa – should occur to explore the option of transitioning current I/T services over to the NPF.</p> <p>A survey to existing clients should be undertaken to see if this would be of interest to them. If merited, a more fulsome service definition will be needed that aligns with technologies needed to manage the Foundation’s overall operations and shared services needs.</p>	<p>Continued refinement and adherence to cost containment strategies and economies of scale efficiencies will improve our infrastructure and technology needs resulting in a reduction in costs and an increase in USG.</p> <p>Investigations into offering I/T services outside of the common roof™ model would create a new revenue stream.</p>	<p>This service support option would need to be ingrained into the core common roof™ Partnership Agreements as one of the essential pieces of our shared services strategy.</p>	<p>Modern fund development practices tend to incorporate technology as an enabler, both through marketing and management. This should be investigated as new technologies are considered.</p>	<p>The infrastructure and technology model needs to be refined and documented as part of the common roof™ model.</p>

Implications of Strategic Goals on Leadership, Organization and Governance

1. Double locations	2. Extend services	3. Increase revenue/USG	4. Add partners	5. Increase fund development	6. Formalize Common Roof model
<p>As we add locations, especially ones that may not be culturally and demographically similar to our current locations, we will likely want to consider adding Board members from other locations, as well as local Community Advisory Groups.</p> <p>Site level management may be required as the number of sites grows with a focus on community animation.</p>	<p>Extending services will require management and governance changes to ensure those services are expertly defined and delivered to meet local needs.</p> <p>An updated organizational and governance model will need to be developed to effectively grow and manage the various site locations and services in our new model.</p>	<p>Effectively managing increasing revenue and decreasing unit costs will be handled as part of the hiring of our Finance and Operations Manager.</p> <p>There may be a need for additional operational resources depending on the location/service mix as the NPF continues to grow.</p>	<p>Developing and converting clients to Partners will need to become a clear executive leadership role.</p> <p>Community engagement and advocacy – as needed – will also become a main focus moving forward.</p>	<p>Partners will likely want to be closely involved in the development and management of Foundation funds targeted for community level support.</p>	<p>The leadership, organization and governance model needs to be refined and documented as part of the common roof™ model.</p> <p>The Board Orientation Manual needs to be completed, especially if we are adding more remote members to the Board.</p>

Implications of Strategic Goals on Performance Metrics

1. Double locations	2. Extend services	3. Increase revenue/USG	4. Add partners	5. Increase fund development	6. Formalize Common Roof model
<p>KPI's and other metrics such as comparative analysis should be designed to measure and report the performance of each location and how it improves over time.</p> <p>Social Determinants of Health should be integrated as part of our overall reporting back to community, donors, etc.</p> <p>Key metrics around cost containment, efficiencies and collaborative approaches should be used to leverage additional sites and management opportunities.</p>	<p>KPI's and other metrics should be designed to measure and report the performance of each location and how it improves over time.</p>	<p>Financial and operational KPI's and other metrics such as comparative analysis should be designed to measure and report the performance of each location and how it improves over time.</p> <p>Summary KPIs should be selected by the Board for key governance functions as part of a dashboard model.</p>	<p>KPIs and other metrics should be designed to measure the effectiveness of our Partnership model.</p>	<p>KPIs and other metrics should be designed to measure the effectiveness of our fund development program.</p>	<p>The performance metrics model needs to be refined and documented as part of the common roof™ model.</p> <p>This will be a key component of any presentation to key stakeholders as well as potential new locations and clients.</p> <p>It will be particularly key for any presentations to the Ontario Government or other outside governance bodies such as Ontario Health Teams or service clubs.</p>

Future State Operating Model and its development over the strategic horizon

Preliminary Funding and Finances Operating Model Element (top-down)

- **This model is a top-down model based on the 2020/21 budget, extended to meet the strategic goals.**
- **It will be refined through the strategic initiatives and replaced with a bottom-up model to guide operational plans**

Client/Community Service Operating Model Element

2020/21

- An understanding of our current client/community experience will be developed to ensure that we are “client first” in our approach and align with identified community needs.



2025/26

- An understanding of our planned future client/community experience will be developed and implemented as we add locations
- Content and use of our Client Satisfaction Survey will be reviewed and updated to inform our work in this area.
- Community Animation should be a key underpinning of our work in community experience development as it effectively engages the community in our work.

Strategic Initiatives

Initiative	Year
Review Client/Community Experience	2020/21
Create Community Animation	2021/22
Review and Update Client Satisfaction Survey	2020/21
Document Client/Community Experience Model	2022/23

Service Delivery Operating Model Element

2020/21

Ventures (fee-based rather than cost allocation model)

- **Maintenance Services**



2025/26

Ventures (fee-based rather than cost allocation model)

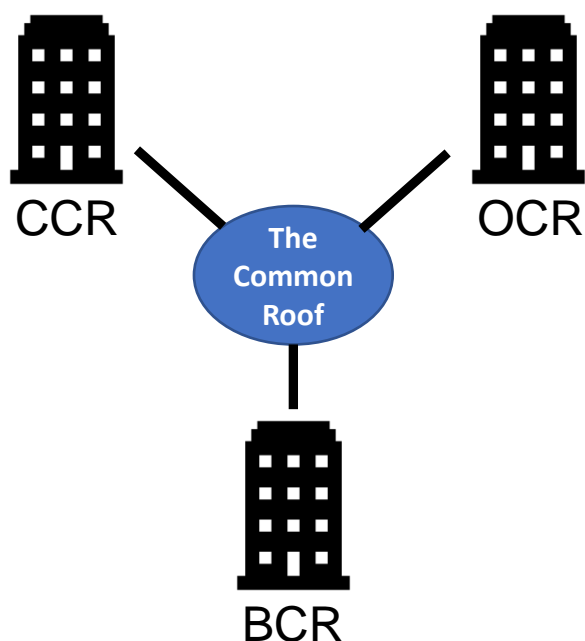
- **Maintenance Services**
- **Consulting**
- **Information Technology**
- **Office Administration**
- **Finance and Accounting**
- **Catalyst Hub/Maker Space Rental**
- **Fund Development**
- **Others as determined**

Strategic Initiatives

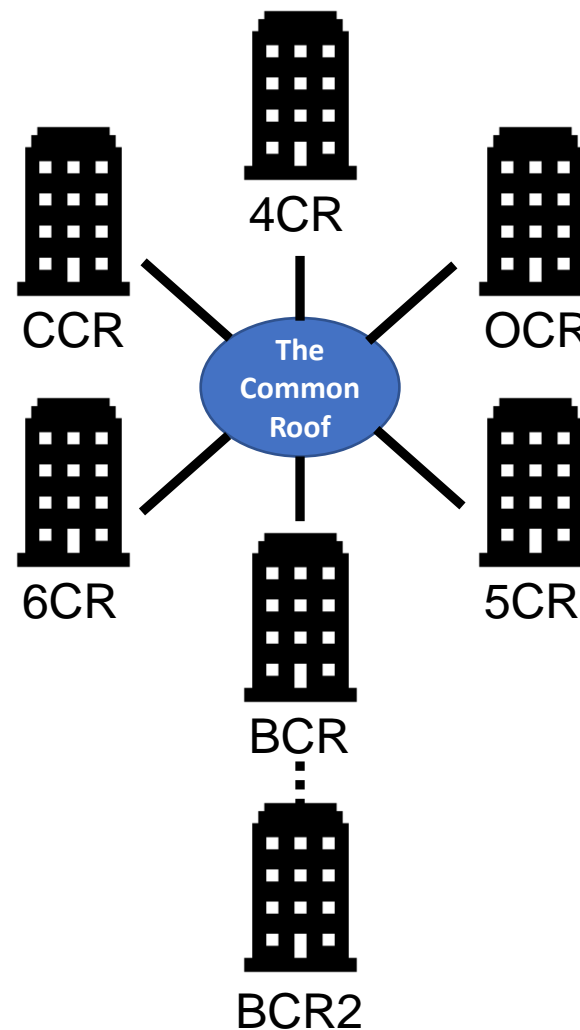
Initiative	Year
Assess Service Gaps	2021/22
Identify New Service Candidates	2021/22
Develop New Services	2022/23
Document Service Delivery Model	2022/23

Locations and Assets Operating Model Element

2020/21



2025/26



Strategic Initiatives

Initiative	Year
Analyze Site Expansion Strategy	2021/22
Assess BCR Expansion Viability (BCR2)	2022/23
Assess Existing Client Expansion Potential	2021/22
Develop Locations and Assets Model	2022/23
Implement New Site 4CR	2022/23 to 2023/24
Implement New Site 5CR	2023/24 to 2024/25
Implement New Site 6CR	2024/25 to 2025/26

Funding and Finances Operating Model Element

2020/21

		Budget 20/21
Line Item	Revenue:	
1	Rent	\$ 684,650.92
2	MITU Recoveries	\$ 577,533.84
3	Building Fund	\$ 52,686.56
4	Other Recoveries	\$ 180,654.03
5	Fundraising	\$ 22,000.00
6	Partnership Fee Income	\$ -
7	HST Recoveries	\$ 45,000.00
Total Revenues		\$ 1,562,525.35
Line Item	Other income and expenses:	
8	Salaries and Benefits	\$ 291,636.15
9	Travel	\$ 6,000.00
10	Grants Paid	\$ 22,000.00
11	Property Taxes	\$ 208,716.10
12	Utilities	\$ 109,928.95
13	Communications & IT	\$ 17,300.00
14	Repairs Maintenance	\$ 236,200.00
15	Supplies	\$ 18,729.58
16	Insurance	\$ 27,138.00
17	Professional Fees	\$ 55,390.99
18	Training	\$ 2,000.00
19	Adver/Promotion/Membership	\$ 2,000.00
20	Bank Charges	\$ 4,500.00
21	Mortgage Payments	\$ 425,095.80
22	Loans Paid NPS	\$ 25,000.00
23	USG Payments	\$ 86,954.00
Total Expenses:		\$ 1,538,589.57
Net earnings (loss) for period		\$ 23,935.78



2025/26

		Plan 25/26
Line Item	Revenue:	
1	Rent	\$ 934,650.92
2	MITU Recoveries	\$ 677,533.84
3	Building Fund	\$ 77,686.56
4	Other Recoveries	\$ 305,654.03
5	Fundraising	\$ 100,000.00
6	Partnership Fee Income	\$ -
7	HST Recoveries	\$ 61,737.65
Total Revenues		\$ 2,157,263.00
Line Item	Other income and expenses:	
8	Salaries and Benefits	\$ 335,989.17
9	Travel	\$ 6,912.50
10	Grants Paid	\$ 22,000.00
11	Property Taxes	\$ 267,698.72
12	Utilities	\$ 140,994.58
13	Communications & IT	\$ 22,188.93
14	Repairs Maintenance	\$ 302,949.49
15	Supplies	\$ 24,022.51
16	Insurance	\$ 34,807.13
17	Professional Fees	\$ 53,426.71
18	Training	\$ 2,304.17
19	Adver/Promotion/Membership	\$ 2,304.17
20	Bank Charges	\$ 5,771.69
21	Mortgage Payments	\$ 545,226.74
22	Loans Paid NPS	\$ 32,064.93
23	USG Payments	\$ 172,581.04
Total Expenses:		\$ 1,971,242.48
Net earnings (loss) for period		\$ 186,020.52

- Requires full time Finance and Operations Manager
- OCR and CCR profitability needs to improve so that BCR does not need to support all Common Roof locations
- Mortgage funding will need review as locations expand
- USG will begin to include OCR and CCR. We propose to increase percentage distributed through USG
- Will propose full time Fund Development Manager

Strategic Initiatives

Initiative	Year
Investigate Funding Alternatives	2021/22
Improve Operational Efficiency	2023/24
Reinvigorate Fund Development Work	2021/22
Document Funding and Finances Model	2022/23

Partnerships and Sourcing Operating Model Element

2020/21

- **5 Partner Agreements currently in place**
- **USG funding**
 - underway at BCR
 - USG funding pending to begin at OCR in 2021/22 fiscal period
 - USG funding pending to begin at CCR in 29/30
- **Shared Services limited to Reception and Maintenance**
- **Limited involvement on community tables**



2025/26

- **Formalization of Partnership Agreement at the start of any new build or management approach**
- **Core shared services identified and incorporated into all Partnership Agreements**
- **Consolidation of sourcing of services across all locations**
- **Sourcing of Partners from non-traditional “Tenants” both onsite and external**
- **Representation on community tables that support NPF’s engagement and animation strategies**
- **Advocacy role in support of Partners and issues identified at community tables**

Strategic Initiatives

Initiative	Year
Define Partnership Structure	2021/22
Update Existing Partnership Agreements	2021/22
Create New Partnership Agreements	2022/23
Investigate External Partnerships	2021/22
Analyze Supplier Relationships	2022/23

Human Resources Operating Model Element

2020/21

- **Mix of full, part time and subcontracted staff**
 - 1 F/T CEO/President
 - 3 F/T Receptionists
 - 1 F/T Manager – Maintenance Services
 - Numerous subcontractors – Finance, Communications, Admin, HVAC, Plumbing, Electrical, etc.
- **Limited capacity to support further expansion**



2025/26

- **Core organizational model in place – centralized and distributed approaches**
- **Human resources model in line with labour rates supporting increased USG and operational targets**
- **Human resources model integrated into common roof™ model**
- **Additional staffing positions in place**
 - Manager of Finance/Operations
 - Manager of Fund Development

Strategic Initiatives

Initiative	Year
Define Organizational Structure	2021/22
Determine Staffing Requirements	2021/22
Develop Employee Satisfaction Survey	2021/22
Document Human Resources Model	2022/23

Infrastructure and Technology Operating Model Element

2020/21

- **Site specific model currently in place**
 - Wifi
 - Monitors in meeting rooms
 - Shared internet services available to Tenants
- **Mix of old/new infrastructure supporting staff; replaced as needed**
- **Office 360 in place allowing for onsite and remote access**
- **I/T through NPACIT services**



2025/26

- **Infrastructure and technology model integrated into common roof™ model**
- **Broader use of current technology to support fund development, marketing and management**
- **Consolidation of I/T as part of shared service offerings managed by NPF – both internal within the common roof™ and external to outside clients**

Strategic Initiatives

Initiative	Year
Assess Implication of New Services on Existing Sites	2022/23
Assess Implication of New Locations	2021/22
Assess IT-as-a-Service	2022/23
Document Infrastructure and Technology Model	2022/23

Leadership, Organization and Governance Operating Model Element

2020/21

- Small staff and Board member team in place
- Board ad hoc or working groups established as needed
- Board development flagged for further work
- Limited representation and/or input from all communities other than within common roof™ model



2025/26

- Updated organizational and governance model in place with an emphasis on cultural and demographic inclusion
- Board of Directors
 - Executive Committee
 - Human Resource, Finance, Services/Operations Committee
 - Community Advisory Working Groups
- Updated Board Orientation Manual
- Clear advocacy role at the community, regional, provincial and federal level

Strategic Initiatives

Initiative	Year
Review Location-level Organization and Governance	2022/23 to 2024/25
Complete Board Orientation Manual	2021/22
Document Organization and Governance Model	2022/23

Performance Metrics Operating Model Element

2020/21

- **Common roof™ Tenant Satisfaction Survey**
 - Site specific
- **Tenant/Partner Committees at each location for input and feedback**
 - Health and Safety, Building and Social Committees/Working Groups
- **Financial Reporting Review**
 - Cash Flow
 - Quarterly Statements



2025/26

- **Clear KPI's and other metrics in place**
- **Comparative analysis approach supported by benchmarks and targets**
 - Cost containment
 - Efficiencies
 - Collaborative Approaches
- **Dashboard model for Board reporting in place**
- **Integration of Social Determinants of Health**
- **Annual reporting back to all key stakeholders**
 - Partners/Tenants
 - Funders/Donors
 - Community
- **Targeted reporting to government and other key sector tables in support of the common roof™ model**

Strategic Initiatives

Initiative	Year
Develop Performance Metrics Model	2021/22

Common Roof™ Operating Model Element

2020/21

- 3 site locations
- Partnership and Tenant based approach
- Asset ownership through conventional financing
- Traditional multi-tenant shared space approach
- Focus on Tenant organizations and client delivery
- Co-location approach
- Mix of short, medium and long term leasing options
- Maintenance and Reception Services offered



2025/26

- **Adaptive and updated common roof™ model to allow for replication**
 - Location identification
 - ROI requirements
 - Assets needed
 - Financing approaches
 - Approval/implementation criteria
- **Doubling of locations**
 - Mix of ownership and management models via purchase of service agreements
 - 2 Additional sites in Simcoe County
 - 1 outside of Simcoe County
- **Service Enhancements in place**
 - Shared I/T as part of shared services
 - Upgraded infrastructure – fibre optic, electrical, solar, etc.

Strategic Initiatives

Initiative	Year
Document Common Roof™ Model	2022/23
Champion Common Roof™ Model to Governments	2022/23 to 2023/24

Strategic Initiatives Schedule

		Goals					Year						
		Double Locations	Extend Services	Increase Revenue	Add Partners	Increase Fund Devt	Formalize CR Model	20/21	21/22	22/23	23/24	24/25	25/26
Client/Community Experience	Review Client/Community Experience	X	X										
	Create Community Animation		X	X	X	X	X						
	Review and Update Client Satisfaction Survey		X		X		X						
	Document Client/Community Experience Model						X						
Service Delivery	Assess Service Gaps		X				X						
	Identify New Service Candidates		X				X						
	Develop New Services	X	X	X	X	X	X						
	Document Service Delivery Model						x						
Locations and Assets	Analyze Site Expansion Strategy						X						
	Assess BCR Expansion Viability						X						
	Assess Existing Client Expansion Potential		X		X								
	Develop Locations and Assets Model					X	X						
Funding and Finances	Implement New Site 4CR	X		X		X							
	Implement New Site 5CR	X		X		X							
	Investigate Funding Alternatives	X			X	X							
	Improve Operational Efficiency		X	X	X								
Partnerships and Sourcings	Reinvigorate Fund Development Work			X	X	X							
	Document Funding and Finances Model						X						
	Define Partnership Structure						X						
	Update Existing Partnership Agreements		X										
Human Resources	Create New Partnership Agreements	X				X							
	Investigate External Partnerships		X		X								
	Analyze Supplier Relationships						X						
	Define Organizational Structure						X						
Infrastructure and Technology	Determine Staffing Requirements	X	X	X	X	X							
	Develop Employee Satisfaction Survey		X										
	Document Human Resources Model						X						
	Assess Implication of New Services on Existing Sites						X						
Leadership, Organization and Governance	Assess Implication of New Locations	X		X									
	Assess IT-as-a-Service		X	X	X	X							
	Document Infrastructure and Technology Model						X						
	Review Location-level Organization and Governance	X	X	X	X	X	X						
Performance Metrics	Complete Board Orientation Manual	X	X				X						
	Document Organization and Governance Model						X						
	Develop Performance Metrics Model	X	X	X	X	X	X						
	Common Roof™ Model												
Common Roof™ Model	Document Common Roof™ Model						X						
	Champion Common Roof™ Model to Governments				X		X						

Appendix – Strategic Initiative Descriptions

Proposed Strategic Initiative Description Template – Client/Community Experience

Description – Ensuring a client/community experience that is responsive to identified needs and ensures engagement; both short and long term.	Interdependencies – Tenant/Partner Organizations; Direct Service Clients; Community Stakeholders.	Costs – Direct staff resources \$10,540; indirect costs \$2,500
	Risks – Identified needs are beyond Foundation scope/mandate; Stretched resource allocation – reputational harm.	Key Milestones Initiative Start – June 2021 Client/Community Assessment Review Report – June 2022 Community Animation Development Model – March 2023 Client/Community Engagement Model – September 2023 Board Approval to Complete Initiative – December 2023

Major Activities	Client/Community Assessment Review <ul style="list-style-type: none"> Review and assess current client/community experience both within the common roof locations as well as externally within our key communities – Barrie, Orillia, Collingwood. Mapping of key stakeholders including value propositions for each. Review and update Client Satisfaction Survey to include KPI's identified as key tracking measures. Development and refinement of data tracking methods to support KPI's 	Community Animation Development <ul style="list-style-type: none"> Established Animation committees within each location with a focus on staff engagement Investigate external community animation model through focus groups and targeted stakeholder conversations on opening common roof locations to external community use. 	Client/Community Engagement Model <ul style="list-style-type: none"> Development and documentation of feedback related to client/community engagement based on feedback from assessments, value proposition discussions with stakeholders and annual survey results.
Deliverables	<ul style="list-style-type: none"> Report outlining client/community experience with key recommendations for inclusion into overall model. Key stakeholders map with detailed value propositions. 	<ul style="list-style-type: none"> Assessment report on identified community needs in terms of space utilization at each site location. Key recommendations for community use tabled to Tenant/Partner Committees. Integration of internal community animation model within all common roof locations. 	<ul style="list-style-type: none"> Comprehensive approach to client/community engagement integrated at all common roof locations Robust client satisfaction assessment using a variety of tools (i.e. survey, in-person, etc.). Client/Community Engagement Model for the Foundation.
Duration	12 months	3 - 9 months	6 months

Proposed Strategic Initiative Description Template – Service Delivery

Description – Creation of a wide array of shared services available as a “fee for service” option through a social enterprise lens for both internal common roof Tenants as well external community stakeholders. Ensuring an operation model that is a core foundation of each common roof site location yet adaptive to respond to emergent local needs.	Interdependencies – Tenant/Partner Organizations; Community Stakeholders (Clients).	Costs – Direct staff resources \$72,617; indirect costs \$5,000
	Risks – Identified needs are beyond Foundation scope/mandate; Stretched resource allocation – reputational harm; velocity of shift in technology; hardware cost escalation.	Key Milestones Initiative Start – June 2021 Service Gap Review Report – November 2022 Service Candidate Summary and Recommendations – November 2022 Service Model Developed – September 2023 Board Approval to Complete Initiative – December 2023

Major Activities	Shared Service Assessment Review <ul style="list-style-type: none"> Review and assess current shared service offerings with a focus on client experience to date. Identification of potential realignment of services currently offered through purchase of service and service integration approaches with Tenants (i.e. Information Technology). Needs assessment of Tenants to identify current and future pressure points with a focus on cost containment/fiscal management. External outreach to identify potential clients and assessment of their needs. 	Service Candidate Development and Recommendations <ul style="list-style-type: none"> Incorporation of shared services as a standing item of Tenant/Partner Committee meetings; use as advisory into service development. Identification of external client service elements. Creation of draft menu of overall services with clear cost/revenue guidelines and client targets. 	Shared Services Model <ul style="list-style-type: none"> Development of an updated model of service offerings for both internal common roof Tenants and external community stakeholders. Launch of updated shared services to both internal Tenants and External Stakeholders. Integration of feedback loops to ensure a comprehensive evaluation process to align ongoing discussions with stakeholders and the annual survey process.
Deliverables	<ul style="list-style-type: none"> Report outlining current utilization of shared service offerings along with identified service gaps. Key recommendations for inclusion into new shared services model. 	<ul style="list-style-type: none"> Targeted action plans for Tenant/Client engagement. Key recommendations for internal shared services approach tabled to Tenant/Partner Committees. 	<ul style="list-style-type: none"> Integration of core shared services model within all common roof locations. Integration of shared services as a cornerstone in all Partnership Agreements. Service Delivery Model for the Foundation.
Duration	18 months	3 - 9 months	12 - 24 months

Proposed Strategic Initiative Description Template – Locations and Assets

Description – Through a social purpose real estate approach, ensure effective development and management of our physical plant facilities. Through efficiencies in operational costs ensure continued reduction of our combined carbon footprint while ensuring more resources are available to support Tenant organizations. Further, continue to source opportunities for expansion of facilities through ownership or purchase of service options.	Interdependencies – Government, Tenant/Partner Organizations; Community Stakeholders (Clients), Financial institutions.	Costs – Direct staff resources \$105,167; indirect costs \$10,000 Unknown – Infrastructure upgrades and leasehold costing; purchase financing requirements.
	Risks – Identified needs are beyond Foundation scope/mandate; Stretched resource allocation – reputational harm; velocity of shift in technology; increasing age of physical plant facilities; availability of financial resources – debt load limitations; lack of community need.	Key Milestones Initiative Start – June 2021 Site Assessments – January 2022 Site Expansion Strategy (including BCR Phase 2) – April 2023 Locations and Assets Model – April 2023 New Site Implementation – April 2023 through March 2026 Board Approval to Complete Initiative – June 2026

Major Activities	Site Assessment Review <ul style="list-style-type: none"> Review and assess all current physical plant facilities to include infrastructure supports and space layout/usage needs from Tenant organizations. Identification of potential upgrades and leasehold improvements to enhance operational efficiencies – both Tenant and Foundation – that support flexible, adaptive and accessible design elements. Needs assessment of Tenants to identify current and future space needs and mapping of their current facility locations. 	Site Expansion Strategy Development and Recommendations <ul style="list-style-type: none"> Research on current and future Government goals and initiatives impacting on Transfer Payment Organizations. Alignment of strategy with these to link common roof model and shared efficiencies. Creation of a communication and advocacy plan with key messages targeted for Government stakeholders. Engagement of Provincial/Municipal and community stakeholders around the benefits of a common roof model. 	Locations and Assets Model <ul style="list-style-type: none"> Development of an overall locations and assets model incorporating key criterion and operational benchmarks for site development, financing requirements, Partnership requirements and minimum return on investment. Development of additional site locations (ownership and/or purchase of service contracts) to 1-2 within Simcoe County and 1 external.
Deliverables	<ul style="list-style-type: none"> Report outlining current state of all common roof locations including recommended upgrades required along with potential expansion opportunities with the current Tenant group. 	<ul style="list-style-type: none"> Site Expansion Strategy for both current and future common roof locations. 	<ul style="list-style-type: none"> Locations and Assets Model for the Foundation's Social Purpose Real Estate platform. 3 Additional common roof site locations.
Duration	7 months	15 months	12 - 36 months

Proposed Strategic Initiative Description Template – Funding and Finances

Description – Improve overall sustainability for the Foundation through the development of an overall Funding and Finances model. Investigation of funding alternatives while also looking into operational efficiencies to increase overall revenue and subsequent reinvestment – both towards strategic initiatives as well as support to Partner/Tenant organizations.	Interdependencies – Government, Tenant/Partner Organizations; Corporations; Service Clubs; Community Stakeholders (Donors), Financial institutions.	Costs – Direct staff resources \$32,052; indirect costs \$2,500 *New - \$66,557 annually with addition of Manager, Resource Development including office set up.
	Risks – Identified needs are beyond Foundation scope/mandate; Stretched resource allocation – reputational harm; availability of financial resources – debt load limitations; cost pressures from other strategic initiatives.	Key Milestones Initiative Start – June 2021 Funding Alternatives Strategy (including Resource Development) – September 2022 Funding and Finances Model – March 2023 Operational Efficiencies – March 2024 Board Approval to Complete Initiative – June 2024

Major Activities	Funding Alternatives Strategy	Funding and Finances Model	Operational Efficiencies
	<ul style="list-style-type: none"> Review and assess all current and potential funding sources targeting operational, infrastructure and granting needs. Identification of resource development potential for both the Foundation and stakeholders as part of an overall fund development strategy. Assessment of Ventures as fee for service social enterprise business model targeting external client base. 	<ul style="list-style-type: none"> Assessment of operational efficiencies including cost containment strategies, facility energy conservation and waste reduction approaches and continued shared service integration opportunities. Alignment of strategy with common roof model and shared service efficiencies. Revision of all financial process to support identified operational efficiencies. Creation of a restricted reserve for strategic initiatives – including increase to USG for Partner organizations. 	<ul style="list-style-type: none"> Ongoing inclusion and evaluation of cost containment and collaborative strategies as a key piece of the Foundations operational model with clear KPI's. Development of an RFP model for sourcing of all subcontracts and ensuring key timelines for review and call to market. Development of additional site locations (ownership and/or purchase of service contracts) to 1-2 within Simcoe County and 1 external.
Deliverables	<ul style="list-style-type: none"> Report outlining funding alternatives approach for the Foundation identifying operational enhancements, resource development strategy and targeted approaches for funding requests to key stakeholders. 	<ul style="list-style-type: none"> Funding and Finance Model for the Foundation as a key underpinning to ensure long term sustainability. 	<ul style="list-style-type: none"> Operational efficiencies in place with clear benchmarks and KPI's.
Duration	15 months	5 months	12 months

Proposed Strategic Initiative Description Template – Partnerships and Sourcing

Description – Formalization of Partnership models as a key foundational piece of the common roof model including core shared service requirements. Improve overall sustainability for the Foundation through the sourcing and securing of new Partner organizations – both a current and future common roof locations.	Interdependencies – Tenant/Partner Organizations; not for profit charitable organizations; Service Clubs.	Costs – Direct staff resources \$24,038; indirect costs \$5,000	
	Risks – Stretched resource allocation – reputational harm; cost pressures from other strategic initiatives.	Key Milestones Initiative Start – September 2021 Partnership Structure Model – June 2022 Supplier Sourcing Model – December 2022 Partnership Sourcing and Agreements – May 2023 Board Approval to Complete Initiative – April 2023	
Major Activities	Partnership Structure Model Development <ul style="list-style-type: none"> Review and assess Partnership model to improve overall operational efficiencies for organizations through cost containment/reduction/conservation leading to increased resources for service delivery. Identification of service collaboration and integration approaches to support development of shared services. Identification of “Premium Services” offered only to Partner organizations as a ROI on their investment and as part of a long term retention strategy. Assessment of Ventures as fee for service social enterprise business model targeting external client base. 	Suppliers Sourcing <ul style="list-style-type: none"> Review all supplier relationships to identify efficiencies in terms of contracting processes and economies of scale where appropriate and feasible. Determine collaborative purchasing framework to support Tenant organizations and drive cost savings. Development of a Request for Proposal (RFP) process to support vendor/supplier engagement and contracting. 	Partnership Sourcing <ul style="list-style-type: none"> Inclusion of new Partnership Agreements as part of any new service expansion opportunity as investigated as part of the Locations and Assets Strategic Initiative. Identification and inclusion of core shared services at all locations as part of updated Partnership and Tenant agreements as per the Service Delivery Strategic Initiative. Investigation of new Partner opportunities as part of a targeted outreach approach including nontraditional organizations – Ontario Health Regions, Health Teams, Post-Secondary Institutions, etc. Ongoing representation at key community groups/tables to support engagement and animation strategies as part of the Client/Community Service Strategic Initiative.
Deliverables	<ul style="list-style-type: none"> Updated Partnership Agreement Model with clear cost benefits for both internal and external Partners. Updated Ventures model. 	<ul style="list-style-type: none"> Consolidated approach to all purchasing and services. 	<ul style="list-style-type: none"> Sourcing of new Partners from non-traditional Tenants both onsite and external.
Duration	9 months	6 months	12 - 24 months (Start as of September 2021)

Proposed Strategic Initiative Description Template – Human Resources

Description – Determination of overall human resource requirements for the Foundation supported by a clear operational model mixed with both centralized and decentralized approaches.	Interdependencies – Tenant/Partner Organizations; not for profit charitable organizations; NPF staff team.	Costs – Direct staff resources \$24,038; indirect costs \$2500 Unknown – Additional staffing requirements/labour rate adjustments
	Risks – Stretched resource allocation – reputational harm; cost pressures from other strategic initiatives.	Key Milestones Initiative Start – September 2021 Organizational Structure Model – June 2022 Human Resources Strategy Assessment – May 2023 Human Resources Model – September 2023 Board Approval to Complete Initiative – December 2023

Major Activities	Organizational Model Development <ul style="list-style-type: none"> Review and assess operational model – both current and proposed - to determine key staffing requirements and lines of supervision to ensure Foundation readiness for implementation of strategic initiatives. Using a lean strategy* approach, reconfigure lines of reporting and operational process to ensure efficiencies with a focus on cost containment/reduction/conservation. *A lean strategy is about gaining a competitive edge by offering better quality products at competitive prices and making a sustainable profit by eliminating waste through engaging employees in discovering deeper ways to think about their own jobs and smarter ways of working together. 	Human Resources Strategy Assessment <ul style="list-style-type: none"> Review all human resources policy and update pending organizational model and current Provincial guidelines under the Employment Standards Act (ESA). Identify centralized and decentralized approaches to ensure efficiencies and onsite support at each common roof location. Align labour rates to support increased USG and operational targets. Identification of service collaboration within a human resource lens in support of the development of enhanced shared services. Assessment of employee job satisfaction. 	Human Resources Model <ul style="list-style-type: none"> Review and confirmation of human resource requirements including recommendations that incorporate all strategic initiatives. Development of a phased in approach for any additional hiring's.
Deliverables	<ul style="list-style-type: none"> Updated Organizational Model with clear areas of job focus and supervisory lines. Provide update to Ventures staffing model. 	<ul style="list-style-type: none"> Assessment of Human Resource needs for the Foundation. Employee Job Satisfaction Survey and Process. 	<ul style="list-style-type: none"> Human Resources Model for the Foundation ensuring staff engagement and retention; centralized and decentralized approaches.
Duration	10 months	11 months	4 months

Proposed Strategic Initiative Description Template – Infrastructure and Technology

Description – Determination of overall infrastructure and technology requirements for the Foundation to support both current and future expansion needs.	Interdependencies – Tenant/Partner Organizations; not for profit charitable organizations; community stakeholders; NPF staff team.	Costs – Direct staff resources \$19,031; indirect costs \$25,000 Unknown – Upgrade or purchase costs for any infrastructure and/or technology items.	
	Risks – Stretched resource allocation – reputational harm; cost pressures from other strategic initiatives.	Key Milestones Initiative Start – September 2021 Infrastructure/Technology Assessment – August 2022 Infrastructure/Technology Model – March 2023 Board Approval to Complete Initiative – June 2023	
Major Activities	Infrastructure/Technology Assessment <ul style="list-style-type: none">Review and assess operational model – both current and proposed - to determine infrastructure and technology needs/requirements to ensure Foundation readiness for implementation of strategic initiatives.Investigation of cost savings and operational efficiency approaches.Current site assessments for each common roof location in consultation with NPACIT.Investigation of transitioning current resources from Tenant/Partner organizations over to the Foundation as part of overall shared service strategy.	Infrastructure/Technology Model <ul style="list-style-type: none">Development of an operational model that incorporates centralized and decentralized approaches to ensure efficiencies and onsite support at each common roof location and remotely as needed.Identification of shared service opportunities to support continued expansion within the Ventures business model.Incorporation of core service elements within common roof operational model including Partnership Agreements.	
Deliverables	<ul style="list-style-type: none">Overall assessment summary report on Infrastructure/Technology needs with clear recommendations to support current operations and future growth opportunities.	<ul style="list-style-type: none">Infrastructure/Technology Model for the Foundation that is adaptive to support phased in operational expansion.	
Duration	12 months	7 months	

Proposed Strategic Initiative Description Template – Leadership and Governance

Description – Organizational leadership and governance model that is adaptive and ensures both cultural and demographic inclusion.		Interdependencies – Tenant/Partner Organizations; NPF Board of Directors; NPF staff team.	Costs – Direct staff resources \$20,053; indirect costs \$7500
		Risks – Stretched resource allocation – reputational harm; cost pressures from other strategic initiatives.	Key Milestones Initiative Start – September 2021 Board Orientation Manual – March 2022 Leadership and Governance Assessment – April 2022 through March 2023 Organizational and Governance Model – January 2024 Board Approval to Complete Initiative – March 2024
Major Activities	Board Orientation Manual <ul style="list-style-type: none"> Review and assess current board member information and processes to determine information gaps and requirements. Review of external Board orientation documents from a variety of sources to inform development of orientation manual. Identify Board training and development needs and inclusion of curriculum into orientation manual; source training as needed. Update all Board membership and responsibility guidelines/expectations as part of the review and assessment process. Investigate various channels to ensure Board members access to information – online, hardcopy, etc. 	Leadership and Governance Assessment <ul style="list-style-type: none"> Identify Board linkages based on both centralized and decentralized approaches that will ensure and reinforce and effective governance model as the organization moves through the various strategic initiative goals. Working with Tenant stakeholders to determine potential linkages at the Board level. Investigation of Advocacy role in support of Foundation goals and to support the work of our Tenant organizations. Assessment of location/service mix needs and impacts on organizational resources. Needs assessment to determine creation of local advisories for each site location that the Foundation operates. 	Leadership and Governance Model <ul style="list-style-type: none"> Review and creation of an updated leadership and governance model for the Foundation. Implementation of subcommittees to support the work of the Board and organization. Updated Partnership strategy with linkages to the Board in support of key stakeholder engagement. Community engagement and advocacy focus – community, regional, provincial and federal.
Deliverables	<ul style="list-style-type: none"> Updated Board Orientation Manual with clear areas of responsibility and accountability. Membership wide and individual training and onboarding plans in place. 	<ul style="list-style-type: none"> Recommendations on an updated Board operational model to include clear sub committees and advisory group linkages (as applicable) 	<ul style="list-style-type: none"> Leadership and Governance Model for the Foundation ensuring Board member engagement and retention; centralized and decentralized approaches.
Duration	6 months	12 months	10 months

Proposed Strategic Initiative Description Template – Performance Metrics

Description – Identification, tracking and reporting on Key Performance Indicators (KPI) as part of the Strategic Plan. Subsequent use of KPI's to inform key strategies around cost containment, efficiencies and collaborative approaches.	Interdependencies – Tenant/Partner Organizations; NPF Board of Directors; External Stakeholders; NPF staff team.	Costs – Direct staff resources \$13,171; indirect costs \$2,500 Unknown: Software needed to support initiative.
	Risks – Stretched resource allocation – reputational harm; cost pressures from other strategic initiatives.	Key Milestones Initiative Start – April 2021 Common Assessment Strategy – March 2022 Performance Metrics Model – September 2022 Board Approval to Complete Initiative – December 2022

Major Activities	Common Assessment Strategy Implementation <ul style="list-style-type: none"> Review and assess services to determine process design elements – organizational theory of change, logic models; impact blueprints. Identify key outcomes and associated indicators based on the following: self defined, mandatory and standardized. Monetize outcomes and identify key indicators. Creation of data requirements and collection plan. Identification of baselines (if applicable) and associated targets. with external Comparative analysis sources to determine key benchmarks (if applicable). 	Performance Metrics Model <ul style="list-style-type: none"> Robust and adaptive model for all KPI's on all service elements provided by the Foundation. Reporting on performance and impact which includes baselines, targets and benchmarks. Inclusion of social impact and social determinants of health in all reporting. Creation of a dashboard model to provide frequent and timely summarization of performance to date. Inclusion as part of the common roof model. Creation of targeted reports for government and other key sectoral tables. 	
Deliverables	<ul style="list-style-type: none"> Clear service outcomes and related Key Performance Indicators for tracking and reporting purposes. Overall Theory of Change Model for the Foundation. 	<ul style="list-style-type: none"> Evaluative model for the Foundation that provides detailed performance tracking for all services on a timely basis. 	
Duration	12 months	6 months	

Proposed Strategic Initiative Description Template – Common Roof Model

Description – Using a social purpose real estate framework to develop an overall model for the common roof; from operational to replicable in support of further expansion.	Interdependencies – Tenant/Partner Organizations; NPF Board of Directors; External Stakeholders; NPF staff team.	Costs – Direct staff resources \$54,797; indirect costs \$15,000 Other - \$25,000 (consultation engagement)
	Risks – Stretched resource allocation – reputational harm; cost pressures from other strategic initiatives; availability of financing options.	Key Milestones Initiative Start – April 2022 common roof model – March 2023 Government advocacy – April 2021 through March 2024 Board Approval to Complete Initiative – June 2024

Major Activities	common roof Model Development <ul style="list-style-type: none"> Review all historical reports, documents, research, etc. on the current common roof model and summarize key foundational items and experience to help inform model “refresh”. Connect to all strategic initiatives integral to the common roof model as outlined – Tenant engagement, service collaboration, shared services, community animation, etc. Investigation of best practices in social purpose real estate and alignment with the common roof model. Identify core criteria and service elements required for both operation and new site/management development. Define value(s) of common roof model. 	Targeted Advocacy Strategy <ul style="list-style-type: none"> Review key stakeholders map and develop value propositions related to a government engagement and advocacy strategy. Work with government funded tenants to identify key linkages within Federal, Provincial, Regional and Municipal government levels. Using the common roof value proposition, develop a targeted advocacy and engagement strategy to inform and develop “champions” with various levels of government supporting the common roof model. Use targeted reports highlighting current KPI’s and benefits for organizations within the common roof for government and other key sectoral tables. 	
Deliverables	<ul style="list-style-type: none"> Overall model for common roof that is replicable and provides clear benefits and guidelines for operations and new development criterion. 	<ul style="list-style-type: none"> Government support for expansion of the common roof model in support of housing Transfer Payment Organizations (TPA). 	
Duration	12 months	12- 24 months	