

Statement of Work

Version 1.0

Home on the Hill

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1.0 Executive Summary

Founded in 2011 and incorporated as a charitable organization in 2012, Home on the Hill (HOH) is a non-profit organization who has made it a priority to build a support network for people living with serious mental illness, as well as families caring for loved ones who are living with serious mental illness.

Home on the Hill's vision is to provide a caring and quality home environment for people living with mental illness that projects a sense of belonging, growth and security for all persons. Their mission is to change the traditional ways that people with mental illness are supported in order to achieve a better state - one that represents a more inclusive circle of care for both patients and family caregivers to be supported.

Home on the Hill conducts a quarterly education series called the Robert Veltheer Lecture Series which has provided outreach and education to the community in and surrounding Richmond Hill. Home on the Hill also supports patients, caregivers and families in the Richmond Hill area with a variety of support programs, and houses one tenant on a part-time basis in a supportive housing unit.

Home on the Hill has engaged the Endeavor consulting team with the goal of establishing and aligning themselves on an adaptable strategy to fulfill their mission and vision. The establishment of an aligned strategy would allow Home on the Hill to better distinguish their strategic planning functions from their operational functions, improve the impact they have with their current programs and services, and better work towards fulfillment of their mission and vision.

The Endeavor consulting team will work closely with Home on the Hill to analyze the current state of the organization versus the desired future state, develop and prioritize strategies to achieve the desired future state (both short and long-term), and develop a high-level roadmap for how prioritized strategies can be achieved.

The Statement of Work provided herein includes a detailed outline of this project including the responsibilities of the Endeavor consulting team and Home on the Hill. It includes the methods, approach, scope, assumptions, constraints, high level timeline and deliverables to be provided throughout this engagement. It outlines how the work will be conducted, what can be expected and what will be required.



2.0 Background

Home on the Hill is an organization who has made it a priority to build a support network for families caring for loved ones who are living with a serious mental illness, such as schizophrenia, bipolar disorder, major depressive disorder and many others. The vision of the organization is to provide an inclusive circle of care together with a caring home environment in which both patients and family caregivers are supported. Home on the Hill was founded in 2011 and was formally incorporated as a charitable organization in 2012.

2.1 Organizational Goals

Aligned with Home on the Hill's vision, there are 3 major goals for the organization with the overarching goal of wishing to be the leader in developing, refining and promoting a cost effective 'client and family' model of care.

- To provide effective social and emotional support programs for adult patients inclusively of their caregivers.
- To provide education through outreach about severe mental health affecting adults and their unique needs for care.
- To provide affordable housing units for patients living with severe mental illness in order to prevent hospitalizations and re-hospitalizations.

These three goals enveloped in an inclusive model of care have far reaching benefits in improving public awareness of severe mental illness for the adult demographic, providing up-to-date education and support around self-care for caregivers, and ultimately decreasing the strain on the health care system by reducing hospitalizations and re-hospitalizations.

2.2 Target segment

Amongst Ontarians living with mental illness, approximately 2.5% will experience serious mental illness (Office of the Auditor General of Ontario, 2008). Home on the Hill serves those adults living with severe and persistent mental illness. Home on the Hill seeks not only to support patients suffering from mental illness but also their family caregivers given that 50% to 90% of mentally ill adults continue to live with their families. Home on the Hill focuses on the Richmond Hill and Vaughan area. Based on the 2016 census, there were 5000 people living with serious and persistent mental illness in the Richmond Hill area, an estimate that Home on the Hill believes is too low.

Home on the Hill currently supports 25 families with their support programs and houses 1 tenant on a part-time basis in their supportive housing unit. The Robert Veltheer lectures have provided the impetus for outreach with audience participation reaching approximately 100 per lecture with a cumulative total reach of 7,000 participants who have attended thus far.



2.2 Current Programs

Home on the Hill provides a variety of different support programs, either aimed at supporting patients, or their family caregivers. These support programs include diverse workshops and are organized frequently. In the month of March 2018, HOH organized a total of 28 support programs, in 2 different locations in the Richmond Hill area. The existing support programs are listed below:

- Bi-weekly Family Support Group: Wednesday evenings 7-9pm
- Weekly Art Therapy: Thursday 1-3pm
- Weekly Art Therapy: Tuesdays 7-9pm
- Soup's On Program Fridays 10am-2-pm
- Music Therapy Thursday 7-9pm
- Yoga Tuesday from 1-2 pm
- Job Skills
- Peer Group Outings Friday from 7-9pm
- One on One Counseling

The Robert Veltheer lectures attract medical and research experts specializing in mental health illnesses as well as policy makers and politicians. As a result, they have been enormously successful in that they have provided an impetus for awareness in the Richmond Hill and Vaughan communities for the need for outreach in education, public awareness, de-stigmatization, self-care for caregivers and the need to form closer partnerships with health care providers. Participants of these lectures, be it patients or their caregivers all attest to the effectiveness of the information provided, the support they feel and the need for more. Each lecture is centered around a specific mental illness, so missing one means that families need to wait a long time to get their specific questions answered and obtain the information they seek. Many patients have to wait in excess of one year waiting for a psychiatrist meaning that these lectures form their only avenue to obtaining specific information about the illnesses of their loved ones. The lectures also provide a supportive community for family caregivers dealing with the same illness, allowing them to share and support each other through their experiences and struggles.

2.3 Organization structure

The organization consists of six board members, three of whom are also members of the executive committee. Currently, the board operates as a working board. A sixth board member recently joined the organization and Home on the Hill is looking to recruit 4 more board members as part of the transition into a working board. There are paid staff on a pro-rata basis to lead different support programs and three volunteers who are seniors as well as caregivers who help the organization with administrative duties.



2.4 Revenue Streams

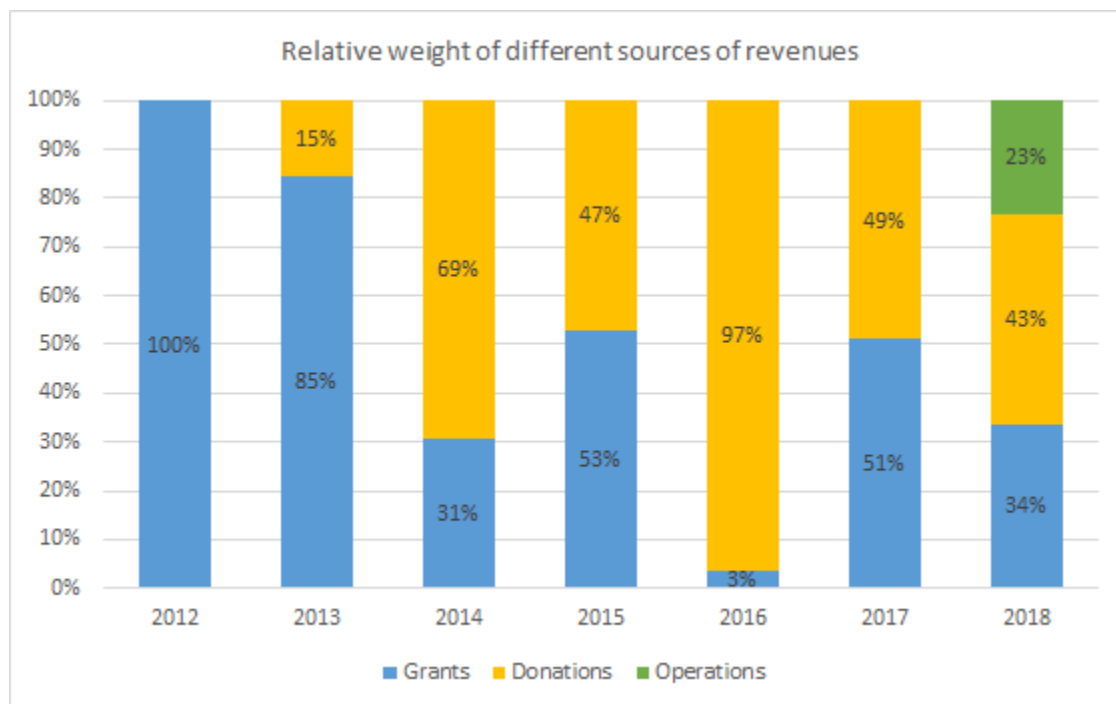
Overall, considering the size of the organization and their various operations, Home on the Hill's financial results are pretty sustainable. Over the years, they have built up net assets of \$32,000 and most operations are funded by grants.

2.4.1 Sources of Revenue:

Grant funding comprises 35% of HOH's revenue and has been provided by the Canadian Government, Canada Mortgage and Housing Corporation (CMHC) and other foundations. Home on the Hill is currently working on an application for a substantial grant from the Central Health Integration Network (Central LHIN).

Private donations comprise an average of 57% of HOH's total revenue. They are in the process of organizing fundraisers to provide a more consistent stream of funding.

Operational revenue, from rental subsidies and support programs comprise the smallest amount of revenue.





2.5 Problem Definition

Home on the Hill is seeking to align themselves with their mission and vision and are striving to create an adaptable strategy that is realistic to be successfully implemented within the given resource constraints. This would allow HOH to distinguish their planning functions from their operational functions in a more structured way. They would like to prioritize and adapt their support programs to provide greater impact and efficiency and to offload the resources into planning and fundraising. In addition, they are struggling with reaching ill patients to attend their support programs (due to the severity of their illnesses) and in recruiting and retaining board members and volunteers.

Despite its small size, the Home on the Hill organization offers a breadth of services to 25 families reaching in excess of 100 through their quarterly lectures centered on education and advocacy. They are impressive in how much impact they are able to achieve with such limited resources.

3.0 Project Objectives

The Endeavour's team overall project objective is to provide a realistic, adaptable and implementable strategic plan that will align Home on the Hill's support programs, advocacy programs and outreach to their mission and vision.

The key aspects of developing the strategic plan will be the following:

1. **Gap analysis:** gather information about how the organization currently operates as well as where it wishes to operate in the shorter and longer terms.
2. **Needs Assessment and Prioritization Framework:** perform a community needs assessment and determine an appropriate prioritization framework under which shorter and longer-term potential recommended strategies can be evaluated. This will include the following components:
 - a. An assessment of the existing service delivery model;
 - b. Performing a capabilities assessment; and
 - c. Determining and prioritizing a list of potential new strategies for consideration to accomplish Home on the Hill's mission and vision.
3. **Roadmap for Implementation of Recommendations:** provide a high-level roadmap of how recommended strategies will reach from the current state to the desired future state, including a set of key performance indicators that could be used to measure progress.



4.0 Project Sponsors

Executive project sponsors will communicate their expectations throughout the project's 5-month cycle. They will enable the Endeavour team by providing access to required information and stakeholders. Kathleen Mochnacki, the President of the Board of Home on the Hill will serve as the primary source of contact for Endeavour's Engagement Manager, Paulina Abramowicz.

Maggie Veltheer, Treasurer and Program Director of Home on the Hill will be her backup in case of Kathleen's unavailability.

Both Kathleen and Maggie will sign-off on all deliverables provided by the Endeavour Consulting Team.

5.0 Project Approach

In order to establish a feasible corporate strategy for Home on the Hill, the following table describe the methodology and its purpose for each stage:

Focus Area	Approach	Purpose
Problem Identification and Statement of Work (SOW)	Introductory meeting	<ul style="list-style-type: none"> To gain a deeper understanding of the organization To align between both parties, Home on the Hill and Endeavour, in this engagement: <ul style="list-style-type: none"> Understanding of the current problem Defining the direction and boundaries
	Statement of Work (SOW) meeting	<ul style="list-style-type: none"> To present and summarize the expectation of this engagement with sign-off This document will be the guiding tool of what will be delivered by the end of this engagement
Assessment & Strategy Development (Internal and External Analysis)	Desk Review of Relevant Documents	<ul style="list-style-type: none"> To gain a deeper assessment into the current operations of the organization "As-is" with existing business data. The documents include and not limited to: <ul style="list-style-type: none"> Historical Feedback forms and results Financial Statements SWOT



	Attending Veltheer lecture / supportive program	<ul style="list-style-type: none"> • To observe current operation workflow "As-is" • To engage participants (Volunteers, hospital partners, patients, caregivers, and government agency professionals etc) with survey and focus group that will help to determine the following aspects and not limited to: <ul style="list-style-type: none"> ○ Customer needs ○ Customer satisfaction ○ Lecture / program effectiveness ○ Organization visibility ○ Customer connection channel ○ Future lecture / program development
	Conduct and distribute survey to members, non-members, professional partners	<ul style="list-style-type: none"> • By engaging with members, non-members, and professional partner, this approach will help establish future strategy of the organization with the following aspects and not limited to: <ul style="list-style-type: none"> ○ Needs from customer in mental health domain ○ Target Audience ○ Organization visibility ○ Organizations strengths ○ Future location and accessibility
	Board members interview / survey / meetings / Capability Assessment	<ul style="list-style-type: none"> • To elicit details from individual board members. This approach will gather their view of: <ul style="list-style-type: none"> ○ Organization's strengths ○ Organization's major challenges and priorities ○ The desired future strategy of organization in both short (1-2 years) and long term (3-5 yrs)
	External Research & Competitive Analysis	<ul style="list-style-type: none"> • To understand the market trend in general focusing mental health domain • To research and compare similar organizations, be it in Canada or abroad, primary to the following areas: <ul style="list-style-type: none"> ○ Target audience ○ Mission, vision, and values ○ Size and location ○ Programs and Service offer • With the above information, they will provide the understand of: <ul style="list-style-type: none"> ○ Future opportunities and direction ○ Best practices in mental health domain ○ Organization standing within competitor group in mental health domain



Conclusion and Recommendation	Final Presentation to board members	<ul style="list-style-type: none">• To provide Home on the Hill's Board members with our findings and recommendation to help achieve their corporate strategy in the next 5 years by end of August 2018.• The recommendations will be supported by a suite of deliverables, as delineated in the Project Objectives of this document in Section 3.0
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6.0 Project Deliverables

The main deliverables throughout the remainder of the project lifecycle, be it internal or final deliverables might include the following (please note this list is not exhaustive and may be abbreviated depending on a deeper analysis):

Interim Report: This report will focus on the initial assessment and research of Home on the Hill and the industry, based on internal and external analysis:

- Collecting, analyzing and synthesizing insights from both existing data as well as additional data collected by the Endeavour team
- Understanding and summarizing the competitive landscape within mental health community organizations within the GTA (as well as looking globally for best practices)
- Conducting and presenting the results of a needs assessment of the target beneficiaries/population within the Richmond Hill area
- Conducting a partner network analysis to gauge potential partnerships and opportunities

Final Report: This final deliverable will summarize our findings and showcase our strategic recommendation, as well as a high-level implementation plan:

- Evaluation of current program offerings to gauge effectiveness and efficiency of support programs
- Development of a prioritization framework to craft a strategic recommendation
- A high-level implementation plan with a focus on potential timelines and metrics for success
- A strategy that depicts optimal approach the organization should take based on the assessment criteria framework and organizational objectives and vision

7.0 Project Scope

7.1 Items within scope

The following items are in scope for this five-month engagement:

- Service model assessment
- Community outreach assessment
- Partner network assessment
- Financial assessment
- Data gathering and analysis



7.2 Items outside-of-scope

The following items are outside of scope of this initiative:

- Fundraising activities including but not limited to, fundraising strategy, in-person fundraising etc.
- Legislative analysis
- Policy analysis
- Recruitment activities
- Training activities
- Detailed implementation plan
- Marketing strategy
- Communication strategy

8.0 Assumptions and Constraints

8.1 Assumptions

Our assumptions are as follows:

- The Endeavour engagement will cease upon final delivery of project deliverables in August 2018.
- Key stakeholders from Home on the Hill will be available within a reasonable timeframe of 72 hours to provide answers to questions or requests for information.
- Existing funding structure will remain constant throughout Endeavour's engagement.
- Existing Board members will remain the same throughout the duration of Endeavour's engagement.

8.2 Constraints

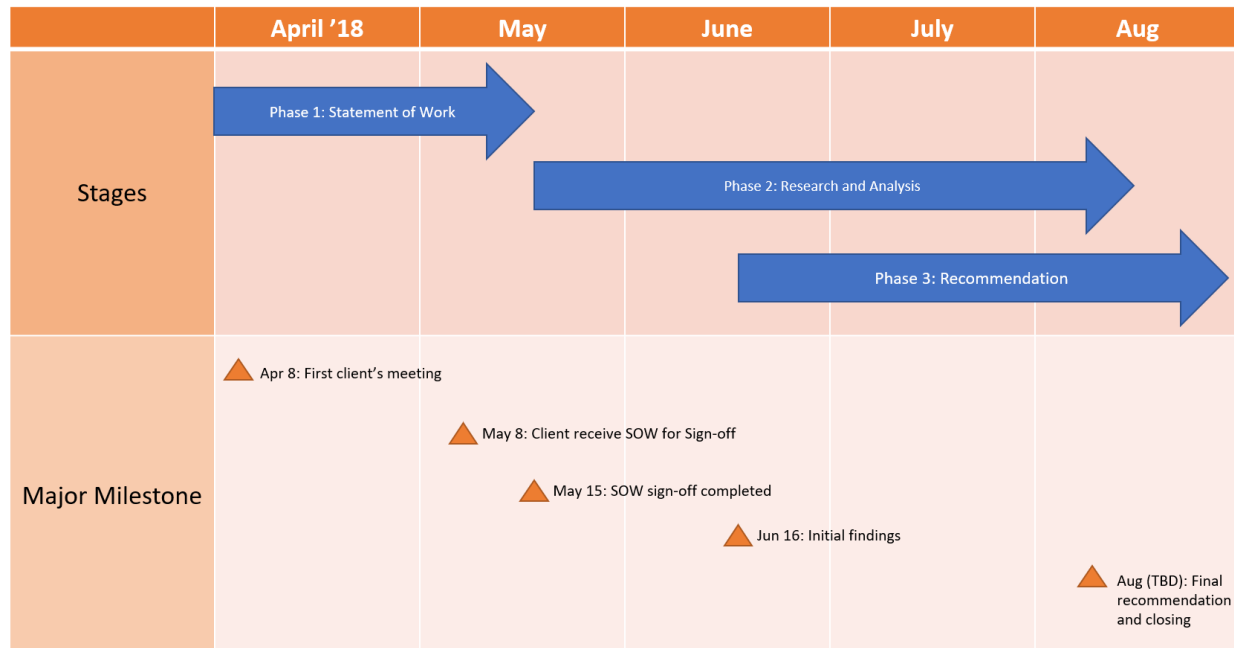
The project is constrained by the following:

- Each member of Endeavour's team is fully employed and has personal or work commitments outside of their Home on the Hill's engagement. Thus, the work deliverables will be completed outside of normal business hours and responsiveness might be variable.
- Home on the Hill is headquartered in Richmond Hill, while the Endeavor consulting team lives and works in Toronto. In-person meetings between the two parties could potentially be limited due to the distance between the two locations.



9.0 Project Schedule

Below is a high-level project schedule. Firm timelines will be provided once a detailed schedule has been



developed.

10.0 Communications Plan

The Engagement Manager, Paulina Abramowicz will be the main source of contact for Endeavour however the entire team will be included in pertinent client communication and information provided. The primary source of communication will be email, secondary conference calls and tertiary vis-à-vis interviews or meetings.

Any Endeavour team members might be assigned with conducting individual interviews, focus groups or surveys depending on need and resource availability. Paulina will designate a backup if she is unavailable.



11.0 Resource Requirements

10.1 Client Human Resources Available

The President of the Board, Kathleen Mochnacki will be available within 72 hours with Maggie Veltheer as backup.

The Endeavour team will hold regular bi-weekly conference calls and will be in contact over email, as it is required. They will be tabled at the monthly Board meeting, as it is necessary.

10.2 Client Document Resources Available and Expected

The Endeavour team will assess all client documents provided to them and will treat them with utmost confidentiality and care.

The Endeavour Consulting team has requested the following data to be sent by Home on the Hill:

- Environmental scan conducted in 2015 by Kathleen Mochnacki
- Annual report - Financial statements (past 7 years)
- Detailed financial information about their operations
- Feedback forms of their various support programs and Robert Veltheer series
- Preliminary SWOT analysis
- Home Matters proposal to central LHIN

The team has received all of the above, except detailed financial information or feedback forms with regards to their various operations. The team may request additional data throughout the consulting engagement.

10.3 Consulting Hours Available

Each member of the Endeavour Consulting Team will be available five to ten hours per week until the end of the engagement. The Endeavour engagement commences in April 2018 and terminates in August 2018. Final deliverable will be in the form of a presentation to the Board Members of the Hill accompanied by any supportive documentation and analytical details.



12.0 Team Structure, Roles, and Responsibilities

12.1 Responsibilities of Consulting Team

The responsibilities of the Endeavour team are to assess the client's needs, to develop a clear and tailored Statement of Work, and to provide a meaningful deliverable at the end of the engagement. The team consists of:

- 1 Engagement Lead
- 1 Senior Consultant
- 4 Consultants

12.2 Responsibilities of Engagement Manager

The Engagement Manager manages the project throughout its life cycle and acts as a main point-of-contact between the consultants, the Endeavour Executive and Home on the Hill. The Engagement Manager is also responsible for understanding the needs of Home on the Hill through consultation; defining the problem statement and the scope of work; structuring the overall project approach and methodology; leveraging the knowledge and creativity of the consultants to generate recommendations; and ensuring the project milestones and deliverables are of the highest quality.

12.3 Responsibilities of Consultants

The consulting team collaborates on and participates in various streams of the project. This includes

participating in defining the problem statement, scope of work and project timelines and deliverables; conducting relevant research and analysis; and participating in summarizing the key findings and recommendations.

12.4 Responsibilities of Project Advisor

The Project Advisor is a member of the Endeavour Advisory Committee who has in-depth knowledge and experience in consulting, strategy, and the nonprofit sector. Project Advisors contribute to the engagement by providing guidance and mentorship to the consulting team; participating in orientation and review sessions; and providing feedback on the statement of work, project approach and all deliverables.

Deviation Disclaimer

The Deviation Disclaimer must be completed to indicate whether the Statement of Work (SOW) is a deviation from the client's initial application. Should there be changes in the SOW, they should be noted to ensure that they client is aware of the scope change and understands the resulting implications.



13.0 Client Agreement

The following is a template of the Client Agreement signed by the Client and Endeavour Volunteer Consulting for Non-Profits (Endeavour) before commencing the consulting engagement:

The template can be found online at the Endeavour Knowledge Center website – under Documents – Agreements and Guidelines.



14.0 Change Request Procedure

Where evaluation of business case for the proposal suggests the proposal may be worthwhile but cannot be achieved without amending the existing plan, the Endeavour Volunteer Consulting for Non-Profits (Endeavour) Change Request Form must be completed. The Change Request Form is designed to assist the Consulting Team, the Executive Team, and the Advisory Board in determining the potential impact of changes to the project timeline in the signed Statement of Work.

The template can be found online at the Endeavour Knowledge Center website – under Documents – Agreements and Guidelines.



15.0 Sign-Off on Statement of Work

This Statement of Work is agreed to be complete and sufficient for commencing the consulting project described herein:

Home on the Hill

Key Contact - Executive Level¹

Endeavour Volunteer Consulting for Non-Profits

Engagement Manager²

Full Name:

Mochnacki, Kathleen

Full Name:

Abramowicz, Paulina

Position:

President of the Board of Directors

Position:

Engagement Manager

Email:

kathleen.mochnacki@gmail.com

Email:

paulina.abramowicz@gmail.com

Phone:

Phone:

416-302-5349

Signature:

Signature:

Date:

Date:

05/08/18

¹ Key Contact - **Executive Level:** This individual has the authority to bind your organization in a consulting agreement with Endeavour and to make decisions for your organization.

² **Engagement Manager:** Only sign after the project advisor has reviewed and approved the Statement of Work



16.0 Project Contributors

Endeavour Volunteer Consulting For Non-Profits (Endeavour)	Client (CO)	Organization
Paulina <i>Engagement Manager</i>	Abramowicz	Kathleen <i>President of the Board of Directors</i>
Shahroz <i>Senior Consultant</i>	Ehsan	Maggie <i>Treasurer, Program Director</i>
Bruno <i>Consultant</i>	Henderyckx	
Neil <i>Consultant</i>	Gangal	
Andy <i>Consultant</i>	Lai	
Tyler <i>Consultant</i>	Scott	
Stuart <i>Project Advisor</i>	Watts	
Julian <i>Project Advisor</i>	Antony	



17.0 About Endeavour

Endeavour Volunteer Consulting for Non-Profits (Endeavour) is a registered Canadian charity that provides management consulting to improve organizational capacity and community impact. We focus on serving non-profit organizations that otherwise cannot afford professional consulting.

Since 2007, Endeavour has recruited and managed more than 300 volunteers to provide management advice to more than 60 non-profit organizations in Ontario, helping communities in many areas, such as the arts, children and family services, disabilities, education, environment, healthcare, immigrant services, rural development, skills training, poverty relief, and youth development.

Learn more about Endeavour at www.endeavourvolunteer.ca