

# Carewest Balanced Scorecard

2024-2025 Q3 & Q4

2025-2026 Q1

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## Carewest Balanced Scorecard

In 2022-23 the Carewest Board and leadership team embarked on a value-based engagement journey to create a strategic direction for the organization. The Carewest Strategic Plan 2023-26, set priorities for not just our business, but for how we make a difference in the lives of those we care for, and create a place where our staff and volunteers feel proud to come every day. There is much to celebrate that has already been accomplished, and we are excited to continue this journey. The 4 strategic foundation pillars are Client Experience, Health Workplaces, Financial Sustainability and Agile Health System Integration.

In 24/25 Carewest has seen many organizational-wide technological changes, such as the Electronic Health record (Connect Care), Mealsuite, Momentum, Reporting and Learning System, for a few examples. The Carewest Balanced Scorecard has been evolving with historical indicators, new data that is accessible and ensuring that the scorecard reflects Carewest as an organization.

In the following pages, the Carewest Balanced Scorecards for 2024-25 Quarter 3 and 4 and 2025/26 Quarter 1 are shown.

### Highlights for 24/25

- Connect Care launch was successful and one of the many technological advances that Carewest has implemented for this fiscal year
- Carewest launched its own Long-Term Care Survey to both residents and caregivers in the Spring of 2025. Overall satisfaction by both residents and caregivers was. The 2 areas of improvement were meals and dining and recreation activities. Action plans were developed in late spring 2025 to improve programming for activities as well as more customized meal options for our residents. This survey will be repeated in the Fall 2025, to evaluate our interventions.
- Carewest established a Privacy office at the launch of Connect Care in 2024, in a new technological environment and possibilities of breaches while learning a new system, Carewest has demonstrated that with substantial education and reinforcement the number of reportable privacy breaches remains consistently low.
- Learning our new data and ensuring data quality with new technological changes is significant and is continuous to inform our work and what matters to our residents and clients

Carewest is committed to continuously improving care for our clients and residents. The Balanced scorecard below depicts at a glance to detail whether we are meeting our targets (green), close to (yellow), or not yet meeting our indicators.

Sincerely,

Carewest Leadership

Carewest Balanced Scorecard 2024/2025				
Strategic Foundation and Goal	Key Performance Indicators	Target	Q3	Q4
<b>Client Experience</b> Improve Quality of Life Achieve Excellence in Quality Safe Care Build Communities	Overall dining experience	>80%	72% <sup>1</sup>	65%
	Overall opportunities to do activities	>80%	70% <sup>1</sup>	68%
	Number of Level 3 and 4 incidents per 1,000 bed days	<0.2	0.29	0.24
	Percentage of facility budget towards improvements	>35%	40%	41%
<b>Healthy Workplace</b> Establish a Workplace of Excellence Create Leaders Embrace Technology	1 yr retention rate	>85%	94%	94%
	Does your work bring you joy, happiness, curiosity and inspiration? How satisfied are you with career growth opportunities within the organization? <sup>2</sup>	>80%	69%	75% <sup>2</sup>
	How would you rate leader support? How satisfied are you with the level of support and guidance provided by your leader? <sup>3</sup>	>80%	83%	81% <sup>3</sup>
	Percentage of Nursing call bells answered	<3 min <6 min <sup>4</sup>	41%	41%
	Number of reportable privacy breaches by Carewest a year	<12	1	2
	Completed IT projects on Carewest IT roadmap	80%	100%	100%
<b>Financial Stability</b> Optimize Resources	Annual operating surplus/deficit of budgeted expenses (millions)	Within 1%	-3.20%	-2.16%
<b>Agile System Integration</b> Leaders in Specialized Programs for Adults Support System Capacity with Adaptive Service Delivery	Occupancy Rate	>95%	LTC 96%	LTC 92.9% Post Acute 86.6% <sup>5</sup>
	Median days from discharge to admission Median days from pending accept to admission (LTC) <sup>5</sup>	5 days 2 days <sup>6</sup>	9 days	6 days <sup>6</sup>

<sup>1</sup>Carewest used the Health Quality of Alberta Resident study that was conducted in 2022/23 as a baseline for 24/25 quarter 3. In the Spring of 2025, Carewest conducted its own Long Term Care Resident and Caregiver Survey, and this is reflected in the quarter 4 results. This survey is conducted every 6 months and due to be repeated in the Fall of 2025.

<sup>2,3</sup>The indicators for creating leaders have evolved with the anticipation of the Staff survey that was to be conducted in the summer of 2025. Carewest is committed to being an employer of choice and sought leadership feedback for joy at work as well as support from leaders as a start. This then evolved to satisfaction with career

opportunities and more specificity in guidance and support from leaders. These metrics were obtained utilizing leadership forums and just in time reporting, anticipating the larger organization-wide staff survey.

<sup>4</sup>Carewest has a call bell system that provides data on timeliness of action to the call. Quarter 3 reporting was the first time that we were able to see this data and a 3-minute interval was set as a target arbitrarily. For quarter 4 we changed to target to 6 minutes as for most of the clients, Carewest is their home. The data did not change. This prompted work with the vendor to review data quality.

<sup>5,6</sup>Occupancy since the adoption of Connect Care (Electronic Health Record) is calculating open beds incorrectly (when clients are on pass, in hospital, etc) therefore showing lower occupancy. There is work in progress to address this. There are many indicators for system capacity, in quarter 3 we chose median days from discharge to admission as this was thought to be the area that Carewest could impact the most. In conversation with AHS, their target was reviewing pending accept to admission and would like to see a 2-day turnaround, therefore Carewest has changed its indicator.

Carewest Balanced Scorecard 2025/2026						
Strategic Foundation and Goal	Key Performance Indicators	Target	Q1	Q2	Q3	Q4
<b>Client Experience</b> Improve Quality of Life Achieve Excellence in Quality Safe Care Build Communities	Overall dining experience	>80%	65%			
	Overall opportunities to do activities	>80%	68%			
	Number of Level 3 and 4 incidents per 1,000 bed days	<0.2	0.15			
	Percentage of facility budget towards improvements	>35%	26%			
<b>Healthy Workplace</b> Establish a Workplace of Excellence Create Leaders Embrace Technology	1 yr retention rate	>85%	83.3%			
	How satisfied are you with career growth opportunities within the organization?	>80%	73.6%			
	How often do you receive constructive feedback that helps you improve and grow in your role?	>80%	62.7%			
	Percentage of Nursing call bells answered <6mins	>80%	81% <sup>1</sup>			
	Number of reportable privacy breaches by Carewest a year	<12	0			
	Percentage of completion of IT deliverables to milestones- on track <sup>2</sup>	80%	100%			
<b>Financial Stability</b> Optimize Resources	Administrative costs as a percentage of total costs (millions) <sup>3</sup>	Within 3.3%	3.2%			
<b>Agile System Integration</b> Leaders in Specialized Programs for Adults Support System Capacity with Adaptive Service Delivery	Occupancy Rate	>95%	LTC 94.6% Post Acute 92.2% <sup>4</sup>			
	Median days from pending accept to admission (Traditional LTC) <sup>5</sup>	2 days	8 days			

<sup>1</sup>Discussions with the vendor of the call bell system and review of the data quality, more accurate reflection of timeliness in call bell response was demonstrated.

<sup>2</sup>IT deliverables are as per Carewest's Information Management and Information Technology roadmap.

<sup>3</sup>Carewest's total administrative costs continue to be below the accountability target to keep administrative costs below 3.3%. This ensures that Carewest is investing in value added administrative functions while ensuring most funding is directed towards front-line operations.

<sup>4</sup>Connect Care data is being reviewed provincially for accuracy on occupancy