

Alzheimer *Society*

SIMCOE COUNTY

ANNUAL REPORT

For the period April 1, 2017 to March 31, 2018



Help for Today. Hope for Tomorrow...®

Report of the Chair

It is my pleasure to report to Members on the 2017-18 fiscal year.

Our vision of “Persons affected by Alzheimer’s disease and other dementias live well and thrive in their community” continues to be a salient aspiration of Members, Friends of the Society, Staff, Volunteers, Community Partners, and Supporters of the Alzheimer Society of Simcoe County.

Over the last year, the Society has continued to make progress in leading the way in promoting brain health and reducing dementia impact in Simcoe County. Our collective strength has been effectively leveraged in building community and individual capacity to support people living with dementia in accordance with our 2015-2019 Strategic Plan.

Our progress this past year is in large part due to the strategic and collaborative leadership approach of our Chief Executive Officer, Debbie Islam, and a strong care culture fostered amongst the staff.

Through 2017-18 we celebrate:

- the continued evolution of our governance process;
- broader involvement and leadership of the members of the Board and Staff in local health system and age-friendly community planning;
- proactive involvement and leadership of Board, Staff and Volunteers in advocacy efforts leading to the announcement of a fully-funded Ontario Dementia Strategy in May 2017;
- the success of one-time funding from the North Simcoe Muskoka Local Health Integration Network for First Link Care Navigation as part of the Ontario Dementia Strategy, which will transition to base funding effective 2018-19;
- a hallmark first year of the Alzheimer Societies in Ontario (ASiO) Federation Agreement (effective April 1, 2017), and innovative expansion of the shared services model;
- our full engagement in ASiO Strategic Planning; and
- the successful implementation of the Minds in Motion® program in Simcoe County and Muskoka supported by a 3-year Ontario Trillium Foundation grant (2017-2020).

As we acknowledge phenomenal contributions in time, energy and resources towards making our vision a reality, there continues to be a high need for greater donor support from our community to sustain and grow our programs and services to meet increasing needs and demands.

I look forward to the year ahead, setting the stage for the next strategic plan with you, and exploring opportunities with Friends of the Society to support long-term engagement with our communities and sustainability of the Alzheimer Society of Simcoe County.

On behalf of the Board, it is with the utmost sincerity that we thank Debbie Islam, the Staff and gracious Volunteers for their dedication, time and passion this past year. There is much to be proud of.

Most Respectfully Yours,
Ann-Marie Kungl-Baker
Board Chair

Alzheimer Society of Simcoe County

The Year in Review

Highlights of Accomplishments

2017 - 2018

Leading the Way in Promoting Brain Health and Reducing Dementia Impact

The Alzheimer Society of Simcoe County successfully managed another year of tremendous growth and change as we continued to deliver on our mission of providing the highest quality support, education and advocacy in collaboration with persons living with dementia, and care partners. **Referrals increased by 37%** over 2016-17, with a **7% increase in the number of individuals served** and a **36% increase in service provision to persons with a diagnosis of dementia**. Despite the significant growth in service volumes, the Education and Support Services Team continued to provide quality, client-centred programs and services, with **99% of clients surveyed indicating their satisfaction with the services they received**.

In order to keep pace with the growing demand for services and increasing complexity of client needs, an evaluation process was initiated under the leadership of Laura-Lynn Bourassa, Manager of Education and Support Programs, to better understand who utilizes our services and for what purpose. With the introduction of a **First Link Care Navigator** supported by one-time funding through the **Ontario Dementia Strategy**, a business process mapping exercise was also undertaken to streamline client access and service delivery processes. In follow-up to this important groundwork, the Alzheimer Society of Simcoe County will endeavor to better define its scope of service and enhance its service delivery model in 2018-19.

The **Client Advisory Committee** continued to provide input and feedback to our Education Program and Support Services staff to ensure that the Society's service offerings respect needs, values and preferences of persons living with dementia, and care partners.

In order to ensure that our outstanding team of staff and volunteers has the capacity to continue to respond to the changing needs of our clients, as well as the diversity and complexity of care requirements, the Alzheimer Society of Simcoe County supported **continuing education and professional development opportunities**. We were pleased that several members of our team participated in Indigenous Cultural Sensitivity Training, as well as Positive Approach™ to Care training, a best practice approach to caring for persons living with dementia.

Education Services

The Education Team continued to deliver a full range of education programs to various stakeholder groups in 2017-18. We provided more **First Link® Learning Series** sessions to persons living with dementia, and care partners than the previous year, and were pleased to offer the new **Taking Control of Our Lives** education program, focusing on self-management knowledge and skill development for persons living with dementia.

Education Services staff continued to work in collaboration with community partners to provide education and training to staff, volunteers and students in long-term care homes, retirement homes, hospitals and community agencies, and as part of formal Personal Support Worker training programs in the region. The Society also participated in the provision of educational opportunities to local family medicine residents once again, as part of the Family Medicine Residency Program Geriatric Rotation.

The Alzheimer Society of Simcoe County played a leadership role in the planning and presentation of the annual **Dementia Conference** in October 2017, hosted by the North Simcoe Muskoka (NSM) Dementia Network. The theme of the conference was “*Everyday Ethics in Dementia: A Framework for Practice*” with keynote speakers Ann Munro Heesters, Director of Bioethics, University Health Network, Dr. Kevin Young, a geriatrician based in Orillia and Lead Physician for the NSM Specialized Geriatric Services (SGS) Program, and Dr. Amanda Gardhouse, another Orillia-based geriatrician. A highlight was an address from Mary Beth Wighton, a founding member of the Ontario Dementia Advisory Group, who was diagnosed in 2012 with probable frontotemporal dementia at the age of 45. Mary Beth and her partner, Dawn Baxter, shared their personal experiences with dementia and some of the challenging issues and decisions they have faced as part of their dementia journey.

Public education continued to be a priority for the Alzheimer Society of Simcoe County in 2017-18. In keeping with the Society’s strategic directions, many of our public offerings focused on the promotion of brain health. The Society continued to experience an overwhelming response to its 4-week Brain Health Series, **Heads Up for Healthier Brains**. This program provided information and practical strategies for maintaining a healthy brain and reducing the risk of developing dementia.

The Education Team also delivered 25 education sessions in 2017-18, promoting the development of **dementia-friendly communities**. A major undertaking was the provision of education to County of Simcoe paramedics to enhance their ability to interact in a more dementia-friendly manner with persons living with dementia, and care partners during their calls.

Our **Speakers Bureau** continued to be a vital component of our public education program. Several active volunteers made presentations to community groups and attended health fairs on behalf of the Alzheimer Society on a regular basis.

The 2018 national **Alzheimer Awareness Month Campaign** was and continues to be a key focus of the Society’s public awareness activities. The theme was “*I live with dementia. Let me help you understand.*” The campaign focused on tackling stigma and negative attitudes around dementia by letting persons with dementia do the telling. Individuals shared their inspiring stories and provided pointers on how to be open and accepting towards persons living with dementia. Media packages were distributed to all local media outlets, resulting in good coverage across the region. We also utilized our website, e-newsletter, e-blasts and social media to share the Awareness Month messages.

Support Services

The Support Services Team continued to provide excellent service to our clients over the past year utilizing a geographically-based service delivery model. Family Support Coordinators provided **dementia counselling services** to clients through face-to-face visits in the Barrie and Orillia offices, as well as in client homes and over the telephone.

An emerging trend is an increase in the number of clients with more complex needs, including persons with dementia who live alone and have little or no support. These individuals require more intensive care management and navigation support to reduce risk and assist them to live well in the community. Over the next year, we plan to explore ways in which we can continue to provide support to this client group while sustaining quality service delivery to all clients.

The Society maintained its partnership with CHATS, a personal and home support services agency based in York Region, to provide dementia counselling for Bradford Adult Day Program clients and their care partners, as well as a support group and education sessions in the South Simcoe community.

The **Support Group Program** continued to be a core component of the Society's Support Services portfolio. Nine Support Groups for Care Partners were offered throughout Simcoe County in 2017-18. This program is monitored continuously and changes are made as needed to accommodate growth and ensure we can continue to offer full access to peer support in the most efficient and effective way possible. We were thrilled to establish a formal partnership with the VON Simcoe County to offer an on-site respite group for persons living with dementia, to enable their care partners to attend our support group meetings. The **Support Group PLUS Respite Program** was initiated in Barrie, Collingwood and Orillia in 2017-18 with funding support for the VON from the NSM Local Health Integration Network (LHIN).

The Alzheimer Society of Simcoe County continued to host three of the positions deployed to the geographically-based NSM **Behavioural Support System (BSS) Community Mobile Support Team**. Two Social Workers and one Occupational Therapist provided service to clients throughout NSM as part of the broader regional BSS program.

Social Programs

We were delighted to bring the evidence-based **Minds in Motion®** program to our region in 2017 in collaboration with the Alzheimer Society of Muskoka, with the support of a 34-month Ontario Trillium Foundation (OTF) grant amounting to \$289,300. Minds in Motion® is a 2-hour, 8-week community-based program for persons living with dementia, and their care partners that combines physical activity and cognitive stimulation. The response to this program across Simcoe County and Muskoka/Parry Sound has been overwhelming. Many community partnerships were established in a short period of time enabling the Society to offer the program in dementia-friendly settings. The number of participants far exceeded our targets in 2017-18, and continues to grow. The most compelling outcomes to-date are the reduction in social isolation for many participants and the promotion of social connectedness. Many of the participants have developed friendships and established informal networks, contributing to people living well and thriving in the community.

The **Barrie Coffee Social** and **Orillia Social Luncheon** continued to attract a large number of participants. We continue to explore ways in which to promote and offer sustainable social programs for clients and care partners as the need has clearly been demonstrated.

We transitioned our popular Music and Memory iPod Program to the **Alzheimer Society Music Project** in 2017, operated by the Alzheimer Society of Toronto. This change has provided a more standardized approach to the delivery of the program, and assisted with human resource management at the local level.

Leveraging Our Collective Strength to Build Community and Individual Capacity to Support People Living With Dementia

The tremendous advocacy efforts undertaken in collaboration with our Alzheimer Society in Ontario partners over the past few years resulted in the exciting announcement of an **Ontario Dementia Strategy** in May 2017. The commitment by the Ministry of Health and Long-Term Care to an investment of \$101 million over a three year period included funding for **First Link Care Navigators** at the local level. The Alzheimer Society of Simcoe County was one of nine Alzheimer Societies in the province to receive one-time funding to support the hiring of a First Link Care Navigator in year one of the Dementia Strategy. This new position is responsible for coordinating and integrating supports and services around the person living with dementia, and care partners. The year-one investment will transition to annualized base funding in 2018-19.

Over the past year, the Alzheimer Society of Simcoe County continued to actively engage in **age-friendly community planning** in the County of Simcoe and the City of Barrie. We served on the County of Simcoe's Age-Friendly Community Project Steering Committee, and joined the City of Barrie's Seniors Advisory Committee. The Society also actively participated in the exploration of a partnership between the City of Barrie and Baycrest's Centre for Aging and Brain Health Innovation as part of a proposed pilot project to develop a Dementia Friendly Virtual Village.

The Alzheimer Society of Simcoe County was pleased to support the establishment of **Project Lifesaver** in Barrie in 2017-18. Project Lifesaver is a tracking device for vulnerable persons who are at risk for wandering and getting lost. The tracking bracelet emits an FM radio frequency signal that can be picked up by Police using a special satellite receiver making it very effective in pinpointing a person's location.

In keeping with our strategic direction of leveraging our collective strength to build community and individual capacity to support people living with dementia, the Society actively participated in the work of the NSM LHIN, the NSM Dementia Network, and the NSM Community Support Services (CSS) Collaborative. Some highlights are as follows:

- The Chief Executive Officer continued to serve on the **NSM Seniors Health Project Team**. The Seniors Health Project Team is supporting the development of an integrated regional Seniors Health Program, with an initial focus on the planning and implementation of an SGS Program serving frail seniors and their care partners.

- The Chief Executive Officer continued to serve as a member of the **NSM Behaviour Service Implementation Steering Committee** which provides advice and direction to the NSM SGS Program regarding the planning and implementation of the re-design of the NSM BSS.
- The Chief Executive Officer actively participated in the **NSM Dementia Network** as a member of the Steering Committee.
- The Chief Executive Officer continued to participate as an active member of the **NSM CSS Collaborative** on behalf of the Society. The Collaborative consists of community support service agencies that work together and with other health care and community partners to coordinate and integrate the local health care system. The overall goal is to ensure access to the right service at the right time in the right place to support the needs of individuals with ongoing community support needs and their families in NSM.

The Chief Executive Officer also served on the **Central LHIN's Dementia Strategy Advisory Committee** in 2017-18. This group was established to bring together people with dementia, family care partners, health clinicians and care providers to co-design a local dementia strategy, in alignment with the Ontario Dementia Strategy.

The Chief Executive Officer continued to serve on the **Alzheimer Society of Ontario (ASO) Planning and Budget Advisory Panel** to represent the Societies in the NSM LHIN region. This group advises ASO's CEO on the preparation of ASO's Annual Plan and Budget, provides input into the development of the Alzheimer Societies in Ontario Strategic Plan, and advises on the use of the Strategic Investment Fund.

The Alzheimer Society of Simcoe County continued to support leading-edge Canadian research in the field of dementia over the past year through the Alzheimer Societies in Ontario Federation Agreement. The Society was extremely pleased to forward **\$19,581** in local donations and bequests designated for research in 2017-18 to the national **Alzheimer Society Research Program** and the **Tanz Centre for Research in Neurodegenerative Diseases** at the University of Toronto. The Society also supported Canadian researchers by promoting client involvement in various research studies throughout the year.

Strategic Enablers:

Resource Growth

The Alzheimer Society of Simcoe County received \$178,814 in **base funding** from the NSM LHIN in 2017-18 in support of its education and support services.

The Society also received \$232,536 in base funding for the First Link® program. We retained \$155,024 to support the program in Simcoe County, and flowed \$77,512 to the Alzheimer Society of Muskoka for the *First Link*® program in that region.

The Alzheimer Society of Simcoe County has not received any stabilization increases from the NSM LHIN for base-funded services since 2011.

BSS funding totaling \$188,359 was flowed to the Alzheimer Society from Waypoint Centre for Mental Health Care in 2017-18 in support of our three BSS Community Mobile Support Team staff and mobilization expenses.

The Society received **one-time funding** from the NSM LHIN in the amount of \$34,000 to support the hiring of a new First Link Care Navigator as part of the Ontario Dementia Strategy, and \$5,250 for equipment and supplies essential to the delivery of education programs and support services.

\$1,684 was received from ASO as part of the new **Alzheimer Societies in Ontario (ASiO) Federation Agreement**. All Alzheimer Societies are now supporting the cost of shared services which is deducted from the revenue allocated to each local Society. This is the reason for a much reduced level of revenue sharing in 2017-18 as compared to previous fiscal years.

Under the leadership of the Events Coordinator, several **fundraising events and campaigns** were undertaken in 2017-18 to support the Society's programs and operations. The highlights of special events fundraising were:

Event/Campaign	Gross Revenue (\$)
<i>Walk for Alzheimer's</i>	50,733
<i>Alzheimer Coffee Break ®</i>	24,780
Tag Days	18,129

Unfortunately, there was an overall decrease in fundraising revenue in 2017-18.

Donations revenue was comparable to that received in 2016-17.

\$64,370 of the 3-year **OTF grant for the Minds in Motion® program** was expended in 2017-18. The Alzheimer Society of Simcoe County receives installments of the grant every six months following required reporting submissions.

With funding support from Service Canada's **Canada Summer Jobs Program**, the Society hired a summer student in 2017 who assisted with the planning and coordination of the *Alzheimer Coffee Break ®* campaign, as well as the *Walk for Alzheimer's* and Tag Days.

Revenue growth has been identified as a strategic priority in ASiO's new Strategic Plan (2018-2022). The CEO of the Alzheimer Society of Simcoe County was invited to serve on **ASiO's Fund Development Strategy Team** that has been tasked with developing a Fund Development Plan for ASiO. We look forward to aligning our local fund development efforts with this plan to enable the Alzheimer Society of Simcoe County to cultivate funding to ensure long-term sustainability.

Close to **300 volunteers provided 2,515 hours of service** in 2017-18. The Volunteer Resources Coordinator continued to work closely with staff to ensure the evolving volunteer needs of the various programs and services were met. We are truly grateful to our amazing volunteer team for the time and energy they devote to assist us in achieving our goals.

We welcomed two new staff members to our team in 2017-18, Taryl Bougie as Minds in Motion Coordinator, and Meredith Barrie as Family Support Coordinator. We were pleased that Michelle Menecola transitioned from her previous role as Family Support and Education Coordinator to take on the new First Link Care Navigator position. We would like to thank Social Workers Jessie Daniel and Emily King who left the Alzheimer Society of Simcoe County in 2017-18, for their contributions to the BSS Community Mobile Support Team. The Society is so fortunate to have a ***dedicated and compassionate staff team*** that strives for excellence and brings passion to their work each and every day in support of our clients.

A Culture of Continuous Quality Improvement

In keeping with our strategic directions for 2015-2019, the Alzheimer Society continued to cultivate a culture of continuous quality improvement.

The Society established a ***Quality, Safety and Risk Committee*** at the operational level in 2017-18, in follow-up to the implementation of a risk management strategy over the previous two fiscal years. This committee is responsible for fostering a client-centred and performance-based culture; providing oversight to ensure the quality and safety of client programs and services, as well as oversight to the risk management program; and, identifying, monitoring and reporting performance data.

Dynamic Communication

The Alzheimer Society of Simcoe County continued to receive ***marketing and communications*** support from the Alzheimer Society Shared Services Centre as part of the new ASiO Federation Agreement. We were provided with assistance for website maintenance, social media posts, advertising, and e-newsletter development on an ongoing basis. This service has helped the Society to increase the efficiency and effectiveness of our communications activities and strengthened our brand in the local community. A strong internal ***Communications Team*** identified our communications priorities throughout 2017-18, and provided oversight to these activities. Analytics showed that we are engaging more people with our Society and its important work as a result of this enhanced systematic approach to communications.

The Alzheimer Society of Simcoe County developed a comprehensive ***Programs and Services Guide*** in 2017-18 which is now published two times each year. This excellent communication vehicle shares detailed information about the Society's programs and service offerings, when and where they are taking place, and how to access them.

Activity Statistics 2017-2018

Total Individuals Served by Organization (registered clients)	699
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<u>Education Services</u>	
New Referrals	102
Individuals Served (registered clients)	308
Visits (registered clients)	252
Service Recipient Interactions (non-registered clients)	7
Group Sessions	250
Group Participants	4,076

<u>Support Services</u>	
New Referrals	476
Individuals Served (registered clients)	500
Visits (registered clients)	1,128
Service Recipient Interactions (non-registered clients)	44
Group Sessions	135
Group Participants	1,536
Individuals Waiting for Service	114

<u>CHATS Counselling Services</u>	
New Referrals	3
Individuals Served	2
Visits	6

<u>Behavioural Support System Mobile Support Team</u>	
New Referrals	148
Individuals Served	170
Visits	709

<u>Minds in Motion® Program</u> (effective October 2017)	
Sessions (8 week series)	7
Individuals Served	94
Group Participants	767

<u>Volunteers</u>	
Volunteer Hours	2,515
# Volunteers at March 31 st	295

Financial Report *

Condensed Statement of Financial Position, March 31, 2018, with comparative figures for 2017

	<u>2018</u>	<u>2017</u>
Assets		
Current Assets	\$467,545	\$491,728
Liabilities & Net Assets		
Current Liabilities	139,678	126,742
Net Assets	327,867	364,986
	\$467,545	\$491,728

Condensed Statement of Operations, March 31, 2018, with comparative figures for 2017

	<u>2018</u>	<u>2017</u>
Revenues		
Donations	\$105,337	\$105,416
Bequest Donations	17,516	42,999
Fundraising	95,485	102,875
Nevada	5,599	448
Ministry of Health & LTC/LHIN	563,225	572,254
Alzheimer Society of Ontario Revenue Sharing	1,684	17,291
Grants	5,985	17,988
Ontario Trillium Foundation Grant	64,370	-
Education Events	-	1,136
Interest	6,481	7,037
Other	9,491	9,809
Total Revenues	\$875,173	\$877,253

Expenditures		
LHIN Programs		
Compensation	\$287,535	\$283,185
Supplies	3,845	4,557
Sundry	30,747	35,838
Equipment	8,110	3,311
Buildings & Grounds	39,740	40,200
	\$369,977	\$367,091
First Link Care Navigation		
Compensation	\$29,682	-
Supplies	112	-
Sundry	922	-
Equipment	3,304	-
	\$34,020	-
General Operations		
Compensation	\$176,713	\$183,315
Contracted Out	2,025	8,100
Supplies	3,746	7,835
Sundry	24,221	36,110
Equipment	3,281	2,534
Buildings & Grounds	15,963	15,211
Research Donations	19,581	45,349
	\$245,530	\$298,454
Behavioural Support Program		
Compensation	\$168,399	\$161,087
Supplies	-	438
Sundry	19,464	19,035
Equipment	497	488
	\$188,360	\$181,048
Orillia Community Geriatric Program		
Contracted Out	-	\$50,000
Equipment	7,791	-
	\$7,791	\$50,000
Minds in Motion Program		
Compensation	\$47,063	-
Supplies	5,053	-
Sundry	11,904	-
Equipment	2,594	-
	\$66,614	-
Total Expenditures	\$912,292	\$896,593

Excess of expenditures over revenues for the year	\$(37,119)	\$(19,340)
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* This is a condensed financial report. The Statement of Financial Position and Statement of Operations have been extracted from the audited financial statements for the year ended March 31, 2018 as reported by our auditors BDO Canada LLP, Chartered Professional Accountants, Licensed Public Accountants. Complete audited financial statements are available upon request.

Alzheimer Society

SIMCOE COUNTY

VISION STATEMENT

Persons affected by Alzheimer's disease and other dementias live well and thrive in their community.

MISSION STATEMENT

In collaboration with persons affected by Alzheimer's disease and other dementias, and care partners, we will provide the highest quality support, education and advocacy.

Board of Directors 2017-2018

Chair:	Ann-Marie Kungl-Baker (Apr-May/17; reappointed Dec/17) Irena Pozgaj-Jones (May-Nov/17; previously Vice-Chair)
Vice-Chair:	Jordan Weber (appointed to Board Nov/17 & Vice-Chair Feb/18)
Immediate Past Chair:	Valerie Armstrong (resigned Apr/17)
Secretary:	Janice McCuaig
Treasurer:	Melissa Faulkner (appointed Jan/18)
Directors:	Deena-Kay Froese Tara Maxwell Valerie Powell (appointed Dec/17)

Staff 2017 - 2018

Chief Executive Officer:	Debbie Islam
Manager of Education & Support Programs:	Laura-Lynn Bourassa
Education Coordinators:	Dana Bessette Michelle Menecola (until Nov/17) Erika Rice
Family Support Coordinators:	Meredith Barrie (effective Feb/18) Heidi Haupt Michelle Menecola (until Nov/17) Susan Nagy
First Link Care Navigator:	Michelle Menecola (effective Dec/17)
Minds in Motion Coordinator:	Taryl Bougie (effective Jul/17)
Events Coordinator:	Josie Figliuzzi
Special Events Assistant:	Emilia Szczepkowski (summer student)
Volunteer Resources Coordinator:	Marguerite Glanfield
Administrative Assistant:	Kristin Flood
Behavioural Support System Mobile Support Team:	Social Worker – Jessie Daniel (resigned Apr/18) Social Worker – Emily King (resigned Nov/17) Social Worker – Stephanie Saunders Occupational Therapist - Jenny Keresztesi

Contact Information

Barrie Office Location:	20 Anne Street South, Barrie, Ontario L4N 2C6
Barrie Mailing Address:	P.O. Box 1414, Barrie, ON L4M 5R4
Orillia Satellite Office Location:	Seniors Care Clinic, 25 Museum Drive, Orillia (by appointment only)
Telephone Numbers:	(705)722-1066 or 1-800-265-5391
E-Mail Address:	Simcoecounty@alzheimersociety.ca
Chapter Website:	www.alzheimer.ca/simcoecounty
Charitable Registration #:	11921 2116 RR0001