

Alzheimer *Society*

S I M C O E C O U N T Y

ANNUAL REPORT

For the period April 1, 2013 to March 31, 2014



Help for Today. Hope for Tomorrow...®

President's Report

It is my pleasure to present the President's Report for the year 2013-2014. It has been a very busy year for the Alzheimer Society of Simcoe County, a year of continued change and of great accomplishment. As the incidence and prevalence of Alzheimer's disease and related dementias continues to increase, so does the demand for the programs and services we provide. The Society continues to look at ways we can offer services to those affected by the disease and their caregivers, realizing that continued change is needed to meet the growing demands into the future.

On April 1, 2013 following two years of planning and extensive consultation with our many stakeholders, the Alzheimer Society of Simcoe County was formed with the integration of the Alzheimer Societies of Greater Simcoe County and North East Simcoe County. This important development helped to ensure that the Alzheimer Society was well positioned to meet the growing demand for programs and services in the most efficient, effective and sustainable manner. With this integration, Board members from the two Societies as well as new members came together to form the new Board ensuring our continued focus on meeting the needs of all clients and caregivers within our Simcoe County community. This year, our Board members had several opportunities to participate in regional governance meetings and education sessions hosted by the North Simcoe Muskoka Local Health Integration Network. These sessions focused on the Board's role to balance agency and system responsibilities and accountabilities while maximizing collaborative opportunities to support health care delivery in our communities.

This past spring, Debbie Islam and I were asked to share our Society's integration experience at the Alzheimer Society of Ontario (ASO) Spring Federation Leadership Forum as other Societies also look to integration opportunities as a means of increasing capacity and ensuring the most effective and efficient use of resources. As our Society enters into its second year, our Board is committed to undertake an evaluation of this integration. We are very pleased to have recently received Ontario Trillium Foundation funding through ASO to support us with this evaluation which we plan to complete in spring 2015.

This fall our Board along with staff members will participate in a strategic planning session to develop our strategic plan for the next 3 years. This session will allow us as an organization to determine where we will focus our energy and resources, establish our priorities and ensure that we are all working towards common goals in response to our changing environment and the needs of our clients and their families.

Continuing in the spirit of collaboration, in July 2013 our Society moved to its new Barrie location on Anne Street sharing our building space with our community partners, CNIB, Deaf Access Simcoe Muskoka and Catholic Family Services of Simcoe County. This move has proven to be a very successful partnership and most importantly has provided staff with much needed space to meet with our clients and caregivers both individually and in group sessions. As well, at our Orillia office at The Orillia Common Roof we were able to move into a new location within the current building ensuring improved access for our clients and caregivers.

In closing, I would like to recognize our Executive Director, Debbie Islam for all her hard work over the last year. Debbie took on the enormous task in 2012-13 in partnership with the Alzheimer Society of North East Simcoe County to ensure a successful integration. This past year through her excellent leadership and support to our team, we have offered increased services to those affected by the disease and their caregivers and demonstrated great success in raising awareness of Alzheimer's disease and the services our Society provides through many successful education and fundraising events. Debbie's dedication to her work is appreciated by the Board, Staff and by the community, and reflects the importance she places on her staff and the clients and caregivers we serve.

Thank you as well to our Staff, Volunteers, Donors and Community Partners and to my fellow Board members. You are an integral part of this organization and a key to our success in meeting the needs of our clients and their caregivers. Whether working directly with clients or behind the scenes, our Staff and Volunteers are all extremely dedicated to their roles and are committed to making a difference to those we serve. We look forward to your continued commitment in 2014-2015 and to ensuring ongoing excellence in the services we provide.

Respectfully submitted,
Val Armstrong
President

Alzheimer Society of Simcoe County
The Year in Review
Highlights of Accomplishments
2013–2014

Support Services

Much of the work undertaken by the Support Services Team in 2013-2014 involved follow-up activity to the integration of the two Alzheimer Societies in Simcoe County which took effect April 1, 2013. The most significant change was the transition to a geographically-based service delivery model using a client-first philosophy. This exciting development has helped to enhance the capacity of the Support Services Team to ensure that residents in all communities have access to quality services on the basis of local needs.

Despite the significant changes arising from revised roles and new processes, Leslie Parham, Manager of Support Services, and Family Support Coordinators, Heidi Haupt, Susan Nagy, Melissa Martinson and Bobby Saini continued to provide excellent service to our clients. Through formal partnerships with CHATS (Bradford), North Simcoe Family Health Team (Midland) and Community Connection (Collingwood), the Family Support Coordinators met with clients in our satellite locations in addition to the Barrie and Orillia offices, enabling us to serve clients closer to home. Our Support Services Team continued to provide supportive counselling services to clients through face-to-face visits and telephone contacts.

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

The *Caregiver Support Group Program* continued to be a vital component of the Society's Support Services portfolio. Ten Caregiver Support Groups were facilitated by trained volunteers and offered throughout Simcoe County. The Education Team developed a core curriculum for the Support Groups for implementation in 2014-2015.

The *First Steps Coffee Social* continued to engage persons in the early stages of dementia and their care-partners on a monthly basis. This valuable social program incorporates education and interactive activities.

With funding provided through the Behavioural Supports Ontario (BSO) project, the Alzheimer Society of Simcoe County continued to host three of the positions deployed to the geographically-based North Simcoe Muskoka (NSM) Behavioural Support System (BSS) Mobile Support Team. Two Social Workers and one Occupational Therapist provided service to formal and informal care-partners throughout NSM as part of the broader BSS Mobile Support Team.

Preparation for the implementation of the provincial Integrated Assessment Record (IAR) began in 2013-2014. The IAR is an application that allows assessment information to move with the client from one health service provider to another. This technology will enable the Society to view client assessment information electronically in a timely fashion. Implementation will be completed in 2014-2015.

Education Services

The Society's Education Coordinators, Laura-Lynn Bourassa and Erika Rice guided the Education Services program through a significant transition over the past year due to the integration of the two Simcoe County Alzheimer Societies. Various aspects of the program continue to evolve as we aim to enhance the efficiency and effectiveness of our new service delivery model.

Numerous education programs were provided to our different stakeholders in 2013-2014, many in collaboration with community partners. Thirteen First Link® Progressive Learning Series were held reaching most regions of Simcoe County. This comprehensive education program provides an overview of dementia, coping strategies, resources and support systems for persons with Alzheimer's disease and related dementias and family caregivers. This important education program will continue to be a core component of the Alzheimer Society of Simcoe County's services.

There was a significant increase in outreach to caregivers of persons with dementia living in long-term care and retirement homes over the past year. The Education Team is looking at ways in which to build on this new area of focus to further support families.

Education Services staff provided in-service education and training to staff, volunteers and students in long-term care homes, retirement homes, community agencies and other organizations. There was a 60% increase in the number of sessions delivered and a 24% increase in the number of participants in these educational offerings during 2013-2014.

The Georgian Bay Family Health Team held its first Mild Cognitive Impairment (MCI) Brain Health Group in partnership with the Alzheimer Society of Simcoe County in November 2013. This 4-week program focused on warning signs and normal aging versus dementia; nutrition for brain health; the importance of physical activity; and stress reduction/mindfulness. The Education Services Team plans to sustain this successful partnership and to reach out to other Family Health Teams in Simcoe County to plan similar sessions in the future.

The Alzheimer Society of Simcoe County received a grant from the Alzheimer Society of Ontario (ASO) in 2013-2014 to implement the *Finding Your Way* Project in this region. Chigamik Community Health Centre in Midland and La Clé d'la Baie partnered with the Society to host a "Safety Day" for the Francophone Community in North Simcoe in March 2014. An additional session will be held in a retirement community in North Simcoe in the future. *Finding Your Way* education kits were developed for distribution to clients and the broader community; posters were printed for placement throughout the region; and advertisements were placed in a local French newspaper and a seniors' magazine.

The annual Dementia Conference was held in October 2013 attracting approximately 155 people. The Conference is hosted by the NSM Dementia Network each year, with the Alzheimer Society participating in key leadership, planning and implementation roles. *Dementia: The Journey Beyond Alzheimer's* presented information on Down Syndrome & Alzheimer's disease, Korsakoff Dementia, Lewy Body Dementia, and Huntington's disease to professional, paid and volunteer caregivers.

Public Awareness

Public education continued to be a primary focus for the Alzheimer Society of Simcoe County in 2013-2014, successfully reaching out to 1,173 people through the Speakers Bureau and health fairs.

The 2014 national Alzheimer Awareness Campaign was the highlight of the Society's public awareness activities. This year's theme "*The Importance of Early Diagnosis*" was the focus of local public awareness efforts, and was incorporated into the *Walk for Memories* events in January 2014. Media packages were distributed to all local media outlets, resulting in excellent coverage across the region.

The Society's website www.alzheimer.ca/simcoecounty continued to be an important mechanism for increasing awareness about Alzheimer's disease and related dementias and Alzheimer Society programs and services, along with our E-Newsletter/Bulletins and Facebook and Twitter accounts.

Public Affairs

The Alzheimer Society is committed to giving a public voice to those touched by dementia and contributing to the creation of an integrated and sustainable health care system.

Considerable organizational activity was devoted to public affairs again in 2013-2014, primarily through involvement in the work of the North Simcoe Muskoka Local Health Integration Network (NSM LHIN), the NSM Dementia Network, and the North Simcoe Muskoka Community Support Services Collaborative. Some of the highlights are as follows:

- The Alzheimer Society of Simcoe County continued to serve as the Lead Agency for the LHIN-wide BSS project as part of the Care Connections initiative. This important project was a significant priority for the Society once again in 2013-2014, with the Executive Director serving as Chair of the BSS Project Steering Committee. As Chair of the BSS Project Steering Committee, the Executive Director participated as a member of the LHIN's Care Connections Complex and Chronic Health Needs Coordinating Council. The BSS Project Steering Committee completed its mandate in March 2014.
- The Executive Director served as a member of the NSM LHIN Seniors Strategy Task Group which developed a Strategy for a Specialized Geriatric Services Program in NSM.
- The Executive Director actively participated in the NSM Dementia Network as a member of the Steering Committee while the Education Coordinators served as active members of the Education Committee. The Dementia Network undertook a strategic planning process in 2013-2014 which will guide the direction and activities of the Network over the next three years.
- The Executive Director continued to participate as an active member of the NSM Community Support Services 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.

- Society staff also participated in and assumed leadership roles with various advisory and planning groups, and local networks, including:
 - NSM Psychogeriatric Resource Consultant Advisory Committee
 - Prevention of Senior Abuse Network – Simcoe County
 - NSM Palliative Care Network Patient and Family Committee
 - Advance Care Planning Champions
 - Orillia Coffee Time Network
 - Barrie Seniors Advisory Council
- The Society’s Board and Staff participated in ASO committees, task groups, consultation activities, conferences, and regional meetings addressing the needs of persons with dementia and their caregivers, and supporting the growth and development of ASiO.
- The Alzheimer Society of Simcoe County actively participated in the Alzheimer Society in Ontario’s Advocacy Campaign during the fall of 2013, to call on the Ontario government to address the growing concerns around access to high quality long-term care, the need for more trained staff in long-term care, and the increased need for community care for people living with dementia. We were assisted in this process by local Dementia Champions who volunteered their time to advocate for a provincial dementia strategy.

Research

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 Society in Ontario Federation Agreement. The Society was also pleased to forward \$19,750 in local donations designated for research in 2013-2014 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 involvement in various research studies throughout the year.

Resource Development

The Alzheimer Society received \$178,814 in base funding from the NSM LHIN in 2013-2014 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.

BSS funding totaling \$204,690 was flowed to the Alzheimer Society from Waypoint Centre for Mental Health Care in 2013-2014 in support of our three BSS Mobile Support Team staff and mobilization expenses.

The Society received one-time funding from the NSM LHIN in the amount of \$13,100 for approved one-time expenditures.

\$17,750 was received from ASO as part of the Alzheimer Societies in Ontario Federation Agreement.

Several fundraising events and campaigns were undertaken in 2013-2014 to support the Society's programs and operations. The highlights of special events fundraising were:

Event/Campaign	Gross Revenue (\$)
Walk for Memories™ (Barrie, Midland)	44,390
Alzheimer Coffee Break®	43,265
Tag Days	25,925
Holiday Gift Wrap Service	16,212
A Penny For Your Thoughts	358

There was an overall decrease in donations revenue in 2013-2014, however the Society was fortunate to receive \$67,765 in bequest income. Several third-party fundraising events/campaigns were held in support of the Alzheimer Society of Simcoe County, most notably the Mariposa Charity Golf Tournament and the Barrie Dragon Boat Races – Destiny's Dragons and Moore Dragon Slayers Race Team.

With funding support from Service Canada's Canada Summer Jobs Program, the Society hired two summer students in 2013. Lisa Richardson spent twelve weeks with the Alzheimer Society as Special Events Assistant in Barrie, and Sydney LaPlante held the same position in Orillia for eleven weeks. Both students assisted the Fund Development Coordinator with the planning and coordination of Alzheimer Coffee Break® 2013.

Chapter volunteers provided 4,265 hours of service in 2013-2014. There were 389 volunteers at March 31, 2014. Marguerite Glanfield, Volunteer Resources Coordinator continued to work closely with staff to ensure the volunteer needs of the various programs and services were met as efficiently and effectively as possible.

Organizational Effectiveness

The main focus of activity for much of the year was transitional work related to the integration of the two local Alzheimer Societies in Simcoe County. The Staff Team is to be commended and thanked for their incredible commitment to this process. Their dedication throughout the implementation of the work plan to effect organizational change was truly inspiring. All of this was accomplished while carrying out their regular work responsibilities.

In addition to post-integration activity, staff adjusted to alterations in the staffing model arising from the integration, along with several changes to the Staff Team itself during the course of the year.

The Society also moved both the Barrie and Orillia offices during the summer of 2013. The Barrie office co-located with three other community support service agencies at 20 Anne Street South. A significant amount of time and energy was devoted to creating a collaborative environment amongst the four partner agencies which has resulted in many benefits for our clients and their families, as well as agency staff and volunteers. The Orillia office was moved from the second floor of The Orillia Common Roof to the main level which has provided the Society with a more accessible and private space for service delivery.

In order to celebrate our recent accomplishments and afford an opportunity to reflect upon the tremendous change we have experienced over the past few years, a Staff Retreat was held in February 2014. Follow-up activity continues in order to create new cultural norms and to nurture a strong sense of team.

The Alzheimer Society of Simcoe County embraced the new Alzheimer Society intranet site called *Connexion*. In addition to the national and provincial sites where we can access shared documents, we have created our own sub-sites for the Staff Team and the Board of Directors where we post resources for internal use. *Connexion* also allows for discussion and working group pages. The site is secure and password-protected, and can be accessed remotely.

We developed and implemented our first annual First Link ® client satisfaction survey in 2013-2014. Under the direction of the Support Services Team, two Georgian College students conducted telephone interviews with clients using a survey tool. 92% of respondents indicated that they were satisfied with the services provided by the Alzheimer Society of Simcoe County. The rich feedback received will be used to inform quality improvement efforts and our strategic planning process in 2014-2015.

The Executive Director continued to serve on ASO's 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 in the development of the Alzheimer Society in Ontario (ASiO) Strategic Plan, and advises on the use of the Strategic Investment Fund.

Our Society continued to participate in ASiO's Volunteer Mobilization Initiative in 2013-2014, with Marguerite Glanfield playing a key leadership role on the provincial Volunteer Strategy and Advisory Committee.

The NSM Community Care Access Centre continued to provide finance, payroll and information technology support to the Alzheimer Society through a Shared Services Agreement. This successful arrangement enables the organization to meet its reporting obligations to the NSM LHIN and Ministry of Health and Long-Term Care in an efficient and effective manner, and to devote its time and resources to client-related activities.

Activity Statistics 2013-2014

Total Individuals Served by Organization (registered clients)	639
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<u>Education Services</u>	
Individuals Served (registered clients)	159
Visits (registered clients)	138
Service Recipient Interactions (non-registered clients)	14
Group Sessions	160
Group Participants	2,546

<u>Support Services</u>	
New Referrals	258
Individuals Served (registered clients)	544
Visits (registered clients)	1,614
Service Recipient Interactions (non-registered clients)	369
Group Sessions	138
Group Participants	1,234
Individuals Waiting for Service	64

<u>CHATS Counselling Services</u>	
New Referrals	15
Individuals Served	27
Visits	46

<u>Behavioural Support System Mobile Support Team</u> (data for Q2-Q4)	
New Referrals	126
Individuals Served	155
Visits	467

<u>Volunteers</u>	
Volunteer Hours	4,265
# Volunteers at March 31 st	389

Financial Report *

Condensed Statement of Financial Position, March 31, 2014, with comparative unaudited figures for 2013

	<u>2014</u>	<u>2013</u>
Assets		
Current Assets	\$543,497	\$552,730
Liabilities & Net Assets		
Current Liabilities	80,457	73,535
Net Assets	463,040	479,195
	\$543,497	\$552,730

Condensed Statement of Operations, March 31, 2014, with comparative unaudited figures for 2013

	<u>2014</u>	<u>2013</u>
Revenues		
Donations	\$95,341	\$111,515
Bequest Donation	67,765	142,500
Fundraising	130,466	142,415
Nevada	3,200	5,886
Ministry of Health & LTC/LHIN	551,628	547,942
Alzheimer Society of Ontario Revenue Sharing	17,750	18,000
Grants	15,985	7,054
Education Events	8	3,319
Memberships	200	1,230
Interest	6,133	7,689
Other	14,754	22,085
Total Revenues	\$903,230	\$1,009,635
Expenditures		
LHIN Programs		
Compensation	\$285,584	\$135,867
Contracted Out	5,570	-
Supplies	3,947	3,000
Sundry	37,606	24,436
Equipment	10,419	2,896
Buildings & Grounds	44,954	18,356
	\$388,080	\$184,555
First Link		
Compensation	-	\$129,604
Supplies	-	669
Sundry	-	25,363
Equipment	-	668
Buildings & Grounds	-	8,974
	-	\$165,278
General Operations		
Compensation	\$216,141	\$239,779
Contracted Out	309	857
Supplies	12,898	10,392
Sundry	61,277	60,282
Equipment	15,692	1,926
Building & Grounds	16,716	13,922
	\$323,033	\$327,158
Behavioural Support System		
Compensation	\$190,306	\$187,160
Supplies	151	939
Sundry	17,458	16,888
Equipment	357	240
	\$208,272	\$205,227
Total Expenditures	\$919,385	\$882,218
Excess of revenues over expenditures (expenditures over revenues) for the year	\$(16,155)	\$127,417

* 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, 2014 as reported by our auditors BDO Canada LLP, Chartered Accountants, Licensed Public Accountants. Complete audited financial statements are available upon request.

Alzheimer Society

SIMCOE COUNTY

MISSION STATEMENT

The mission of the Alzheimer Society of Simcoe County is to improve the quality of life of persons who are directly affected by Alzheimer's disease or related dementias.

Board of Directors 2013 - 2014

President:	Valerie Armstrong
Vice President:	Nikki Holmes
Immediate Past President:	Kelly Hastings
Secretary:	Ann-Marie Kungl-Baker
Treasurer:	Dan Kirby
Directors:	Valerie Beasley Cheryl McLean (until February 2014) Irena Pozgaj-Jones (as of February 2014) Diane Vetter (as of February 2014)

Staff 2013 - 2014

Executive Director:	Debbie Islam
Education Coordinators:	Laura-Lynn Bourassa Erika Rice
Manager of Support Services:	Leslie Parham
Family Support Coordinators:	Heidi Haupt Susan Nagy Bobby Saini
Fund Development Coordinator:	Alisa Sears
Volunteer Resources Coordinator:	Marguerite Glanfield
Administrative Assistants:	Diane Anderson Julie Jones
Behavioural Support System Mobile Support Team:	Social Worker - Stephanie Saunders (Mat Leave) Social Worker - Melissa Martinson (Mat Leave Replacement) Social Worker - Donna Gordon Occupational Therapist - Jenny Keresztesi

Contact Information

Barrie Office Location:	20 Anne St. S., Barrie, Ontario L4N 2C6
Barrie Mailing Address:	P.O. Box 1414, Barrie, ON L4M 5R4
Orillia Office Location:	The Orillia Common Roof, 169 Front St. S., Orillia, Ontario L3V 4S8
Orillia Mailing Address:	P.O. Box 486, Orillia, ON L3V 6K2
Telephone Numbers:	(705)722-1066 or 1-800-265-5391 (Barrie) (705) 329-0909 or 1-855-529-0909 (Orillia)
E-Mail Address:	Simcoecounty@alzheimersociety.ca
Chapter Website:	www.alzheimer.ca/simcoecounty
Office Hours:	8:30 a.m. – 4:30 p.m. Monday to Friday (both offices)
Charitable Registration #:	11921 2116 RR0001