



***Strategic Plan  
Working Document***

**May 2016**

**Original Document 2008  
Updated 2010  
Updated 2012  
Updated February 2014  
Updated May 2016**

**Status Legend:  
A = Achieved  
1 = Significant Progress  
2 = Steady Progress  
3 = Some Progress  
4 = Little or No Progress**

**Our Mission:**

The Alzheimer Society of Nova Scotia is committed to alleviating the personal and social consequences of Alzheimer's disease and other dementias and also to promoting the search for causes, treatments and cures.

**Our Vision:**

- Provide leadership in addressing the reality of Alzheimer's disease and other dementias.
- Strengthen existing programs and create new ones in response to ever increasing needs.
- Advance and develop educational opportunities.
- Participate in and promote research.
- Provide an environment that attracts and retains high quality staff and volunteers.

**Our Values:**

C – Collaboration. A – Accountability. R – Respect. E – Engagement.

**Collaboration.** We work together and with partners to achieve our goals and ensure Nova Scotians receive personal and responsive services throughout their dementia journey.

**Accountability.** We measure our performance and follow a process of continuous improvement. We are wholly accountable for our actions and must account to our stakeholders for our use of the financial and human resources available to us.

**Respect.** We set for ourselves the highest standards of honesty, trustworthiness and professional integrity in all aspects of our organization and carry out our work with the utmost respect for the dignity and the rights of the people we serve.

**Engagement.** We strive to engage stakeholders in meaningful ways. To inform, listen and be attentive to those we work with: people with dementia, families, community partners, donors, volunteers and staff members.

**Global ENDS Statement:**

The Alzheimer Society of Nova Scotia exists to enhance the quality of life and care provided along with hope for those Nova Scotians living with and affected by Alzheimer disease and other dementias (ADOD).

**Notes:**

- *The culture of the Alzheimer Society of Nova Scotia is guided by our Vision, Mission and Values*
- *ASNS priorities are driven by federation priorities and ENDS policies*
- *Goals are defined as those activities that will guide us over the next 3-5 years*
- *Deliverables are defined as those activities to be achieved in the next 12-18 months*
- *Budget will reflect deliverables and metrics of strategic directives*

## Strategic Priority #1

**FEDERATION:** Be known as the pre-eminent organization for Alzheimer Research.

**ENDS POLICY 4.3 – Research Partnership:** The Alzheimer Society of Nova Scotia is recognized as a partner in dementia research, providing collaboration, support and funding.

**ASNS:** The Society will support, respond to and network with researchers, both locally and nationally, on research.

### Goals:

- 1) Enhance ASNS support of research initiatives.
- 2) Network, promote and collaborate researchers and research initiatives.
- 3) Facilitate knowledge transfer amongst stakeholders.

Objectives	Base Year 2015/16	Status	Accomplishments 2015/16	Deliverables/Metrics 2016/17	Deliverables/Metrics 2017/18
Increase research contribution to ASRP	Research commitment increased to \$40,000	A		Increase research contribution to ASRP \$43,000	Research commitment increased by 10%
Position ASNS as the go-to resource for research informed information on dementia	Increase web hits on ASNS site by 10% Increase profile among local and national researchers Establish a baseline for evaluation in future years An Integrated Marketing Communications Plan (IMC) to position ASNS as a valuable community resource exist	2 2 3 3		Position ASNS as the go-to resource for research informed information on dementia	Increase web hits on ASNS site by 10% Increase profile among local and national researchers Establish a baseline for evaluation in future years Implement an Integrated Marketing Communications Plan (IMC) to position ASNS as a valuable community resource exist
Review and Monitor all research restricted funds	Review the amount of funds that have been awarded to NS researchers Review policies for monitoring restricted funds and update 100% Compliance with donor criteria	3 A 1		Review and Monitor all research restricted funds	Review the amount of funds that have been awarded to NS researchers 100% Compliance with donor criteria
Develop a plan to increase additional	Plan exists	A			

support for ASRP that fits into the FD Revenue Generation Strategy					
Determine opportunity to fund ("Venture Philanthropy") of Nova Scotia based research initiatives	SWOT analysis with key stakeholders	3			
<b>Develop policies and procedures /protocols to promote opportunities for participation in research studies by stakeholders</b>	All research opportunities promoted met the protocols *Speak to Research Liaison*	2		<b>Develop policies and procedures /protocols to promote opportunities for participation in research studies by stakeholders</b>	Determine opportunities to partner with other funders of research to maximize contributions
Increase opportunities to Facilitate/partner to increase research sharing opportunities (Knowledge transfer)	Hold one extra event	A	le: Cafe Scientifique event Research breakfast increase to 3	Increase opportunities to Facilitate/partner to increase research sharing opportunities (Knowledge transfer)	Hold one extra event, donor opportunity and or research breakfast
Increase research related funding within Nova Scotia	Increase Phyllis Horton bursary to \$3,000	A			Increase funding to Maritime Brain Tissue Bank Add second bursary Financially support center on aging
<b>Enablers to 2015/16 Accomplishments</b>			<b>Barriers to 2015/16 Accomplishments</b>		
Research assessment increased by \$5,500 due to revenue increase Staff led in the area of research appointed. Designated gift for research in 2016/17			HR capacity – time. Increased demand for client services.		

## Strategic Priority #2 Draft completed BY Linda- go to PROGRAMS AND SERVICES TEAM

**FEDERATION:** Expand services/support to people with dementia and their caregivers.

**ENDS POLICY 4.1 – Individuals, Family and Caregivers Approach:** Individuals, their family and caregivers will be respected and have access to knowledge about dementia and support structures to facilitate an informed decision making process as they continue their journey.

**ENDS Policy 4.2 - Health Care Professional Approach:** Health care providers delivering care and support to persons with ADOD and their families will have the knowledge, skills and abilities to provide holistic person-centered care.

**ASNS:** Ensure that Nova Scotians seeking information or support from the Alzheimer Society are provided services that meet their needs as they experience them, and are based on current evidence-based standards where available and/or best practice.

**Goals:**

- 1) Create and foster a culture of quality
- 2) Build capacity and competencies to expand services

Objectives	Base Year 2015/16	Status	Accomplishments 2015/16	Deliverables/Metrics 2016/17	Deliverables/Metrics 2017/18
<b>A. Implement federation core standards for all services</b>	<p>Prioritized and address identified gaps in core services.</p> <p>Top priorities include: Continue to expand core services in readiness for First Link, increase support for PWD, reach underserved populations</p>	<b>A</b>	<p>Developed plan to address program priorities and assigned staff leads. Program manuals, facilitator training developed/revised for existing programs First Link, Shaping the Journey and Early stage support group all started in HRM</p>	<p>Staff leads complete priority work on program framework Year 1- includes: update of caregiver support group manual; manual for coffee and conversation; revised manual for infoLine; basic facilitator training; framework for revised Family caregiver Education series</p> <p>Expand programming to other DHAs as ready</p>	75% of top priorities have been addressed
b. First Link™ is available across the province	<p>First Link® processes well established. Referrals underway in Halifax and South shore.</p> <p>First link preparations continues - D H&amp;W</p> <p>Increase number of First Link® direct referrals by 20%</p> <p>Increase number of First Link Referral partners by 30%</p>	<p><b>A</b></p> <p><b>A</b></p> <p><b>3</b></p> <p><b>A</b></p> <p><b>2</b></p>	<p>First Link well established in Halifax, South Shore, some progress in Sydney, Truro.</p> <p>Actual first Link referrals up 50%</p> <p>Referral partners fluctuates. Ongoing referrals from geriatricians in HRM, south Shore and starting in Sydney. 811 making direct referrals.</p>	<p>First Link established in Sydney area, launched in Sydney and Truro</p> <p>Increase number of First Link® direct referrals by 30% in DHA 3 &amp; 8.</p> <p>Pre-link preparation takes place in DHA's 3, 4, 5, 6, 7 &amp; 8</p> <p>Increase number of First Link® direct referrals by 30%</p>	<p>First Link launched in Amherst, work in progress New Glasgow- Pictou area and the Annapolis Valley.</p> <p>Increase number of First Link Referral partners by 30%</p>
c. Expand services for persons with early stage dementia	<p>Increase participation of PWD in Early Stage forum by 10%</p> <p>Increase number of initial InfoLine calls by people with dementia by 10%. Baseline 2014/15 =47.</p> <p>Developed framework for for:</p> <ul style="list-style-type: none"> <li>• Early Stage Support Group</li> <li>• Shaping the Journey education series</li> </ul>	<p><b>1</b></p> <p><b>?</b></p> <p><b>3</b></p> <p><b>A</b></p>	<p>ESF Participation up by 8%.</p> <p>% increase PWD Infoline calls</p> <p>STJ Facilitator Reference Manual developed, program being offered in South shore, Halifax and Annapolis Valley.</p> <p>Early stage support groups operating in Halifax and Sydney, manual in early development.</p>	<p>Increase ESF participation and baseline callers from PWD by 10%</p> <p>Complete Early stage support group Manual.</p> <p>Seek community partners to deliver Shaping the Journey and Early stage Support groups</p> <p>Implement ESG framework in DHA8</p>	<p>PWD Infoline calls Increased by 10%</p> <p>Two additional DHAs are delivering Shaping the Journey and Early Stage Support Groups.</p>
Increase community partners to deliver core services	Develop program manuals and facilitator training to support community partners	<b>2</b>	Hired program coordinator to develop a suite of facilitation packages to support	Facilitation manuals developed for mid and late stage FCES	

	to deliver consistent ASNS programs. Community Coordinators were successful in partnering with two community partners to deliver programming (four in total)	2	our range of community partners. Identify gaps B/w services offered for people with dementia  Statistics on Growth of programming in districts		
Provide ongoing learning/training opportunities for staff and program volunteers	Support Group facilitators from 70% of groups attend the Provincial Conference Program staff provide Infoline and Support group facilitators minimum of 3 learning opportunities /year All P&S staff participate in an minimum of five approved learning/training(online, conferences, geriatric rounds, workshops) educational opportunities each year	A A A	<b>X5 of Support group facilitators attended the provincial conference</b>	Maintain  Maintain  Maintain	

**Enablers to 2015/16 Accomplishments**

**Barriers to 2015/156 Accomplishments**

Government Funding to maintain 2014/15 staffing and to hire additional staff- .4 FTE admin support,.4 FTE for infoLine; .6FTE Program Development; .6FTE Coordinator Annapolis Valley. More staff in place to cover more geographic areas.  
Solid framework developed through MOU Dementia Strategy to guide priorities.  
Partnership with Nova Scotia Research Foundation to evaluate our services and tell our story.  
ASC brainxchange and QE2 deliver free, quality webinars or in person sessions on a variety of dementia related topics. Provincial conference continues to attract high quality speakers.  
Other provincial Societies willing to share their program materials to help us get a head start on program development.  
ASNS has a solid reputation across the province and partners in the community are willing to work with us.

Time to orientate new staff; money came in late, hired in last quarter of the year.  
Additional growth in demand for services (increase staff time to Infoline, Support group facilitators, delivering education program, etc.);  
Partners at QE2 on maternity leave and support group volunteers left us short staffed and having to replace with office staff.  
Delay in program frameworks cause a delay in rolling out programs.  
Number of infoLine call backs restricted by insufficient staff to make the calls in the time frame we are striving to achieve.  
Diagnosis and First link referrals by family doctors is beyond our control.

## Strategic Priority #3

FEDERATION: Grow revenue.

ENDS POLICY 4.6 – The Alzheimer Society of Nova Scotia has a multiyear business plan that responds to demand for Programs and Services and research that is sustainable and recognizes the implications of the impact of dementia over the next 30 years in Nova Scotia Society.

ASNS: The Society will maintain a multi-year Revenue and business strategy plan that recognizes the impact of demand on the Society.

**Goals:**

- 1) Maintain a five -year growth plan (Revenue Generation strategy).
- 2) Create a culture of philanthropy.
- 3) Build revenue development capacity across Nova Scotia based on a clear and thorough assessment of capacity needs.

Objectives	Base Year 2015/16	Status	Accomplishments 2015/16	Deliverables/Metrics 2016/17	Deliverables/Metrics 2017/18
Ensure five year revenue development strategy	Five year rev dev strategy will cover 13/14 through 17/18	A	Five year revenue strategy was developed	Examine current ways donors enter system / create plan for one time donations (e.g. IM giving) Revise revenue development strategy to cover another year	Another year is added to the strategy
Audit current donor communications	Gaps in Policies and Procedures to be identified	3	Analyzed Audit results	Map the ASNS Donor journey / develop stewardship plan for all donors	Ensure that all donors entered into the database are on a stewardship path
Campaigns and events will meet budget requirements	Major Gifts budget increased to \$375,000	4	ASNS, in total, exceeded final projections and expectations for I FD events.	Campaigns and events will meet budget requirements Add contract staff positions to major gifts and planned giving Examine events strategy to determine potential realignment of resources	Increase the role of Transformational Giving in the organization
<b>Enablers to 2016/17 Accomplishments</b>			<b>Barriers to 2016/17 Accomplishments</b>		
Coordinators have time to focus on research and planning. Successful events enhance staff confidence for future planning.			Third deliverable above beyond current internal ASNS staff/volunteer capacity.		



<p>Increased staff capacity in community to support events.          Co-op student.          All ASNS staff support/take part in all events – breeds enthusiasm.          Met with nine prominent business reps w/ two outstanding asks for major gifts.</p>	
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## Strategic Priority #4

FEDERATION: not available

ENDS POLICY 4.5 – Source of Information and Service: The public are aware of the Alzheimer Society of Nova Scotia as a credible source of dementia information and service.

ASNS: Bring clarity to our common promise to Nova Scotians – galvanize them around a compelling brand.

**Goals:**

- 1) Increase ASNS public profile and communicate our promise\* to Nova Scotians
- 2) Protect and promote the ASNS brand.

Objectives	Base Year 2015/16	Status	Accomplishments 2015/16	Deliverables/Metrics 2016/17	Deliverables/Metrics 2017/18
All staff are abiding by the federation brand standards	Checklists created for editing communications (Donor, grants, community)	A 2	ASNS staff are using checklists	Develop process for monitoring compliance	Conduct spot audits
Create a strategy to promote the Society	Development of an IMC plan	2	IMC plan did not happen	Create a Communications plan to promote the Society, that includes social media plan	Complete and share IMC plan Evaluate success of plan
Ensure that the Alzheimer Society is the “go-to” organization for media/government inquires regarding Alzheimer’s disease or other dementias.	Monitor ASNS media impressions Increase impressions by 30% Establish baseline and monitor, government accessing ASNS and our participation in government activities (i.e. committees, consultation)	1 2 1	Media monitoring started, baseline established	Ensure that the Alzheimer Society is the “go-to” organization for media/government inquires regarding Alzheimer’s disease or other dementias. Maintain monthly and quarterly reports	Increase impressions by 30%.
ASNS website and social media is a significant resource for those diagnosed with dementia, their families, caregivers and physicians	ASNS continues to contribute to the development of the national web portal Increase visits to the ASNS page	A 2	FB followers up by 50%	Keep blog updated/Make more content downloadable	Write crisis communication plan



Develop and monitor a coordinated response to potential risk to organization		4		Research risks	Write crisis communications plan
Nova Scotia has a funded Dementia strategy that promotes information, education, and support initiatives	Realize government funding annualized at \$360,000( Year 1 @ 270,000. For 9 months)	2		Government funding will exceed \$430,000. Ongoing negotiations with government re funding	Negotiate with Health and Wellness to ensure ongoing financial support from government
<b>Enablers to 2016/17 Accomplishments</b>			<b>Barriers to 2016/17 Accomplishments</b>		
Awareness month Dementia strategy			Competing against other charities and organizations for promotion/awareness		

## Strategic Priority #5

### FEDERATION:

**ENDS POLICY 4.4 – Government Health Priority – The Alzheimer Society of Nova Scotia will continue to advocate to government as they create public policy so that Alzheimer’s disease or other dementias is seen as a significant health priority.**

**ASNS: The Government of Nova Scotia will see dementia as a major health priority and they will allocate operational and research funds.**

### Goals:

- 1) Ensure the Nova Scotia government understands what they need to do to improve the lives of people with dementia and to fund research.
- 2) Increase responsiveness to Alzheimer’s disease or other dementia issues and ensure that Nova Scotia’s public policy response meets provincial needs.
- 3) The Alzheimer’s cause is supported through advocacy, public policy and promotion.

Objectives	Base Year 2015/16	Status	Accomplishments 2015/16	Deliverables/Metrics 2016/17	Deliverables/Metrics 2017/18
Based upon the strategic and operational framework, obtain corporate sponsorship to facilitate the creation of a dementia strategy	Continue to roll out First Link in HRM Access additional funds for the continuing expansion of First Link Receive government sponsorship for a Provincial Dementia Strategy Obtain additional Dementia Strategy funding from other sources	A  2  1	DHW assumed responsibility - \$35,000.00 for 4 years, funding concluded this year  H&W & NSHRF provides financial support to Dementia Strategy along with research expertise Ongoing	Continue to roll out First Link in HRM  NSHRF provides expertise in the area of evaluation and monitoring of dementia strategy Continue to work with H&W re provincial dementia strategy.	Continue to roll out First Link around the province  Continue to work with H&W re provincial dementia strategy.

Each party recognizes dementia as a health care priority	Meet with MLAs, MPs, and the three provincial caucuses (re. educate and ask for support) Each party lists dementia as a health care priority in their platform	<b>A</b>  <b>1</b>	One of three parties listed dementia as a priority.	Each party recognizes dementia as a health care priority  Lobby for all caucuses to support maintenance of a dementia strategy Work within the Federation towards the realization of a national dementia strategy	Continue to work with government on ongoing provincial dementia strategy
Develop framework to respond to public policy, advocacy initiatives and government statements to ensure they reflect current ASNS issues and respond accordingly	ASNS responds to Government announcements and media reports where appropriate Government announcements are monitored to identify areas of concern	<b>2</b>  <b>2</b>	Ongoing  Ongoing	Develop <i>process</i> for responding to public policy, advocacy initiatives and government statements to ensure they reflect current ASNS issues and respond accordingly  Consult with stakeholders on priorities and deliverables	ASNS responds to Government announcements and media reports where appropriate Government announcements are monitored to identify areas of concern Process is created, documented and vetted through Leadership Team and Advocacy Committee.
Provide tools to stakeholders for individual and group advocacy		<b>4</b>		Provide tools to stakeholders for individual and group advocacy	Develop a list of advocates that will support ASNS initiatives. Monitor the impact of their/our work.
Ensure that ASNS efforts are stakeholder driven and reflective of their needs.	Monitor e-advocacy tool. Conduct community-based stakeholder consultation process to review ASNS deliverables.	<b>3</b> <b>4</b>		Ensure that ASNS efforts are stakeholder driven and reflective of their needs.	Launch and monitor e-advocacy tool. Conduct community-based stakeholder consultation process to review ASNS deliverables.
<b>Enablers to 2013/14 Accomplishments</b>			<b>Barriers to 2013/14 Accomplishments</b>		
DHA funding for strategy.					

## Strategic Priority #6

**FEDERATION: Combine efforts to achieve efficiencies.**

**ENDS Policy 4.7: The Alzheimer Society of Nova Scotia will be good stewards of their resources and provide reports that demonstrate transparency, accountability, and add value to its stakeholders.**

**ASNS: Enhance organizational effectiveness and efficiencies.**

### Goals:

- 1) Set, review and maintain quality standards across the organization.
- 2) ASNS provides clear, consistent, accurate information to the public and stakeholders and is viewed as good stewards of resources.
- 3) ASNS has the human, material and financial resources to carry out its mandate.
- 4) Develop an approach to managing risk that is based on best practice.

Objectives	Base Year 2015/16	Status	Accomplishments 2015/16	Deliverables/Metrics 2016/17	Deliverables/Metrics 2017/18
Implement Continuous Quality Improvement plan	Develop a Policy Framework ( <i>Alzheimer Society Quality Standards document – first page</i> ) Approve standards per quadrant to reflect Nova Scotia experience Do self assessment to set baseline Each department develops a policy review schedule	3 3 3 2	P&S completed gap analysis for P&S quadrant.	Implement Continuous Quality Improvement plan	Ensure that ASNS departments have completed the <i>Alzheimer Society Quality Standards</i>
Reporting is transparent, reflects current realities, and is accessible to the Public	Develop a tool for monitoring ASNS materials. Monitor all communication materials to ensure the promotion of transparency, accountability and stewardship	1 1		Reporting is transparent, reflects current realities, and is accessible to the Public	Develop a checklist for monitoring ASNS documents. Ensure all communication materials to ensure the promotion of transparency, accountability and stewardship
Maintain an information systems for data collection, analysis, benchmarking and best practice	Data is collated and shared and used for informed decision making	2	<b>Increased data collection and reporting through the data base .working with NSHRA to enhance our data collection, monitoring and performance.</b>	Identify gaps and create priorities to respond.	Maintain an information systems for data collection, analysis, benchmarking and best practice
Identify, assess and manage financial,	Organizational balance	A	<b>Leadership level accomplished</b>	at a governance level, identify, assess	Board to assess effectiveness and test

administrative and reputation risks	scorecard/dashboard is developed and maintained			and manage financial, administrative and reputation risks	outcomes with stakeholders
Maintain five-year rolling growth plan to support revenue and program growth	Growth plan will reflect current five-year period	<b>A</b>	<b>Growth plan completed</b>	Growth plan updated and reflects current five-year plan.	Growth plan updated and reflects current five-year plan.
Manage and adhere to core standards ( <i>Peer Review Quadrants</i> ) required for financial management, advocacy, program design and delivery, fundraising and other key functions	Adopt federation revenue development framework. Conduct community-based stakeholder consultation process to review ASNS deliverables Departments adhere to: <ul style="list-style-type: none"> <li>• Programs and Service Core Standards</li> <li>• Fund Development adheres to the International Donor Bill of Rights</li> <li>• Finance and Accounting Standards</li> </ul>	<b>A</b> <b>4</b> <b>1</b>	<b>the Federation Agreement , its Accountability Agreement and funding formula are on hold, for a year pending ASO chapter circumstance.</b>	Manage and adhere to core standards ( <i>Peer Review Quadrants</i> ) required for financial management, advocacy, program design and delivery, fundraising and other key functions	Adopt a Peer Review Process Identify gaps between stakeholder input and current ASNS Conduct community-based stakeholder consultation process to review ASNS deliverables Explore the potential for accreditation for Imagine
Develop a human resource plan to respond to demand	Review all HR policies/procedures to ensure they reflect current industry standards. Staff Professional Development Plan created. Develop a Volunteer Management Strategy that guides the utilization of Volunteers.	<b>2</b> <b>4</b> <b>3</b>	<b>Additional staff resources added to community based operations</b>  <b>HR policy review at 75% completion and ongoing</b>	Review the human resource plan to respond to demand Additional funding sought to complete representation in all identified communities plus funding for Cape Breton area Ongoing Review of all HR policies/procedures to ensure they reflect current industry standards. Develop a Paid Staff Development Plan that responds to education/training needs.	Ongoing Review of all HR policies/procedures to ensure they reflect current industry standards. Develop a Volunteer Management Strategy that guides the utilization of Volunteers.  Review the Paid Staff Development Plan that responds to education/training needs. Identify and address gaps between industry standards and ASNS practices.
<b>Enablers to 2015/16 Accomplishments</b>			<b>Barriers to 2013/14 Accomplishments</b>		
<b>Team working together on data and dashboard</b>			<b>Budget &amp; time constraints</b>		