PUTTING OUR BEST FOOT FORWARD

Taking Strides Towards

Effective Practices

and Accountability

Alzheimer *Society*

ONTARIO

BECOMING OUR BEST
A message from the project manager

When the Alzheimer Society of Ontario (ASO) began the Ensuring Quality Standards Project almost five years ago, we weren't sure what to expect. It's the Alzheimer Society's mission to alleviate the personal and social consequences of Alzheimer Disease and related disorders and to promote research.

Our work includes collaborating with all levels of the organization to foster excellence in service, education and research. ASO supports a network of 39 Chapters across the province that offer service based on the specific priorities of communities. How could we appropriately measure compliance to standards when our work is so diverse? How could we best assist Chapters in the development of an accountability process in a manner efficient enough not to take away from other priorities? How could we create effective practice supports that would meet every Chapter's needs?

We may not have known the best way forward, but we knew there were crucial steps to take. Today, more than 150,000 people rely on services delivered by Ontario Alzheimer Society Chapters. Our work is needed. As it turns out, the Ensuring Quality Standards Project itself was an effective way to support the Chapters in their efforts to improve quality — through determining areas in need of improvement, developing helpful resources and initiating a system of accountability that fits our organization. It was a pleasure to witness first-hand the commitment of Alzheimer Society Chapters to operationally and strategically embed quality management philosophies into their everyday work.

Given our aging population and, therefore, the growing numbers of people affected by Alzheimer Disease — 300,000 in Canada in the next 25 years — we know our work will continue to be needed. Now, we can count on it being of the highest quality possible. And that means a lot to our clients, to our donors and funders, and to us.

But there is another group we had in mind when doing this project — you. We wanted to share our findings, the lessons learned and the resources developed with other voluntary-sector agencies. The result is this report. We hope you find it helpful and that together we can devise the best means for achieving effective practice in all our diverse and crucial work.

Beth Martin

Beth Martin
Ensuring Quality Standards Project Manager
Alzheimer Society of Ontario
Summer 2005

THE ORGANIZATION

From the Alzheimer Society of Canada, to provincial societies like the ASO, to each of our local Chapters, the Alzheimer Society network is composed of autonomous organizations each playing its own role towards achieving our common mission. The ASO supports a provincial network of 39 Chapters, each of which provide core services such as public education, support and advocacy. Each also provides direct service customized to meet community need that can range from day programs to volunteer visiting to in-home respite for caregivers.

[
"The Alzheimer Society network is composed of autonomous organizations each playing its own role towards achieving our common mission."
]

High standards

To accomplish their mission, Chapter leadership felt it was incumbent upon them to ensure that governance and administration, as well as all Chapter programs, achieved the highest possible quality. The Alzheimer Program Standards, which cover issues relating to service provision and volunteer management, were developed by the Program Quality Task Force and distributed to Chapters in 1997. The Chapter Standards, covering areas such as financial management, human resources and public relations, were developed under the leadership of the Chapter Standards Task Force and endorsed by the membership at the 1999 ASO Annual General Meeting. In total, there are 388 statements of expected performance and processes, across services and operations.

THE PROJECT

In 1999, ASO applied for funding from The Ontario Trillium Foundation to implement effective-practice standards among Ontario's Chapters. Chapters were surveyed to determine their needs. The funding application was approved in November 2000 and the Ensuring Quality Standards Project was officially underway.

The project had three phases. The first, in 2001, determined the initial level of compliance to the standards. The second worked to develop resources to help build Chapter capacity to better meet those standards. The third looked at implementing a system for ongoing accountability, launching a pilot project to test the peer-review method of accreditation.

THE PROCESS

The project data was gathered through written self-assessment questionnaires filled out by Chapter executive directors in collaboration with their staff and board. The questionnaire was designed to be objective using a "yes/no/not applicable" answer format to decrease the chances of reporter bias or subjective responses.

A $200 incentive was also provided for all Chapters that filled out the questionnaire. This resulted in a 95 percent response rate that eliminated any voluntary-response bias. The same principles and processes were used in designing the process-evaluation and client-satisfaction questionnaires used in the project.

THE STARTING POINT

To begin the project, we needed to find out where we were beginning from. The initial 2001 self-assessment questionnaire distributed to all Chapters assessed baseline compliance to both program and Chapter standards. The responses ind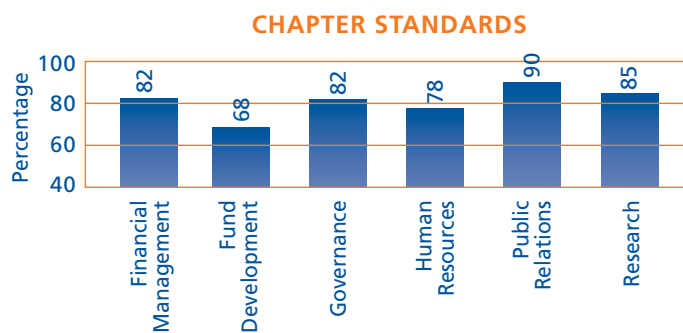icated Chapters' level of compliance with each of the 388 standards. To summarize this data, the standards were grouped into 14 categories, eight applying to programs and six to Chapters.

Initial Standards Compliance, 2001
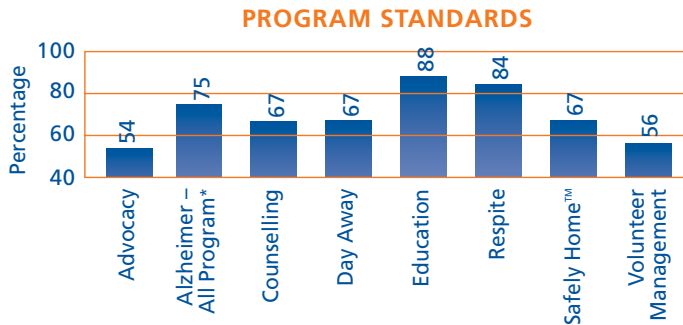
PROGRAM STANDARDS

Percentage (y-axis: 40, 60, 80, 100)

Category	Percentage
Advocacy	54
Alzheimer – All Program*	75
Counselling	67
Day Away	67
Education	88
Respite	84
Safely Home™	67
Volunteer Management	56

*Refers to standards that affect all programs such as evaluation and program management.

CHAPTER STANDARDS

Percentage (y-axis: 40, 60, 80, 100)

Category	Percentage
Financial Management	82
Fund Development	68
Governance	82
Human Resources	78
Public Relations	90
Research	85

The numbers were not as high in some areas as Chapters would have liked, and in all areas, there was room for improvement. This assessment helped us pinpoint standards that required support and to set priorities for the resource-development phase of the project. It was clear, however, that assistance in every area would be of value.

DEVELOPING USEFUL AND USED RESOURCES

The next challenge was to determine what forms of support would be most useful. To find out, Chapters were asked in a written survey what kind of tools they used most often and anticipated finding most useful in the future. Emerging from that, the project team set out to create several resources, ranging from policy templates to process guides to workshops. New resources were developed collaboratively with Chapters to meet particular identified needs.

NEED: *Accurate, easily accessible and well-organized information about achieving effective practices*
OUR SOLUTION: *The Ensuring Quality Standards Encyclopaedia*

The encyclopaedia is an evolving collection of more than 200 policies, tools and templates accumulated from local Chapters and other groups, organized according to standard area. For example, standard #71 requires that job descriptions are available for all positions. Encyclopaedia item #71 includes template job descriptions for various Chapter positions, a related checklist and hiring policies. The resource was provided in print to all Chapters and is accessible via the ASO Intranet, which is updated regularly. Four years into the project, 37 of the 39 Chapters had used the encyclopaedia, and all questionnaire respondents indicated that it was a valuable resource.

> **"***I am always amazed that whatever I need in terms of policies, templates or research-based information... it is always there waiting for me in the Ensuring Quality Encyclopaedia and the Standards Resource Library.***"**
>
> — *Karen Gill, Executive Director, Alzheimer Society of Kingston*

NEED: *A centralized place for materials that assist Chapters in increasing standards compliance*
OUR SOLUTION: *The Standards Resource Library*

The Standards Resource Library is a lending library of manuals and other resources to support the implementation of Chapter and program standards. It is housed at the ASO and is organized by standard section. Chapter staff may review library holdings on the ASO Intranet. While Chapters have indicated that the resource is a valuable one, four years into the project only 20 of the 39 Chapters had used the library. Future development will focus on increasing the accessibility of this resource.

NEED: *A mechanism for ongoing capacity building*
OUR SOLUTION: *Provincial and Regional Workshops*

Chapters identified workshops as the most effective tool for increasing knowledge and capacity. Several workshops, at both the provincial and regional levels, were held. Some of the topics covered included developing logic models, case management, developing fund-development plans and adopting Imagine Canada's Ethical Fundraising & Financial Accountability Code.

Each of the five chapter regions was given the opportunity to hold a workshop that would give them the tools and resources needed to improve their compliance with the standards specific to their geographical area. Participants reported much higher satisfaction with the regional workshops, as compared to the provincial ones. Almost 90 percent of attendees indicated sentiments in line with the following participant feedback: "The regional workshop was more effective because I have more in common with neighbouring Chapters"; "The region-specific workshop was most helpful because the group was smaller."

NEED: *Template policies that were transferable across the province*
OUR SOLUTION: *Collaborative Policy-Development Working Groups*

As autonomous organizations, prior to the Ensuring Quality Standards Project each Chapter was developing policy on their own. During the resource-development phase of the project, Chapter representatives got together in working groups and produced template policies that could meet each Chapters needs — an ambitious goal given the diversity of Alzheimer Societies in Ontario. The template policies allowed each Chapter the option of customizing a policy based on the template or using the policies as a resource when reviewing existing policies.

Feedback has been very positive and participation on the working groups is increasing. Going forward, the template policies will be reviewed every two years to ensure currency and relevance.

NEED: *Financial support for standard-compliance initiatives*
OUR SOLUTION: *Subsidy Program*

The Subsidy Program was offered to Chapters for six months in the first year of the project. It granted funding to Chapters to assist with the financial costs of the direct implementation of Chapter and program standards. All activities approved for funding were required to yield materials that could be shared with all Chapters via the Ensuring Quality Standards Encyclopaedia. Materials could include tools, templates or policies that employed a standard and were obtained as a result of attending meetings or workshops, or through peer support or consultation services.

> **"***Since I started with our Chapter four years ago, our board has approved more than 80 new policies. The Ensuring Quality Encyclopaedia was our starting point for all research into effective practices. As a result, our Chapter now has a strong and effective quality-management program.***"**
>
> *— Carolyn Cybulski, Executive Director,*
> *Alzheimer Society of Sault Ste. Marie & Algoma District*
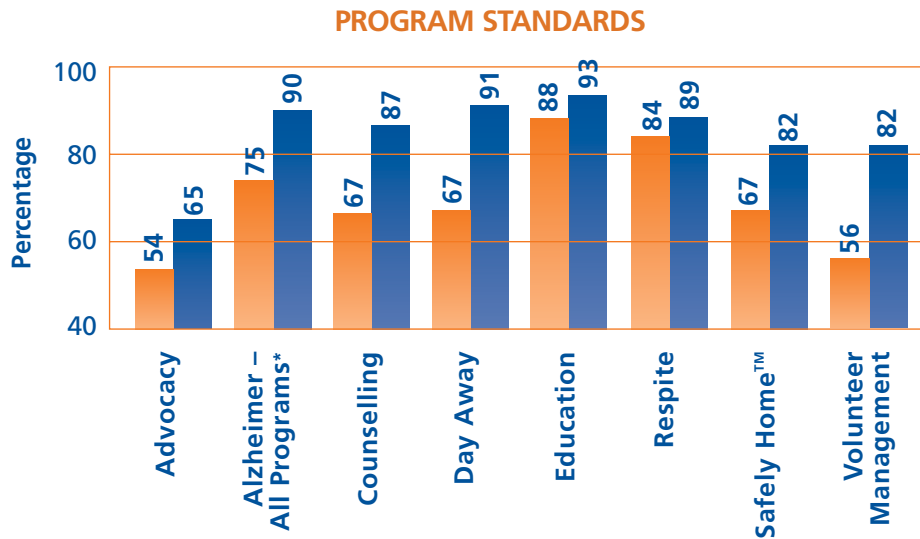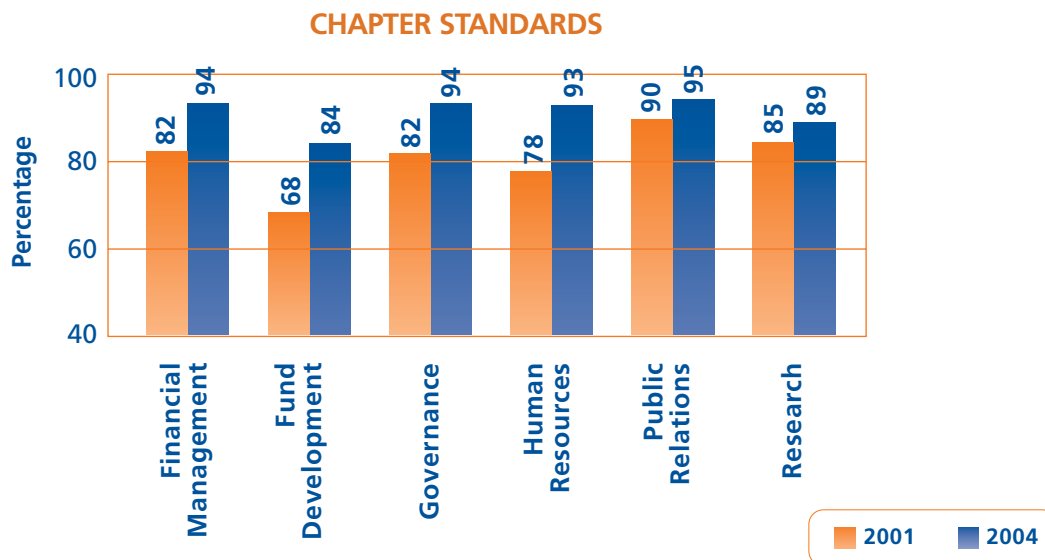
THE RESULTS

Good, better, best!

After developing the resources and seeing them put to use, we wanted to know what effect our efforts had on standard compliance. To gauge improvements in 2004, we used the self-assessment questionnaire first employed. We're proud to say, the results are so positive, they speak for themselves.

Comparison of Compliance between 2001 and 2004

PROGRAM STANDARDS

Category	2001	2004
Advocacy	54	65
Alzheimer – All Programs*	75	90
Counselling	67	87
Day Away	67	91
Education	88	93
Respite	84	89
Safely Home™	67	82
Volunteer Management	56	82

Percentage

Refers to standards that affect all programs such as evaluation and program management.

CHAPTER STANDARDS

Category	2001	2004
Financial Management	82	94
Fund Development	68	84
Governance	82	94
Human Resources	78	93
Public Relations	90	95
Research	85	89

Percentage

Legend: ■ 2001 ■ 2004

WHAT'S NEXT

Getting going on ongoing accountability

After this rapid growth, it was important to find out how best to achieve ongoing accountability. An initial analysis pointed to a peer-review system as a promising method. It had the capacity to:

• provide evidence to stakeholders that organizations are delivering services that meet identifiable standards;

• assist in identifying strengths and weaknesses against standards of effective practice; and,

• provide a base from which strategies for improvement could be developed.

So we decided to give it a try. A pilot peer review was conducted during the spring and summer of 2004 in which 11 Chapters participated.

Peer reviewers were chosen from senior staff familiar with the operations of Chapters, but not from the Chapter to be reviewed. Reviewers received a full-day training course, conducted on-site assessment visits and then participated in focus groups on the peer-review accreditation process.

The project's key findings were as follows:

• The peer-review process was effective at building capacity for both the Chapter and the peer reviewer's Chapter through the sharing of knowledge, information and resources, and was able to easily accommodate the unique qualities of each Chapter.

• The process enabled Chapters to identify areas of focus for continuous quality improvement.

• The process increased knowledge of effective practices and resources available for support.

• The pilot verified peer review as a solid foundation to build an effective review system that will increase the Alzheimer Society's accountability for high-quality services to people affected by Alzheimer Disease and related disorders.

In addition, participants have told us that the process is "a great opportunity to involve a number of staff members and volunteers," that it occurred in a "very non-threatening, let-your-hair-down environment with peers," and that the ability to talk jargon (Alzheimer Society lingo) "really facilitated the process."

As a result, ASO is ready to move forward with a formalized review system for all Ontario Chapters.

> **"***...a great opportunity to involve a number of staff members and volunteers...***"**
>
> **"***The peer-review process was effective at building capacity for both the Chapter and the peer reviewer's Chapter through the sharing of knowledge, information and resources...***"**
>
> *— Focus Group Participants*

A BIG STEP IN THE RIGHT DIRECTION

The Alzheimer Society of Ontario initiated the Ensuring Quality Standards Project to increase excellence, accountability and the quality of services and operations. The project has resulted in new resources, a new system of accountability, positive changes across the board as well as areas of focus for the future. Congratulations to all Alzheimer Society of Ontario Chapters who worked hard to improve the quality of their programs and services. Our thanks also goes to The Ontario Trillium Foundation for making this important work possible. It is our hope that as we continue to work towards meeting the challenge for accountability, the results of the Ensuring Quality Standards Project will be as valuable to other organizations as they have been for us.

For more information about the Ensuring Quality Standards Project, the resources developed and the peer-review process, please contact project manager Beth Martin by e-mailing **bmartin@alzheimeront.org**.

You can learn more about the Alzheimer Society of Ontario and member Chapter services at **www.alzheimerontario.org**.

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