

# Alzheimer Society

WATERLOO WELLINGTON



## OUR STRATEGIC PLAN 2021-2025

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consulting | learning | coaching



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## INTRODUCTION

Alzheimer Society of Waterloo Wellington’s (ASWW’s) strategic priorities for 2021 – 2023 were determined through a focused planning process that engaged board members, senior leadership, and staff between March and May 2021. We took stock of the changed environment, gathered insights considering service trends and benefits, organizational strengths and challenges, and defined the key strategic issues before our organization. A strategy update was then completed in early 2023 for the period between 2023 – 2025.

### Key Strategic Issues

- › there is a growing and diverse population of people who could benefit from our supports and services
- › our clients and their care partners are impacted by social isolation, perhaps like never before
- › we need enhanced capacity to offer services responsive to need
- › ASWW’s presence can be enhanced to place our services within reach of those who need them
- › An internal culture of agility and resilience is essential to underpin our efforts over the next two years

### Our Path Forward

Having identified the strategic issues facing the organization, ASWW will continue to provide exceptional services to isolated individuals, and evolve to better engage our diverse, underserved populations, including newcomer, LGBTQ+, and racialized communities.

We will seek to meet the changing needs of the community through responsive programming and expanded capacity.

We know that our progress forward, and our daily work, will be underpinned by a capable and representative team of employees and volunteers, community partnerships, and an internal culture of agility and resilience.

## OUR PROCESS

1

### DISCOVERY

We gathered critical insights on current and future service provision, our strengths and challenges, and our service and community environment.



2

### REFLECTION & SENSE-MAKING

We considered what we have learned and then identified the key strategic issues before ASWW for service, operations, and people & culture.

3

### STRATEGY DEVELOPMENT

We identified and calibrated our Strategic Priorities, defined success, and forecasted milestones along our path forward for 2021-2023.

## OUR STRATEGIC PLAN AT A GLANCE

We know that there is an expanding need for services and supports for people living with dementia. Clients and care partners are challenged to maintain connections to family, friends, and other supports. Our growing and aging population has an increasing number of diagnoses and higher need for support. And our services don't always reach members of diverse groups in our communities.



### Our Beneficiaries

The impact we want to deliver for our beneficiaries

Responsively meet the needs of isolated individuals living with dementia

Engage and serve individuals from diverse, underserved populations, including newcomer, LGBTQ+, and racialized communities in our region



### Our Business Model

The finance and operations we need in place to achieve this

Maximize service capacity, utilizing volunteers, new partnerships, fund development, and community support

Successfully complete and achieve accreditation to enhance quality, safety, and risk management culture within the organization

Enhance awareness and participation with ASWW through a fulsome communications and engagement strategy



### Our People

The human resource capabilities and culture that will underpin it all

Develop an internal culture and practice of agility, resilience, and responsiveness

# OUR BENEFICIARIES

<b>Goal</b>	Responsively meet the needs of isolated individuals living with dementia
<b>Definition of Success</b>	Clients experience reduced isolation and increased support
<b>Progress Milestones</b>	<p>MAR 2021 – OCT 2021</p> <ul style="list-style-type: none"> <li>&gt; continuously adapt programs to virtual, in-person, and hybrid models in response to pandemic</li> <li>&gt; begin collecting information (i.e. survey, etc.) to identify statistics related to clients who are underserved and clients from diverse communities</li> </ul> <p>OCT 2021 – MAR 2022</p> <ul style="list-style-type: none"> <li>&gt; assess needs of people living with dementia, and their care partners, who are feeling isolated</li> </ul> <p>MAR 2022 – OCT 2022</p> <ul style="list-style-type: none"> <li>&gt; develop new programs and services, related to the needs we uncover</li> <li>&gt; build relationships with agencies relevant to needs/gaps</li> </ul> <p>OCT 2022 – MAR 2023</p> <ul style="list-style-type: none"> <li>&gt; repeat survey and needs assessments</li> </ul> <p>MAR 2023 – OCT 2023</p> <ul style="list-style-type: none"> <li>&gt; review and analyze existing therapeutic recreational programming</li> </ul> <p>OCT 2023 – MAR 2024</p> <ul style="list-style-type: none"> <li>&gt; determine service volumes and develop therapeutic recreational programming to a sustainable level</li> </ul> <p>MAR 2024 – OCT 2024</p> <ul style="list-style-type: none"> <li>&gt; evaluate therapeutic recreational programming and monitor demand and potential waitlist</li> </ul> <p>OCT 2024 – MAR 2025</p> <ul style="list-style-type: none"> <li>&gt; develop plan to sustain therapeutic recreational programming</li> </ul>

<b>Goal</b>	Engage and serve individuals from diverse, underserved populations, including newcomer, LGBTQ+, and racialized communities in our region
<b>Definition of Success</b>	Clients and care partners from diverse backgrounds engage with ASWW supports and services
<b>Progress Milestones</b>	<p>MAR 2021 – OCT 2021</p> <ul style="list-style-type: none"> <li>&gt; analyze community population data, compared to current client data, to learn underserved populations for ASWW – identify key underserved populations to engage</li> <li>&gt; secure expertise to support the development of a strategy to become more diverse and inclusive</li> <li>&gt; engage expertise and support of other AS societies</li> </ul> <p>OCT 2021 – MAR 2022</p> <ul style="list-style-type: none"> <li>&gt; engage with agencies serving populations we wish to reach, to seek their insights on potential needs</li> <li>&gt; engage underserved populations to assess needs</li> </ul> <p>MAR 2022 – OCT 2022</p> <ul style="list-style-type: none"> <li>&gt; seek to build relationships with agencies that may be potential partners in meeting identified needs</li> <li>&gt; develop new, and/or adapt existing, programming to respond to identified needs</li> </ul> <p>OCT 2022 – MAR 2023</p> <ul style="list-style-type: none"> <li>&gt; implement new/adapted programming</li> <li>&gt; implement new/adapted groups</li> <li>&gt; conduct annual review on progress on equity, diversity, and inclusion (ED&amp;I) goals</li> </ul> <p>MAR 2023 – OCT 2023</p> <ul style="list-style-type: none"> <li>&gt; deliver in-person and virtual DEI training to clientele, volunteers and staff in partnership with community DEI partners</li> </ul> <p>OCT 2023 – MAR 2024</p> <ul style="list-style-type: none"> <li>&gt; evaluate DEI offerings and create a sustainable plan for ongoing training</li> </ul>

<b>Progress Milestones</b>	MAR 2024 - OCT 2024
	<ul style="list-style-type: none"> <li>&gt; integrate multi-language programming into our yearly education plan and connect with community partners for service delivery and potential waitlist</li> </ul>
	OCT 2024 - MAR 2025
	<ul style="list-style-type: none"> <li>&gt; evaluate multi-language programming and survey for client feedback and satisfaction</li> </ul>

## FINANCE & OPERATIONS

<b>Goal</b>	Maximize service capacity, utilizing volunteers, new partnerships, fund development, and community support
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<b>Definition of Success</b>	ASWW has optimized volunteerism, partnership, and community support to enhance program and service capacity
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<b>Progress Milestones</b>	MAR 2021 - OCT 2021
	<ul style="list-style-type: none"> <li>&gt; engage staff team to identify volunteer and partnership opportunities, and develop a plan to integrate their support in programs and services</li> <li>&gt; research, create, and implement a volunteer management and engagement strategy</li> </ul>
	OCT 2021 - MAR 2022
	<ul style="list-style-type: none"> <li>&gt; assess and select a volunteer management system</li> <li>&gt; create best-practice volunteer policies and procedures, aligned with new strategy and system</li> <li>&gt; engage community partners</li> <li>&gt; apply for grants that help increase our capacity to meet needs of increased client base</li> <li>&gt; foster a commitment to volunteer engagement amongst staff and Board members</li> </ul>
	MAR 2022 - OCT 2022
	<ul style="list-style-type: none"> <li>&gt; onboard, orientate, and train new volunteers/community partners and match with programs and services</li> </ul>

<b>Progress Milestones</b>	OCT 2022 - MAR 2023
	<ul style="list-style-type: none"> <li>&gt; evaluate effectiveness of volunteer programming/community partnerships</li> <li>&gt; develop plan to sustain additional staff</li> </ul>
	MAR 2023 - OCT 2023
	<ul style="list-style-type: none"> <li>&gt; align volunteer management system and processes with Accreditation standards</li> <li>&gt; create a plan to move ASWW towards a philanthropic fund development model</li> </ul>
	OCT 2023 - MAR 2024
	<ul style="list-style-type: none"> <li>&gt; research and implement volunteer appreciation approaches and integrate into current system</li> </ul>
	MAR 2024 - OCT 2024
	<ul style="list-style-type: none"> <li>&gt; work with ASWW team to determine program needs and develop a volunteer recruiting plan</li> </ul>
	OCT 2024 - MAR 2025
	<ul style="list-style-type: none"> <li>&gt; increase volunteer opportunities in direct client service programming</li> </ul>

<b>Goal</b>	Enhance awareness and participation with ASWW through a fulsome communications and engagement strategy
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<b>Definition of Success</b>	ASWW is well-known across its communities
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<b>Progress Milestones</b>	MAR 2021 - OCT 2021
	<ul style="list-style-type: none"> <li>&gt; draft a fulsome communications, marketing, and outreach plan with key goals, stakeholders, media, and metrics</li> <li>&gt; prioritize new social media, and online, strategies for communications and service provision</li> </ul>

# OUR FINANCE & OPERATIONS (continued)

<b>Progress Milestones</b>	OCT 2021 - MAR 2022
	<ul style="list-style-type: none"> <li>&gt; identify communications, marketing, and engagement priorities based upon needs assessment results for existing and underserved populations, and integrate into the communications and marketing plan</li> <li>&gt; engage underserved populations to assess needs</li> </ul>
	MAR 2022 - OCT 2022
	<ul style="list-style-type: none"> <li>&gt; align communications, marketing, and outreach to support efforts to build new relationships/partnerships with other agencies</li> <li>&gt; tailor communications, marketing and outreach to respond to the results of learnings from all ASWW needs assessments</li> </ul>
	OCT 2022 - MAR 2023
	<ul style="list-style-type: none"> <li>&gt; implement and adjust the plan</li> <li>&gt; embed branding into all ASWW materials, activities</li> </ul>
	MAR 2023 - OCT 2023
<ul style="list-style-type: none"> <li>&gt; integrate communications and engagement strategy to align with both client services and fund development</li> </ul>	
OCT 2023 - MAR 2024	
<ul style="list-style-type: none"> <li>&gt; create collateral for monthly newsletters, outreach, etc.</li> </ul>	
MAR 2024 - OCT 2024	
<ul style="list-style-type: none"> <li>&gt; develop plan and schedule to implement monthly newsletters and communications</li> <li>&gt; align plan with social media outputs</li> </ul>	
OCT 2024 - MAR 2025	
<ul style="list-style-type: none"> <li>&gt; evaluate client, volunteer and staff satisfaction via survey</li> </ul>	

<b>Goal</b>	Successfully complete and achieve accreditation to enhance quality, safety, and risk management culture within the organization
<b>Definition of Success</b>	ASWW successfully achieves accreditation
<b>Progress Milestones</b>	<p>MAR 2021 - OCT 2021</p> <ul style="list-style-type: none"> <li>&gt; engage with other AS across Ontario to gauge readiness</li> </ul> <p>OCT 2021 - MAR 2022</p> <ul style="list-style-type: none"> <li>&gt; create, revise, and collect policies and procedures</li> <li>&gt; engage staff</li> <li>&gt; engage accreditation body</li> </ul> <p>MAR 2022 - OCT 2022</p> <ul style="list-style-type: none"> <li>&gt; create, revise, and collect programs and services manuals, create policy and procedure manuals</li> <li>&gt; train staff team</li> </ul> <p>OCT 2022 - MAR 2023</p> <ul style="list-style-type: none"> <li>&gt; initiate and complete accreditation survey process</li> </ul> <p>MAR 2023 - OCT 2023</p> <ul style="list-style-type: none"> <li>&gt; develop Accreditation Leadership Committee work flows for policy and procedure review</li> </ul> <p>OCT 2023 - MAR 2024</p> <ul style="list-style-type: none"> <li>&gt; prepare for site survey</li> </ul> <p>MAY 2024</p> <ul style="list-style-type: none"> <li>&gt; site survey to be held</li> </ul>

# OUR PEOPLE

<p><b>Goal</b></p>	<p>Develop an internal culture and practice of agility, resilience, and responsiveness</p>
<p><b>Definition of Success</b></p>	<p>ASWW is an agile and adaptive organization</p>
<p><b>Progress Milestones</b></p>	<p>MAR 2021 - OCT 2021</p> <ul style="list-style-type: none"> <li>&gt; survey employees, Board, and volunteers to take stock of current team culture</li> <li>&gt; identify lessons learned through pandemic to inform desired culture</li> <li>&gt; define an ideal team culture</li> </ul> <p>OCT 2021 - MAR 2022</p> <ul style="list-style-type: none"> <li>&gt; assess current processes and policies with respect to elements of an agile and adaptive culture</li> <li>&gt; update current processes and policies to align with ideal team culture as much as possible</li> <li>develop an action plan to promote and create an ideal team culture, addressing prioritized gaps</li> </ul> <p>MAR 2022 - OCT 2022</p> <ul style="list-style-type: none"> <li>&gt; implement team culture action plan</li> </ul> <p>OCT 2022 - MAR 2023</p> <ul style="list-style-type: none"> <li>&gt; re-assess team culture and progress</li> </ul> <p>MAR 2023 - OCT 2023</p> <ul style="list-style-type: none"> <li>&gt; review and analyze flexible work arrangement agreements</li> </ul> <p>OCT 2023 - MAR 2024</p> <ul style="list-style-type: none"> <li>&gt; engage with ASWW team to identify opportunities for wellness in the workplace</li> </ul> <p>MAR 2024 - OCT 2024</p> <ul style="list-style-type: none"> <li>&gt; create ASWW Wellness plan</li> </ul> <p>OCT 2024 - MAR 2025</p> <ul style="list-style-type: none"> <li>&gt; implement ASWW Wellness plan and survey for staff satisfaction</li> </ul>



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