



*Confronting the Challenge:*

**The Strategic Plan 2007-2012**

**of the**

**Alzheimer Society of Toronto**

June 18, 2007

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# ***Confronting the Challenge:*** **The Strategic Plan 2007-2012** **of the Alzheimer Society of Toronto**

## **Mission, Vision and Values**

The **mission** of the Alzheimer Society in Canada is to alleviate the personal and social consequences of Alzheimer's disease and related dementias and to promote research. The **vision** of the Society is a world without Alzheimer's disease. Our **values** are collaboration, accountability, respect and excellence. As a matter of policy, the Alzheimer Society of Toronto harmonizes its mission, vision and values with those of the Alzheimer Society federation.

## **Role of the Alzheimer Society of Toronto**

The role of the Alzheimer Society of Toronto is to offer support, information and education for persons with dementia, their families and their caregivers, to increase public awareness of dementia, to promote research, and to advocate for services that respect the dignity of the individual.

## **The ASiO Strategic Planning Framework**

In 2006, the Alzheimer Society in Ontario (ASiO) collectively agreed to a series of strategic and enabling directions aimed at achieving the mission of the Society. All chapters in Ontario were encouraged to use the following strategic framework to guide their own planning:

### **Strategic Directions:**

1. **Service:** Every client has access to high quality services throughout the continuum of the disease.
2. **Profile and Public Awareness:** Ontarians understand Alzheimer's disease and related dementias and their implications, and view ASiO as a leader in the field.
3. **Public Affairs:** ASiO is the respected voice on all public policy matters related to Alzheimer's disease and related dementias.
4. **Research:** Research into the cause, prevention, care and cure of Alzheimer's disease and related dementias is comprehensive, high quality and effectively applied.

### **Enabling Directions**

5. **Fund Development:** ASiO is a first-tier health charity. As a leading health charity, ASiO has the financial resources to achieve the mission.
6. **Organizational Effectiveness and Capacity/Capability:** ASiO is a dynamic, highly effective, efficient and respected organization.

## The Strategic Planning Process

The Alzheimer Society of Toronto (AST) decided to develop a strategic plan to guide it from 2007 to 2012, within the framework of the ASiO Plan. The AST plan was developed by consultant Lyn McDonnell, working with the AST senior staff under the guidance of the Strategic Planning Advisory (SPA) Committee of the Board of Directors.

Inputs sought for a current state analysis included:

- Interviews with 20 stakeholders (internal and external)
- A review of strategic documents, including
  - ASiO Strategic Plan and background documents
  - Dementia projections for Ontario
  - ASiO Core Services Dialogue Report (December 2004)
  - Toronto Dementia Network Community Consultation Report (2003)
  - AST annual reports 2002-2005
- An invitation for public input featured in the AST newsletter *Alert*, to which several responses were received from caregivers and health professionals

A Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis framework was used to synthesize findings. Strategic issues and opportunities were identified. The Board of Directors met on February 19, 2007 to consider the earliest findings. It identified several directions that should be vigorously pursued, and other issues to approach with more caution. The SPA Committee reviewed this feedback and provided further guidance in developing the strategy.

Senior staff reviewed the SWOT analysis, strategic issues and opportunities, and developed directions arising out of the Board response to issues and opportunities. In a second meeting, senior staff and the fundraising staff of the Ontario (ASO) and Canada (ASC) levels of the Society considered opportunities for more collaborative fundraising and marketing in Toronto. A third meeting fine-tuned objectives and established specific targets in response to guidance from the SPA Committee. The Board confirmed plan directions on April 23, 2007 and provided input on specific objectives on May 14, 2007. The SPA Committee met on June 7, 2007 to address any outstanding issues.

The Strategic Plan was formally approved by the Board of Directors on June 18, 2007.

It is anticipated that a basic balanced scorecard of stakeholder, financial and internal process metrics will be developed to link and track measures and initiatives to Strategic Plan objectives. Management will set realistic objectives for progress in the annual plans and budgets towards 2012. Regular feedback on the Plan's implementation through the scorecard will identify strategies that need to be bolstered or modified. Thus this Strategic Plan sets the direction, strategies, objectives and, in some cases, general targets, while measurable goals will be determined in the annual planning and budgeting processes.

Change can happen quickly and unexpected developments often occur. As part of management's planning process, the Strategic Plan will be reviewed annually. However, in the mid-term of the Plan, the Board of Directors should undertake a more substantial review to consider new opportunities and issues so that the Plan can be formally updated to ensure its continued relevance for the years 2010 – 2012.

## Strategic Directions

Strategic directions from the ASiO framework were interpreted for the unique opportunities and challenges of the Alzheimer Society of Toronto. The term *clients* refers to persons with dementia, their families and their caregivers – both informal (family/friend) and formal (paid).

### Strategic Direction: Service

#### **1. Every client has access to high quality services through the continuum of the disease**

##### **By 2012:**

- 1.1 Increased capacity (double 2007 levels) of counselling and client education programs
- 1.2 Increased reach and responsiveness through partnerships with other community services
- 1.3 Increased client access to high-level information support
- 1.4 Expanded, recognized training program for formal caregivers

### Service Objectives

#### **1.1 *Double the capacity of AST's counselling, support and educational programs.***

There is a growing prevalence of dementia in the aging population. It is projected that “by 2010 the number of cases of dementia in Ontario will increase by nearly 40% over 2000 levels, by 2020 the increase will be nearly 85%...”<sup>1</sup> This increase will strain the capacity of the health care system to provide timely access to specialized care. There will be longer waiting lists for community support services as well as for long term beds. Toronto’s increasingly diverse population will need appropriate services and programs.

Family members, particularly spouses and adult children, will continue to be the main source of care for individuals with Alzheimer's disease and related dementias, about half of whom live in the community. To better meet expected demand, AST will increase its capacity for personal counselling, support groups and educational workshops for families and other informal caregivers. Specific tactics will include extended counselling hours via telephone or in-person and scheduled hours in satellite locations across Toronto.

Capacity will be increased through additional program positions leading to more counselling hours, more support groups, more satellite programs, etc.. The mix and proportion of these offerings may change -- depending on evaluation of the most efficacious use of resources to serve community needs. Measurable goals regarding clients served or program hours delivered will be set annually in the operational plan. As well, capacity will be enhanced through best practices research, so that programs reflect the most effective methods to benefit clients.

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<sup>1</sup> Dementia Projections For The Counties, Regional Municipalities, And Districts Of Ontario (Incorporating CHSA Prevalence Data) Robert W. Hopkins, Ph.D., Julia F. Hopkins, B.Sc., January 2002, Mental Health Services, Kingston, Ontario.

**1.2 *Partner with other community services for increased reach and responsiveness of AST counselling and client educational programs.***

AST will continue to establish partnerships with health care professionals and organizations as a vital part of its service strategy. Partnerships will be formalized to provide continuity and to advance priority goals. AST will continue to expand *First Link* partnerships with physicians, pharmacists and memory clinics. It will forge connections with social service agencies as part of the Diversity Program, and partner with organizations such as Community Care Access Centres, Parkinson Society Canada, and the Heart and Stroke Foundation, where there are significant synergies.

AST will continue its efforts to understand population trends in the community so that programs and services stay relevant in serving specific client groups (cultural, ethno-linguistic, newly emerging, living alone, etc). AST will remain sensitive to the cultural context of these groups to optimize caregiver effectiveness and provide appropriate tools for coping.

Measurable targets for outreach and partnerships will be set annually, and data on service and program usage will be carefully analysed to monitor the achievement of goals.

**1.3 *Develop high-level information support services for clients.***

Clients will receive the best personalized information and appropriate referral relative to their particular circumstances. AST will experiment with leading communications technology to funnel information to clients or groups of clients. AST will continually seek the best and most reliable online information materials and, where possible, will personalize materials to serve the needs of individuals or groups of clients.

The Resource Centre will strengthen its position as a reliable source of authoritative information about dementia and dementia care. For the foreseeable future, the Toronto Dementia Network (TDN) website and AST's will continue to be separate, the TDN website will slowly adopt a 'look and feel' that is consistent with the Alzheimer Society brand so as to be strongly associated with the Society. AST will optimize on-line media requiring a technology investment over several years and will ensure that there is a robust technology platform to support this objective in the years to come.

**1.4 *Increase the proportion of formal caregivers trained by AST in dementia-specific care.***

AST will investigate more and better ways to train formal caregivers in best practices for dementia care. AST will become a recognized source of excellence in dementia-specific training for formal caregivers, increasing the number of our program staff over five years to resource this objective. Measurable goals in training formal caregivers will be set annually in the operational plan.

AST will target the Ministry of Health and Local Health Integration Networks (LHINs) for funding and responsibility to increase the ambit and recognition of its PSW training program. The goal after successful completion of an AST training course will be a recognized credential which is valued by employers. This will increase enrolment, supporting the objective of increased numbers of persons trained.

## Strategic Direction: Profile and Public Awareness

### 2. Torontonians understand dementia and its implications, and view AST as a leader in the field

#### By 2012:

- 2.1 AST as a leading “top of mind” source of information on dementia care in Toronto
- 2.2 Increased number and variety of public information sessions offered by AST and in partnership with other organizations
- 2.3 Potential social enterprise ventures: Fee-for-service training programs for organizations that serve the general public or ‘Healthy Brain’ training on ways to lower the risk of Alzheimer’s

AST will position itself as a leading source in Toronto of information on dementia care, boosting the profile of dementia and of the Society’s role through a variety of means: direct marketing, partnerships, public education sessions and, if appropriate, fee-for-service or other social entrepreneurship ventures.

## Strategic Objectives

### 2.1 *Position AST as a leading and “top of mind” source of information on dementia care in Toronto.*

An Ipsos-Reid poll for Alzheimer Canada in 2002 found that the general public had only a vague idea of the role of the Alzheimer Society. Increased efforts in marketing and communications must be directed to the general public, so that AST becomes ‘top of mind’ whenever people in Toronto think of dementia and dementia care.

AST will develop marketing and awareness strategies to reach different target audiences, and establish itself as the leader in Toronto in the field of dementia care information with the ability to direct the public to other resources as required. AST will produce informational materials in different formats for different audiences and exploit all media (online, print and broadcast) to achieve this goal. AST will work in collaboration with ASC and ASO to increase recognition and awareness of the Society in Toronto.

Before the end of the strategic plan period, AST will consider undertaking a public opinion poll, possibly in collaboration with other levels of the Society. This poll would determine whether a shift has occurred since 2002 in the public’s knowledge about, and perceptions of, dementia and the Society.

### 2.2 *Expand the number and variety of public information sessions offered by AST and co-presented with other organizations.*

AST will increase the number of public information sessions to educate the public and contribute to the Society’s positioning as on the leading edge of research and information on dementia. Partnerships with geriatric care centres, university research centres, health professional groups or other charities will increase AST’s public profile. Session themes may include the most current information about links to other disease conditions,

prevention, research, breakthroughs in diagnosis, care and treatment, and so on. To increase AST's presence and impact with specific client target groups, it will partner with associations and health/social service agencies serving diverse groups including those of the Chinese, Italian, Greek, Jewish, Caribbean, and South Asian communities.

**2.3 *Investigate the feasibility of social enterprise ventures to leverage the AST brand, knowledge and expertise.***

Social enterprises are intended to create profits that support charitable aims. AST is a source of expertise on dementia and could translate that knowledge into profits in one or more social enterprise ventures.

AST will investigate the possibility of fee-for-service dementia training and assistance to develop dementia-friendly service policies. Organizations that serve the general public such as banks, insurance companies and retail outlets may be interested in training their front-line staff to recognize the symptoms of dementia and to learn how to serve those clients sensitively and appropriately. This concept requires a feasibility assessment and a test of market interest through contact with corporate human resources departments.

Brain fitness is of increasing concern to boomers and the X generation who intend to stay sharp and age well. As a core public education theme, AST will offer 'maintain your brain' workshops. In addition, AST will investigate whether a healthy brain social enterprise (alone or in partnership) and directed to the general public, might have the potential to generate a profit. Some investment may be required to assess market interest and profit potential.

## Strategic Direction: Public Affairs

### 3. AST is a respected voice on public policy matters relating to dementia

#### By 2012:

- 3.1 Several AST programs supported by Local Health Integration Networks (LHINs) and the Ontario Ministry of Health (OMH)
- 3.2 The Toronto Dementia Network an additional channel of communication and influence for AST with the LHINs and the OMH
- 3.3 Support to ASO and ASC to represent the interests of and advocate for the mission of the Society at provincial and federal levels

AST will develop relationships with the LHINs and the OMH, directly and through dementia networks - especially the TDN. AST will support ASO and ASC efforts to influence public policy to benefit people with dementia. AST will be a respected and authoritative voice on public policy and health care system issues related to dementia as it affects the people of Toronto.

### Strategic Objectives

**3.1 *Ensure AST programs are well understood and supported by the Toronto Central Local Health Integration Network (LHIN), the four bordering LHINs and the Ontario Ministry of Health (OMH).***

LHINs and the OMH will be made aware of the centrality of AST in the system of dementia care in Toronto, and of AST plans for the future. AST will build relationships with LHINs and the OMH, including active participation in task forces and collaboratives. LHIN and OMH priorities will be closely tracked to relate the work of the Society to them as appropriate. AST will seek LHIN or OMH funding to supplement and expand core programs in counselling, education and training.

**3.2 *Provide leadership to the Toronto Dementia Network as an additional channel of communication and influence with the LHINs and with the OMH.***

AST will closely monitor the work and focus of the OMH and the LHINs so as to better understand their goals and policy directions. To be effective in their context, AST will support dementia networks and the TDN in particular. A critical goal is a full-time TDN coordinator funded by the LHIN and housed at AST. Representing all dementia service providers in Toronto, the TDN would then initiate sector-wide collaborative projects to identify unmet needs in dementia care and recommend solutions to increase the efficiency and effectiveness of the sector.

**3.3 *Collaborate with ASO and ASC to represent the interests of and advocate for the mission of the Society at provincial and federal levels.***

The government of Ontario will continue to provide stewardship of Ontario's health system by setting direction, strategic policy, system standards and delivering provincial programs and services. AST will support ASO initiatives at the provincial level to foster public health policy, planning and funding solutions that help people with dementia. In the federal context, AST will support ASC as it presses for a National Alzheimer Strategy. AST will participate in strategies to influence decision-makers at all levels.

## Strategic Direction: Research

### **4. Research into the cause, prevention, care and cure of dementia is comprehensive, high quality and effectively applied**

#### **By 2012:**

- 4.1 Increased funding of dementia research from 4% to at least 6% of gross revenue
- 4.2 AST dissemination of the latest and best research information (translating research into knowledge)
- 4.3 AST actively supporting research projects and policy studies
- 4.4 Program-related research projects initiated by AST and the TDN

AST will support research so that best practices relating to dementia care and prevention become available as quickly as possible. This support will include funding of research through ASO and ASC, disseminating research information and serving as a dementia resource for researchers. Program-related research will be initiated by AST or the TDN.

## Strategic Objectives

- 4.1 *Increase funding commitment to dementia research to at least 6% of gross revenue.***  
AST presents itself to the community as an organization that provides services and supports research. AST will contribute to ASO's research commitment to the University of Toronto and to the ASC national research program. The aspirational research commitment by 2012 is a minimum of \$200,000 annually.
- 4.2 *Disseminate the latest and best research information.***  
AST will support the dissemination of the latest knowledge through a variety of channels. The Resource Centre will inform the dementia community of research-based evidence, best practices and technology that can be applied to prevention, treatment and care of people with dementia, with a particular focus on the psycho-social aspects of dementia, caregiver burden and non-pharmacological interventions.
- 4.3 *Actively support research projects and policy studies.***  
AST will seek formal links with partners such as Baycrest, the University of Toronto's Institute for Life Course and Aging, Sunnybrook or other institutions which might benefit from research partnerships. AST will serve as a subject expert and a source of client recruitment for clinical trials or other research studies.
- 4.4 *Initiate program evaluation, need assessments, and best practices research directly or in collaboration with the TDN.***  
AST programs are interventions targeted at individuals with dementia and their caregivers, and at the broader public's understanding and support of dementia. AST will evaluate the impact of its programs and services in order to share best practices. The TDN may conduct program evaluations and needs assessments of dementia services, and recommend ameliorating strategies to service providers and decision-makers.

## Enabling Strategies

Enabling strategies support the achievement of the mission-related strategic directions. They are a necessary condition for strategic success.

### Strategic Direction: Fund Development

#### 5. Fund Development: AST has the financial resources to achieve its mission

##### By 2012:

- 5.1 Increased donations from individuals to 63% of total revenue
- 5.2 Increased support from foundations and the corporate community
- 5.3 Increased government funding
- 5.4 Collaboration to ensure the donor potential in Toronto is realized

AST will pursue an aggressive, progressive fund development strategy to maximize the potential of support for the Alzheimer Society in Toronto. This requires a collaborative and increasingly integrated relationship with ASO and ASC. It also entails an investment of staff resources, particularly in major gifts. By seeking enduring relationships with supporters and funders of all types, especially individuals, aspirations of the Society will be supported financially.

See Appendices A. *Revenue Sources 2007 vs 2012*, B. *2007 vs 2012 Revenue Mix*

### Strategic Objectives

#### 5.1 *Increase the total amount of individual giving to 63% of annual revenue by obtaining more donations and at greater gift values.*

AST will identify key prospects and build enduring relationships with Toronto donors to secure support from them that comes as close as possible to each individuals' giving capacity. Major and planned gifts are targeted at an aspirational \$1.6 million in 2012, accounting for 47% of total revenue and reducing the current reliance on labour-intensive special events.

Special events will be valued as feeder and cultivation vehicles, subject to annual evaluation to ensure they are meeting their goals. Other pipeline programs such as direct response will identify prospects for gifts at higher levels. Direct response will contribute directly to revenue growth from 13% to a target of 16% of total revenue.

Sufficient staff resources will be dedicated to major gifts and individual giving. Senior volunteers (especially the Board of Directors) will be key to the success of this objective as they must help to identify, reach, cultivate and solicit donors.

AST will foster a sense of "stewardship" among its clients, offering them opportunities to become friends and supporters of the Society.

**5.2 *Maximize support from foundations and the corporate community.***

Although the primary emphasis will be on individual giving, AST will continue to pursue philanthropic and sponsorship opportunities. Working with other levels of the Society, AST will seek corporate and foundation sponsors for programs and activities. These sources will grow from 2% to 3% of total revenue (\$39,000 in 2007 to an estimated \$100,000 in 2012).

**5.3 *Grow government funding to 9% of total revenue.***

Government funding will grow from 7% to 9% of total revenue (\$115,000 in 2007 to an estimated \$300,000 in 2012). As noted earlier, the OMH and the LHINs will be targeted to fund expansion of the following AST programs: training of personal support workers and other formal caregivers, additional counsellors, and coordinators for First Link and the TDN.

**5.4 *Collaborate with ASO and ASC to realize the fundraising potential of Toronto to benefit the Society as a whole.***

AST will collaborate with ASO and ASC to develop a coordinated strategy for individual and planned giving, major gifts, corporate philanthropy and sponsorship. Such collaboration will reduce competition and maximize the fundraising potential of Toronto donors. This will involve the exchange of donor and prospect data, making necessary the resolution of any restrictions arising from privacy legislation. Volunteer leadership at all levels will be required to maximize giving from the community.

## **Strategic Direction: Organizational Effectiveness and Capacity/Capability**

### **6. Organizational Effectiveness and Capacity Building: AST is dynamic, highly effective, efficient and respected**

#### **By 2012:**

- 6.1 Strong Alzheimer Society profile/brand in Toronto
- 6.2 AST staff and volunteers have skills and experience required to achieve all goals of the Strategic Plan
- 6.3 AST facilities supportive of program offerings, accessible and attractive
- 6.4 A financially stable organization with administration and fund raising costs in line with public and sector expectations
- 6.5 Strong governance and leadership
- 6.6 AST, ASO and ASC achieving organizational efficiencies across the spectrum of activities in Toronto

The three levels of the Society understand they are part of a whole in the minds of the Toronto public. They also understand that the public expects them to work together to maximize the value of donations to the cause. AST will strive to ensure its staff and volunteers are valued and supported in their efforts to achieve the goals of this Plan. Facilities will reflect the Society's commitment to a client-centred and professional environment. The Board of Directors will be strong and well-positioned to lead in the realization of strategic directions. In marketing, fund development and basic organizational functions, synergies with the other levels of the Society will be sought and welcomed.

### **Strategic Objectives**

#### **6.1 *Strengthen marketing, communications and media relations to raise the Alzheimer Society profile and brand in Toronto and with key stakeholders.***

The Alzheimer Society will be perceived in Toronto as a single organization so as to create a seamless presence. Recognition and relevance of the brand and awareness of Toronto programs will increase through a targeted marketing, communications and media relations strategy. Strategies that support fund development will be incorporated into a communications plan. Key messaging, key spokespeople, media partnerships and media campaigns are expected. Media policies and protocols will optimize the expertise, experience and contacts of the different levels of the Society and minimize confusion. Stakeholders will know what the Society does. The Society will be accountable and transparent, values which are increasingly becoming watchwords for the public.

Human resources will be dedicated to marketing and communications, transitioning from the current part-time consultant to a full-time salaried position.

**6.2 *Ensure AST staff and volunteers have the skills and experience required to achieve all goals of the Strategic Plan.***

People are the Society's most valuable asset. AST will provide a working and learning environment for staff and volunteers to develop their pride and professionalism in the organization and its work. Under the leadership of the Executive Director, AST will assess staff capabilities and invest in the development of aptitudes, skills and knowledge to increase the capacity of staff to fulfil the goals of the Strategic Plan. Positions in fund development will become more specialized to increase focus and develop specific skill-sets. The expertise of program staff will be enhanced so that they are increasingly recognized as experts in dementia care. Staff turnover will provide opportunities to assess roles and update them, and to shift or refocus responsibilities.

Aspirational plans are for eleven additional staff by 2012, including three counsellors, two public education coordinators, two administration staff, two development staff, one marketing position and one dementia network coordinator.

AST will continue to engage and involve volunteers, enabling them to grow and contribute to a more healthy and vital Toronto. Appropriate human and financial resources will support the volunteer program and recognition of volunteers will be enhanced.

**6.3 *Ensure AST is financially stable and that fundraising and administration costs are reasonable and in line with public and sector expectations.***

AST will seek at all times to maintain sufficient financial reserves and cash flows to ensure stability and manage occasional economic downturns. No more will be spent on administration and fundraising than is required to ensure effective management and resource development. AST will monitor the proportion of spending of comparable peer organizations and seek to match or better those organizations in terms of its *Good Works Index*, sensitive to what the public expects from charities. It will continue to adhere to Imagine Canada's *Fund Raising and Financial Accountability Code*.

See Appendices C: *Expenses 2007 vs 2012*, D: *Spending Mix 2007 vs 2012*

**6.4 *Continue strong and effective leadership and governance through the Board of Directors.***

The Board of Directors is the governing body for AST. It directs strategic priorities, delegates authority and responsibility to the Executive Director, and determines results by managing and monitoring. The Board will consider the requirements of the directions taken by AST in this Strategic Plan and undertake targeted Board member recruitment using a competency profile so new Board members "fit" what the Society is trying to do. The Board will endeavour for its members to represent the diversity of Toronto. It will ensure continued professional development for its members and regular opportunities for them to learn about the Society's work. Best practices in the governance function will be adopted and demonstrated. Leadership in giving and fund raising will be expected from Board members to the extent of their personal and corporate capabilities.

**6.5 *Ensure AST offices are accessible and attractive to clients and supportive of program offerings.***

AST must move within the next two years. New premises will be client-friendly - providing privacy for counselling, suitable function rooms, and a professional environment for staff and volunteers. The new office will demonstrate an effective use of space. Visibility is desired: ideally, the passing public should be able to see the Alzheimer Society office or its signage.

**6.6 *Achieve organizational efficiencies across the spectrum of Society activities in Toronto.***

Increased clarity is expected on the roles, responsibilities and accountabilities of the three levels of the Society. The local level of the Society will continue to provide direct services to clients through an appropriate basket of programs and services.

In addition to playing this valuable role, AST will adopt a Society-wide perspective for leveraging the strength, quality and value of its resources internally and its relationships externally. AST will continue to pursue opportunities for collaboration where cost-efficiencies can be gained and where sometimes intangible synergies offer the potential of increased productivity. Joint efforts to create a stronger public image of the Alzheimer Society are expected. Complementary expertise in fund development will be leveraged. Opportunities in the back office functions of finance, IT, HR and facilities operations can be maximized in a co-located environment but will be pursued with vigour even if Society offices remain separate.

## Conclusion

The Alzheimer Society of Toronto is filling a human services need in Toronto. It has established a strong and enviable reputation and earned the trust and respect of clients, organizational partners and the community. AST enjoys and benefits from strong teamwork between the staff and the Board. Fundraising events have a track record of success. There are increasingly positive relationships with the other levels of the Alzheimer Society federation.

Nevertheless, AST is at a crossroads. Canada's population is aging and in Toronto, a large and diverse city, the need for dementia services is growing. The health care system will be strained in the future. More people will need to know about dementia, how to care for people who live with it and how to cope as caregivers.

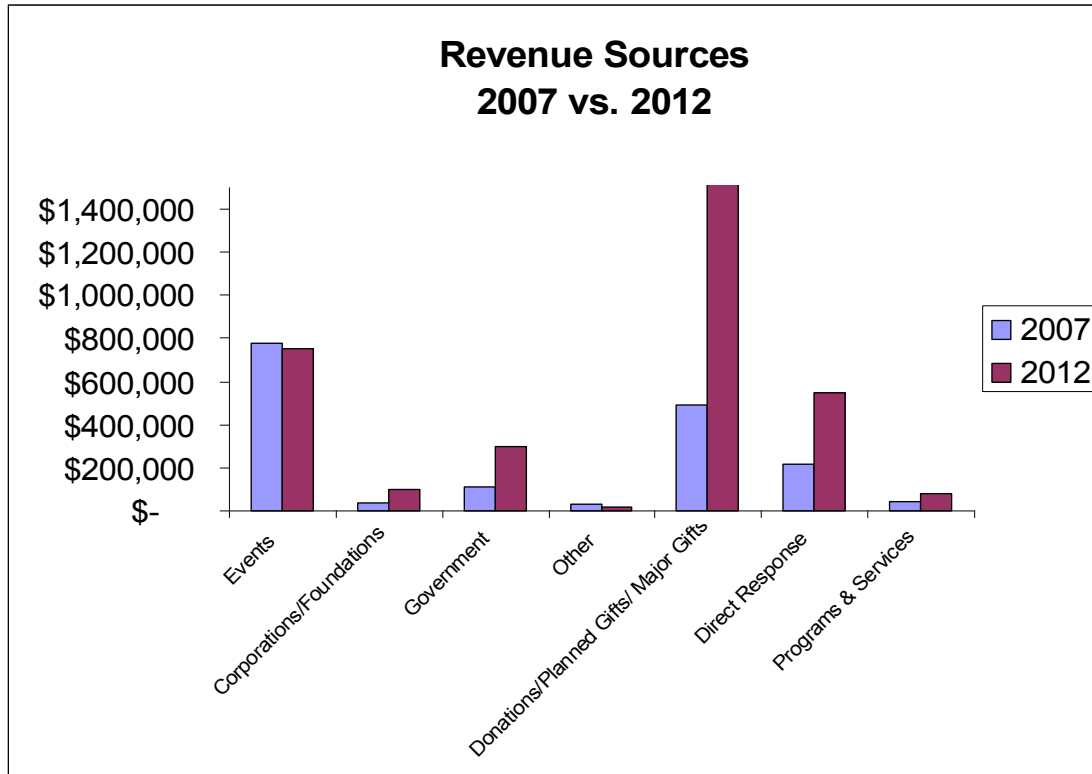
The Alzheimer Society everywhere is building a unique expertise. In Toronto, that expertise has already been translated into valuable programs – counselling for families, training for personal support workers, public information sessions, a resource centre and much more. There is a need to expand these programs exponentially to meet anticipated needs. This entails being strategic and wisely leveraging partnerships, technology and human resources.

To fund this expansion, there must be an increasingly sophisticated and effective fundraising program aimed at individuals with the capacity to give and renewed efforts to secure corporate, foundation and government funding. Dedicated resources need to be focused in these areas and results shown so that fund raising costs do not escalate beyond the proportion of charitable spend that is desirable. This will require investment, focus, teamwork and careful management.

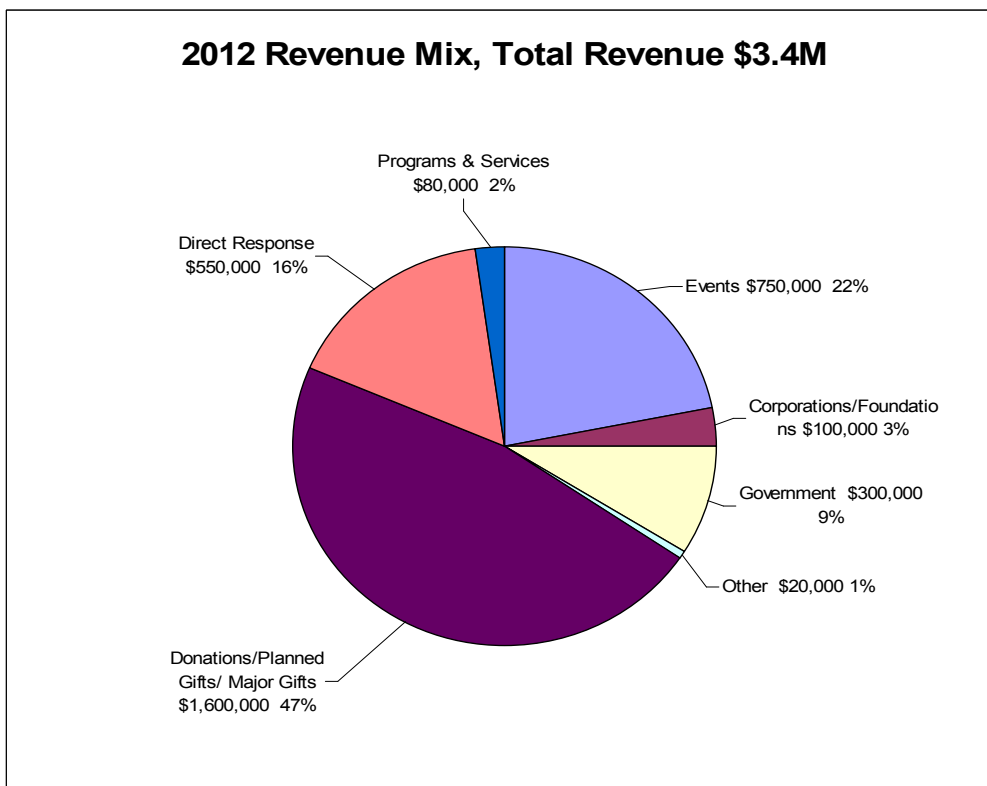
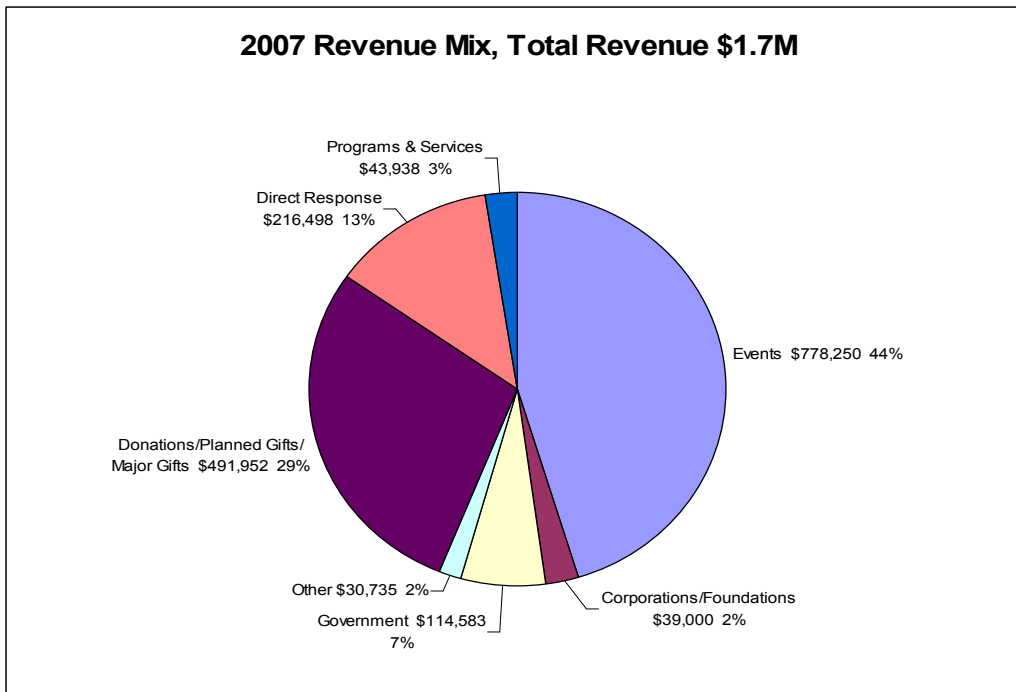
To support efforts to “raise the tide” of funding and donations in Toronto, a strong marketing and communications program is essential. In this area, as in fundraising, collaboration with the other levels of the Alzheimer Society will be essential. Pursuing synergies with ASO and ASC is the right thing to do to optimize the value of every Toronto dollar given to the cause.

This Strategic Plan sets a horizon of five years and defines objectives for effort. The plan is aspirational, setting out an ideal with broad strategies to get there. Annual operational plans will now move the Society forward.

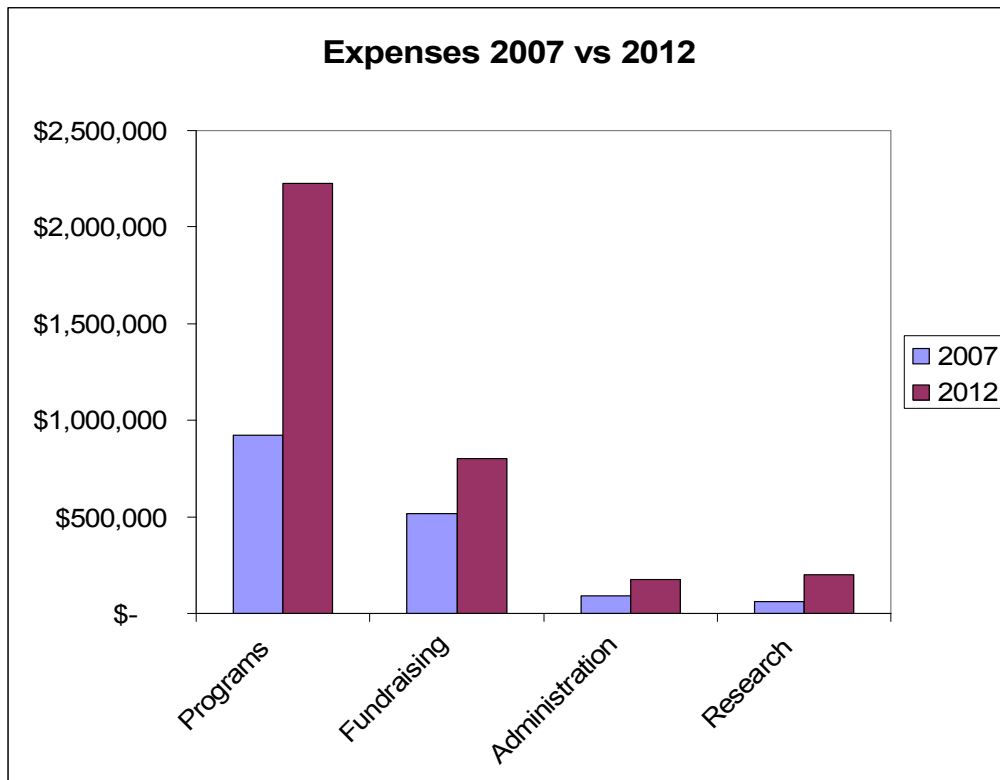
Appendix A. Revenue Sources 2007 vs 2012



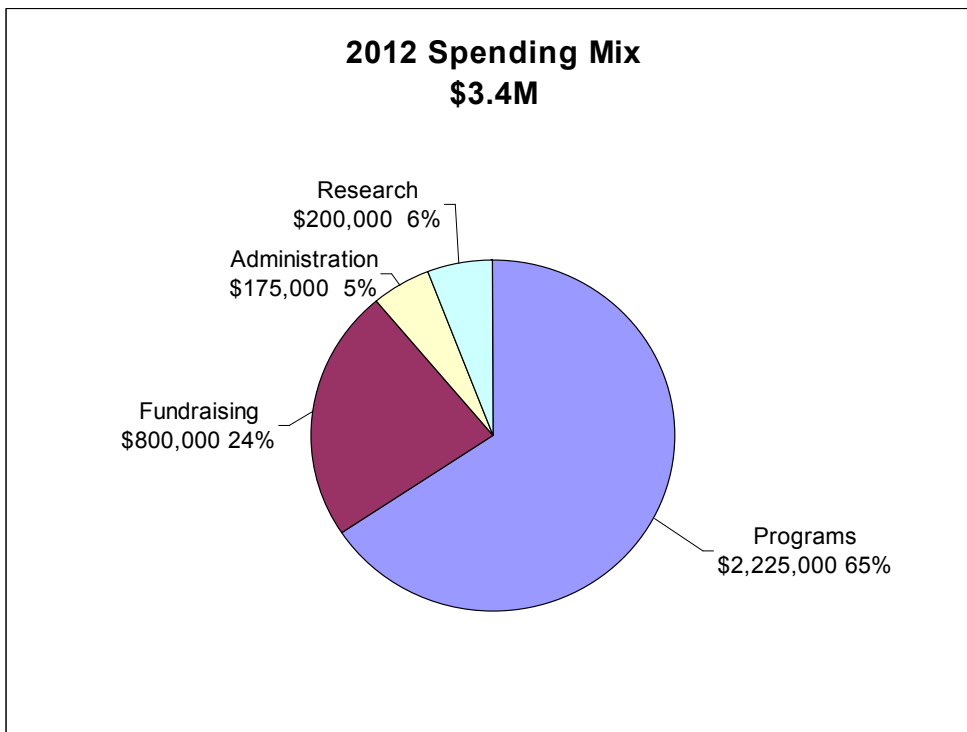
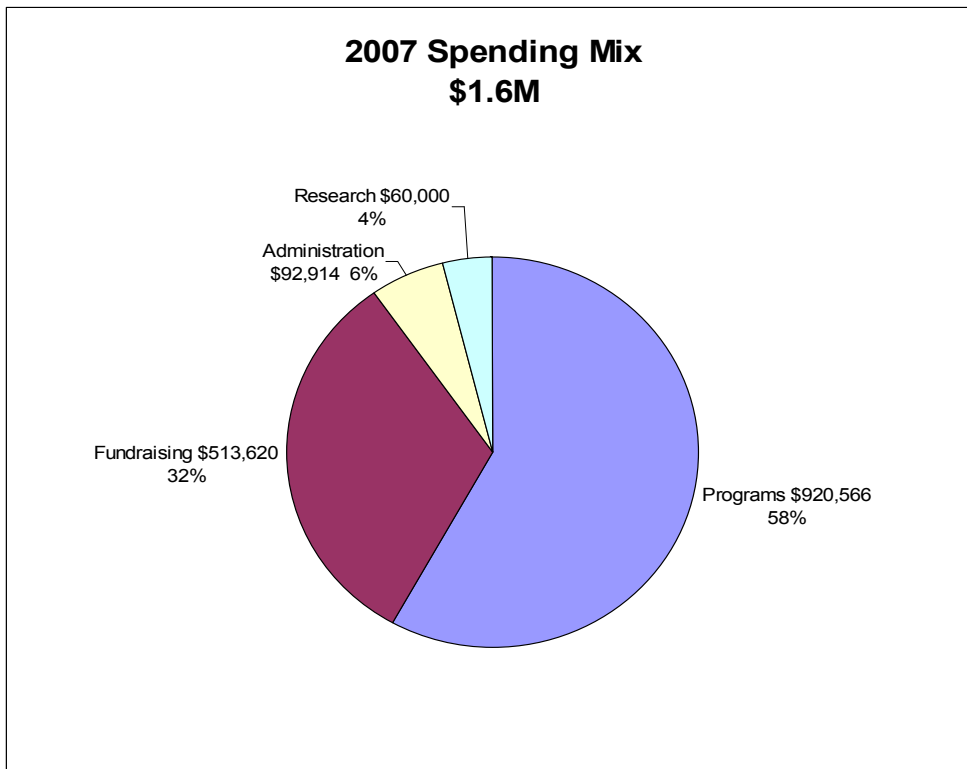
## Appendix B. Revenue Mix 2007 vs 2012



Appendix C. Expenses 2007 vs 2012



Appendix D. Spending Mix 2007 vs 2012



# Confronting the Challenge: Strategic Plan 2007-2012

<b>Our Vision</b>	<b>A World without Alzheimer's disease</b>
<b>Our Mission</b>	<b>To alleviate the personal and social consequences of dementia and to promote research</b>
<b>Our Role</b>	<b>To offer support, information and education for persons with dementia, their families and their caregivers, to increase public awareness of dementia, to promote research, and to advocate for services that respect the dignity of the individual.</b>

## STRATEGIC DIRECTIONS AND OBJECTIVES

<b>Service</b>	<b>Profile and Public Awareness</b>	<b>Public Affairs</b>	<b>Research</b>	<b>Fund Development</b>	<b>Organizational Effectiveness and Capacity</b>
<ul style="list-style-type: none"> <li>▪ Increased counselling and client education</li> <li>▪ Partnerships for reach and responsiveness</li> <li>▪ High level information support</li> <li>▪ Trained formal caregivers with recognized certification</li> </ul>	<ul style="list-style-type: none"> <li>▪ Positioned as leading source of dementia information in Toronto</li> <li>▪ Public Information sessions and with partners</li> <li>▪ Potential Social Enterprise ventures</li> </ul>	<ul style="list-style-type: none"> <li>▪ Relationship with Toronto LHIN and four bordering LHINs</li> <li>▪ Empowered Toronto Dementia Network</li> <li>▪ ASO and ASC advocacy supported at provincial and federal levels</li> </ul>	<ul style="list-style-type: none"> <li>▪ Increased funding commitment for dementia research</li> <li>▪ Dissemination of latest and best research information</li> <li>▪ Active support of research projects</li> <li>▪ AST/Dementia Network research: program evaluation, needs assessment, and best practices</li> </ul>	<ul style="list-style-type: none"> <li>▪ Major and planned gifts emphasis with feeder programs</li> <li>▪ Increased support from foundations and corporate community</li> <li>▪ Government and LHIN funding</li> <li>▪ Collaborative effort with ASO and ASC so Toronto development potential maximized</li> </ul>	<ul style="list-style-type: none"> <li>▪ AS profile/brand in Toronto</li> <li>▪ Skilled, experienced staff and volunteers</li> <li>▪ Attractive and accessible facilities that support program offerings</li> <li>▪ Stable organization with administrative and fund raising costs in line</li> <li>▪ Strong governance and leadership</li> <li>▪ Organizational efficiencies through collaboration with ASC and ASO</li> </ul>