



Aphasia Institute

STRATEGIC PLAN 2010 – 2014

March 2010

OUR STRATEGY FORWARD

OUR MISSION: Our mission is what we do -- the business we're in:

Give hope to people with aphasia and their families by developing and sharing innovative solutions that reduce language barriers to full life participation

OUR VISION: Our vision is a statement about the impact we want to create:

There are no barriers to living successfully with aphasia

OUR VALUES: Values are our foundation and govern our actions. We strive to reflect them daily. They shape our culture:

- *Respect:* Believing our clients, families, partners, volunteers and employees have capability and competence; recognizing that people with aphasia and their families know the most about living with aphasia; listening to learn; valuing diversity of background and perspective; acting with honesty, candour and in ethical relationships with others
 - *Compassion:* Creating a welcoming environment; acknowledging clients needs and aspirations; demonstrating empathy; striving to empower individuals and families; seeing and appreciating the whole person to better help them to develop their potential and resourcefulness
 - *Collaboration:* Working internally and externally towards shared goals knowing results are better when we work together; recognizing that because we are privileged to learn, we are obligated to share; believing that a diversity of perspectives leads to a deeper understanding of issues and enriched knowledge for decision-making
 - *Creativity:* Not settling for the status quo; always looking for new ideas; open to trying new solutions; enthusiastic about the creative process to bring value to our clients and to apply our knowledge
 - *Excellence:* Believing and demonstrating that “being okay” is not good enough when we have the resources and means to be better and even the very best; creating an excellent organization that inspires trust, a sense of community, personal responsibility, and well-being.
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OUR GUIDING FRAMEWORK

The Institute has a framework which guides our professional work in supporting people with aphasia Living with Aphasia: Framework for Outcome Measurement (A-FROM)¹. We recognize that the client is the most appropriate person for judging “meaningful” life change. We seek to understand the important outcomes of interventions that make a difference to the everyday lived experience of individuals with aphasia and their families

WHOM WE SERVE

The Institute serves people living with or impacted by aphasia. We are a source of support to these individuals, their families, the professionals who work with them, and to the wider community.

WHAT WE DO – OUR FUNDAMENTAL STRATEGY

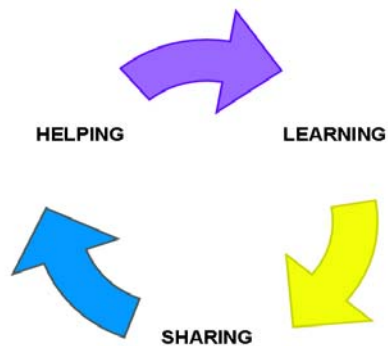
Once the mission and vision is set, *what we do* to achieve our mission is the next fundamental choice in a strategic plan. This is strategy at the highest level. It is the “how” the organization creates value in its environment and for whom it serves.

For the Aphasia Institute, the Board of Directors has affirmed that there are in fact three essential activities in the Institute which together constitute its fundamental strategy. These constitute a “virtuous cycle.”² One activity builds upon and reinforces another.

These activities are direct service, applied research, and education and together they allow the Institute to make the broadest impact.

¹ Kagan, A., Simmons-Mackie, N., Rowland, A., Huijbregts, M., Shumway, E., McEwen, S., Threats, T., & Sharp, S. (2007). Counting what counts: A framework for capturing real-life outcomes of aphasia intervention. *Aphasiology*, 22(3), 258-280.

² A virtuous cycle is a sequence of events that continually reinforces itself through a feedback loop. A virtuous circle has favorable results.



Institute's core strategy is to integrate these activities because that integration has most potential to develop new possibilities for living with aphasia.

The core activities are:

Direct service (Helping)

Direct service is at the heart of what we do. It is intended to serve the needs of our clients with aphasia and their families. At the same time, service supports learning and research and contributes directly to a broader impact germane to the Institute's vision. The Aphasia Institute serves people with aphasia and their families with passion and commitment and also leverages what is learned to impact and inspire "the many more." In the future, we will increasingly connect direct service to knowledge development.

Applied Research (Learning and Knowledge Exchange)

We will pursue our own research initiatives and also conduct research and consultation for and with others. The Institute exists, in part, to harness the experiences and knowledge of people who are learning to live successfully with aphasia. We will create linkages and knowledge exchange amongst clients, caregivers, researchers and others so new models and procedures for living successfully with aphasia are developed and evidenced. The Institute will position itself as a place and space for knowledge exchange – both for those with aphasia and formal/informal caregivers.

Education (Sharing)

What the Aphasia Institute learns from its one-on-one and small group relationships will be translated out "into the world." This means we will codify and capture knowledge into a practical and efficient format that is transferable through different channels. There is a teaching program already and this is an area we will grow. However other means of instruction will be established through partnerships and technology extensions. To be relevant, we will target health system issues and priorities offering tools and training. We

will exploit adjacencies including development of "for-revenue" lines of business.

The actual proportion of effort to applied research, education and service will depend on dynamic changes over time and by the Institute's focus on different projects and themes.

As well as our dedication to direct service, we do aim to grow our work in applied research and education. These activities make important contributions to our vision.

STRATEGIC GOALS 2010 - 2014

Strategic Goals are based on our strategy as an organization including fundamental choices made to achieve our vision such as what we do and for whom. The overall strategy has been determined to be direct service, education, and applied research *in synergistic relationship with one another*.

Strategic goals are over-arching and reflect key focus needed to fulfill our mission and vision. Within the range of possible activities in direct service, education and applied research, we now seek to concentrate on what's important and timely – both responsive to opportunities and challenges and requiring "over and beyond" effort to accomplish.³ Over the next four years, our strategic goals are:

1. BROADEN SOLUTIONS TO REDUCE BARRIERS TO FULL LIFE PARTICIPATION FOR THOSE LIVING WITH APHASIA
2. PARTNER WITH LOCAL HEALTH PROVIDERS TO EASE THE CLIENT'S WAY THROUGH THE CONTINUUM OF CARE
3. DEMONSTRATE THE VALUE OF OUR WORK THROUGH APPLIED RESEARCH
4. DEVELOP CONTENT AND CHANNELS FOR WIDER KNOWLEDGE TRANSFER AND EXCHANGE
5. BUILD A STRONG AND SUSTAINABLE ORGANIZATION

³ N.B. Focus on strategic goals does not mean that we do not do other things. Rather, these strategic goals provide direction and focus on certain key shifts that must be integrated into our activities for us to be successful in our vision.

1

STRATEGIC GOAL: BROADEN SOLUTIONS TO REDUCE BARRIERS TO FULL LIFE PARTICIPATION FOR THOSE LIVING WITH APHASIA

What it means:

This is our commitment to a full life participation model. We seek to open inspiring possibilities for living successfully with aphasia. To smooth the way for a person with aphasia and enable more effective communication we will expand our focus to the wider set of relationships they may have. We will create programs at the Aphasia Institute which will allow us -- together with our clients, who have an insider's perspective -- to develop/create the nature of the solutions to living successfully with aphasia.

The Institute will become the credible 'go-to' place for people living with aphasia. It will be a portal of support to them in all their important life relationships. In order to fully realize this role, we will develop supports to the person with aphasia and their family living in the community in interacting with others on a daily basis. This means relevant information, tools and support to families, workplaces, informal caregivers and others in the community including service providers. By working with others in the community and improving their understanding, people living with aphasia will be able to integrate into society more easily and live a fuller life.

To shape our services and involve our clients, we will engage the community – as is expected by any agency funded by the Central LHIN. We will exceed this expectation, as community engagement is consistent with our values. The Institute will reach, listen to, and enable the input of our community through various means of ongoing community engagement and relationship building. This engagement will help us to understand the needs and interests of each type of stakeholder group (clients, stakeholders, partners and funders), to chart our goals with them, and plan what we do knowing we have their support and involvement.

Objectives :

- 1.1 Through direct service, develop programming which will provide the fundamental knowledge for a set of solutions for living successfully with aphasia
 - 1.2 Develop and implement a Community Engagement Plan to deepen relationships with stakeholders
 - 1.3 Develop external partnerships in the broader community including and beyond the health sector
 - 1.4 Increase and develop communicative access supports for other life situations
 - 1.5 Provide linkages for clients to other forms of treatment of aphasia when appropriate
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2

STRATEGIC GOAL: PARTNER WITH LOCAL HEALTH PROVIDERS TO EASE THE CLIENT'S WAY THROUGH THE CONTINUUM OF CARE

What it means:

This relates to our work in our local service environment but what we learn in this activity will have wide application. The Aphasia Institute will expand its focus through the continuum of care. We will offer communication solutions to local health care providers who work with people with communicative access issues, specifically aphasia. By focusing on helping the person with aphasia and the family to navigate and communicate within the health system “from day one,” we help providers better understand and meet needs. We will support key communication junctures or essential conversations along the continuum of care.

The Institute will engage with health providers in their settings to see opportunities to offer help and solutions. There will be a greater effort to “go out and meet” providers and commitment to partner with them side-by-side to offer help. In this process we will be learning at the same time. We expect certain key moments in care will specifically respond to known health system issues. For example, when a hospital is planning discharge of an individual with aphasia and needs to know supports at home, the Institute can help support that important conversation. The Institute model of aphasia intervention will be offered as an essential part of emerging solutions to meet health care priorities.

We will document what we learn and transfer this knowledge more widely to others in the health care system facing similar issues helping people with aphasia and their families.

Objectives:

- 2.1 Reach service providers addressing health system priorities and teach them *Supported Conversation for Adults with Aphasia (SCA™)*
 - 2.2 Develop learning and tools from these interventions for wider dissemination
 - 2.3 Extend consulting opportunities – for example, conduct audit processes in health care settings observing and identifying opportunities for physical environment changes and adjustments to the process to make it easier for people with aphasia and the providers who serve them
 - 2.4 Connect professionals to resources and to user community channels
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3

STRATEGIC GOAL: DEMONSTRATE THE VALUE OF OUR WORK THROUGH APPLIED RESEARCH

What it means:

Through this work, we maximize our impact and reach. Every single service act has the potential to become the basis for knowledge creation. We will continue to create knowledge -- learning what works and providing evidence for solutions we discover with our clients and partners. To accomplish research, we will continue to partner with research-oriented organizations. Engagement on health system issues -- for example, contributing to addressing health equity -- may create new applied research opportunities.

We will encourage staff to welcome the research process explaining that knowledge development and transfer is how we help people who cannot directly reach us. While most of our clients will choose to help others and share their experience, they are not obligated to participate if they do not wish to. As part of our research process, the Institute will not divulge personal information and will comply with all applicable privacy legislation.

As a foundational basis for this discovery work and consistent with our values, we will continue to demonstrate best practices for process, evaluation and performance measurement. We will strengthen the quality of service we provide and be mindful of both expectations of clients and how success is measured in performance data to funders.

Objectives:

- 1.1 Ensure that recipients of our direct service understand that they have potential to contribute to the broad vision and mission of the Institute helping others as well as to directly benefit
 - 1.2 Integrate the research process into the daily work of staff
 - 3.3 Partner with research-oriented organizations
 - 3.4 Fulfill funder expectations for performance data
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4

STRATEGIC GOAL: DEVELOP CONTENT AND CHANNELS FOR WIDER KNOWLEDGE TRANSFER AND EXCHANGE

What it means:

Consistent with our aim to make the Institute a widely accessible and sustainable “portal” for people affected by aphasia, we will expand our current channels of knowledge dissemination through:

- digital content (in formats accessible by computers)
- new channels of technology and
- product development in order to generate revenue (“for-revenue”)

This is about having the greatest impact. It involves greater efforts to “package” what we have learned and expanding efforts to share knowledge beyond our facility through various vehicles.

We will digitize resources into audio, video, text, graphics and photo relevant to users and deploy new channels of technology. In the Web 2.0 environment, we will develop opportunities for trainees and related professionals to share their experience with others. In the future, professionals will be able to upload content discussing their use of techniques in their settings. The Institute acknowledges that it can and will manage any privacy or other issues regarding this.

To enable the wider entrepreneurial sharing of knowledge, we will strengthen and focus our product development process. The Institute will develop a series of products and services to sell “for revenue” purposes. This is not new - the difference will be its emphasis within our operation. We need to grow this part of our business in order to have more impact. Our innovation/“for revenue” development strategy may also extend to those with other communicative access challenges and will include addressing questions of intellectual property. Mindful of funder commitments and our vision, we will decide which products are for-profit, cost-recovery, subsidized, or at no-cost and to whom.

This also means investment in marketing – see the enabling goal: *Ensure Strategic and Pro-Active Communications and Marketing*.

Objectives:

- 4.1 Develop components of our service model for wider transferability
 - 4.2 Widen accessibility or means through which people can access relevant aspects of the service model without being on site
 - 4.3 Segment markets to ascertain their needs for a basket of current and potential products and services. Develop products with “for revenue” purposes. A separate Business Plan is required including definition of the market, assessment of need, product and service development, costing for digitization, returns over what period of time, and a marketing plan
 - 4.4 Create a forum or space for stakeholders to share their clinical and personal experiences in various modalities (text, videos, blogs, and chats)
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5

STRATEGIC GOAL: BUILD A STRONG AND SUSTAINABLE ORGANIZATION

What it means:

While the organization already has some strong foundational elements in place, leadership and commitment will be necessary to achieve our challenging mandate in an ever-changing environment. Largely drawn from staff work done in the planning process, the following goals align our organization to the vision and allow pursuit of our strategic goals. They are the enabling and necessary supports and processes required *organizationally* to be successful. These ENABLING GOALS are:

- A. DEVELOP OUR QUALITY STAFF AND VOLUNTEERS IN A TEAM LEARNING AND SHARING ENVIRONMENT
- B. ENSURE STRATEGIC AND PRO-ACTIVE COMMUNICATIONS AND MARKETING
- C. INCREASE AND DIVERSIFY OUR REVENUE TO BUILD AND SUSTAIN CAPACITY
- D. DEVELOP EFFICIENT AND EFFECTIVE INFORMATION MANAGEMENT AND SUPPORTIVE TECHNOLOGY

PEOPLE

A

ENABLING GOAL: DEVELOP OUR QUALITY STAFF AND VOLUNTEERS IN A TEAM LEARNING AND SHARING ENVIRONMENT

What it means:

Our people will ensure our organization adapts to our dynamic environment. Leadership in governance, management, program, and administrative functions, both staff and volunteer, will move our organization forward. We will develop leadership in our current team and we will also attract new leaders. When we positively influence and enable others to take personal responsibility for making improvements, we enable the Institute's growth and development and create opportunities for others to contribute their talents.

The Institute will strive to be a great place to work so we attract and retain high quality staff. This means building a strong team culture where staff can learn and contribute, be recognized for their gifts and have opportunities for growth. As part of our people strategy, we will work diligently to improve compensation and benefits for our staff.

We aim for our people to feel a vital part of our inspired future. We will integrate this strategy's components, as appropriate, into every job description along with accountability

and necessary authorities. This means making a better connection between service, research, and education helping staff to contribute to knowledge creation.

To succeed, we must establish a strong learning and teaching environment and culture. The Institute will ensure current employees are supported to make the transition and be a successful part, growing their own careers. We will recruit and orient new staff into this mode.

Volunteers contribute so much to the life of the Institute. They are a vital link to the community. They enhance many aspects of our programs and service environment, and already contribute greatly to our recreational and lifestyle programs. We will seek to strengthen our volunteer program and the range of opportunities offered. We will maximize the skills and experience that volunteers bring -- whether they are in positions of governance, program support or advising us on how to increase the professionalism and effectiveness of what we do. We value volunteers as team members and will seek to enhance and better recognize their contributions.

Objectives:

A.1 Incorporate components of our strategic plan into every job description with accountability and appropriate authority. This will be within a framework which clarifies consultation processes and decision making while retaining the spirit of the Institute

A.2 Implement a performance management process

A.3 Identify core competencies or discovery questions that will be the basis for training current and new staff in order that they better link their work in direct service to learning and to sharing as knowledge

A.4 Develop, communicate and implement effective, fair and enabling human resources policies

A.5 Further develop the Volunteer Program recruiting, securing a range of diverse volunteers who have skills and experience to contribute towards our strategic goals as valuable team members

A.6 Create the environment in our facility to support the synergy of direct service, education and applied research

COMMUNICATIONS AND
MARKETING

B

ENABLING GOAL: ENSURE STRATEGIC AND PRO-ACTIVE
COMMUNICATIONS AND MARKETING

What it means:

We will ensure strong ongoing internal and external communications. This means ensuring staff, volunteers and the Board are well-informed and dialoguing on matters of importance. Externally, we will present the Institute to the community with professionalism, transparency

and with consistent messaging and branding.

Robust strategic marketing support will be provided to our fundraising, programs, and our “for revenue” ventures. Since marketing involves not only promotion but understanding changing needs and responding with offerings of value, what we learn from our community engagement strategy (in Strategic Goal #1) will enhance what we do. Marketing support will be detailed in any business plan for our for-revenue efforts and fundraising, and encouraged in planning service programs.

Objectives:

B.1 Develop a Strategic Communications and Marketing Plan including ongoing effective internal communications and external communications and marketing support to programs, “for-revenue” activities and ventures, and fundraising

FINANCE



ENABLING GOAL: INCREASE AND DIVERSIFY OUR REVENUE TO BUILD AND SUSTAIN CAPACITY

What it means:

We will grow our revenue in order to develop opportunities and meet needs, attract the best people, generate new programs and achieve our mission and vision. We will ensure that new programs and initiatives generate -- or are supported with -- sufficient revenues to cover their costs. Our goal is to achieve financial sustainability and fuel the Institute’s growth so that we can have wider impact.

We will prioritize the development of diversified revenue including non-traditional sources so as to build stability. Diverse sources will be:

- LHIN funding: We will be alert to and mindful of their priorities, meeting our accountabilities and offering greater value to the health care system
- Earned income through teaching
- Profit derived from “for revenue” entrepreneurial business lines of our education and training
- Fundraising from individuals, groups, companies, and foundations
- Sponsorship

We will especially strengthen our fundraising and “for-revenue” ventures.

Fundraising requires developing a compelling case for support, teamwork across the organization to identify and encourage relationships with individuals, groups and companies with the capacity to give, disciplined implementation of cultivation, solicitation, recognition and stewardship strategies, and leadership.

Sound business plans must be developed to grow the “for revenue” part of our business. This priority is new and not without risk, so we will invest in this wisely and strive to develop

comfort with, confidence, and expertise regarding our “for revenue” ventures.

We will also seek cost-savings and ways to stretch resources.

Objectives:

C.1 Develop an integrated revenue development plan that links to our communications and marketing plan. To grow the fundraising net dollars per year, we will identify and commit to basic strategies (for example, planned gifts, annual gifts, and so on) and key practices that identify steward and recognize donors well.

C.2 Continue to seek core funding from Central LHIN and other LHINs for projects.

C.3 Pace the strategic funding of Institute priorities to maintain financial sustainability

INFORMATION AND TECHNOLOGY **D** ENABLING GOAL: DEVELOP EFFICIENT AND EFFECTIVE
INFORMATION MANAGEMENT AND SUPPORTIVE
TECHNOLOGY

What it means:

Information management and technology must be utilized to improve our service to clients and to support our vision. The goal is an efficient back office (clinical and administrative) using a single platform. Given that the Central LHIN aims to develop strategies to share information across the system, the Aphasia Institute will be aligned with any wider information management developments as they emerge.

As well, we are committed to digitize our resources in the next few years – we must take our technology resources to the next level. The initiatives discussed in Strategic Goal #4 (Develop Content and Channels for Wide Knowledge Transfer and Exchange) are supported here with appropriate technology.

The website needs increased functionality. As a “portal” for people affected by aphasia and the professionals who work with them, there must be updated educational information, information for donors, and prospective donors, and ways in which people can interact and contribute. The site must be fresh, and contemporary consistent with our vision, user-friendly, and have improved search facility and navigation.

Objectives:

D.1 Develop increased Website functionality

D.2 Develop a single technology platform consistent with any LHIN developments

D.3 Train staff and volunteers in technology tools and information management

APHASIA INSTITUTE STRATEGIC PLAN 2010 - 2014

Mission

Give hope to people with aphasia and their families by developing and sharing innovative solutions that reduce language barriers to full life participation

Vision

There are no barriers to living successfully with aphasia

Community Served

- Our Clients and Families**
- Our Partners in the Health Care System**
- Our Team of Staff and Volunteers**
- The Wider Community**

Strategic Goals

- BROADEN SOLUTIONS TO REDUCE BARRIERS TO FULL LIFE PARTICIPATION FOR THOSE LIVING WITH APHASIA
- PARTNER WITH LOCAL HEALTH PROVIDERS TO EASE THE CLIENT'S WAY THROUGH THE CONTINUUM OF CARE
- DEMONSTRATE THE VALUE OF OUR WORK THROUGH APPLIED RESEARCH
- DEVELOP CONTENT AND CHANNELS FOR WIDER KNOWLEDGE TRANSFER AND EXCHANGE

Enabling Goals

- BUILD A STRONG AND SUSTAINABLE ORGANIZATION
- DEVELOP OUR QUALITY STAFF AND VOLUNTEERS IN A TEAM LEARNING AND SHARING ENVIRONMENT
- ENSURE STRATEGIC AND PRO-ACTIVE COMMUNICATIONS AND MARKETING
- INCREASE AND DIVERSIFY OUR REVENUE TO BUILD AND SUSTAIN CAPACITY
- DEVELOP EFFICIENT AND EFFECTIVE INFORMATION MANAGEMENT AND SUPPORTIVE TECHNOLOGY

- Respect**
- Compassion**
- Collaboration**
- Creativity**
- Excellence**

OUR VALUES