

Strategic Plan

2022 - 2026

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Summary

Executive Summary

In September 2021, The Epilepsy Association of Calgary set out to assess and solidify their Strategic Plan. The purpose of this process was to set the direction of the organization with a predominantly new Board and new Executive Director.

Directors were invited to respond to a survey to prepare for the planning session. Survey outcomes were:

- solidify what the Mission and Vision statements 'mean' in practical terms assess if the three strategic directions are still relevant and what might be missing
- help identify future priorities of the organization

In developing this plan, the Board reviewed input from the Service Gaps / Needs Assessment (2021), key findings of which included:

- emphasizing opportunities for people with epilepsy improve income and financial security (including employment)
- supporting improved mental health outcomes
- advocating to reduce stigma associated with misperceptions around epilepsy

Finally, the strategic plan development culminated in an in-person session facilitated by Merin Coutts on November 2, 2021 to align the core values that guide the organization with strategic directions, supporting targets and measures of success.

The **2022-2026 Strategic Plan** outlines a refreshed purpose, a new vision, and articulated values for the organization.

The Strategic Plan outlines two priorities, each of which include specific goals, strategies, outcomes, and measures of success to guide the Board and staff in plan implementation.

The organization's progress against the priorities of the Strategic Plan will be communicated through our Annual Operating Plan and supporting Budget.

Our Story

Our Mission

"To connect and support those living with or impacted by epilepsy and empower their independence, quality of life, and community participation."

Our Vision

"A community where all people living with or impacted by epilepsy can thrive."

Our Purpose Statement

The Epilepsy Association of Calgary is a charitable social service agency established to address community, individual and family needs related to epilepsy.

Values



RESPONSIVE

We listen to our community, provide them with innovative and accessible services, and are accountable to their evolving needs.



SUPPORTIVE

We provide education and support to enable the best quality of life for individuals impacted by Epilepsy to empower them across the different stages of their journey.



COLLABORATIVE

We unite stakeholders across our communities to develop and enhance the support network for those we serve.



ADVOCACY

We provide leadership and a powerful voice so that people impacted by epilepsy can thrive.

Our Strategic Priorities

Strategic Directions or Aspirations are overarching priorities that guide all activity and resourcing in pursuit of your Vision. Based on the February 2020 planning session, three Strategic Directions were articulated. From here the directions were condensed down to one guiding priority in the pursuit of the Vision and from which all activity flows.

STRATEGIC ASPIRATION

Become a LEADING Epilepsy Association in Canada

WHAT DOES BEING A LEADING ORGANIZATION MEAN?

- Collaborating, mentoring, and bringing other associations along; being a driving force behind a stronger alliance.
- Be a trusted advisor and influence decisions with government partners, the medical community, families & people with epilepsy.
- Evolve from looking to others for best practices and innovation and adapting it to the local environment to being the advisor; the association others seek counsel, inspiration, and innovation from.
- Being a pioneer; not settling for status quo. Extending our visibility beyond our region.
- Be a self-sustaining organization.
- Model the behaviors of responsive and compassionate leader in the human services field.

Our Strategic Priorities

Strategic Priorities are goal headlines with 5-year progressive targets to track progress towards the strategic direction.

These in turn guide supporting strategies with specific goals, desired outcomes, and measurables. They focus the activities and resources of the organization to ensure the strategic aspiration is met and the organization moves closer towards realizing its Vision.

The Board aligned on two strategic priorities that each have multiple goals.

1

Funding Sustainability

Funder diversification to mitigate risk of reliance on any one single source measured by annual revenue (growth)

2

Program Impact

Strive to create a Return-on-Investment metric that captures the impact made for every dollar invested in EAC, supported by:

- Client engagement & empowerment, measured by:
 - growth in annual clients served
 - new, repeat, & total clients
- Client satisfaction
- Conversion to volunteering
- Community connection & collaboration measured by partner satisfaction & # of referrals

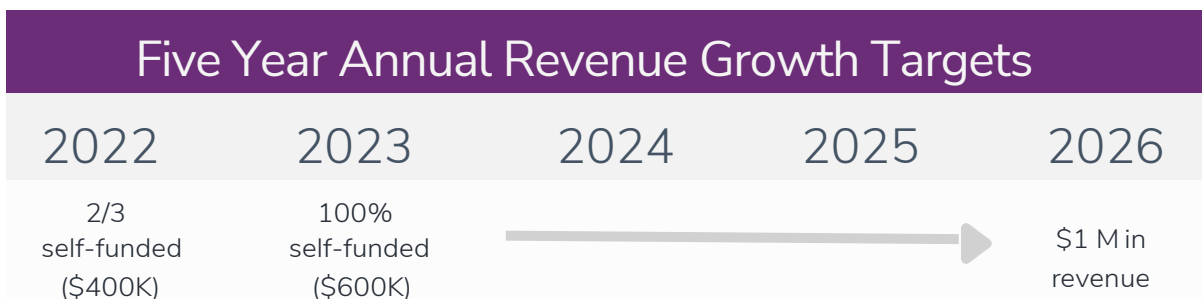
1. Funding Sustainability

The Association will focus its efforts to build trust, credibility, and expand relationships with funders to diversify the funding pool.

We believe that our ability to deliver programs that support the epilepsy community is limited by our ability to source and generate operating revenue.

The Association will employ three key tactics to support this priority:

- 1 **Re-envision fund development strategy**
Hire a fund development resource to lead and execute on this strategy
- 2 **Leverage existing donor relationships**
Re-engage with donors to grow their support and commitment
- 3 **Foster a culture of philanthropy**
Set the expectation for everyone involved to be ambassadors for "giving"



GOAL	OUTCOME	MEASURE
Re-envision fund development strategy	Diversify funding sources to reduce risk of operations disruption resulting from changes	Diversify Funding 2022 - hire resource & set plan, establish inaugural flagship event 2023 set targets for growth 2024-26
Leverage existing donor relationships	Increase revenues from existing relationships with donors to grow base funding	Grow recurring donors 2022 – set growth target 2023 – leverage success and continue progress towards growth.
Foster a culture of philanthropy	Build and leverage 'ambassador' network to increase funding reach	2022 - Create toolkit(s) to equip ambassadors to be giving advocates 2023+ = 100% participation in donor program or in support of a campaign

2. Program Impact

The Association will ensure that programs offered align with the clients' needs and that program delivery is successful.

Listening to what the community needs from us is critical as is responding with the right and effective supports.

Defining a measure that captures overall impact will build credibility, trust and increase potential for government funding.

The Association will employ three key tactics to support this priority:

- 1 Client satisfaction**
 Continually seeking to ensure our offering matches the need and responding effectively to the feedback we hear and that we have served each client to the best of our ability.
- 2 Referral Success**
 Continually communicate with our partners in the medical community to build and sustain trusting relationships and ensure clients transition between service providers with ease.
- 3 Digital Strategy Implementation**
 Successful implementation of digital systems will enable progress tracking against specific outcomes sought on a client-by-client basis and lead to the ability to create an impact measure, and extend reach to new client and funding prospects
 - Website update
 - CRM & Client Database
 - Digital marketing & communication tools, platforms, and subscriptions



GOAL	OUTCOME	MEASURE
Client Satisfaction	Clients whose needs are successfully met will become ambassadors for the association (generate referrals, become donors, &/ or become mentors)	<p>Client satisfaction 2022 – collect data via surveys and evaluation tools 2023+ refine KPIs set targets to improve scores including approach to developing a Net Promoter Score</p> <p>Volunteerism conversion 2022 – Develop tools for screening, onboarding, management, and evaluation 2023+ set targets for growth</p>
Referral Success	Trusting relationships will lead to more referrals, lower wait times, and happier clients	<p>Referrals – Clinics & Community Partners 2022 – track referrals according to known KPIs & refine 2023+ continue to progress KPIs and set targets for growth including approach to developing a Net Promoter Score</p>
Digital Strategy Implementation	Build out digital road map to enable client database and promotion. Assess and track the unique needs of each client, progress made, & corresponding impact achieved	<p>Implementation 2022 - Create digital roadmap, "back office" CRM platform & website design 2023 - "outward facing" CRM/Website rollout CRM, integrate with website, & train staff</p>

Summary

Where do we go from here?

How do we implement this plan?

The 2022-2026 Strategic Plan for the Epilepsy Association of Calgary gets intentional about our priorities and links

The Strategic Plan will guide the Association's Annual Business Plans and Budgets, as well as initiatives or issues that arise throughout the five-year horizon.

First and foremost, focus and clarity is essential. With a small staff team, ensuring priorities are clear and resources are available is required to make this happen. With specific goals and measure around funding sustainability, the organization can grow, add more resources, offer additional programs and supports. The CRM system will open up a world of possibilities for tracking and measuring. Key to this is defining an impact measure. This in turn will help further the case to potential funders and enable continued program development and growth.

The Association will evaluate opportunities and specific initiatives with the following process:

1. Assess the initiative or program against our strategic goals
2. Understand resource, capacity and funding requirements to support the initiative or program
3. Prioritize the initiative or program accordingly
4. Revisit the plan annually - celebrate success, modify approach where necessary, are refine targets

1st

Focus Efforts



Impact Measure



Program Growth



Epilepsy Association of Calgary
316-4014 Macleod Tr SE
Calgary, AB T2G 2R7