

# **Strategic Implementation Plan**

**FY 12 – 14**

**Alzheimer's Association, Greater Cincinnati Chapter**

**Approved by Chapter Board on April 12, 2011**

# Strategic Implementation Plan FY 12 – 14

Alzheimer's Association

Greater Cincinnati Chapter

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## Strategic Goal: Advancing Public Policy

**Strategic Objective:** Advance public policy by securing governmental action to increase federal research investment to \$2 billion, create early detection and care planning initiatives, create a federal Alzheimer plan, and implement coordinated nationwide state policy priorities.

<p><b>Priority Activity One:</b></p> <p>Increase the number of advocates nationwide to at least 500,000, with a <b>minimum of 900 in each congressional district</b> and with <b>at least 25 percent of total advocates taking at least two actions per year.</b></p> <p><i><b>Advocate</b> – Individual who volunteers to actively support the public policy mission of the Alzheimer’s Association (registered in Kintera)</i></p> <p><i><b>Ambassador</b> – Leadership advocate assigned by National to a certain member of Congress.</i></p>	<p><b>FY 2012-14 Key Measures:</b></p> <p>Advocates per district goal: 900</p> <p>Kentucky: 4<sup>th</sup> District – 1,064 (Rep. Geoff Davis) U.S. Senate: Mitch McConnell and Rand Paul</p> <p>Ohio: 1<sup>st</sup> District – 841 (Rep. Steve Chabot) 2<sup>nd</sup> District – 936 (Rep. Jean Schmidt) 3<sup>rd</sup> District – 1,524 (Rep. Michael Turner) 8<sup>th</sup> District – 1,118 (Rep. John Boehner)</p> <p>U.S. Senate: Sherrod Brown and Rob Portman</p>	<p><b>FY 2012 Tactics:</b></p> <ul style="list-style-type: none"> <li>• Incorporate advocacy message and need for volunteers in appropriate Chapter brochures, event marketing materials and emails.</li> <li>• Continue to support and drive participation in national and state advocacy days.</li> <li>• Communicate with current registered advocates through Kintera email – provide clear list of expectations and ascertain specific level of interest.</li> <li>• Implement advocacy training for advocates and lead staff.</li> <li>• Establish / develop more encompassing system to track advocate activity (phone calls, emails, etc.) to complement National’s recording system.</li> <li>• Determine and define role of Volunteer Coordinator in recruitment and training of advocates.</li> <li>• Expand recruitment and education of advocates at Walk to End Alzheimer’s and related public events.</li> <li>• Recognize outstanding advocacy volunteers and ambassadors at annual Chapter Appreciation Event.</li> </ul>
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Total advocates taking at least two actions per year goal:  
Approximately: 1,200

**FY 2012 Tactics:**

- Incorporate advocacy message and need for volunteers in appropriate Chapter brochures, event marketing materials and emails.
- Continue to support and drive participation in national and state advocacy days.
- Communicate with current registered advocates through Kintera email – provide clear list of expectations and ascertain specific level of interest.
- Implement advocacy training for advocates and lead staff.
- Establish / develop more encompassing system to track advocate activity (phone calls, emails, etc.) to complement National’s recording system.
- Determine and define role of Volunteer Coordinator in recruitment and training of advocates.
- Expand recruitment and education of advocates at Walk to End Alzheimer’s and related public events.
- Recognize outstanding advocacy volunteers and ambassadors at annual Chapter Appreciation Event.

**FY 2013 Tactics:**

- Continue all appropriate 2012 tactics.
- Establish regular training schedule and curriculum for newly recruited advocates.
- Monitor advocates and determine their level of activity.
- Engage major donors / supporters as advocates.

		<p><b>FY 2014 Tactics:</b></p> <ul style="list-style-type: none"> <li>• Continue all appropriate 2012 and 2013 tactics.</li> <li>• Eliminate volunteers from roster list who have been inactive for the past 18 months.</li> </ul>
<p><b>Priority Activity Two:</b></p> <p>Have an <b>Alzheimer’s Ambassador for every member of the U.S. House and Senate.</b></p>	<p><b>FY 2012-14 Key Measures:</b></p> <p>Current: No Ambassadors Chapter/shared goal: one (1) ambassador per member of Congress</p> <p>Kentucky: 4<sup>th</sup> House District (Rep. Geoff Davis)</p> <p>U.S. Senate: Mitch McConnell and Rand Paul</p> <p>Ohio: 1<sup>st</sup> House District (Rep. Steve Chabot) 2<sup>nd</sup> House District (Rep. Jean Schmidt) 3<sup>rd</sup> House District (shared) (Rep. Michael Turner) 8<sup>th</sup> House District (shared) (Rep. John Boehner)</p>	<p><b>FY 2012 Tactics:</b></p> <ul style="list-style-type: none"> <li>• Collaborate, when appropriate, with sister chapters in Ohio and Kentucky to identify potential ambassadors.</li> <li>• Develop a plan to identify and survey Chapter leadership volunteers to determine if any have an interest in serving as ambassador to appropriate legislators.</li> <li>• Assist National with training or orientation (as requested).</li> <li>• Recognize ambassadors during annual Chapter Appreciation Event and through Chapter communications (newsletter and Web site).</li> </ul> <p><b>FY 2013 Tactics:</b></p> <ul style="list-style-type: none"> <li>• Continue all appropriate 2012 tactics.</li> <li>• Provide ambassadors with appropriate updates regarding state public policy initiatives.</li> <li>• Develop short list of potential ambassador “partners.”</li> <li>• Invite members of Congress to speak at Walk to End Alzheimer’s events - as deemed appropriate.</li> </ul>

U.S. Senate: Sherrod Brown and Rob Portman

**FY 2012 Tactics:**

- Collaborate, when appropriate, with sister chapters in Ohio and Kentucky to identify potential ambassadors.
- Develop a plan to identify and survey Chapter leadership volunteers to determine if any have an interest in serving as ambassador to appropriate legislators.
- Assist National with training or orientation (as requested).
- Recognize ambassadors during annual Chapter Appreciation Event and through Chapter communications (newsletter and Web site).

**FY 2013 Tactics:**

- Continue all appropriate 2012 tactics.
- Provide ambassadors with appropriate updates regarding state public policy initiatives.
- Develop short list of potential ambassador “partners.”
- Invite members of Congress to speak at Walk to End Alzheimer’s events - as deemed appropriate.

**FY 2014 Tactics:**

- Continue all appropriate 2012-2013 tactics.

<p><b>Priority Activity Three:</b></p> <p><b>Meet at least seven times a year</b> with every member (or his/her staff) of the U.S. House and Senate.</p>	<p><b>FY 2012-14 Key Measures:</b></p> <p>National Advocacy Forum (1)</p> <p>Visits by National Public Policy Staff (2)</p> <p>Schedule four (4) additional visits per year</p> <p>Kentucky – 4<sup>th</sup> District Ohio – 1<sup>st</sup> District 2<sup>nd</sup> District 3<sup>rd</sup> District (shared with Central Ohio Chapter) 8<sup>th</sup> District (shared with Miami Valley Chapter)</p> <p>U.S. Senate: Kentucky: Mitch McConnell and Rand Paul Ohio: Sherrod Brown and Rob Portman</p>	<p><b>FY 2012 Tactics:</b></p> <ul style="list-style-type: none"> <li>• Collaborate with sister chapters in Ohio and Kentucky to determine who will be assigned responsibility for meetings with members of U.S. Senate.</li> <li>• Communicate with current advocates to confirm expectations and determine level of interest.</li> <li>• Implement advocacy training for advocates and lead staff.</li> <li>• Reiterate to volunteers importance of notifying Communications Director about a visit with member of Congress so it can be recorded.</li> <li>• Provide appropriate talking points and informational resources to volunteer advocates.</li> <li>• Develop annual plan to schedule and track legislative office visits.</li> <li>• Identify roster of lead volunteers who will be assigned responsibility for office visits with their respective member of Congress.</li> <li>• Honor most active advocate volunteers at annual Chapter Appreciation Event and recognize volunteer achievements through Chapter newsletter and Web site.</li> </ul>
		<p><b>FY 2013 Tactics:</b></p> <ul style="list-style-type: none"> <li>• Continue all appropriate 2012 tactics.</li> <li>• Educate advocates about federal issues and Association public policy priorities.</li> <li>• Educate advocates on how to track the progress of a bill through Congress.</li> </ul>

		<b>FY 2014 Tactics:</b> <ul style="list-style-type: none"><li>• Continue all appropriate 2012 and 2013 tactics.</li></ul>

## Strategic Goal: Enhancing Care and Support

**Strategic Objective:** The Alzheimer's Association will be an early and ongoing point of contact for at least 50 percent of people diagnosed with Alzheimer's disease, either directly or through a caregiver.

<p><b>Priority Activity One:</b></p> <p>Conduct outreach, consisting of at least two contacts, with the goal of <b>reaching the clinical practices of 80 percent of neurologists and geriatricians and 50 percent of the top prescribing clinical practices</b> within general/family medicine, internal medicine and psychiatry.</p>	<p><b>FY 2012-14 Key Measures:</b></p> <p>List of top prescribing clinical practices in Chapter service area is provided by national office (“top prescribing” refers to Alzheimer’s med’s prescribed often)</p> <p>Tracking system for outreach activities will be determined by national office, but internal Outreach Logs will be maintained by Chapter per internal procedures</p> <p>Helpline database reports will show specific physician practices identified in Referral Source field, documenting total percentage of physician-based referrals to services</p> <p>Measure length of time between date of diagnosis and first contact from client to measure whether outreach efforts result in earlier contact with diagnosed individuals and families</p>	<p><b>FY 2012 Tactics:</b></p> <ul style="list-style-type: none"> <li>• Send introductory letter and Programs brochure to practices on list provided by National (possibly via Priority Mail).</li> <li>• Identify practices that have medical students/residents interning (use contacts via Reynolds grant at UC).</li> <li>• Make visits to listed practices to distribute supply of Programs &amp; Services brochures and Referral Forms.</li> <li>• Ask staff and leadership volunteers to take brochures and forms to their own personal physician’s office.</li> <li>• Make follow-up phone calls and/or emails to practices.</li> <li>• Offer to conduct care consultations for clients in physician offices.</li> <li>• Send copy of Action Plan to physician (with caregiver permission) when referral results in a Care Consultation meeting.</li> <li>• Ask to be added to agenda at physician office staff meetings and hospital medical staff meetings to give brief overview of programs.</li> <li>• Explain how our services can help physician office staff with patients/families who require assistance.</li> <li>• Offer national expert led continuing education programs for physicians on topics of latest research with information about Alzheimer’s Association services, including risk management.</li> <li>• Consult the Professional Advisory Council re: ideas for reaching physicians and providing educational opportunities.</li> </ul>
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		<p><b>FY 2013-14 Tactics:</b></p> <ul style="list-style-type: none"> <li>Continue all appropriate 2012 tactics.</li> </ul>
<p><b>Priority Activity Two:</b></p> <p><b>Increase utilization of the Association’s information, support and referral services via the Association-wide 24/7 Helpline by 25 percent and via visitors to the Web site by 80 percent.</b></p>	<p><b>FY 2012-14 Key Measures:</b></p> <p>Volume of calls to toll-free number will be measured by national office on a quarterly basis</p> <p>LASRmetrics Chapter reports of total Helpline calls to local and toll-free numbers will continue to be submitted by Chapter on a quarterly basis</p> <p>Chapter internal Helpline statistics reports will show increased number and type of contacts</p> <p>Local and national Website usage will be measured by national office</p>	<p><b>FY 2012 Tactics:</b></p> <ul style="list-style-type: none"> <li>Review all existing collateral for programs, events, advocacy, etc. and develop new materials as needed; e.g. business card size, post card size.</li> <li>Put 800 number and website address on all Chapter materials, including all staff business cards and non-program related material.</li> <li>Create a marketing plan for Helpline using both free and paid advertising opportunities.</li> <li>Mention Helpline number and Website in all media contacts.</li> <li>Ensure all staff and volunteers memorize the Helpline number and Website address and refer people when opportunities present.</li> <li>Develop information request form for use at health fairs/events, etc. that includes full mission opportunities.</li> <li>Encourage all program participants (support groups, education programs, care consultation, etc.) to call 800 number for ongoing support.</li> <li>Create magnets, pens, bumper stickers or other marketing materials with 800 number and Web site address; for use at education programs, health fairs, events, etc.</li> <li>Assess need for increased staff or trained volunteers to handle increased volume of Helpline calls.</li> </ul> <p><b>FY 2013-14 Tactics:</b></p> <ul style="list-style-type: none"> <li>Continue all appropriate 2012 tactics.</li> </ul>

<p><b>Priority Activity Three:</b></p> <p>Improve meaningful engagement of early-stage constituents through a <b>50 percent increase in participation</b> in consistent, high-quality and evidence-based early-stage programs, support groups and volunteer activities.</p>	<p><b>FY 2012-14 Key Measures:</b></p> <p>LASRmetrics report shows number of early stage programs delivered, including educational, social and volunteer groups</p> <p>Internal Chapter program statistics reports will show increase in number of programs delivered</p>	<p><b>FY 2012 Tactics:</b></p> <ul style="list-style-type: none"> <li>• Develop a variety of social/arts/cultural programs for early stage engagement; e.g. history museum, zoo, plays, music, writing group, etc.</li> <li>• Identify community partners, key volunteers to help foster relationships with potential program sites.</li> <li>• Introduce new education program “Orientation to Memory Loss”, an opportunity to screen diagnosed persons for participation in 8-week education/support series and identify early stage program needs in under-served areas.</li> <li>• Require staff and volunteers to take the “Confidence to Connect” Insite web training on how to engage with early stage individuals when encountered in office or at events.</li> <li>• Increase offerings of current Early Stage Strategy Groups for diagnosed persons throughout Chapter service area.</li> <li>• Add a staff position for Early Stage Program Coordinator.</li> </ul> <p><b>FY 2013-14 Tactics:</b></p> <ul style="list-style-type: none"> <li>• Continue all appropriate 2012 tactics.</li> </ul>
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<p><b>Priority Activity Four:</b></p> <p><b>Provide high-quality assistance through [NAME OF PROGRAM TBD], an assessment and referral program</b> to help persons with dementia and their families to determine and access appropriate education, support and care options throughout the disease continuum with each enrollee following through on at least one recommended action step. The basic program will be delivered online and will be coordinated with quality-measured Common Program Plan services.</p>	<p><b>FY 2012-14 Key Measures:</b></p> <p>National office will design, implement and measure outcomes of the online assessment tool</p>	<p><b>FY 2012 Tactics:</b></p> <ul style="list-style-type: none"> <li>• Chapter staff to participate in workgroup to help develop the online assessment tool.</li> <li>• Include online assessment program in Chapter materials, such as newsletter, Web site, fact sheets, etc.</li> <li>• Keep local programs and services updated in resource listings for online assessment program.</li> <li>• Local Chapter to offer all core programs to clients referred through online assessment, such as care consultation, education, support groups, etc.</li> </ul> <p><b>FY 2013-14 Tactics:</b></p> <ul style="list-style-type: none"> <li>• Continue all appropriate 2012 tactics.</li> </ul>

## Strategic Goal: Accelerating Research

**Strategic Objective:** Accelerate progress in global Alzheimer research by increasing funding by the Association, engaging more people in Alzheimer science priorities, leading global efforts to advance key issues and supporting emerging needs.

<p><b>Priority Activity One:</b></p> <p><b>Increase participation by 30 percent in Alzheimer’s disease science priorities</b> by engaging individuals, chapters and institutions in the global research effort.</p> <p><b>Priority Activity Two:</b></p> <p><b>Advance key issues in Alzheimer’s research</b> by leading global efforts in the creation, standardization, validation and qualification of diagnostic and interventional tools for the scientific community. Initiate and/or facilitate two global or national efforts.</p> <p><b>Priority Activity Three:</b></p> <p><b>Accelerate progress in global Alzheimer’s research</b> by addressing emerging needs with a focus on new investigators and the launch of three novel and innovative programs that reshape the field.</p>	<p><b>FY 2012 Key Measures:</b></p> <p>10% increase in total number of individuals (currently 51) within the Chapter territory who utilize TrialMatch™, join Int’l Society to Advance Alzheimer Research and Treatment (ISTAART) and/or attend Int’l Conference on Alzheimer’s Disease (ICAD)</p> <p><b>FY 2013 Key Measures:</b></p> <p>Another 10% increase in total number of individuals within the Chapter territory who utilize TrialMatch, join ISTAART and/or attend ICAD</p> <p><b>FY 2014 Key Measures:</b></p> <p>Another 10% increase in total number of individuals within the Chapter territory who utilize TrialMatch, join ISTAART and/or attend ICAD</p>	<p><b>FY 2012 Tactics:</b></p> <ul style="list-style-type: none"> <li>• Add TrialMatch™ call out box to Chapter Web site.</li> <li>• Add Helpline database service referral item for TrialMatch.</li> <li>• Feature TrialMatch in Chapter newsletter.</li> <li>• Provide information about TrialMatch at Walks, health fairs, programs and during physician outreach visits, when appropriate.</li> <li>• Include information about ISTAART at programs, when appropriate.</li> <li>• Create library of research journals.</li> <li>• Request input from Professional Advisory Council regarding additional engagement tactics and potential speakers for research oriented education programs.</li> <li>• Add information about TrialMatch to Programs &amp; Services brochure when next revised.</li> <li>• Increase local partnership with key universities and hospitals.</li> </ul> <p><b>FY 2013 Tactics:</b></p> <ul style="list-style-type: none"> <li>• Continue all appropriate 2012 tactics.</li> <li>• Evaluate potential to stream ICAD sessions to a local site or purchase DVD’s of conference sessions. If possible, offer as an educational program.</li> </ul> <p><b>FY 2014 Tactics:</b></p> <ul style="list-style-type: none"> <li>• Continue all appropriate 2012 and 2013 tactics.</li> </ul>
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## Strategic Goal: Increasing Concern and Awareness

**Strategic Objective:** Increase the momentum of the Alzheimer’s disease movement by 1) measurably increasing concern annually in the general population about Alzheimer’s disease as a critical public health issue; and 2) doubling unaided awareness of the Alzheimer’s Association among the Champions audience.

<p><b>Priority Activity One:</b></p> <p><b>Increase media impressions</b> naming the Alzheimer’s Association by <b>an average of 20 percent per year</b> by implementing communications plans for, at a minimum, the Alzheimer’s Association International Conference on Alzheimer’s Disease, World Alzheimer’s Day, Walk to End Alzheimer’s, National Alzheimer’s Disease Awareness Month/Family Caregiver Month and the Alzheimer’s Association Alzheimer’s Advocacy Forum, as well as year-round branding opportunities.</p>	<p><b>FY 2012 Key Measures:</b></p> <p>1,674 media impressions (earned and paid media, should name Alzheimer’s Association)</p> <p>3,892 Blackbaud registered participants (w/in 15 days) in 2011 Greater Cincinnati Chapter Walks to End Alzheimer’s</p> <p><b>FY 2013 Key Measures:</b></p> <p>2,009 media impressions (earned and paid media, should name Alzheimer’s Association)</p> <p>4,410 Blackbaud registered participants (w/in 15 days) in 2012 Greater Cincinnati Chapter Walks to End Alzheimer’s</p>	<p><b>FY 2012 Tactics:</b></p> <ul style="list-style-type: none"> <li>• Create FY 2012 internal and external Communications Plan that includes all priority activity events (listed in far left column) and adds innovative news hooks as well as personal stories for additional coverage.</li> <li>• Integrate with programs, education and development to identify media and new branding opportunities (i.e. ALZ Stars, Art of Making Memories, Walk to End Alzheimer’s, others).</li> <li>• Define consistent offerings for corporations and nursing homes/assisted living/senior communities.</li> <li>• Increase corporate and nursing home/assisted living/senior community partnerships.</li> <li>• Create increased menu of volunteer opportunities.</li> <li>• Examine new media approaches – discounted billboards, free PSAs (confirm use of Walk TV ad in fall), try for feature in <i>Cincinnati Magazine</i>, article in <i>Business Courier</i>.</li> <li>• Include Helpline 800 number branding on all collateral.</li> <li>• Include impactful, news-making spokespersons, early-stage individuals, families, staff, medical experts for key events and media interviews.</li> <li>• Consider purchasing select discounted advertising, leveraging National’s buy.</li> <li>• Keep track of all local media impressions (newspaper clippings), consider how/if we count radio and television.</li> </ul>
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**FY2014 Key Measures:**

2,411 media impressions (earned and paid media, should name Alzheimer's Association)

4,928 Blackbaud registered participants (w/in 15 days) in 2013 Greater Cincinnati Chapter Walks to End Alzheimer's

- Have volunteers review local papers for stories.
- Purchase clipping service, confirm which pubs are included, purchase select subscriptions as required.
- Coordinate to confirm National's list of what's being monitored and how it is being monitored.
- Consider advertising on buses, signs on cars, bumper stickers – "The End of Alzheimer's STARTS WITH ME" with 24/7 Helpline number.
- Create Walk to End Alzheimer's "Mission Experience," pitch of what's new (Promise Garden, early-stage speaker, celebrity speaker, advocacy, education, Trial Match etc.) to media (see walk goals for further detail of innovations).
- Create key consistent messaging to be used in all contacts with clients and the media, hold all-staff in service session and include leadership volunteers in rollout of messaging.
- Hold media training for senior staff who could be interviewed for external media.
- Investigate new media sponsorships and consult board volunteers in media.
- Ensure all staff is discussing the walk mission experience: at programs, community meetings, health fairs, etc.
- Continue to strengthen social media going forward.
- Create, share robust e-mail list of stakeholders w/staff.

**FY 2013 Tactics:**

- Continue all appropriate 2012 tactics plus new ideas based on implementation learning.
- Consider Metropolitan and "Micropolitan" areas.
- Identify and approach top view/listener media outlets to be Walk media sponsors.
- Identify new celebrity honorary chair.

		<p><b>FY 2014 Tactics:</b></p> <ul style="list-style-type: none"> <li>• Continue all appropriate 2013 tactics plus new ideas based on implementation learning.</li> </ul>
<p><b>Priority Activity Two:</b></p> <p>Grow community presence and the Alzheimer’s movement by doubling the number of registered participants in the Walk to End Alzheimer’s and expanding Walk to End Alzheimer’s to additional geographies.</p> <p><i>Note. Per National, grow registered participants from 3,374 (2010 walk) to 4,928 by end of 3-year plan (2013 walk) with each participant averaging fundraising total of \$115.</i></p>	<p><b>FY 2012 Key Measures:</b></p> <p>1,674 media impressions (earned and paid media, should name Alzheimer’s Association)</p> <p>3,892 Blackbaud registered participants (w/in 15 days) in 2011 Greater Cincinnati Chapter Walks to End Alzheimer’s</p> <p><b>FY 2013 Key Measures:</b></p> <p>2,009 media impressions (earned and paid media, should name Alzheimer’s Association)</p> <p>4,410 Blackbaud registered participants (w/in 15 days) in 2012 Greater Cincinnati Chapter Walk to End Alzheimer’s events</p>	<p><b>FY 2012 Tactics:</b></p> <ul style="list-style-type: none"> <li>• Offer educational classes as part of nursing home’s/assisted living/senior community’s sponsorship of Walk to End Alzheimer’s w/required # walkers.</li> <li>• Identify strategy and create top-priority list of companies and nursing homes/assisted living/senior communities w/contacts to approach as sponsors/partners.</li> <li>• Define consistent menu of corporate and nursing home/assisted living/senior community offerings.</li> <li>• Increase corporate and nursing home/assisted living/senior community partnerships and walk teams.</li> <li>• Create increased selection of volunteer opportunities and leadership roles.</li> <li>• Create FY 2012 internal and external Communication Plan that includes innovative news hooks for additional Walk coverage.</li> <li>• Integrate with programs, education and development to identify new Walk branding opportunities</li> <li>• Consider new Walk media approaches – discounted billboards, free PSAs (confirm use of Walk TV ad in fall), try for feature in <i>Cincinnati Magazine</i>, article in <i>Business Courier</i>.</li> <li>• Include Helpline 800 # branding on all Walk collateral.</li> <li>• Include impactful, news-making spokespersons (David Hyde Pierce/others at Walk, early-stage individuals, families, staff) for key events and media interviews.</li> <li>• Consider purchasing select discounted advertising for the Walk.</li> <li>• Create Walk to End Alzheimer’s “Mission Experience,”</li> </ul>

	<p><b>FY 2014 Key Measures:</b></p> <p>2,411 media impressions (earned and paid media, should name Alzheimer's Association)</p> <p>4,928 Blackbaud registered participants (w/in 15 days) in 2013 Greater Cincinnati Chapter Walks to End Alzheimer's</p>	<p>pitch what's new (Promise Garden, early-stage speaker, celebrity speaker, advocacy, education, Trial Match etc.) to media.</p> <ul style="list-style-type: none"> <li>• Create key consistent messaging re Walk to be used in all contacts with clients and the media, hold all-staff in service, and include leadership volunteers in rollout of messaging.</li> <li>• Hold media training for senior staff who could be interviewed for Walk external media.</li> <li>• Investigate new media sponsorships; consult board volunteers in media for Walk opportunities.</li> <li>• Ensure all staff is discussing the Walk mission experience: at programs, community meetings, health fairs, etc.</li> <li>• Ensure all registered walkers are loaded into Blackbaud within 15 days.</li> </ul>
		<p><b>FY 2013 Tactics:</b></p> <ul style="list-style-type: none"> <li>• Continue all appropriate 2012 tactics plus new ideas based on implementation learning.</li> <li>• Offer educational classes as part of all nursing home sponsorships.</li> </ul>
		<p><b>FY 2014 Tactics:</b></p> <ul style="list-style-type: none"> <li>• Continue all appropriate 2013 tactics plus new ideas based on implementation learning.</li> </ul>

## Strategic Goal: Growing Revenue to Meet Mission

**Strategic Objective:** Achieve significantly greater Association-wide mission impact by growing contributed revenue at a minimum annual growth rate of 6 percent in FY12, 8 percent in FY13, and 10 percent in FY14 to at least \$240,000,000 in FY14 by increasing the number of donors and donations and by investing in both short- and longer-term growth strategies.

<p><b>Priority Activity One:</b></p> <p>Combined Events – <b>increase revenue by a minimum of 45 percent</b> (a minimum of 12 to 15 percent annual growth rate) <b>and number of new donors/participants by 30 percent.</b> (National still working this detail out for reporting/measurement).</p> <p>The most powerful strategy is <b>growing Walk to End Alzheimer’s from \$384,948 FY11 to \$708,415</b> by the end of FY14.</p>	<p><b>FY 2012 Key Measures:</b></p> <p>All other non-Walk event participants that can be registered via Blackbaud – create baseline in FY12</p> <p>Using estimated \$600,000 FY11 grow all event revenue by 13% - \$78,000 for \$678,000 FY12</p> <p>Grow total Walk revenue from \$384,948 to \$452,876 FY12 (+\$67,928)</p> <p>Using estimated \$678,000 FY12 grow all event revenue by 15% - \$101,700 for \$779,700 FY13</p> <p>Grow total Walk revenue from \$452,876 to \$549,916 FY13 (+\$97,040)</p>	<p><b>FY 2012 Tactics:</b></p> <ul style="list-style-type: none"> <li>• Continue to / maximize collaboration with National Direct Mail program to offer annual fund donors Walk engagement opportunities such as; fundraising participants, team Captains, event day volunteers, Leadership/Planning Committee volunteers.</li> <li>• Focus Walk expansion efforts on Butler Warren and Cincinnati/NKy. Metro Walks.</li> <li>• Continue to strengthen leadership planning volunteers via ongoing recruitment strategies.</li> <li>• Increase frequency and strength of Walk key messages shared with public/volunteers/key stakeholders – FUNDRAISING Walk participants needed.</li> <li>• Leverage new/expanded media sponsorships for greater exposure.</li> <li>• Explore media purchase opportunities to extend National media campaign in Greater Cincinnati market.</li> <li>• Support all staff branding and promoting Walk to End Alzheimer’s via increased branded materials/staff training/open collaborative efforts across all departments.</li> <li>• Utilize celebrities at Cincinnati/N.Ky. Walk to help create public/media interest.</li> <li>• Prior to “Walk Season” such as late spring/early summer, create and execute a local integrated Walk brand launch that includes: free print and digital media,</li> </ul>
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Using estimated \$779,700  
FY13 grow all event revenue  
by 17% - \$132,549 for  
\$912,249 FY14

Grow total Walk revenue from  
\$549, 916 to \$708,415  
FY14(+\$158,499)

Chapter Walk kick-off event/activity, use of Chapter Champions and a large number of Chapter volunteers (go purple in multiple locations on same day or during same week – use media sponsors to help raise awareness).

- Continue to expand Very Important Fundraiser program at all Walks to leverage additional donor dollars and stronger teams.
- Create event day plan that more aggressively captures fundraising participants as registered participants.
- Seek ideas from other successful Chapters and determine if these strategies can be implemented.
- Utilize Promise Garden strategy to drive participants to registration/complete registration process.
- Create/implement volunteer plan that supports aggressive registration processes.
- Create event day plan that more aggressively captures donated dollars from participants at the Metro Walks.
- Include a direct ask from the stage either from a national/local celebrity champion or affected family.
- Create event day plan that embraces all of the recommended Walk elements; Full mission experience; Promise Garden, Advocacy Recruitment and Action, Clinical Studies, Programs and Support Education, Volunteer Recruitment/Information Station, See You Next Year Station.
- Ensure Walk cost allocations are managed appropriately via appropriate key messaging and intent.
- Utilize Corporate Engagement strategies to raise awareness of mission and create opportunities for new: event sponsorships, event/fundraising participants, event leadership/planning volunteers.
- Continue/expand calls/visits/personal notes to local Team Captains, donors and high producing individuals.
- Engage users of services with Walk print media and emails as appropriate.
- Continue/expand Walk recognition activities.

		<ul style="list-style-type: none"> <li>• Continue to nurture ALZ Stars marathon programs to grow registered participants and event revenue. Expand planning committee.</li> <li>• Assess Blonde vs. Brunette (BvB) event model as a senior staff, if approved confirm leadership volunteers and begin work/coaching with BvB volunteers for July FY13 event.</li> <li>• Identify and work more closely with appropriate 3rd party event volunteer groups to increase revenue and capture registered number of participants via Blackbaud (August Golf event identified for FY12).</li> <li>• Identify all possible opportunities to capture event participant data via Blackbaud; spring event, appropriate 3<sup>rd</sup> party events, ALZ Stars, other events.</li> <li>• Continue Art of Making Memories (AoMM) with current formula if event space allows.</li> <li>• Execute search process for additional special events Development staff member to join team July1, 2012.</li> </ul>
		<p><b>FY 2013 Tactics:</b></p> <ul style="list-style-type: none"> <li>• Continue all appropriate 2012 tactics.</li> <li>• Finalize new addition to Development staff and</li> <li>• Launch first BvB event.</li> <li>• Continue/expand Walk recognition activities; produce at least 1 Walk specific or active event specific recognition /education/celebration event FY13.</li> <li>• Consider adapting AoMM event formula to accommodate larger space and new event elements.</li> <li>• Analyze possible Walk expansion opportunities for FY14 and create/launch Walk campaign in new community.</li> </ul>
		<p><b>FY 2014 Tactics:</b></p> <ul style="list-style-type: none"> <li>• Continue all appropriate 2013 tactics.</li> <li>• Finalize new addition to Development staff.</li> <li>• Launch new Walk event.</li> </ul>

<p><b>Priority Activity Two:</b></p> <p>Individuals and Families – <b>increase revenue by a minimum of 17 percent</b> (a minimum of 4 to 8 percent annual growth rate) and engagement by 15 percent (calls, visits, moves, use of leadership, asks). This includes private family foundations and excludes individuals/families in combined events.</p>	<p><b>FY 2012 Key Measures:</b></p> <p>Combined FY10 \$973,741 target number; Planned Giving gifts/National Direct Mail program/Major Gifts/Intermediate Gifts/Memorials &amp; Tributes (M&amp;T's)/ restricted gifts:</p> <p>4% overall growth represents \$38,950 FY12</p> <p>2012 develop baseline for \$1000 gift/ donor engagement “moves” AND identify appropriate tracking mechanism</p> <p>6% overall growth represents \$60,761 FY13</p> <p>Complete and appropriately track “moves” FY13</p> <p>Complete and appropriately track “moves” FY14</p>	<p><b>FY 2012 Tactics:</b></p> <ul style="list-style-type: none"> <li>• Continue to seek deeper engagement with Direct Mail/ Intermediate Gift donors via calls/personal notes/additional local mail/invitations to special events.</li> <li>• Adapt thank you follow-up plans to accommodate use of trained volunteers.</li> <li>• Explore options for utilizing Direct Mail program for appropriate annual and ongoing appeals.</li> <li>• Continue calls/visits/personal notes to local donors</li> <li>• Continue Major Gifts collaboration with National to both accomplish documented donor engagement moves and produce new major gifts.</li> <li>• Engage users of services at least once per year with a non-event donor opportunity via National Direct Mail or local appeal opportunity.</li> <li>• Explore migration strategies to expand special event donors to annual fund/major gifts.</li> <li>• Continue/expand donor recognition activities; produce at least 2 events FY12 (fall breakfast/holiday or spring luncheon).</li> <li>• Continue Planned Giving collaboration with National to increase donor education opportunities around Planned Giving.</li> <li>• Ask Leadership volunteers to make a commitment to Planned Gifts and tell their story.</li> <li>• Increase local donor education activities.</li> <li>• Begin discussions with appropriate key stakeholders regarding FY13 or FY14 A Reason to Hope event.</li> <li>• Continue to expand strategies for donor education around friend/family M&amp;T's.</li> <li>• Partner with Program team to develop user/donor awareness regarding M&amp;T's (what is hospice doing and how do we manage this?).</li> </ul>
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		<p><b>FY 2013 Tactics:</b></p> <ul style="list-style-type: none"> <li>• Continue all appropriate 2012 tactics.</li> <li>• Begin process for integrating A Reason to Hope event into annual events calendar and determine launch details for either FY13 or FY14.</li> <li>• Analyze collaborate efforts with national in previous year and identify opportunities for deeper partnership.</li> </ul> <p><b>FY 2014 Tactics:</b></p> <ul style="list-style-type: none"> <li>• Continue all appropriate 2013 tactics.</li> <li>• Launch or grow A Reason to Hope event.</li> <li>• Analyze collaborate efforts with national in previous year and identify opportunities for deeper partnership.</li> </ul>
<p><b>Priority Activity Three:</b></p> <p>Corporations and Foundations – <b>increase revenue by a minimum of 18 percent</b> (a minimum of 3 to 7% annual growth rate) and strategic engagement by 15 percent (calls, visits, moves, use of leadership, asks). This excludes private family foundations and Corporate involvement in combined events.</p>	<p><b>FY 2012-14 Key Measures:</b></p> <p>2012 develop baseline for strategic corporate engagement “moves” AND identify appropriate tracking mechanism</p> <p>Using estimated \$56,000</p> <p>FY11 grow non-event Corporate and Foundation revenue by 5% - \$2,800 for \$58,800 FY12</p> <p>Complete and appropriately track “moves” FY12</p>	<p><b>FY 2012 Tactics:</b></p> <ul style="list-style-type: none"> <li>• Utilize Corporate Engagement strategies to raise awareness of mission and create opportunities for new corporate donations, the identification/recruitment of internal Corporate “Champions” and volunteers.</li> <li>• Determine best action plan to work local National Priority Accounts.</li> <li>• Continue to seek investment from foundations for local programs and services.</li> <li>• Continue to expand strategies for donor education around matching gifts.</li> <li>• Identify local corporations with strong matching gifts programs and share with donors/prospective donors (We have asked for several years but ask again can national provide us with this list? Can we buy?).</li> </ul>

	<p>Using estimated \$58,800 FY12 grow non-event Corporate and Foundation revenue by 6% - \$3,528 for \$62,328 FY13</p> <p>Complete and appropriately track “moves” FY13</p>	<ul style="list-style-type: none"> <li>• Identify local corporations with strong matching gifts programs and; seek engagement with those corporations for volunteerism/other engagement activities, create local list for use in donor education (investigate tools such as Easy Match).</li> <li>• Continue to expand strategies for donor education around corporate M&amp;T’s.</li> <li>• Expand volunteer engagement and WIFM (what’s in it for me?) opportunities with national priority accounts.</li> </ul>
	<p>Using estimated \$62,328 FY13 grow non-event Corporate and Foundation revenue by 7% - \$4,363 for \$66,691 FY14</p> <ul style="list-style-type: none"> <li>• Complete and appropriately track “moves” FY14</li> </ul>	<p><b>FY 2013 Tactics:</b></p> <ul style="list-style-type: none"> <li>• Continue all appropriate 2012 tactics.</li> <li>• Continue to build local matching gifts companies comprehensive list</li> </ul>
		<p><b>FY 2014 Tactics:</b></p> <ul style="list-style-type: none"> <li>• Continue all appropriate 2013 tactics.</li> </ul>