Bien Vieillir Chez Soi
— Cocagne —

BUILDING A ONE-STOP SHOP OF COMMUNITY SUPPORT SERVICES FOR AGING IN PLACE

COMPANION GUIDE
JUNE 2023

CATHERINE BIGONNESSE

COLETTE LACROIX

MAJELLA DUPUIS

To those who wanted to stay but were forced to leave their home too early;

To those who are now dedicated to ensure this never happens again.

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Preamble

There is a growing number of older adults in rural areas, and many of them need support to stay healthy and active in their communities as they age. This guide provides an overview of the important background information needed to implement a one-stop shop program to support aging in place for older adults living in rural communities.

This document was assembled by the research team behind the creation of Bien vieillir chez soi Cocagne ("Aging Well in Place Cocagne") and it is intended to be a comprehensive resource to encourage age-friendly initiatives in your community. It provides key resources, including forms and templates to be used or adapted to implement community programs and services for older adults. It also includes additional links to other online resources and lessons "from the field" we learned along the way. You will find those practical tips as you read in the "From the Field" boxes.

A complementary manual called "BVCSC Toolkit" with a number of reference documents is also available. You will find its content referenced throughout the guide. Contact the Bien vieillir chez soi Cocagne office to learn how to obtain a copy of the complementary toolkit.

Each community will have different requirements and unique processes and resources to meet the needs of older adults and will need to tailor the steps and resources to meet local needs. This guide is meant to be a user-friendly tool for rural community leaders, staff and residents.

We hope you will find this guide useful and inspiring as you implement a one-stop shop of community support services to support older adults aging in place in your community.

Happy reading!

Catherine,
Colette, & Majella

Bien Vieillir Chez Soi

— Cocagne —

Bien vieillir chez soi Cocagne (BVCSC) is a non-profit organization located in Cocagne that opened in 2021. Its mission is to enable people aged 50 and over to remain in their homes and communities as long as possible. BVCSC is a single point of entry that informs users about programs available to older adults and provides them with assistance in accessing community support services in the Cocagne area.

2015

In 2015, after learning about the Age-Friendly Municipalities (AFM) movement, the rural community of Cocagne wanted to learn about the needs of its older adults. It initiated a consultation process through a confidential bilingual survey, distributed door-to-door by many volunteers. A large number of older adults responded, with a 91 percent participation rate. Surprised by this success, the Cocagne AFM Committee approached the Université de Moncton's Centre d'études du vieillissement (CÉV) to analyze the survey data. This approach paved the way for a number of opportunities to collaborate on community-based participatory research projects.

2017

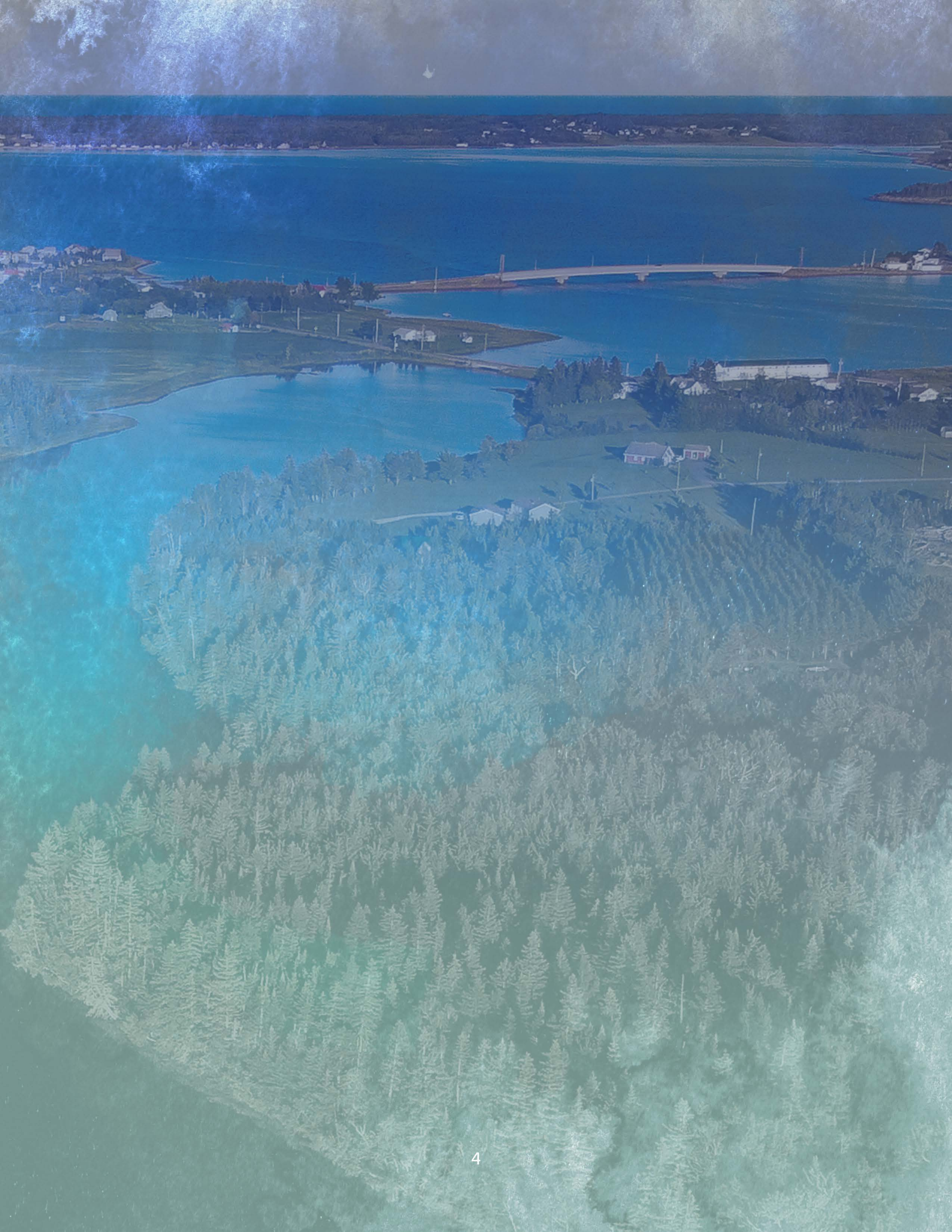
In December 2017, the AFM Committee, under the leadership of its Chair, Majella Dupuis, continued its partnership with the CÉV through a participatory research project led by postdoctoral researcher Catherine Bigonnesse. This initial project allowed us to identify a hybrid one-stop shop model adapted to the needs of the Cocagne community and to produce a community appraisal of existing services for older adults in the region.

2019

In 2019, the results of this initial project served as a springboard for the development of a second research project conducted in close collaboration between the CÉV and the Cocagne AFM Committee. Catherine and Majella received funding through the Government of New Brunswick's Healthy Seniors Pilot Project as co-leaders of the project entitled "Building a One-Stop Shop of Community Support Services for Aging in Place."

2021

This project is supported by a steering committee made up of representatives from community organizations in the region, including the Centre 50 d'Âge d'Or, the Communauté rurale de Cocagne, the Pays de Cocagne Sustainable Development Group and the Kent Community Inclusion Network. This collaboration between the Université de Moncton's CÉV, the Cocagne AFM Committee and members of the steering committee resulted in the non-profit organization (NPO) Bien vieillir chez soi Cocagne Inc. in October 2020. BVCSC opened its doors in April 2021.



PLANNING

Creating a Steering Committee

What is a Steering Committee?

A steering committee helps direct a project from start to finish. Sometimes it is made up entirely of the staff of the organization that is developing and implementing the project. But more often, it is composed of representatives of key organizations that are partners in the project, individuals who have particular expertise to lend to the project or people who are the intended users of the project.

It is very important, and useful, to include at least one client of the service or potential user of the project being developed, as their views are essential to ensuring that the project is properly focused. It is important to establish a well-balanced group of between five and nine members, with representation from the following:

Older Adults

Elected Representatives &
Local Government Officials

The Community: Representatives from the private sector, businesses, healthcare and volunteer sectors will provide a variety of perspectives

Organizations Serving the interests of older adults

What is the Role of a Steering Committee?

The role of the steering committee is to provide guidance and ensure the achievement of project outputs and outcomes. This may include the following tasks:

- Contributing to the development of the project, including the evaluation strategy;
- Providing guidance on the budget;
- Defining and helping to achieve project outcomes;
- Establishing project priorities – where to direct the most energy;
- Defining risks;
- Monitoring risks;
- Meeting deadlines;
- Monitoring the effectiveness of the project as it develops;
- Providing advice, and sometimes making decisions, on changes to the project as it develops;
- Carrying out other related duties.

From the Field

When the organization incorporates, the board of directors replaces the steering committee.

↳ See the **Governance** section

What Role do Individual Members Play?

Steering committee members must understand the purpose, strategy and expected outcomes of the project and recognize the importance of the project. They must also take a genuine interest in the project and its intended outcomes and advocate for the project by doing what they can to promote its outcomes. In practice, this means the following:

- They determine the deliverables (i.e., concrete and measurable outcomes related to the project objective) and the timeline of the deliverables.
- They review the team's progress reports and compare them to the deliverable timelines.
- They change the priorities and focus of the team's efforts as needed.
- They are responsible for overseeing and making decisions that will have an overall financial impact on the organization (i.e., resource allocation to meet deliverable needs, space acquisition and utilization, staffing requests, resource requirements).
- They review the ideas and issues raised.
- They give advice to the project team.
- They help balance priorities and resources.
- They foster positive communication outside the committee about the progress and outcomes of the project.
- They promote the project outcomes.
- They contribute to the project evaluation, both to the process of developing and implementing the project and to its actual impact on its target audience.

A member of the steering committee must also be elected as chair to ensure that meetings run smoothly and that objectives are met. A member of the steering committee must be elected as secretary to keep meeting minutes.

How Does a Steering Committee Work?

How Often Should a Steering Committee Meet?

The committee should schedule its meetings to coincide with the milestones established for the project. It is a good idea to set meeting dates in advance and ask committee members to commit to attending each meeting.

What Happens Before Each Meeting?

At least one week prior to the meeting, materials for the meeting will be distributed to all committee members and include:

1. An agenda, including the scheduled time of the meeting, so that members can allow sufficient time to attend and participate
2. Minutes of the last meeting, including an action list, ideally updated with any information on hand about completed or ongoing actions
3. A progress report on the status of the work since the last meeting
4. All other documents to be reviewed at the meeting, particularly the draft resources being developed for the project

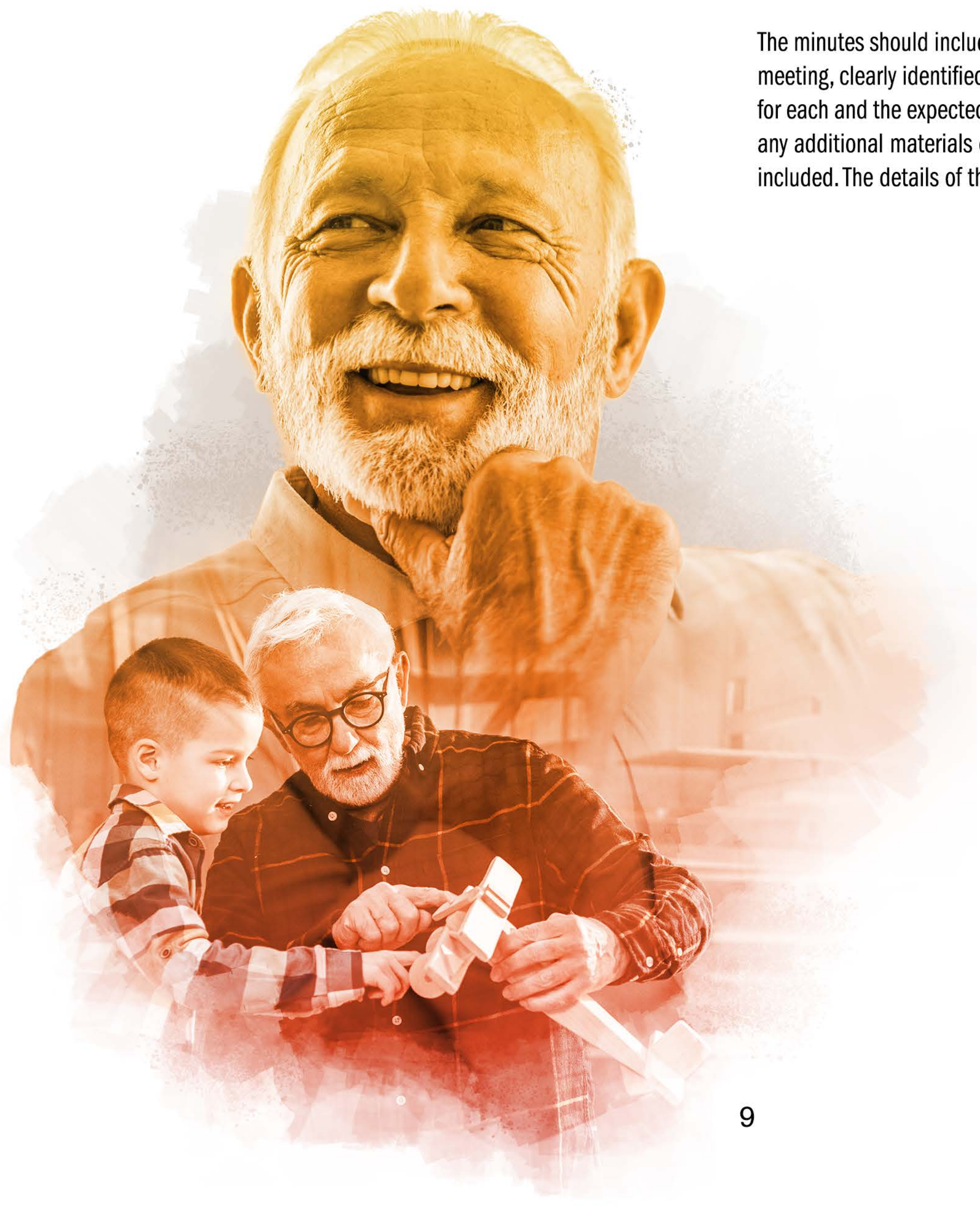
What Happens at Steering Committee Meetings?

It is important to review the list of action items from the previous meeting, confirm actions taken and issues resolved and agree on how to move forward with actions that were not established.

What happens after each meeting?

As soon as possible and no later than one week after the meeting, a copy of the meeting minutes must be distributed to all members. At the very least, decisions and action items should be sent to them as soon as possible after the meeting. This is important both to ensure that the minutes accurately reflect the decisions and discussions of the meeting and to get members to move forward with the actions they agreed to implement. This makes it easier for members to remember what was discussed at the meeting and to ensure that any important issues or comments raised during the meeting were not inadvertently overlooked.

The minutes should include a list of the actions agreed upon at the meeting, clearly identified with the name of the person responsible for each and the expected timeframe for implementation. Copies of any additional materials distributed at the meeting should also be included. The details of the next meeting should be clearly noted.



Hiring a Professional to Manage the Project

A project manager can make a significant contribution to the success of your project, especially if the members of the steering committee volunteer their time or serve as representatives of partner organizations.

What is the role of the project manager?

Working closely with the steering committee, the project manager performs several types of tasks to ensure that the project runs smoothly. For example, they attend steering committee meetings to report on progress and answer any questions members may have.

Therefore, it is important to hire someone with the experience and skills needed to see your project through. A sample job description that can be used for a job posting is available in **Appendix I**.

From the Field

It is helpful to have an additional person (e.g., someone who works on the project or is part of the administrative staff) to assist the project manager in recording the minutes and decisions of the meeting.

Assessing the Needs of Older Adults

Before engaging in a program that promotes aging in place, the needs of the community's older adult population must be assessed. This may mean speaking directly with older adults, community members and organizations that regularly interact with and support them. Such an assessment will facilitate a local approach to meeting the needs of the community's older adult population and provide residents with the opportunity to participate in planning and implementing the project.

A community needs assessment identifies the strengths and resources available in the community to meet the needs of older adults. The assessment focuses on the capabilities of the community, including its citizens, agencies and organizations. It provides a framework for finding and developing services and solutions and creates communities that support older adults so that they can age in place.

From the Field

Statistics Canada compiles a lot of information on communities across the country and offers several tools to understand the statistics in your area. For example, the Census Program Data Viewer[1] allows you to select indicators such as age, gender or mother tongue and see the results for your area on a map. This tool allows you to easily visualize the data for your region.

A community assessment may be limited to a compilation of demographic data from census records, results of surveys conducted by others and informal feedback from community partners. Assessments can also be expanded to include focus groups, town hall meetings, stakeholder interviews and telephone or mail surveys of partnership members and the community.

[1] Appendix IX - Online Resources : The Census Program Data Viewer produced by Statistics Canada

Developing a comprehensive assessment serves several action goals to advance the implementation of programs and services for older adults. It helps to assess the community in its current state, provide feedback on data, identify assets, areas for improvement and gaps, set standards for a community and evaluate progress.

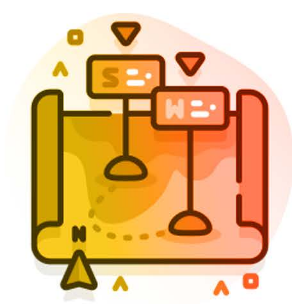
Your completed assessment should result in a set of recommendations. These recommendations can be used to help guide future policies and programs regarding the creation of your age-friendly community.

You will also use your assessment to share information about the community with residents and stakeholders. Your assessment will be a data-rich resource for understanding some of your community's strengths and weaknesses when it comes to accommodating older adults.

The following sections describe two tools to better understand the needs of your community: mapping available services and community consultation.

From the Field

In support of the World Health Organization's Age-friendly Cities Framework, the Public Health Agency of Canada has developed an excellent tool called The Age-Friendly Communities Evaluation Guide: Using Indicators to Measure Progress [2]. This guide will help you develop a project based on the needs of the community. Collaborating with your local Age-Friendly Community committee, if it exists, is also strongly recommended.



Mapping Available Services

An important step in the needs evaluation is to identify the services that already exist in your community. This avoids creating duplicate services and paves the way to partnering with other organizations in your area. Each community has limited resources, so working together is essential to accelerating community development in your area.

Mapping services for older adults is a relatively simple exercise, but it can be time consuming. However, it is worth the effort to determine what older adult services are lacking in the community. It will also allow you to learn about the mission of other organizations in the community and begin building relationships with them. Once the mapping is complete, you can use this information to create a service directory that can be used by one-stop shop staff to direct older adults to existing services. A sample form for creating your service directory is included in **Appendix II.**

There are a few free resources that can be consulted to start your mapping. If your area still receives the Yellow Pages phone book, you will find all the organizations, businesses and companies that are active in your community. This information is also available online at www.yp.ca. Another free resource is Google Maps (www.google.ca/maps), which allows you to enter your postal code or community name and see all the services available in your area.

[2] Appendix IX - Online Resources : The Age-Friendly Communities Evaluation Guide

Lastly, some people offer services as private contractors, but they are not always listed in the directory or online. For example, people who offer snow removal, small home repairs or lawn mowing services might like to be included in your service directory. Members of your steering committee who live in the community can help you document these types of services. However, it is important to contact these individuals directly to get their permission before adding them to your service directory.

Organizing a Community Consultation

Once you have mapped the services available in your area, we recommend that you reach out directly to the people and organizations that work directly with older adults. Organizing a community consultation allows you to bring together a large number of representatives from organizations in one place to discuss the reality of older adults in your community. This exercise takes time and organization, but it yields positive results that would otherwise be difficult to achieve. You would be surprised how rarely agency representatives have the opportunity to get together and discuss their work. In addition to documenting the reality of your community's services, these activities often lead to collaborations and partnerships between passionate people!

There are a number of ways to structure a community consultation. This section describes how to organize a roundtable discussion on the needs of older adults. This model of community consultation brings together representatives from organizations that work with older adults for a roundtable to discuss a series of topics interspersed with plenary sessions. A number of representatives from the same organization can attend this activity, but we recommend that they be seated at different tables to encourage the exchange of diverse perspectives (5-6 persons per table). Each discussion topic is based on questions prepared in advance by the consultation organizers.

For example, to document the needs of older adults, you may ask the following questions: "In your opinion, what needs of older adults are still not being met properly? What resources or services are missing?" To help participants prioritize the most important needs, resources or missing services, you can ask them to identify the three most urgent needs. This step forces participants to form a consensus and allows community consultation organizers to quickly identify the most pressing needs in their community. As you can see, if the same need has been identified at every table, there is a good chance that you have identified the highest priority for your one-stop shop.

A moderator leads the exercise and guides the participants through the various discussion topics and plenary sessions. This consultation can last about two hours, but if it is going to last longer, then a break should be planned to prevent participants from getting tired. We also strongly recommend that you designate someone as a note taker during the plenary sessions to ensure that the comments raised in the group are recorded.

A handout is distributed to each table to record the discussions that take place. An example of such a document is provided in **Appendix III**. Participants designate one person to write the answers to the questions, one to be the spokesperson to summarize the group's ideas discussed in plenary, and one to keep track of time. The moderator ensures that the block of time assigned to each discussion topic and plenary period is respected.

From the Field

To make the plenary more dynamic, you can ask a representative from each table to write the three most pressing needs on a Post-it® and post them in a designated area of the room (e.g., a section of wall, poster board, flip chart). This will make the moderator's job much easier and will help identify needs that are repeated from table to table.

One last block of time is reserved for a final plenary, in which all participants are asked to identify five key messages that emerged during the consultation. To facilitate this final plenary, with the help of the note taker, the moderator can note the key ideas/points that seem to be the consensus (i.e., the same ideas that were raised at several tables). The moderator then presents these points to the group for discussion. The note taker ensures that the opinions and comments made during this final stage of the community consultation are recorded.

Lastly, thank the participants for their cooperation and remember to collect the notes and any other materials produced during the exercise (e.g., Post-its®, flipchart paper). This will allow you to write a report of the results that will complete your evaluation of older adults' needs and that can be shared with all the organizations that attended the community consultation.

Creating Mission, Vision and Value Statements

Mission, vision and value statements should be developed early in the project's implementation, as they serve as the foundation for the strategic plan. They convey the purpose, direction and underlying values of the organization. Clear and compelling mission, vision and value statements define the organization by communicating why it exists (mission), where it wants to go (vision) and what it stands for (values).

When developed and implemented in a thoughtful and deliberate manner, these statements can serve as powerful tools to provide organizations with useful guidance. Therefore, it is important to spend the time needed to develop relevant mission, vision and value statements.

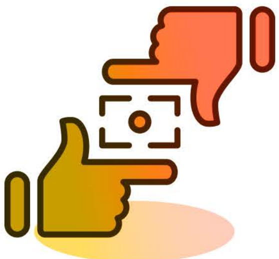
What is a Mission Statement?

A mission statement is a brief and powerful statement of the organization's purpose. Therefore, it must be written in clear, concise and client-oriented language. It should state what the organization does, the audience it wishes to serve and why it exists. When drafting a mission statement, ask yourself the following questions:

- What are we doing today?
- Who do we serve?
- What do we want to accomplish?
- What impact do we want to create?

As an example, here is BVCSC's mission statement:

> *"Bien vieillir chez soi Cocagne is a community-based support service offering model that aims to support older adults to age in place in their community as long as possible. This one-stop shop serves as a single point of entry for older adults to learn about programs and services available in their area so they can continue to live independently, healthily and safely in their own homes while remaining connected and involved in their community."*



What is a Vision Statement?

A vision statement describes the future of the organization. It is a source of inspiration and motivation, but it also provides direction by indicating where the organization is headed. It guides the choice of current and future courses of action.

An effective vision statement should be concise, ambitious and inspiring, and focus on the organization's own outcomes. It answers these key questions:

- What does success look like for our organization?
- How will the world be different if we succeed in our mission?
- What makes our organization unique?

From the Field

Tips for writing your vision statement:
- Project five to ten years into the future.
- Focus on success.
- Use clear, concise, jargon-free language.

As an example, here is BVCSC's vision statement:

> *"Bien vieillir chez soi Cocagne is enabling the rural community of Cocagne to become a model of a community that unites around its older adults, in which all older adults who wish to do so are supported to live in the home of their choice and in their home community for as long as possible."*

What is a Value Statement?

The value statement highlights an organization's fundamental principles and philosophical ideals. It is used both to inform and guide the decisions and behaviours of people within the organization and to inform external stakeholders of what is important to the organization.

The core values of an organization shape the day-to-day culture and establish standards of conduct against which actions and decisions can be measured. These values must be embedded in both the mission and vision and be part of all internal and external communications. The value statement answers these key questions:

- What are we defending?
- Which behaviours do we value above all else?
- How will we conduct our business to achieve our mission and vision?
- How do we treat members of our own organization and the community?

As an example, BVCSC's values are:

- *Empathy*
- *Equality*
- *Innovation*
- *Independence*
- *Safety*
- *Kindeness*
- *Respect*

Mission, vision and value statements are an organization's driving forces. The mission statement communicates the organization's purpose. The vision statement provides an overview of what the organization hopes to achieve or become. The value statement reflects the fundamental principles and ethics of the organization. Together, these statements provide strategic direction to inform the organization's current and future business strategies.

Developing a Strategic Plan

A clearly defined strategic plan is a formal guide that describes how an organization will achieve its goals and objectives. It offers many benefits, including the following:

- It guides the board of directors in navigating the wide range of challenges and choices that each organization faces.
- It promotes strategic thinking throughout the year.
- It helps with the board of directors' training and development.
- It improves decision-making.
- It reinforces the organization's legitimacy.

When writing the plan, it is important to set specific and measurable objectives that are broken down into manageable and trackable steps and have clear instructions about who is responsible for each action. This will help monitor the plan to better ensure its success. The development of a strategic plan should include the following groups:

1. **Steering Committee / Board of Directors**

   Members of the steering committee / board of directors will be among the most important voices in the strategic planning process.

2. **Volunteers**

   Volunteers have an affinity with the organization. They care enough about the mission to collaborate and contribute time and energy. As a result, their participation in the development of the strategic plan is very important.

3. **External Stakeholders**

   Planning should also include valuable input from external stakeholders. Donors, corporate partners and community leaders are all potential external stakeholders.

The following are the steps we took in developing BVCSC's strategic plan.

Step 1

Clarify the Organization's Objectives

Develop a concrete statement for which the non-profit organization will hold itself accountable, indicating the time frame, the target audience (intended impact) and the work process to achieve that impact.

Step 2

Establish Strategic Priorities

Determine the specific actions and activities that need to take place in order to implement the project.

Step 3

Determine the Resources Needed

Consider the resources (financial, human and organizational) that will be needed to achieve the strategic priorities and develop a plan to carry them out.

Step 4

Develop an Implementation Plan and Establish a Performance Measurement

To effectively implement the strategic plan, you must clearly specify the steps required for each of the strategic priorities, who is responsible for each step, and the quantitative and qualitative milestones to be achieved.

BVCSC Toolkit

BVCSC Strategic Plan

Developing an Action Plan

An action plan makes the strategic plan operational. The action plan is a checklist of steps or tasks that need to be completed to achieve set objectives. It is an essential part of the strategic planning process that helps improve teamwork planning.

The components of an action plan include:

- A well-defined description of the objective to be achieved;
- Tasks/steps to be completed in order to achieve the objective;
- The people who will be responsible for completing each task;
- A task completion schedule (deadlines and milestones);
- The resources needed to complete the tasks;

BVCSC Toolkit

BVCSC Action Plan

An action plan is not set in stone. As the organization evolves and the surrounding circumstances change, you will have to review and make changes to the plan to continue ensuring that the needs are met. It has a number of advantages:

- It gives you a clear direction. Because an action plan highlights exactly what steps to take and when they need to be completed, you will know exactly what you need to do.
- The fact that the objectives are written and planned by step will keep you motivated and committed throughout the project.
- The action plan tracks progress toward your objective.
- Since you list all the steps you need to take in your action plan, it will help you prioritize your tasks based on effort and impact.

From the Field

Tips for creating a successful action plan:
- Involve team members from the beginning.
- List the concrete details of each action.
- Include a timeline.
- Designate resources.
- Establish a monitoring and measurement process.
- Distribute the plan.

GOVERNANCE

Governing Your Organization

Governance is the process of providing strategic leadership to a non-profit organization. It involves the functions of setting direction, making policy and strategic decisions, overseeing and monitoring organizational performance and ensuring overall accountability.

Governance may include many different practices. Some of the key best practices include creating a competent board of directors, aligning strategies with objectives, ensuring accountability and high levels of ethics and integrity, defining roles and responsibilities, and effectively managing risks.

The board of directors assumes the role of governance. Governance is the practice of the board of directors meeting to make decisions about the direction of the organization. Functions such as oversight, strategic planning, decision-making and financial planning are governance activities.

BVCSC Toolkit

Policy Guide: Governance

For more details on BVCSC's governance, you can consult the related policies. They cover the following topics:

a) Mandate of the corporation

b) Roles and responsibilities of the board of directors

c) Responsibility and duties of directors

d) Recruitment and guidance of directors

e) Membership

f) Role of older adult management

Board of Directors

Non-profit organizations need a board of directors for a variety of reasons. The members' wealth of knowledge and experience is invaluable.

What are the Responsibilities of a Board of Directors?

Overall, when people become board members of a non-profit organization, they are expected to take on a number of responsibilities for the organization. The individuals who make up the board of directors are responsible for making key decisions that serve the mission, strategy and goals of the organization. They aim to respond to the public interest through the organization's work and act as its legal voice.

The board of directors has many responsibilities: it oversees the management, finances and quality of operations; it sets strategic direction; and it establishes community relations, standards, values and ethical compliance. It is ultimately responsible for ensuring compliance with legal and ethical standards.

The board must establish appropriate policies and procedures (e.g., personnel policies, grievance procedures) and comply with the provisions of the organization's regulations and by-laws. To facilitate its operation, the members of the board (called "directors") elect four members to hold the positions of chair, vice-chair, secretary and treasurer. These four directors form the board of directors.

Chair

The chair of the board of directors is the head of the non-profit organization's board. This person presides over the board's meetings and drafts the meeting agendas. They also oversee all of the board's business affairs and act as the primary contact for the group.

Vice Chair

The vice-chair supports the chair's role and may act in the chair's capacity in their absence.

Secretary

Your board's secretary is responsible for distributing the agenda for your meeting and taking minutes. They also ensure that all documentation is properly filed and organized for easy access at a later date and that all actions are in accordance with the organization's by-laws.

Treasurer

Your board's treasurer is responsible for overseeing your organization's financial situation by tracking income and disbursements. This person can be part of your financial team or at least in frequent contact with them. If you need to conduct a financial audit, your treasurer will present the findings.

Annual General Meeting

Provincially incorporated non-profit organizations are required by law to hold an annual general meeting (AGM). Ensuring that this statutory business meeting takes place is part of good governance. An AGM is an important part of an organization's democratic life. Activities that take place during the AGM include:

- Reading and correcting the minutes of the previous AGM;
- Approving the audited financial statements, including reports to the board;
- Receiving committee reports not included in the financial statements;
- Approving the amendments and additions to the by-laws;
- Calling for nominations to the board or receiving the report of the nominating committee;
- Electing new directors;
- Electing the auditor;
- Handling any other business.

The AGM is also an opportunity for a board to share the organization's news, challenges and successes and to listen to feedback from its members. It is often the primary two-way communication channel for a board and its stakeholders.

From the Field

Members volunteer their time to come and listen to your organization. Make the meeting as enjoyable and accessible as possible!

Organizing an Annual General Meeting

Unless otherwise specified in the Articles of Incorporation, annual meetings of the members must be held within 12 months of the last annual meeting, but no later than six months after the end of the previous fiscal year. Some organizations have a fixed or approximate date designated in their by-laws. A typical AGM agenda might look like this:

AGM Agenda

I	*Call to order*
II	*Confirmation of quorum*
III	*Reading and approval of the agenda*
IV	*Reading and approval of the minutes of the previous AGM*
V	*Directors' reports*
VI	*Financial statements*
VII	*Optional – Treasurer's report*
VIII	*Auditor's report*
IX	*Appointment of auditor*
X	*Optional – Coordinator / executive director's report*
XI	*Optional – Committee reports*
XII	*Optional – New business or activities*
XIII	*Nomination and election of new directors*
XIV	*Miscellaneous*
XV	*Adjournment*

Incorporation

A non-profit organization (NPO) has no legal obligation to incorporate; however, as an unincorporated entity, the organization has no legal status. An unincorporated NPO is simply a group of people (members) who come together for a common purpose. This means that members of the organization may be personally liable for the full amount of any debt incurred by the organization.

Incorporation gives an NPO legal status. As an incorporated entity, the NPO can enter into contracts, purchase assets, own property, borrow money and generally conduct business. Incorporation limits the liability of the members and they are not personally liable for the corporation's debts.

Other benefits of incorporation include the following:

- A non-profit corporation has a separate and distinct legal status from its members. Members may come and go, but the corporation continues to exist until it is dissolved or wound up.
- A non-profit corporation can enter into contracts, buy and sell goods, etc.
- The corporation's individual members are protected from liability for the actions of the corporation.
- The formal corporate structure facilitates ongoing operations and decision-making.
- There can be increased credibility with government, donors and the public.
- The non-profit corporation has an enhanced ability, through its governing documents, to address membership issues (e.g., revocation for unpaid dues or death, and expulsion for disciplinary reasons).
- The continuity of the organization is ensured even if there is a change of members.
- The organization has the ability to pursue legal action in its own name.
- The chance of receiving grants is greatly improved because of the corporation's stability and structure.

The corporation can be created at the federal level under the *Canada Not-for-profit Corporations Act* or at the provincial level under the *Corporations Act*.[3] Once incorporated, the NPO must comply with the Act. This includes the requirement to hold meetings of directors and members, and to have formal by-laws that comply with the law.

[3] Appendix IX - Online Resources : Incorporation in New Brunswick

By-Laws and Regulations

The by-laws are the guide to your organization's internal affairs. They establish procedures for holding elections, organizing meetings, quorum requirements, membership structure (if necessary) and other essential operations of your non-profit organization. They will also serve as your organization's operating manual and guide you as you work to operate the organization smoothly.

By-laws are useful for preventing or resolving conflicts and disagreements. They can protect the organization from potential problems by clearly defining rules about levels of authority, rights and expectations. If the board of directors fails to comply with the by-laws, it may be held liable for failing to perform its duty to the non-profit organization.

By-laws are not that difficult to create and there are many examples you can find on the internet. You may also base yours on the BVCSC by-laws and regulations.

BVCSC Toolkit

BVCSC By-Laws and Regulations

Registering a Charity

A registered charity is one that meets certain criteria set by the Canada Revenue Agency. Registration provides certain benefits and responsibilities. The organization must also meet certain criteria in order to be registered.

What are the Advantages of Registering?

The main advantage of being a registered charity is that you can issue official donation receipts that can reduce the income tax payable by the person who made the donation. You may also receive donations from registered charities, and many of your goods and services are exempt from the goods and services tax (GST) and harmonized sales tax (HST).

What are the Obligations of a Registered Charity?

As a registered charity, some of the key obligations include:

- Filing an annual T3010 Registered Charity Information Return form within six months of the end of the fiscal year;
- Maintaining sufficient and complete accounting records;
- Providing complete and accurate official donation receipts.

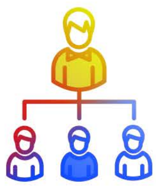
The organization must also inform the Charities Directorate of any changes to its operations or legal structure. If the obligations are not met, the organization is subject to a penalty and may have its charitable registration revoked. [4]

[4] Appendix IX - Online Resources : Canada Revenue Agency on Registering a Charity

SERVICES

Service Delivery Structure

As an organization, BVCSC structures its activities around two service delivery mechanisms:



The One-Stop Shop
to guide older adults in their search for support services

The Time Bank
to facilitate the exchange of services and mutual assistance between people of all generations.

One-Stop Shop

The concept of "one-stop shop" refers to a single point of entry to access a diverse range of related non-medical and non-governmental support services in addition to providing assistance with various daily tasks. A one-stop shop for older adults' community services allows older adults in a given region to call or visit a central point of service where they can then be referred to services that meet their needs.

Community support services include all non-governmental services such as accompanied transportation, health and wellness promotion programs, support for exterior home maintenance and minor repairs, friendly visits and social activities.

The objectives of the BVCSC one-stop shop are to:

- Make older adults aware of services that already exist, but are sometimes not well known in their community;
- Work in partnership with various non-governmental organizations in the region to coordinate the supply of and demand for existing services;
- Develop and deliver new community support services to meet the unmet needs of older adults in the community.

The community support services that will be provided by your one-stop shop will vary depending on the needs of older adults in your region and the services already offered by other organizations in the community. In order to provide services that will have an impact on older adults' quality of life and their ability to age in place, it is essential to complete a needs assessment before implementing one-stop shop services (see section on **Assessing the Needs of Older Adults**).

Time Banking

The BVCSC one-stop shop model combines pay-per-use services with a time bank to limit the cost of these services to users. A time bank is a system for trading services between people without the need to use money. It is based on two key principles: an hour of time given is worth an hour of time received, regardless of the type of service traded, and everyone has something to contribute.

Each member has a time account. This account allows them to request services and respond to requests from other members. Think of a classified ad system where people can post ads with services offered and services desired. Once the exchange takes place, the requester will send the time bank a time credit, which will credit time to the provider's account.

For example, Jeanne will accumulate three hours of time by knitting a pair of mittens for one member, which she can then trade for three hours of another member's time to help her shovel her balcony. The time bank allows its members to use their talents and receive services without having to pay money, a key point for low-income older adults.

From the Field

The decision to establish a time bank in your community will depend on older adults' level of digital literacy, internet access and the presence of an informal support network. There seems to be less of a need for a time bank in small communities where everyone knows one another.

The BVCSC time bank uses the free online platform created by hOurworld Co-op (www.hourworld.org). There are other platforms, including the one created by the Accorderie in Quebec (www.accorderie.ca) [in French only]. Each platform has its own advantages and disadvantages that you will need to weigh according to the specifics of your project.

BVCSC Toolkit

Policy Guide: Time Bank

For more details on how the time bank works, you can review the BVCSC Time Bank Policy. It covers the following topics:

a) Principles of the Trade System

b) Service Categories

c) Membership and Guidance

d) Rights and Responsibilities

e) Privacy

Services Program

BVCSC provides older adults with non-medical, non-governmental support services and assistance with a variety of daily tasks. The service program for community support is designed to enable older adults to age in place with dignity while remaining socially connected to prevent social isolation.

Services are provided by a combination of volunteers, paid staff and contractors, depending on the service required and the program's ability to respond to requests. Persons who are eligible for the program are adults 50 years of age or older who reside in the Communauté rurale de Cocagne.

Older adults are first visited by the coordinator. During this initial discussion, the coordinator asks the older adults if they agree to participate in the program. If they say yes, an information sheet is completed (see **Appendix IV**). Older adults must also become members of BVCSC and pay the annual fee.

The client is then matched with the person who best suits their needs and goals. Afterwards, it is the volunteer's turn to ensure that services continue. The service provided will be monitored and evaluated in a number of ways: phone calls, visits by the coordinator and compilation of statistics. The objective is to validate the quality of the services offered.

The table below provides a list of services offered by BVCSC. Some are offered by the service coordinator, others by volunteers or through other agencies in the area. In some cases, the BVCSC team refers members to the Department of Social Development for a professional assessment of their needs.

One-Stop Shop Information Line

506-576-2100

The central information line allows BVCSC members to get information about programs and support services for older adults in the community.

Resources
BVCSC Coordinator
211
Social Development
1-833-733-7835

Cocagne Time Bank

The time bank allows BVCSC members to share their talents and skills. Whenever one member helps another, they can benefit from the time and skills of the other members. One hour given is worth one hour received.

Resources
Cocagne Time Bank

Friendly Calls and Visits

BVCSC members who feel lonely can receive friendly calls and visits from volunteers once a week.

Resources
Cocagne Time Bank
BVCSC volunteers

Community Transportation Services

BVCSC members can take advantage of round-trip transportation services to:

- Medical appointments
- Social activities
- The grocery store
- The pharmacy
- The bank

*Some conditions apply.

Resources
Kent Community Transportation

**(Possible funding available from the Department of Social Development through the Long-Term Care Program)*

Accompaniment Services

BVCSC members can be accompanied by a volunteer to medical appointments. Volunteers can also offer assistance with bringing in and putting away groceries and other errands.

Resources
Kent Community Transportation
**(Possible funding available from the Department of Social Development through the Long-Term Care Program)*

Meal Services

BVCSC members can take advantage of a home meal delivery service.

*The cost of the meals is the responsibility of the members who use the service.

Resources
Partnerships
BVCSC/Centre 50
**(Possible funding available from the Department of Social Development through the Long-Term Care Program)*

Social Activities

In collaboration with Centre 50, BVCSC members enjoy a diverse program of social, cultural and educational activities to promote healthy aging.

Resources
Partnerships
BVCSC/Centre 50

General Services

BVCSC members may occasionally benefit from general services such as:

- Dog walking
- Animal visits
- Getting the mail
- Taking out garbage cans for collection day

Resources
BVCSC volunteers
Cocagne Time Bank

Simple Home Repairs/Help

BVCSC members can get help with basic home repairs such as replacing light bulbs, checking and changing the battery in the smoke detector, fixing simple leaks, assembling furniture, and cleaning the mini-split/air exchange system or furnace filter.

Resources
BVCSC volunteers
Cocagne Time Bank

Light Housekeeping

BVCSC members can get help with light housekeeping tasks such as:

- Maintenance of floors and floor coverings
- Dusting of frames and knick-knacks, windowsills, fans, blinds and pictures
- Cleaning the exterior of appliances and electronics, doors and woodwork, sinks and faucets, countertops and furniture, bathtub and toilet bowl, lamps and mirrors
- Emptying garbage cans
- Sorting clothes for laundry, washing, drying, ironing and folding clothes, putting clothes in the closet and changing sheets

Resources
Cocagne Time Bank
Phare des services communautaires
Kent Senior Homecare

**(Possible funding available from the Department of Social Development through the Long-Term Care Program)*

Outdoor Maintenance

BVCSC members can get help with simple exterior maintenance jobs such as:

- Raking leaves
- Mowing the lawn
- Helping with flower beds and gardening
- Shoveling snow from entrance doors and ramps and keeping outdoor spaces safe during the winter
- Taking out or putting away patio furniture and BBQs

Resources
BVCSC volunteers
Cocagne Time Bank

**Work that is considered dangerous or that would require the services of a professional will not be performed.*

Computers/Assistance with Remote Computer Activities

BVCSC members can receive computer assistance (Facebook, tablet, smartphone, Skype, Zoom, Messenger) and participate in computer training or digital literacy programs (computers, tablets, cell phones). These courses can be offered in person or remotely.

Resources
Cocagne Time Bank
BVCSC volunteers

Centre d'activités à distance with the help of their online platform, ConnectAînés

Cyber-older adults computer training program, Conseil pour le développement de l'alphabétisme et des compétences des adultes du Nouveau-Brunswick (CODAC NB)

Literacy

BVCSC members can participate in a literacy program to improve their reading, writing and oral and written communication skills.

Resources
In collaboration with the Conseil pour le développement de l'alphabétisme et des compétences des adultes du Nouveau-Brunswick (CODAC NB)

Respite Service for Caregivers

BVCSC members can receive in-home caregiver respite services to ensure their safety. Some conditions apply.

Resources
BVCSC volunteers
Phare des services communautaires
Kent Senior Homecare

**(Possible funding available from the Department of Social Development through the Long-Term Care Program)*

Developing Partnerships

In order to successfully implement an aging in place program, it is important to get community buy-in and build partnerships between the individuals and organizations that will be involved in the program. This is particularly true in rural areas where there are already few resources and services. Identifying and bringing together community partners and stakeholders allows the program to focus on community assets and resources and to more easily meet the needs of older adults. Such partnerships can be useful in promoting the benefits of having a vibrant and engaged older population.

What are the Benefits of Establishing Partnerships?

1. **Save on Administrative Costs.** By sharing costs with a partner, you save money through joint purchases, shared office supplies, transportation, facility rental fees and joint staff training.

2. **Improve the Range of Services.** Collaborating with another non-profit organization gives you access to new tools and resources to expand the range of services you provide.

3. **Bring in New Ideas.** Partnerships and collaboration are valuable elements that facilitate the exchange of new ideas.

4. **Increase the Visibility of the Program.** Depending on the type of partnership you establish, you can increase your promotional efforts by sharing information about your programs, including on your partners' social media channels.

5. **Create Programs.** Lastly, working with another non-profit organization can allow you to expand your current programs and create new ones.

Regardless of the partners selected, it is important that they be integrated early in the process to make it easy to implement programs successfully. It can also be important to partner with local community leaders to gain their support for ongoing program work.

Building Effective Partnerships

Before entering into negotiations, determine why you need partnerships and who would be the most appropriate partners. It may be necessary to have a preliminary discussion with potential partners to discuss relevant issues before deciding that a partnership is desirable. It is important to ensure that each organization is ready, willing and able to partner.

Join forces with leaders of partner organizations to promote engagement. Set expectations for the resources that each group will commit and follow the guidelines to ensure the partnership's success.

Goals and guidelines must be clearly defined so that everyone is on the same page, and decision-making must be transparent. Commitment, compatibility and communication are essential for a successful partnership.

Key Steps in Implementing a Partnership Include the Following:

- Identifying and involving stakeholders.
- Establishing personal relationships and beginning to build trust.
- Clarifying the goals and objectives that each partner wants to accomplish.
- Choosing and implementing a mutually beneficial partnership.
- Establishing governance, procedures, ground rules and decision-making structure.

Establishing Sustainable Partnership Agreements

Partnership agreements must be in writing and reviewed annually. The agreement should contain sufficient detail to guide the partnership and serve as a mechanism by which the partners assess whether they are meeting their commitments and contributions.

As a legal document, the agreement protects the best interests of all partners. Partnership agreements define who does what, when, how, with whom, and for what purpose, as well as timelines. They also contain specific outcome objectives and a plan for measuring achievement.

Community Partnerships Take Work! Barriers and traps should be avoided along the way. Common barriers to successful partnerships include a lack of clear purpose, missing key entities, hidden agendas, communication failures and domination by one party. Successful partnerships avoid these pitfalls to truly thrive.

However you decide to partner, make sure it is a good fit for both parties and that it will benefit your community. See **Appendix V** for examples of memoranda of understanding (MOU).

Evaluating Your Program of Services

Evaluation is critical to both the success and the sustainability of a program. In the context of a one-stop-shop project such as BVCSC, a "program" can be associated with the services offered (program of services), the work of volunteers (volunteer program) or any other series of activities that aim to achieve a specific objective (training program, social program).

It is important to evaluate the impact of program objectives to demonstrate value, monitor progress toward goals, and identify potential best practices and lessons learned. Evaluation results are also fed back into the program to improve performance.

In other words, program evaluation allows your organization to determine whether the goals you have set are being met by the strategies you have in place. For example, if your one-stop's mission is to help older adults in your community age in place, it is critical to assess whether users are satisfied with your services, whether your program of services is meeting their needs, and whether it is truly helping them stay in their homes as long as possible.

Spending time looking at aspects and components to evaluate a program is well worth it, as it saves a lot of time in the long run. There are a number of benefits to establishing an evaluation program, such as:

- Understanding what works;
- Improving the way things are done;
- Determining the impact of the program on participants or the community;
- Increasing the likelihood of achieving program goals and objectives;
- Determining how to achieve value for money (ensuring that allocated resources provide the greatest benefit to users and partners);
- Identifying which program components are not working and why;
- Identifying areas for improvement in order to provide the best possible services.

From the Field

There are several online resources that can help you learn about program evaluation. The website "L'évaluation en 7 étapes" (https://evaluation7etapes.fr) [in French only] offers a practical guide to evaluating health and social work. Organizations such as the Centre for Community Organizations (COco) and Imagine Canada offer program evaluation training for NPOs.

In addition to gaining and maintaining external support for your organization, program evaluation also provides the data, analysis and strategies that your leadership, managers, teams and staff can use in real time to improve, refine, expand, reduce or create the programs and services you provide. It allows your board of directors and staff to know whether goals have been met and to find ways to do even better.

What Should I Include in my Evaluation Plan?

An evaluation plan typically contains the following elements:

Program Description

The program description sets the context for the evaluation plan by outlining the mission of the program to be evaluated, its vision and a list of its objectives. This description will determine the other elements of your evaluation plan. In other words, the evaluation plan must be consistent with the mission, vision and objectives of the program you wish to evaluate.

Evaluation Methods

This section describes the purpose of the evaluation plan and the methods that will be used. Here, we must specify the evaluation criteria (what we want to measure) and the related indicators (how we will measure it). For example, if you want to measure the impact of a supportive services program that aims to help older adults age in place, you can use the aging in place of one-stop shop users as an evaluation criterion. This can be measured using the percentage of one-stop shop users who have not been admitted to a long-term care facility in the past year as an indicator. The percentage that determines whether the program objective is met (i.e., the target for success) must also be determined. Do 100 percent of users need to still be at home, or 75 percent? This target is determined by your team, but it must be realistic and determined though consensus. Indicators can be quantitative measures (e.g., percentage) or qualitative measures (e.g., satisfaction level).

Other examples of evaluation criteria to consider include:

- Independence: Evaluate users' independence through activities of daily living and mobility by measuring their ability to get around without difficulty, shop, cook or use transportation independently.
- Mental health and quality of life: Document changes in mental health and quality of life by measuring decreases in social isolation and depression and increases in social connectedness, civic engagement and volunteerism.
- Environmental conditions: Reduce barriers that prevent older adults from aging in place or accessing health care by measuring modifications made to the home to allow a person to remain there longer, access to transportation to medical care and other services, or increased use of telehealth services.

Data Collection and Analysis

Once the evaluation criteria and their indicators have been determined, the next step is to determine which tools will be used to collect the data. For example, the success of the program can be evaluated through:

- a user survey;
- a compilation of administrative data;
- a volunteer focus group;
- interviews with partners.

Two examples of data collection tools used in the evaluation of the BVCSC project – an annual user survey and a volunteer focus group question guide – are included in **Appendices VI** and **VII**.

Once the data is collected, it is analyzed by compiling statistics or comments for each evaluation criterion and related indicators. An evaluation report is then prepared to communicate the results.

During the evaluation, results and other findings must be kept confidential and consistent with consent agreements made with participants. This should apply to the storage, use and disposal of all data collected. The consent must include any information about how you will disclose or publish any of the evaluation data, which may include a provision for disclosure of information for administrative and marketing purposes. It is important that participants know how their data will be used.

Communication of Results

It is important to prepare a plan for communicating key results in order for your organization to be transparent and accountable. Share evaluation results with members, partners, the community and donors to demonstrate the success and value of the program. If the evaluation reveals challenges, don't be discouraged! With your evaluation plan, you have all the tools you need to improve your program.

COMMUNICATION

Promoting Your Organization

Your organization needs strong relationships with donors, volunteers, the media and even government organizations in order to effectively pursue your mission. Promoting your organization will allow you to reach your target audience, educate the public and increase support for your mission.

Marketing helps you to:

a. **Disseminate your message and mission statement;**

b. **Attract new donors and new revenue;**

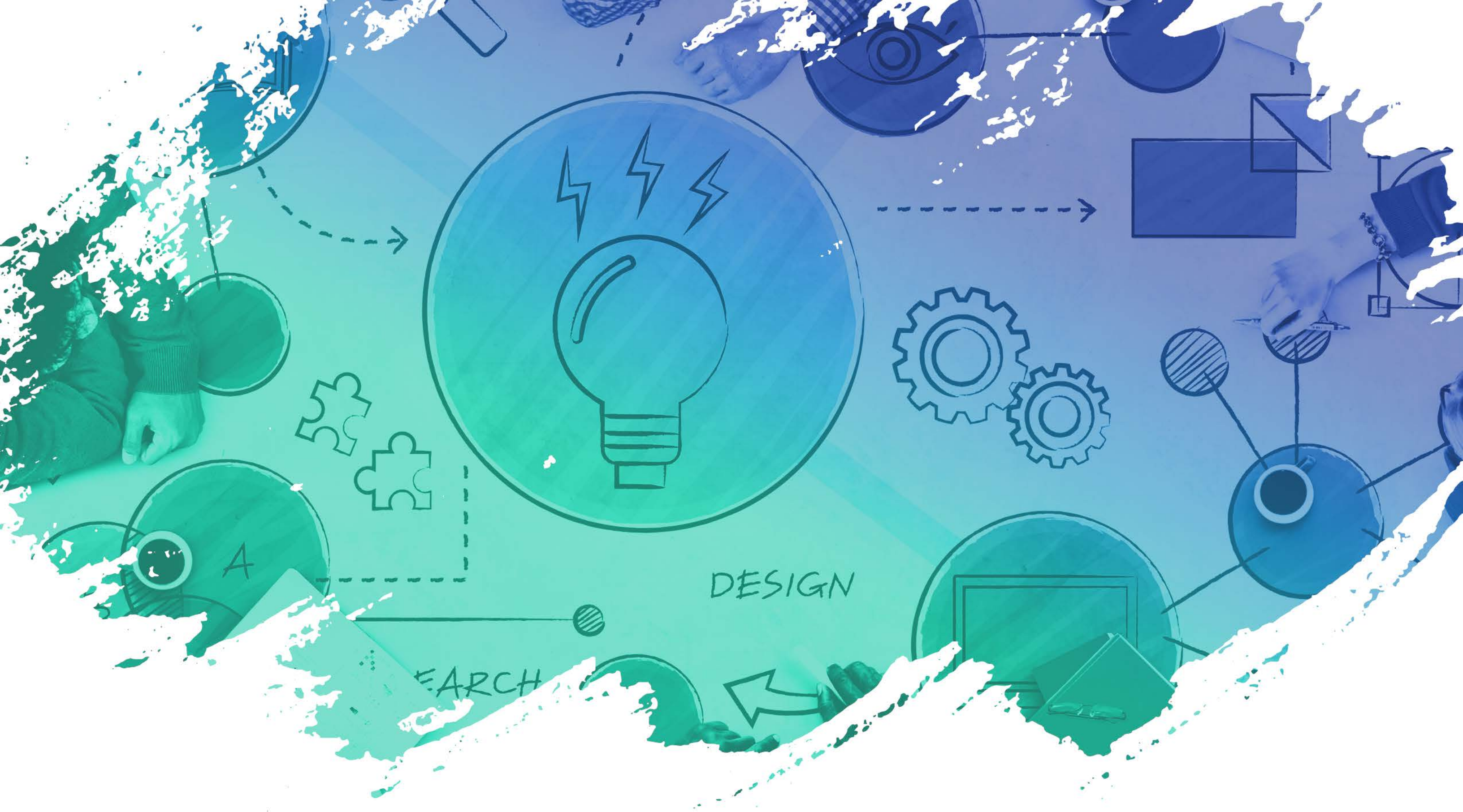
c. **Satisfy current donors by highlighting your success;**

d. **Build strong relationships with other organizations and government agencies;**

e. **Gain visibility in the media;**

f. **Inform the public of important events;**

g. **Reach more people with the work you do.**



Communication Plan

We are all aware of the importance of effective communication. Developing a communication plan is one way to help ensure that your communication efforts are strategic, coordinated and consistent. A communication plan is a strategic plan for delivering consistent, coordinated and targeted messages to achieve specific objectives.

A communication plan is a written document that describes the following:

- What you want to accomplish with communications;
- The means by which these objectives can be achieved;
- To whom your organization's communications will be addressed;
- How you will achieve your goals;
- How you will measure the results of your program.

There are a number of reasons to have a communication plan:

- To clarify goals and objectives. You know where you want to go, but you need a way to get there. The plan is your roadmap.
- To clarify the relationships between audiences, messages, channels, activities and media by identifying who you need to reach, telling them what you want them to know and determining how you will reach them.
- To identify and implement a variety of communication activities in which you will engage so that you are not continually pulled in different directions.
- To clarify the roles of steering committee members, stakeholders and others involved in the process.
- To develop creativity and commitment within your team: involving many people in the planning process brings different perspectives and diverse thoughts.

Integrating a communication plan into your marketing efforts will allow you to reach the right audience at the right time to produce results. Your communication efforts should always support a broader organizational goal. Never lose sight of the goal when communicating. Here are the steps to follow in order to develop an effective communication plan:

Step 1 **Clarify Objectives;**

Step 2 **Determine Target Audiences and Objectives;**

Step 3 **Develop Key Messages;**

Step 4 **Determine Communication Strategies;**

Step 5 **Develop an Outreach and Awareness Plan;**

Step 6 **Specify Timelines;**

Step 7 **Measure Results.**

Communication Activities

Press Conference

Press releases, interviews and informal media contacts are excellent ways to get your message out. A press conference is an additional media technique, for special occasions, when you really want to make an impression. Holding a press conference is a simple and effective way to communicate your message to the media.

A successful press conference can disseminate information about your cause and publicize your project. A successful press conference can not only spread news, but also boost your own group's morale, in that they can take pride in knowing that the press will actually come to hear what you have to say.

This section examines the elements of planning a successful press conference, when to hold a press conference and how best to communicate with the media and the public at a press conference.

From the Field

Tuesdays, Wednesdays and Thursdays are the best days for press conferences, as they are considered slower news days. The best time to schedule your press conference is between 10:00 and 11:00 a.m. to ensure maximum media coverage.

Why Hold a Press Conference?

- You can provide more information than in a press release.
- A press conference is interactive; you can answer questions from the press and make points that you might not otherwise have had the opportunity to make.
- You can make a major announcement and explain what the local and broader impact will be.
- You can often generate the type of notice or advertising, such as a segment on the 6:00 p.m. news, that you would otherwise have had to pay a significant amount of money for.
- When many media representatives are present, it makes your conference worthwhile. The media presence itself adds to the importance.

How to Plan the Press Conference

To start, answer the following questions:

- When will it take place (date and time)?
- Where will it take place?
- Who will be the moderator?
- Who will act as spokesperson?
- Who will be invited (media and other stakeholders)?

One Week Before the Press Conference

- ***Invite the media*** – Publish a media advisory. You may also choose to make personal phone calls to media representatives who already support your organization's work.
- ***Invite other stakeholders*** – Other stakeholders may include key community members, representatives of key stakeholders with whom you work or who support your work.
- ***Confirm the availability of the moderator and spokesperson.***
- ***Write or get all speaking notes*** – It is important to ensure that the speeches to be delivered during the press conference complement one another and that all key messages are heard. Speaking notes should be reviewed and approved by all parties involved before delivery. Speaking notes are sometimes included in the press kit because they can be a key source of quotes in a story.
- ***Develop an event scenario*** – In consultation with the moderator and spokesperson, determine the following:
    - The speaking order;
    - Time to be allocated to each presentation – Speeches should be no longer than three to five minutes each;
    - Format and time allocated for the question period – Determine whether questions will be addressed after each presentation or after all presentations are completed. A 15-minute public question period is normally planned;
    - The number and timing of photo shoots before, during or after the event.
- ***Prepare a press release*** – Summarize the key message. Include the name and phone number of a contact person who can receive and screen media requests.
- ***Prepare the press kit*** – Gather background information that will be made available to the media on-site or online. This may include the media advisory, the press release, a list and biography of the press conference moderator and speaker(s), speaking notes, background material on the topic or your organization (statistics, promotional brochure, etc.).

From the Field

A press conference should last no longer than 45 to 60 minutes, including the question period.

The Day Before the Press Conference

- ***Issue a reminder –*** Update the media advisory with the word "Reminder" in large, bold type and resend the document to your media contacts;
- ***Follow up with the various media outlets*** with a phone call and confirm whether they plan to attend.

The Day of the Press Conference

- ***Set up the room*** – Arrive at least one hour before the press conference to set up the room.
- ***Set up the table for the press conference moderator and speaker(s).*** You may want to place a name card in front of each spokesperson to clearly identify them to media representatives.
- ***Set up the registration des***k – At the entrance to the room, set up a table where all participants will be invited to register, including the media.
- ***Make sure to start and end the press conference on time.***
- ***Ask the moderator to open, conduct and close the press conference.*** They are responsible for welcoming everyone, explaining the agenda of the meeting, introducing and thanking the speaker(s) and handling questions raised during the question period.
- ***Record the conference.***

After the Press Conference

- ***Coordinate individual media interviews.***
- ***Send an email to all journalists who attended the press conference*** to thank them for their attendance.
- ***Ensure that press conference materials are sent*** to or made available to all media not in attendance.

Social Media

Social media is the best channel for creating communities with minimal resources. It plays an important role in maintaining engagement with your target audience. It is a way to promote your latest news, find out what is important in your industry and exchange ideas.

There are many tools and resources available for non-profits on social media. Most platforms, including Facebook, Instagram and YouTube, offer special support and features to eligible non-profits.

The main benefits of using social media for non-profits include:

- Building communities;
- Building relationships;
- Promoting awareness;
- Inspiring action;
- Sharing your impact;
- Creating campaigns and fundraisers.

To engage in social media, you need to have clear goals about what you want to achieve and know your target audience.

These platforms allow you to tell your organization's story. When done right, social media posts can help you engage your members, volunteers and supporters and capture and hold their attention. Social media can also increase the visibility of your project/organization, which can support fundraising efforts.

Website

Having a website gives your organization legitimacy and credibility. You can put an enormous amount of information on a website, far more than can be contained in a single brochure. You can include your website address in your brochures, advertisements or other promotional materials to encourage people to visit and get more information.

Whatever information you post on your website is immediately available to anyone who wants it, 24 hours a day, seven days a week. The Web is also a good way to reach people who have difficulty getting information through more traditional means, such as people who cannot leave their homes due to disability, lack of transportation or illness.

The website can be used to engage your members, volunteers and supporters. A website with the email addresses of people in your organization gives people a quick and easy way to contact them.

Facebook Page

Facebook can be much more than an online message board. It is a multifaceted platform that allows users to send private messages, make public comments, post photos and videos (recorded and now live), create events, join groups, donate money, etc.

With so many different applications and opportunities to share content and interact with supporters, Facebook is the most widely used social media site among non-profits. Why create a Facebook page?

- Visibility;
- Credibility;
- Fundraising.

It may seem daunting at first, but creating and maintaining your page is worth it. When you post regularly, engage your followers and provide valuable and informative content, you'll

Promotional Materials

Business cards, posters and brochures are all basic print promotional tools that help share information about your organization and its work, services and upcoming events.

Creating a Brand Image

Branding defines the organization to internal members and external groups (members, volunteers, etc.). It helps you define yourself in detail to your audience. What are you doing? What do you believe in or stand for? What do you represent? With effective branding in place, all of these questions and more can be answered.

To find the right tone for your brand, start by answering a few questions:

- What is your mission?
- How would you describe your organization?
- How would a member sum up your organization?
- How do you want people to experience your services?

Creating a Logo

Your logo is essentially a visual representation of everything your organization stands for. It enables you to build a membership base and improve your marketing strategy. A brand logo should be immediately recognizable – original, simple, unique, appropriate and memorable – and should clearly convey the message of your organization.

A well-designed logo offers unlimited possibilities and opens the door to future interactions with your group's donors, members and volunteers. A well-thought-out logo design is the model for your organization's success. You can create your own logo or use a graphic designer or an online service.

Here are the steps to follow to design a logo:

- Focus on your mission;
- Think about the words that describe your organization;
- Sketch ideas based on these words;
- Choose colours that reflect your organization;
- Select a font;
- Create multiple versions;
- Get feedback and opinions from volunteers and members;
- Polish up your winning design.

Bien Vieillir Chez Soi
— Cocagne —

From the Field

The BVCSC logo was created by a local artist who conducted a brand analysis based on the organization's user profile and values. The logo is intended to represent the values of safety, respect and independence. The artist chose to represent the Bay of Cocagne to symbolize home. The great blue heron, a very common bird in the region, represents the independence of older adults and their freedom to choose where and how they will age.

Creating Promotional Material

Connecting with people and communicating a message requires some documentation. This can take the form of a brochure, a poster or even a website. Such materials create a strong impression in the minds of people, whether they are members or donors. Also, if you submit a grant proposal to a funding agency, you will be able to send this promotional material.

These materials should have your logo and include information that highlights your organization's accomplishments, services and values.

Essential promotional materials include the following:

- ***Business cards:*** Business cards are inexpensive and durable. Print as many as you want and hand them out to everyone you meet.
- ***Posters:*** Posters can be a remarkably effective way to get your message across to the public. They allow you to raise awareness of the programs and services you offer by helping you communicate with community members. Posters can reach large audiences as they are accessible to people isolated by illiteracy or poverty.
- ***Brochures:*** A brochure or pamphlet is carefully designed promotional material that provides information about the organization and its mission, services/programs and goals. Images that reflect your organization, including your logo, will be featured prominently. Brochures can be distributed at meetings and workshops and serve as important introductory materials.

🗁 BVCSC Toolkit

"About BVCSC" Brochures

HUMAN RESOURCES

Administration of a One-Stop Shop

There are several types of tasks that need to be completed to ensure the proper operation and management of your one-stop shop. They include the following:

1. Coordinating services and volunteers;
2. Administrative management, communication and marketing;
3. Building partnerships and service programs;
4. Preparing grant applications and seeking funding;
5. Advancing the organization's goals and sustainability.

The number of staff and volunteers in your organization will depend directly on the number of clients you serve, their needs and your financial resources. Some of these tasks can be performed by board members or volunteers, while others must be performed by full-time or part-time staff.

Service coordination is certainly the most critical position in the operation of a one-stop shop. A sample job description that can be used for a job posting is available in **Appendix VIII**. As your organization grows, staff will also need to be hired to provide general management and day-to-day administration of the organization.

From drafting policies that create a safe environment to securing the best talent, human resource management plays a critical role in the success of your project/organization. Board members, volunteers and full or part-time staff need to understand the regulations, policies and procedures that must be put in place in order to stay in compliance with the law and have happy and well-supported staff.

From the Field

The person who fills the service coordination position must be carefully selected. They are the first person with whom the public and members interact, and they assess the needs of older adultolder adults and coordinate the delivery of one-stop services. You need to find someone who is organized and enjoys working with the public for your project to be successful.

Developing policies makes it possible to recruit and retain a strong workforce, treat employees consistently and establish standards to follow. Administrative policies are also needed to ensure that your organization runs smoothly and to guide the work of employees and volunteers.

BVCSC Toolkit

Policy Guide: Human Resources

The human resources policies developed by BVCSC address the following topics:

a) Staffing needs assessment and recruitment;

b) Selection and hiring of personnel;

c) Orientation and training of new employees;

d) Compensation, hours of work and vacations;

e) Performance, discipline and termination.

BVCSC Toolkit

Policy Guide: Administration

The BVCSC administrative policies cover the following topics:

a) Confidentiality and access to information and privacy;

b) Conflicts of interest, code of ethics and intellectual property and copyright;

c) Language of communication, communication and media relations;

d) Conflict resolution and complaints;

e) Criminal record and employment reference checks;

f) Use of computer resources;

g) Use of tobacco, alcohol and legal and/or illegal drugs;

h) Dress code and identity card.

Creating a Volunteer Program

Volunteers are the "face" of your organization. Therefore, it is important to ensure that the volunteers you work with are a true representation of your vision and mission. Volunteers are important contributors to the care and socialization of older adults and play an intricate role in aging in place. Volunteers must be caring people with an interest in making a difference in someone's life.

Before you begin creating your volunteer program, you must first establish what your organization hopes to accomplish with the program. What are your goals and how do you plan to achieve them? Once you have defined the overall goal of the program, you can begin to plan how volunteers can work together to achieve that goal.

Here are some things to consider when creating your volunteer program:

- What tasks should your volunteers perform?
- What skills and qualifications do volunteers need to perform these tasks?
- How can you define volunteer roles that describe the skills and scope of work required for each task?
- When do you want the program to start and end?
- When do you need volunteers and what tasks do you need to accomplish within a specific time frame?

Once you have answered the above questions, you can begin to develop your volunteer program plan. Start by defining the roles of the volunteers and your programming. Once everything is set up and ready to go, you need to turn your attention to how you will find effective, passionate and dedicated volunteers.

By developing a solid volunteer management strategy, the team can create a positive and immersive volunteer experience that will help cultivate long-lasting and mutually beneficial supportive relationships.

🗁 BVCSC Toolkit

BVCSC Volunteer Manual
Policy Guide: Volunteering

BVCSC's volunteer policies cover the following topics:

a) Recruitment and selection;

b) Orientation and training;

c) Performance appraisal and discipline;

d) Recognition.

Criminal Record Check

If a person's job requires them to be alone with vulnerable people or to do an activity that may be related to a criminal record (such as driving a vehicle or handling money), a background check can help identify potential problems before they start. Employees or volunteers must be informed that they will be subject to a background check.

Some may see this as an invasion of privacy, while others may see it as an important precaution. The easiest way to explain the importance of this check to volunteers is to help them understand the importance of their role and the possibility that they may find themselves in sensitive situations. You can also let them know that background checks help make the volunteer environment and experience safe for everyone involved.

Why Should You Conduct a Background Check?

There are many reasons to conduct a background check on applicants, including:

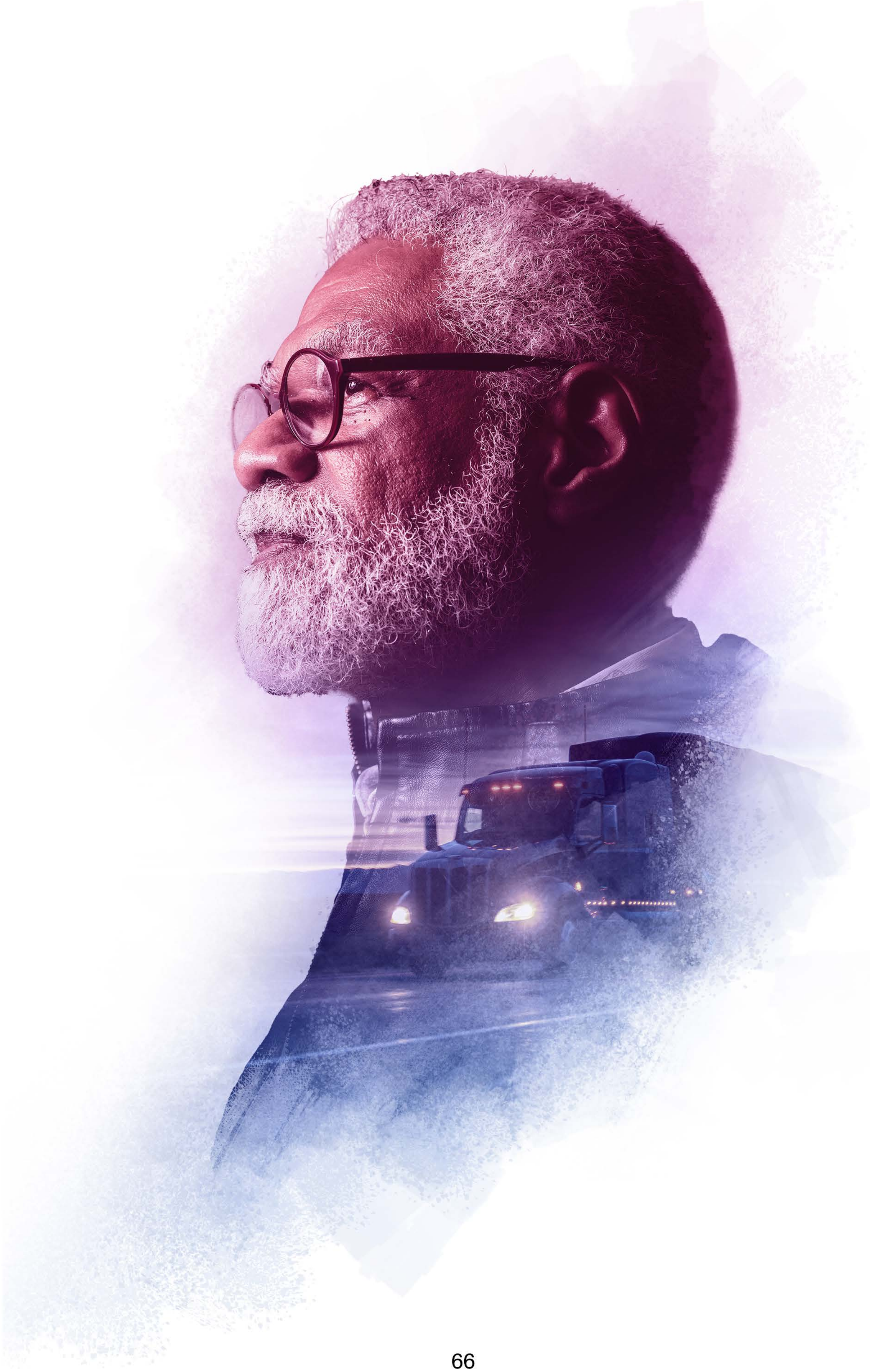
- Failure to do due diligence when screening employees and volunteers can put those they work with at risk. Legally, "due diligence" can be used to show that an organization has done everything possible to prevent something from happening.
- Ensuring that the employee/volunteer does not have a criminal record, especially if they will be working in a high-risk position involving vulnerable people.
- Requiring a criminal background check will give you the information you need to ensure that safety is maintained within your organization.
- Ensuring that services are provided in a safe environment by competent and trustworthy staff and volunteers.
- For legal reasons, non-profits need to be protected from any sort of legality issues when providing services.
- If you sense that an employee or volunteer is hesitant to submit to a background check, ask if they have any concerns and let them know exactly what you are looking for in the check. You can also offer support and inform them of the confidentiality that comes with processing background checks.

Do You Need a Background Check for All Volunteers?

Not all volunteer positions require a background check. Some positions require it, and for others it is simply good risk management to do background checks. Selection requirements depend on the level of risk associated with a certain position. A check also depends on whether the person needs to work with or without supervision.

Keep in mind that background checks are only one part of the risk management work that your organization must do. In-depth volunteer interviews, reference checks, policies, job descriptions and volunteer training are all essential to managing organizational risk. For more information, visit the Public Safety Canada website. [5]

[5] Appendix IX - Online Resources : Government of Canada Public Safety Guide



FINANCIAL MANAGEMENT

Using Money Responsibly

In order to use your financial resources to accomplish your mission effectively and efficiently, it is important to establish clear policies and practices to regularly monitor how funds are being used. The purpose of this financial management system is to ensure the financial stability of the organization, which is essential to long-term success.

What are the Responsibilities of the Board of Directors, Staff and Auditor with Respect to Financial Planning and Reporting?

- The board of directors must review and approve a detailed written budget of revenues and expenses on an annual basis and gain a sufficient understanding of the assumptions underlying the development of the budget. This operating budget should include: expected revenues, including grants, and expenses, including salaries, benefits, rent, office equipment and supplies, and program and administrative costs.
- Those responsible for an organization's financial reporting must prepare consistent, timely and accurate financial reports with comparisons to the organization's budget, and present them to the board of directors.
- The organization must adopt written financial procedures and have appropriate financial management software to record revenues and govern major expenditures and use of assets.
- The organization should periodically assess its risks, take appropriate steps to minimize them, and purchase appropriate types and levels of insurance to manage its liabilities effectively.
- Board members and key personnel must know how to properly read and interpret the financial statements, including the limitations on the use of allocated funds.
- The board treasurer should take a leadership role in helping the board understand its financial management duties. It also needs to make the board of directors aware of the organization's current financial position, revenue projections and the need for timely expenditure adjustments to maintain the organization's financial health.

BVCSC Toolkit

Policy Guide: Finance

BVCSC's financial management policies include the following topics:

a) Fiscal year and division of responsibilities;

b) Budget and cost allocation;

c) Management of bank accounts, assets, reserves and petty cash;

d) Insurance and grants;

e) Ethical fundraising practices;

f) Billing and payroll processing.

Operating Expenses

Unless you have experience in running an NPO, it is not always easy to estimate the necessary investments and operating costs of an organization such as BVCSC in advance. To assist you in implementing your project, the table below outlines BVCSC's various expense items. To give you an idea, BVCSC's annual budget is approximately $250,000, of which 80 percent is dedicated to the salaries of the three full-time employees. It is certainly possible to start a one-stop-shop project with a single staff member to coordinate services. However, in order to ensure that your one-stop shop runs smoothly, this person will need to be supported by volunteers and a competent board of directors.

Staff

- General manager
- Service coordinator
- Administrative assistant

Rent and Utilities

- Rent
- Electricity, heating
- Internet, telephone

Activities and Services

- Fees and expenses related to activities (e.g., printing of materials, snacks, room rental)
- Costs of services provided (e.g., meal preparation and home delivery, travel reimbursement for volunteers and the service coordinator)

Administrative Services

- Liability insurance for directors and volunteers
- Annual WorkSafeNB dues
- Bank fees
- Professional fees (e.g., auditor of annual expense report)
- Office supplies
- Website hosting and software licenses (e.g., Microsoft Office, QuickBooks)
- Advertising and information materials (e.g., flyers, business cards, mailing costs)

Your project expenses will vary based on the needs of your community, the amount of services you decide to offer and the professional expertise of your board members or community network. For example, a retired accountant may be willing to help you prepare your books for the annual financial audit at no charge. It is also perfectly acceptable to start with one or two services and aim to gradually grow your one-stop shop. It is also not necessary to become an incorporated organization at the outset (see section on **Incorporation**). A gradual growth approach consistent with your resources and capabilities will contribute to the sustainability of your program over the long term.

Lastly, plan for furniture and equipment purchases such as a computer, telephone and printer, if necessary. It is also important to choose an office space that is appropriate for the needs of older adults and the operation of the one-stop shop. Your office should be easy to find and accessible for people with limited mobility. It must also include at least one closed room to ensure confidentiality during calls with users and a filing cabinet with a lock to store the organization's files and documents.

From the Field

To keep your project costs down, consider partnering with an organization in your area to share the cost of office space rentals or the services of an administrative assistant.

Sources of Funding

Grant Applications

A grant application is a document written for a funding agency to convince assessors to provide you with support. Before you begin writing your application, you must:

- Develop a specific, logical and achievable plan;
- Find a grant agency that funds projects like yours;
- Research this organization to ensure that its mission aligns with your plan;
- Review the organization's grant application guidelines.

Your application must be written logically. To do this, divide your application into sections with clear headings. Follow the headings and content requirements set forth in the granting agency's call for grant applications exactly.

Grant Application Components

Overview/Summary

- What is the objective of your project?
- What are the expected results?
- How will you achieve these results?
- Why is your project important?

Description of the Problem or Needs

- Clarify the needs or problems you wish to address in the project and what the impact will be in the community.
- Describe the group of people targeted by this project and include data.

Project Description, Goals, Objectives, and Methodology

- What are the objectives and results of the project?
- How will you achieve these results? What methods will you use?
- How will you measure or recognize the achievements of your project?
- How will the project productively address the issues?
- What will be the timeline for your project?

Many of these questions relate to the impact of the project. Funders want to see that you have clearly established the realistic benefits of your work and how you plan to verify and evaluate your achievements.

Budget

You must clearly explain the amounts requested and why. Budgets are often submitted in table format. Each amount must be clearly stated, and you may need to justify whether the costs, materials and equipment are necessary and reasonable for your project.

Other Sections that are Sometimes Required

- Cover letter
    - A cover letter that briefly describes your project and conveys enthusiasm for it.
- Organizational qualifications
    - When introducing your organization, you may need to devote an entire section to describing its nature, mission and function. This is often similar to the section where you are reviewing a problem.
- Supporting documents
    - Supporting documents for your proposal, presented as appendices:
        - Endorsement files
        - Information on tax status
        - Biographies of your organization's staff
        - Letters of support from organizations or groups that are associated with your project, etc.

From the Field

Collecting and compiling administrative data about how your one-stop operates is essential to support your grant applications. This data includes, for example, the number of clients and the services they use, the number of activities and the number of people who participate in them, the number of calls per month and their nature, and the number of volunteers and the number of hours they provide. Although this task takes time and organization, you will greatly increase your chances of success by including statistical data in your applications.

Grant writing is hard work, requiring you to closely analyze your vision and critically examine how your solution will effectively address a need or problem. Keep in mind that grant competitions are often very competitive and only well-written and justified applications are considered.

How to Solicit Donations

Donors are the backbone of your organization. Your fundraising plan should include a strategy for finding potential donors who can make a significant gift.

Creating a Donor List

Potential Donors

Potential donors are people who have not yet made a donation, but who would be prime candidates to support your organization in some way. You'll want to make sure they receive your mailings and participate in your activities.

Individual Donors

Individual donors come to your organization for a myriad of reasons. They may have become members or donated to a cause highlighted by activities or events you have organized. The correspondence sent to them each year is not intended to solicit donations, but rather to update them on key initiatives or the general status of the organization. Their donations may be small, but frequent. They can respond to your call for membership, participate in your activities and make a donation in response to a specific need.

Major Donors

Large donors can take years to find, but once they decide to give, they give large amounts. Some may have the ability to give a large amount annually, while others may give strategically when you are doing a special campaign. The correspondence sent to them each year is not intended to solicit donations, but rather to update them on key initiatives or the general status of the organization.

Know Your Donors

Make sure you have done your research to identify the areas in which the donor is willing to invest, as well as their tastes.

- Donor's interests
- Type of support offered
- Philanthropic activities
- Engagement process
- Preferred method of communication
  (emails, letters, calls, in-person meetings, etc.)

Writing a One-Pager

When contacting a potential donor, you will want to make a connection quickly. A one-pager that you can send in advance of a meeting or leave behind afterwards summarizes your organization's work and highlights its accomplishments. The purpose of this document is to get the donor interested in your work.

A one-pager includes the main messages and the request. The main points are to identify the problem you are trying to solve, your unique solution to that problem and the evidence of your past success. The last point is your request. Make sure the donor knows what you want them to do once they have finished reading.

Connecting with Potential Donors

Remember that first impressions are often last impressions, so be very careful when communicating with donors. When approaching a new donor, make sure you have done proper research and identified areas where you can benefit from funding.

Organizing a Meeting

Once you have found the donor you want to approach and know why you want to meet with them, schedule a meeting. To do this, simply write an email on behalf of the organization telling the donor that you would like to meet with them. This should be followed by a phone call to arrange an appropriate time and place for the meeting.

In preparation for this meeting, it is important to set a clear objective and agenda. Among other things, you want to do the following:

- Inform them of existing projects;
- Explain the latest work done in the organization;
- Invite them to an event, membership drive, etc.;
- Ask for support;
- Get feedback/advice on existing projects.

You must maintain contact with potential donors and funders. It often takes time to build relationships with them. Even if they don't say yes immediately, stay in touch. Send them a periodic update on your organization's efforts or a news clip on a topic in which they have expressed interest. Invite them to an event so they can learn more about your organization's work.

Solicitation

Be sure to begin your presentation by describing the problem to be solved or the project being considered to the potential donor. After describing the specific actions you will take, explain why you are the best person to do the job. End your presentation with a vision of what you will accomplish with the donor's support that is directly related to their core concerns.

Make the donation process easy by offering multiple options (by cheque, monthly subscription, online donations, etc.).

Thank Your Donors

Sending a thank you message to donors and including their names on your Facebook page, website and newsletters will motivate donors to continue their support.

Fundraising Campaigns

A fundraising campaign is a time-limited effort to raise a significant amount of money for a specific project. It has a beginning and an end, and it can often extend over several years.

Mailing

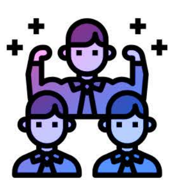
Direct mail fundraising is a form of direct marketing used to solicit funds and recruit new donors or members. It helps to inform, maintain interest, provide a solicitation reminder and increase the level of contributions.

Telemarketing

The greatest success of telemarketing comes from well-trained volunteers who are already donors. A good script is needed for volunteers to use on calls, and a call sheet form for each donor is also needed.

Planned Giving

Planned giving is a method of support that allows donors to make larger gifts than they could with their income. It is a way to invest money so that the donor receives benefits over their lifetime and then bequeaths the remaining funds to the non-profit organization.



Special Events

Special events are a way to recognize and strengthen relationships with current donors, recruit or introduce your organization to new donors, generate publicity for your organization and its mission, provide a fundraising experience for your staff, directors and volunteers, and raise funds.

Creative ideas can help you launch longer-term initiatives and raise resources quickly. The effectiveness of your ideas depends on how well they engage donors, maximize participation, motivate immediate action and encourage donors to give back.


WHO WE ARE

About the Authors

Dr. Catherine Bigonnesse and Ms. Majella Dupuis were the co-leaders of the pilot project leading to the creation of Bien vieillir chez soi Cocagne. Dr. Bigonnesse has a Ph.D. in gerontology and is now an assistant professor at the Department of Political Science at the University of New Brunswick. Ms. Dupuis is a retired nurse and led the work of the Cocagne Age-friendly committee for many years. She now serves as the President of Bien vieillir chez soi Cocagne. Ms. Colette Lacroix joined the team as project manager. She is a retired teacher and has an extensive experience in developing and managing not-for-profit organizations.

Contact Us

For more information about this document or to access its complementary toolkit,
contact Bien vieillir chez soi Cocagne:

BVCSC Centre 50
10 Villa Street
Cocagne, NB
E4R 3M6

bvcscocagne@outlook.com

506-576-2100

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- Communauté rurale de Cocagne Age-Friendly Community Committee
- Université de Moncton's Centre d'études du vieillissement
- Communauté rurale de Cocagne municipal council
- Centre 50 d'Âge d'Or Inc.
- Pays de Cocagne Sustainable Development Group
- Kent Community Inclusion Network

The time, energy and expertise you contributed to this collaborative effort have resulted in a better set of tools to support organizations that wish to implement such a project.

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Financial contribution from

Public Health Agency of Canada

Agence de la santé publique du Canada

Project Manager Position

Job Description

Under the supervision of the steering committee chair, the person assigned to this position will ensure the start-up and implementation of the project.

Qualifications

- At least four years of experience as a project manager/project support officer.
- High level of proficiency in Microsoft Office and other project management tools.
- Bachelor's degree or higher, preferably with a major in gerontology or social work.
- Experience in a non-profit sector.
- Fluency in French and English.
- Good communication skills and ability to organize and plan.
- Ability to work interactively with stakeholders.

Main Duties and Related Tasks

Working closely with the steering committee, the successful candidate's duties and responsibilities include the following:

1. **Implement the Decisions of the Steering Committee**
    - Ensure the implementation of the strategic plan and the action plan, and coordinate the non-profit organization;
    - Adhere to the project timeline and allocated budgets;
    - Act as a resource person for the steering committee to make informed decisions;
    - Compile information, interpret it and present it to the steering committee (information on community trends and resources);
    - Keep the committee informed of important issues regarding the development and delivery of programs and services;
    - Provide guidance to the steering committee on process issues (i.e., mandates, decision making, accountability, etc.).

2. **Project Document Management**
    - Prepare and collect the necessary documents;
    - Participate in meetings and present reports and minutes of steering committee meetings;
    - Draft documentation to be used (forms, information packages, letters, policies and procedures);
    - Create a filing system for secure access and archiving of project-related documents.

3 Monitor and Supervise the Organization's Financial Management

- Manage and monitor the budget;
- Find new sources of funding;
- Maintain relationships with funding agencies;
- Write accountability reports to be submitted to funders.

4 Establish, Maintain and Enhance Relationships with the Community to Accomplish the Mission, Vision and Goals of the Project

- Stay abreast of community needs and the changing context in which programs are delivered;
- Build and maintain relationships with a wide range of stakeholders, including community groups,
- government agencies, non-profit organizations and the business community;
- Develop and implement activities in the community to raise the project's profile.

5 Communication

- Create promotional materials;
- Prepare and draft press releases and speeches as requested by the steering committee;
- Establish and maintain contact with various media outlets.

6 Human Resources Planning and Management

- Ensure the hiring of employees, professionals or consultants related to the project;
- Recommend staffing requirements for organizational management and program delivery;
- Oversee the implementation of human resources policies, procedures and practices, including the development of a job description for staff;
- Establish a positive, healthy and safe work environment in accordance with all appropriate laws and regulations;
- In collaboration with the steering committee, recruit, interview and select staff with the essential technical and personal skills;
- Ensure that staff are given an orientation about the organization and that appropriate training is provided;
- In conjunction with the steering committee, implement a performance management process for staff that includes ongoing monitoring and an annual performance review.

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Registration Form - BVCSC Service Directory	
Company name	
Resource person	
Address	
Email	
Phone number	
Website, Facebook	
Types of services offered	☐ Food (grocery stores, restaurants, meals on wheels) ☐ Beauty and well-being (hair salon, natural products) ☐ Retail business ☐ Hospitality (hotel, B&B, inn) ☐ Repair and maintenance (plumbing, snow removal, general work) ☐ Health and medical services (medical clinics, massage therapy) ☐ Financial services (bank, credit union, insurance broker) ☐ Municipal services (police, fire, post office, recycling) ☐ Religious services (church, gatherings) ☐ Community support (charity, donations, used items) ☐ Technology and computers (computer repair, advice) ☐ Car and mechanical services (garage, bodywork, tires) ☐ Other: [specify]
Description of services	[Brief description of the services offered by the organization]
Authorizations	☐ I consent to the sharing of the information on this form with the user members of Bien vieillir chez soi Cocagne (BVCSC) for the purpose of using my services. ☐ I consent to the information contained on this form being posted on the organization's website, which will go live in the fall of 2020. ☐ I understand that I may contact BVCSC at any time to remove my company from the service directory. Name of authorized person: Authorization given on: [DATE]

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Roundtable on the Needs of Older Adults in Cocagne

Preparation

1. If possible, make sure you do not have two representatives from the same organization at the same table.
2. Designate a secretary
3. Designate a spokesperson for the plenary sessions
4. Designate a person responsible for the sticky notes
5. Designate a person to keep track of time

Table #	Date:
Organizations at the table (please fill in)	
Organization 1:	
Organization 2:	
Organization 3:	
Organization 4:	

Schedule	
Welcome, Introduction of Participants, Proceedure	7:00 – 7:10 p.m.
Topic I: Available Resources and Unmet Needs of Older Adults	7:10 –7:25 p.m.
Plenary I	7:25 – 7:35 p.m.
Topic II: Financial Security of Ongoing Projects and Initiatives	7:35 – 7:55 p.m.
Mini-Break	7:55 – 8:00 p.m.
Plenary II	8:00 – 8:15 p.m.
Topic III: Collaboration and Partnerships for Older Adults' Well-Being	8:15 – 8:30 p.m.
Plenary III	8:30 – 8:40 p.m.
Conclusion: Five Key Messages to Share	8:40 – 9:00 p.m.

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Topic I: Available Resources and Unmet Needs of Older Adults - 15 minutes
Question 1 What resources or services do you think your organizations provide that help older adults in Cocagne age in place as long as possible?
Question 2 In your opinion, what are the needs of older adults that are still not being met properly? What resources or services are missing? • Identify three unmet needs that are the most pressing on a sticky note.

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Topic II: Financial Security of Ongoing Projects and Initiatives - 20 minutes

Question 3

In your opinion, how can stable and regular funding be ensured for your organizations? What sources of funding would you like to access, but seem unrealistic or impossible at the moment?

Question 4

In an ideal world (we dream big!), how would you meet the long-term financial needs of your organizations?

- Write down your favourite idea on a sticky note.

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Question 5

What obstacles do you think might prevent the ideas you raised in questions 3 and 4 from being implemented? What are the solutions?

- Write the three most important obstacles on a sticky note.
- Write your solutions to these obstacles on a sticky note.

Topic III: Collaboration and Partnerships for Older Adults' Well-Being - 20 minutes

Question 6

Do your organizations share similar goals or a common mission? In what ways do you think they could work together to support the well-being of older adults in Cocagne?

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Question 7

What obstacles do you think might prevent the ideas you raised in questions 3 and 4 from being implemented? What are the solutions?

- Write the three most important obstacles on a sticky note.
- Write your solutions to these obstacles on a sticky note.

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Questions

Topic I: Available Resources and Unmet Needs of Older Adults - 15 minutes

Question 1
What resources or services do you think your organizations provide that help older adults in Cocagne age in place as long as possible?

Question 2
In your opinion, what are the needs of older adults that are still not being met properly? What resources or services are missing?

- List three unmet needs that are the most pressing on a sticky note.

Topic II: Financial Security of Ongoing Projects and Initiatives - 20 minutes

Question 3
In your opinion, how can stable and regular funding be ensured for your organizations? What sources of funding would you like to access, but seem unrealistic or impossible at this time?

Question 4
In an ideal world (we dream big!), how would you meet the long-term financial needs of your organizations?

- Write down your favourite idea on a sticky note.

Question 5
What obstacles do you think might prevent the ideas you raised in questions 3 and 4 from being implemented? What are the solutions?

- Write the three most important obstacles on a sticky note.
- Write your solutions to these obstacles on a sticky note.

Topic III: Collaboration and Partnerships for Older Adults' Well-Being - 20 minutes

Question 6
Do your organizations share similar goals or a common mission? In what ways do you think they could work together to support the well-being of older adults in Cocagne?

Question 7
What barriers do you think might prevent the forms of collaboration or partnership you raised in question 6?

- Write the three most important obstacles on a sticky note.
- Write your solutions to these obstacles on a sticky note.

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BVCSC Service User Registration Form

Date of first meeting: ____

Person met: ________________________ **Relationship:** ______________________

Information	
Last name:	First name:
Year of birth:	Phone: ___________________________ Email: _____________________________
Address:	
Language spoken in kindergarten:	Language spoken at home:
Emergency contact	
Name: Relationship with the person: Phone number(s): Home: Cell: Work:	
Name: Relationship with the person: Phone number(s): Home: Cell: Work:	

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Additional Personal Information

Living situation: ☐ Lives alone ☐ Does not live alone
Details:

Housing type:

☐ Detached house ☐ Duplex ☐ Mini home ☐ Apartment ☐ Other

Is there an animal in the house? ☐ Yes ☐ No
If so, which type of animal:

Do you consider yourself a homebound person? ☒ Yes ☒No
Please describe:

Do you have access to government-funded services? ☒ Yes ☒ No
Which ones?

Physical considerations:
Wears glasses ☐ Yes ☐ No Contact lenses ☐ Yes ☐ No
Details: ____

Uses a cane ☐ Yes ☐ No Uses a wheelchair ☐ Yes ☐ No
Details: ____

Has difficulty hearing ☐ Yes ☐ No Wears a hearing aid ☐ Yes ☐ No
Details: ____

Wears a hairpiece ☐ Yes ☐ No
Details: ____

Wears dentures ☐ Yes ☐ No
Details: ____

AutoAlert device (Lifeline) ☐ Yes ☐ No
Details: ____

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Other items of note:
____
____

What type of activities do you prefer?

☐ Physical ☐ Manual ☐ Intellectual ☐ Cultural ☐ Other: ______

Do you like:

Reading ☐ Yes ☐ No Favourite reading topics: __

Music ☐ Yes ☐ No Music style: _____

Television ☐ Yes ☐ No Radio ☐ Yes ☐ No

Favourite programs or channels: ____

Sports ☐ Yes ☐ No What type: ______

Outings ☐ Yes ☐ No What type: ______

Manual activities (sewing, drawing, etc.) ☐ Yes ☐ No

Examples: ____

Other interests: ____

Reference source

☒ Self-referral ☒ Extramural ☒ Friend/family member ☒ Agency/community organization

☒ Doctor/nurse ☒ Other/please specify: ______________________________________

Details: ____

How did you hear about the program?

☐ Newspaper ☐ Parish bulletin ☐ Radio ☐ Poster ☐ Brochure ☐ Friend

☐ Family member ☐ Other/Please specify: ______________________________

Details: ____

Needs assessment of services offered

Table of services offered attached.

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User consent to collection and use of personal information
I hereby consent to provide personal information, including my address and telephone number, to the Bien vieillir chez soi Cocagne program. I understand that this information will be entered into an electronic database used to provide me with and/or refer me to appropriate services.
Safety
Everyone's safety is very important to the Bien vieillir chez soi Cocagne program. We make sure to treat everyone with dignity and respect. Bien vieillir chez soi Cocagne clients, program staff and volunteers have the right to expect a safe and abuse-free environment. They have the right to refuse to provide in-home services when they feel their workplace is unsafe.
Please sign below to indicate that you have read and agree to the terms described above.

Date: ______________________________

____ ______________________________________
Name (please print) Signature

____ ______________________________________
Evaluation completed by (please print) Signature

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Memorandum of Understanding

BETWEEN XXXXXXXXX

AND XXXXXXXXX

WHEREAS one of the services provided by XXXXXXX is access to a hot meal service for people 50 years of age and older in XXXXXXXX so that they can live independently, healthily and safely at home for as long as possible;

WHEREAS XXXXXXXXXXX offers a nutritious meal service;

WHEREAS the purpose of this agreement is for the collaboration and participation of both organizations to facilitate channels of communication and collaboration;

Therefore, the partners wish to work together in accordance with the following clauses:

RESPONSIBILITIES OF XXXXXXXXX AND XXXXXXXXX

- Refer clients who require meal service.
- Recruit volunteer drivers to pick up meals between 11:15 and 11:30 a.m. and deliver them five days a week, Monday through Friday.
- Take all reasonable steps to reduce risk: screening, criminal background check, Social Development record check.
- Refer volunteer drivers to XXXXXXXXXXX.
- Promote the meal service.
- Distribute promotional material.
- Collect and share with XXXXXXXXXXX.

XXXXXXXXXXX

- Evaluate users' dietary needs.
- Prepare nutritious meals that include a main course, soup and dessert for $15 per day.
- Provide a copy of the menus to XXXXX.
- Provide disposable containers.
- Provide coolers for meal delivery.
- Manage volunteer drivers for meal delivery.
- Bill users or Social Development, as appropriate, monthly for meal costs.

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- Collect and share with XXXXXXXXXXXX information essential to the sound management of user records.
- Collect and share statistics with XXXXXXXXXX for evaluation purposes.

INTELLECTUAL PROPERTY

The parties agree that any intellectual property jointly developed through activities covered by the MOU may be used by either party for non-commercial purposes without getting the consent of the other party and without accountability to the other.

All other intellectual property used in the implementation of the MOU will remain the property of the party that provided it.

EFFECTIVE DATES AND CHANGES

This Memorandum of Understanding shall become effective upon signature by both parties and shall remain in effect for a period of two (2) years from that date, unless terminated earlier. Neither party may assign or transfer all or any part of this MOU without the prior written consent of the other party.

The MOU may be renewed at the end of this period by mutual written agreement of both parties.

The provisions of this MOU may only be amended by mutual written agreement of both parties.

Any party may terminate this MOU and any agreement by giving thirty (30) days' prior written notice to the other party.

The persons signing this MOU on behalf of their respective entities represent and warrant (without personal liability) that upon execution by each of them, this MOU will have been duly executed by the entity each represents.

FINANCIAL OBLIGATIONS

The parties acknowledge and agree that this MOU does not create any financial or funding obligations for either party.

SIGNATURES

This agreement embodies the full understanding and agreement between the partners and no amendment will be effective unless signed by both partners.

XXXXXXXXXX	XXXXXXXXXX
Signature____________________	**Signature**____________________
Name____________________	**Name**____________________
Title____________________	**Title**____________________
Date____________________	**Date**____________________

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Memorandum of Understanding

BETWEEN XXXXXXXXX

AND XXXXXXXXX

WHEREAS ONE of the services provided by XXXXXX is access to a community transportation service for people 50 years of age and older so that they can live independently, healthily and safely in their homes for as long as possible;

WHEREAS XXXXXXX provides transportation for Kent County residents that is reliable, courteous, safe, efficient, inclusive, and sensitive to the needs of all individuals and respectful of each individual's privacy through XXXXXXXXXXX;

WHEREAS the purpose of this agreement is for the collaboration and participation of both organizations to facilitate channels of communication and collaboration;

Therefore, the partners wish to work together in accordance with the following clauses:

RESPONSIBILITIES OF XXXXXXXXX AND XXXXXXXXX

- Recruit volunteer drivers for medical appointments, dietary needs and access to community and government programs.
- Refer volunteers to the XXXXXXXXXXX transportation service.
- Promote the community transportation service.
- Distribute XXXXXXXXX promotional material.
- Inform XXXXX when volunteers have completed training relevant to their role as a volunteer driver.
- Collect and share statistics with XXXXX for evaluation purposes.

XXXXXXXXXXX

- Take all reasonable steps to reduce risk: screening, criminal background check, Social Development record check.
- Provide orientation, training and supervision of volunteer drivers.
- Provide transportation for medical appointments, dietary needs, and access to community and government programs.
- Provide an escort service for older adults who are losing their independence so that they can go to medical appointments, grocery stores and other appointments with peace of mind.
- Reimburse volunteer drivers to cover some of their mileage costs.
- Inform XXXXXXXXXXX when volunteer drivers have completed training.
- Collect and share with XXXXXXXXXXX information essential to the sound management of user records.
- Collect and share statistics with XXXXXXXXX for evaluation purposes.

Bien Vieillir Chez Soi

INTELLECTUAL PROPERTY

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The parties acknowledge and agree that this MOU does not create any financial or funding obligations for either party.

SIGNATURES

This agreement embodies the full understanding and agreement between the partners and no amendment will be effective unless signed by both partners.

XXXXXXXXXX

Signature____

Name____

Title____

Date____

XXXXXXXXXX

Signature____

Name____

Title____

Date____

Bien Vieillir Chez Soi
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Annual Member Survey

A. SOCIO-DEMOGRAPHIC PROFILE
In what year were you born? ___________________
How long have you been a member of Bien vieillir chez soi Cocagne? ☐ Less than 6 months ☐ Between 6 months and 2 years ☐ 2 years or more
What is your gender? ☐ Male ☐ Female ☐ Other: ____________________ ☐ Prefer not to answer
What is your marital status? ☐ Single ☐ Married ☐ Common-law partner ☐ Separated/divorced ☐ Widow(er)
Do you have children? ☐ No ☐ Yes. How many? ______________ ☐ One of my children lives less than an hour away from me.
Who do you live with? ☐ I live alone ☐ Spouse/partner ☐ In a couple, but in separate housing ☐ My son or daughter ☐ Extended family ☐ Friend ☐ Other: _____________________

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What is the highest level of education you have completed? ☐ Primary ☐ Secondary ☐ College (professional, technical) ☐ University
Which of the following statements best describes your income level? ☐ My income ... ☐ Is not enough to meet my daily needs. ☐ Is just enough to meet my daily needs. ☐ Is enough to meet my daily needs without me having to worry. ☐ Allows me to make big purchases from time to time.
What type of housing do you currently live in? ☐ Single-family home ☐ Townhouse ☐ Condominium ☐ Apartment ☐ Other: ______________________
Compared to people your age, how would you rate your current health? ☐ Excellent ☐ Very good ☐ Good ☐ Average ☐ Poor

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B. SERVICES

Please indicate your level of satisfaction with the following services offered by Bien vieillir chez soi Cocagne. If you do not use the service, check "I do not use this service."

On a scale of 1 to 7, how satisfied are you with the information services provided by phone or in person?

Very dissatisfied 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ Very satisfied

☐ I do not use this service

On a scale of 1 to 7, how satisfied are you with the services to help you complete applications to social services?

Very dissatisfied 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ Very satisfied

☐ I do not use this service

On a scale of 1 to 7, how satisfied are you with social activities such as Coffee and Chat or Coffee and Cards?

Very dissatisfied 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ Very satisfied

☐ I do not use this service

On a scale of 1 to 7, how satisfied are you with public sessions such as the one offered by the Alzheimer Society?

Very dissatisfied 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ Very satisfied

☐ I do not use this service

On a scale of 1 to 7, how satisfied are you with courses such as computer courses or financial management courses?

Very dissatisfied 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ Very satisfied

☐ I do not use this service

On a scale of 1 to 7, how satisfied are you with the maintenance and minor work services?

Very dissatisfied 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ Very satisfied

☐ I do not use this service

If you are dissatisfied with any of our services, how can we improve them? Please enter your suggestions in the space below.

____
____
____
____
____
____
____
____
____
____

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C. AGING IN PLACE
On a scale of 1 to 7, indicate your opinion of the following statements:
Prior to becoming a member of Bien vieillir chez soi Cocagne, my level of confidence in my ability to age in place in the coming years was: Not at all confident 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ Fully confident
Since becoming a member of Bien vieillir chez soi Cocagne, my level of confidence in my ability to age in place in the coming years is: Not at all confident 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ Fully confident
I have all the resources I need to age in place for as long as I want: Strongly disagree 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ Strongly agree
My current health allows me to remain at home as long as I want: Strongly disagree 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ Strongly agree

D. OTHER COMMENTS?
Do you have any ideas for developing new services or activities? We would be happy to receive them. Please enter your suggestions or comments in the space below.

Interview Guide

Experience

Thinking about your experience as a volunteer in our organization ...

- What aspect of your involvement makes you most happy or proud?
- What aspect of your involvement could be improved or is problematic?
- To what factor(s) do you attribute these challenges?
- What do you think could be some solutions to these challenges?

Services

Based on your experience and contact with users:

- What are the most popular services?
- What services are missing?
- What services need to be improved?
    - How can we achieve this?
- Is there a type or profile of person who does not have access to our services?
    - How do you think we could make them aware of our services?

Conclusion

Is there anything else you'd like to discuss before we finish?

Coordinator Position

Job Description

Under the supervision of the board of directors, the coordinator will implement programs and services for people 50 years of age and older so that they can live independently and safely in their homes for as long as possible.

Qualifications

- Assess the needs of users and refer them to the appropriate services;
- Recruit, train, assign tasks to and supervise volunteers;
- Prepare and submit proposals for programs, special events and initiatives;
- Develop partnerships and collaborate with community and government agencies to facilitate the implementation of programs;
- Coordinate marketing efforts to increase community awareness of the benefits of aging in place;
- Develop administrative systems and management protocols;
- Maintain computerized lists of users and volunteers, compile statistics and develop forms;
- Provide administrative support.

Skills and Qualifications Sought

- Excellent command of spoken and written French;
- Knowledge of spoken and written English;
- Knowledge of the community environment;
- Computer skills: Proficiency in MS Office (Word, Excel, PowerPoint, Access, Outlook) and the internet;
- Experience in project implementation and management, organization of activities and development of awareness tools;
- Excellent communication and interpersonal skills;
- Planning process skills: prioritizing, planning, implementation and evaluation of projects;
- Ability to manage multiple files effectively and to work with initiative, independently and as part of a team;
- Networking and facilitation skills;
- Discretion, maturity and good judgment.

Skills and Qualifications Sought

The place of work is in Cocagne. The person must have a valid driver's license and access to a car.

Salary: According to the established wage schedule.

Full time, 35 hours per week for a one-year period with possibility of extension. Full-time start date is X XXX 20XX.

Online Resources

The Census Program Data Viewer produced by Statistics Canada

https://www12.statcan.gc.ca/census-recensement/2021/dp-pd/dv-vd/cpdv-vdpr/index-eng.cfm

The Age-Friendly Communities Evaluation Guide

https://www.canada.ca/en/public-health/services/health-promotion/aging-older-adults/friendly-communities-evaluation-guide-using-indicators-measure-progress.html

Incorporation in New Brunswick

https://www2.gnb.ca/content/gnb/en/services/services_renderer.201449.Incorporation_of_Non-Profit_Companies.html

Canada Revenue Agency on Registering a Charity

https://www.canada.ca/en/revenue-agency/services/charities-giving/charities/registering-charitable-qualified-donee-status/apply-become-registered-charity/deciding/advantages-obligations-becoming-registered-charity.html

Government of Canada Public Safety Guide

https://www.publicsafety.gc.ca/cnt/rsrcs/pblctns/bpg-scrng-vls/index-en.aspx