



MedicAlert®
FOUNDATION • FONDATION CANADA

EXCELLENCE
COLLABORATION
KINDNESS
DEDICATION
TRUSTWORTHINESS

MedicAlert Strategic Plan 2022 – 2024



Our Purpose

To put everyone living in Canada in a position to benefit from high-quality health information at a time of need.

Our Values

EXCELLENCE
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EXCELLENCE - We were founded to save lives and are responsible for excellence in everything we do. We believe in personal accountability and confidently taking bold actions to achieve our mission.

COLLABORATION - We multiply our social contribution through collaboration. We learn and innovate by listening to our members, health practitioners, first responders and other key partners. We pro-actively cooperate with all stakeholders because we know that together we can achieve more, faster.

KINDNESS - We are respectful, caring, considerate and friendly – striving to walk in the shoes of those we serve to make a difference every day.

DEDICATION - We are passionate about the important work we do. Integrity, initiative, professionalism and enthusiasm characterize the way we deliver our services. We take pride and satisfaction in the quality of what we do and offer.

TRUSTWORTHINESS - We are honest, reliable and dependable. Our clients can always count on us to follow through and to achieve positive outcomes.



Our Principles

Diversity

We respect the uniqueness, experiences and value that all people bring to the work we do.

Belonging

We cultivate a culture of connectedness and acceptance.

Equity

We believe in the fair treatment, access, opportunity, and strive to identify and eliminate barriers that have prevented the full participation of some groups.

Inclusion

We serve all with sensitivity, respect, and fairness.

Our Future



Our Strategic Plan 2022-2024 lays out a comprehensive blueprint to affirm our purpose and our Canada wide, long-term vision: **A world where no one is left alone in their time of need.**

The 2022-2025 Strategic Plan was developed under the careful guidance of the MedicAlert Board of Directors and a Special Strategic Planning Committee of the Board. We sought input from a wide range of stakeholders including our subscribers and donors, the first responder community, our academic and community partners. What we learned reinforced that after 60 years, MedicAlert is as valuable as service is it was back in 1961 when we were founded in Halifax, Nova Scotia – perhaps even more so. We learned that nine in 10 Canadians want first responders to have direct access to critical health information during a health crisis. We also learned that a growing number

of first responders value MedicAlert's ability to provide health information in a way that is consumable for them as they make decisions when seconds count. Their use of technology is growing exponentially, they need ours to do so as well.

MedicAlert's new Strategic Plan builds on our progress over the last two years and looks ahead with ambition, courage, humility, and optimism. In the face of the Covid-19 pandemic and significant technological disruptions, MedicAlert is prepared to move forward with this plan to evolve our legacy business model and embrace a digital-first strategy. These essential changes support the needs of vulnerable Canadians, their

families, first responders, and the health care system itself.

This strategic plan will be complemented by annual operational plans, ensuring that MedicAlert achieves our ambitious objectives over the next three years and prepares us to serve beyond 2024. We look forward to continuing our invaluable work in the context of modern-day health care delivery.

Blair Bigham
Chair, Board of Directors

Leslie McGill
President & CEO

Strategic Objectives 2022-2024

MedicAlert is unique among health charities in Canada. While our colleagues in disease-oriented charities focus on disease eradication through research or disease management through education and programming -- our primary focus is data and information exchange from the health system user to the first response triage – the very beginning of trauma or emergency health services. In short, we are the bridge that connects the community to the hospital, the doctor’s office or the clinic.

Our work is ripe for disruption from the private sector. Yet the uniqueness of Canada’s pride and joy – our healthcare system – means Canadians want something different than disruption from commercial enterprise, and they are willing to trust MedicAlert to deliver. In short it is truly our long-term vision be integrated into the healthcare system.

That vision will take time to achieve.

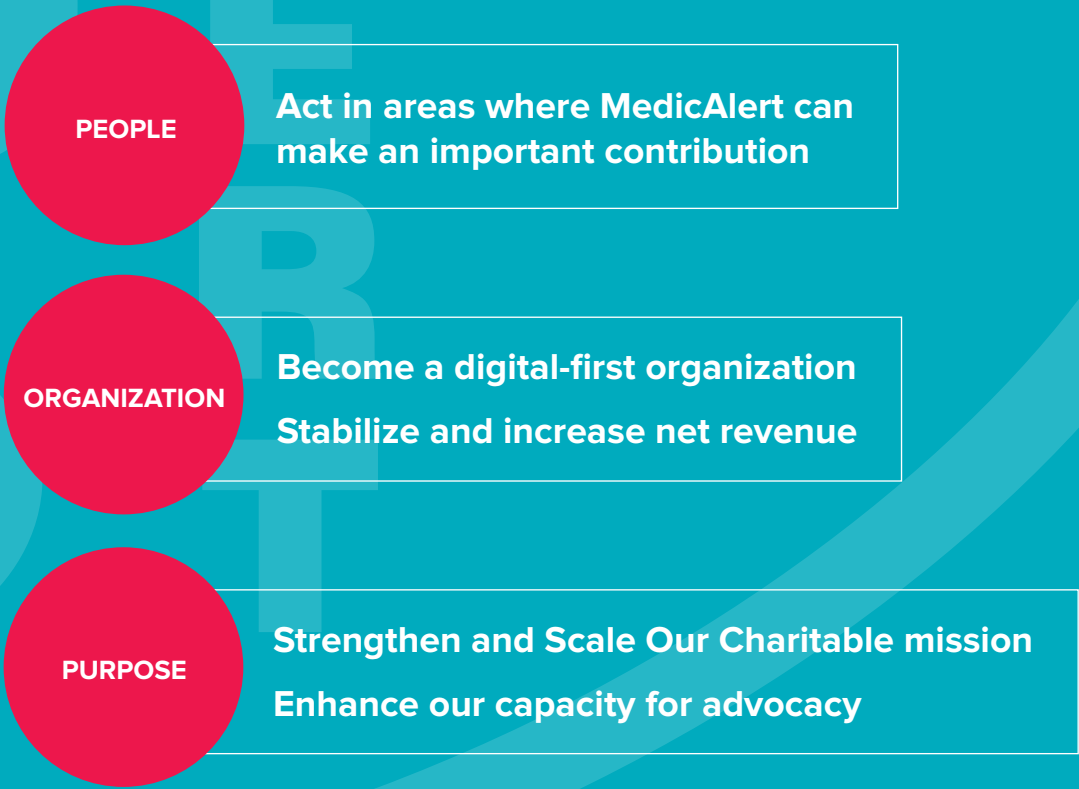
The Strategic Plan identifies five core objectives that will enable MedicAlert to best serve our mission and our vision and facilitate our goal for what people living in Canada need and want us to be now -- a digital-first, service-based organization.

Our five strategic objectives of the 2022 – 2024 Plan will not only focus our efforts but will also determine where we will direct our resources (talent, finances, assets) to make a meaningful difference for subscribers, donors, and partners.

These strategic objectives will be supported with specific strategies, tactics and measures. On an annual basis, we will share progress reports and specific annual measures of success.

Plan Pillars & Objectives

What we learned in the listening phase of our strategic planning process significantly impacted our choice of direction and the three key pillars of our plan:



The Plan Objectives are MedicAlert’s expectations of what we will accomplish over the course of the 2022-2024 strategic plan. The objectives set the organization’s intention to evolve its organizational model in service of stakeholders, partners, and donors.

People

Where we choose to focus our efforts has traditionally been broad for MedicAlert. What we have learned in our planning process is that today's health system realities call for us to focus on specific growing or underserved populations – those who are most vulnerable. To that end, while we will continue to serve all who need and want our services, we will focus our efforts on growing outreach, partnerships and programming in the following key areas:



Alzheimer's & other dementias

- Growing population expected to hit 1,000,000 Canadians by 2030
- We are the national experts and can leverage the national wandering registry taken over from RCMP in 2013
- Strong existing partnership with Alzheimer's Society with direct channels to the majority of families managing individuals with these illnesses
- Newly developing partnerships with Philips Lifeline whose focus is on becoming a leader in Alzheimer's safety and prevention.
- Wandering is a significant issue in search and rescue policing with high costs and poor outcomes for many people and MedicAlert is an essential service

Children 4-14

- Large population base of approximately six million young Canadians
- Leverage expertise of the No Child Without Program
- Future-proof MedicAlert to build engagement strategies for parents, children, and youth
- Non-disease-specific enables MedicAlert to develop programs to meet subscriber population needs
- Fill the need to normalize the school experience for children with chronic health conditions, disabilities, or mental illness.

Mental health

- One in every five Canadians lives with a mental illness and the pandemic has brought mental illness to the forefront of health care.
- 40% of police 9-1-1 calls are mental health related yet police training on how to manage these calls is less than adequate.
- MedicAlert will make a significant contribution to mental health care through advances in MAFCA's technology infrastructure (e.g. HELP 9-1-1 Project), which will ultimately eliminate the need for a person to wear an ID which can be stigmatizing for people with mental health conditions.



Organization

Become a Digital-First Organization

Health care is one of the most rapidly expanding sectors for technology disruption. MedicAlert, as a valued service among Canadians. Must take a proactive approach to augmenting its core technologies and future-proof its services to ensure people living in Canada remain protected at their time of need. We will:

- Focus on technology at scale to drive rapid growth
- Capitalize on the \$1.2M investment in digital transformation made in 2021
- Meet the needs of first responders for on-time, as needed data transfer to reduce barriers for health system integration
- Ubiquitous technology that can be embedded into product offering e.g. QR codes
- Given risk factors around data privacy continue to invest in legal, compliance and data governance to address this ever-changing landscape of legislation



Stabilize and Increase Net Revenue

The COVID-19 pandemic had a significant impact on Canada's charities. Viewing our fiscal accountability through this lens, MedicAlert is focused on futureproofing the organization through:

- Narrowing our focus on execution of strategic priorities and consistently seek opportunities for strategic 'no'
- Focusing on mass opportunities in our chosen areas of focus versus 1:1 relationship which are costly to acquire and maintain
- Building a product roadmap that addresses product market fit (including high-value partnerships that reduce time-to-market)

Purpose

As a charity with 60 years of service we draw on our past successes and look forward to the future.



Strengthen and Scale our Charitable Mission

- Leverage our charitable status to partner and engage with government and for-profit entities that will allow us the opportunity to scale.
- Emphasizing our three areas of “people” focus will enable increased fundraising results.

Enhance of Capacity for Advocacy

- Leverage our trusted voice with government and health systems to position MedicAlert as an essential partner for supporting vulnerable populations
- Partner with academia to conduct research in support of our vision to have an impact at a health systems level
- Capitalize on the federal and provincial governments’ budget focus on data and technology – an area where MedicAlert has considerable cross-jurisdictional expertise



Our Path Forward

Health consumers' expectations about how their needs are met have shifted dramatically in the past decade and have been accelerated by the COVID-19 pandemic. Our strategic plan represents an opportunity for MedicAlert to address the modern realities of health management by meeting our subscribers' needs, our first response partner needs, and the interoperability that is emerging within the health care system.

Our digital transformation journey began with the desire to address operational inefficiencies and subscriber experience. It was a significant step in our backbone infrastructure – necessary for us to do our work. Ongoing investment on a smaller scale will help us to be agile in responding to our stakeholder needs. It will help us to achieve stability and growth by:



- **Creating operating efficiencies through automation**
- **Creating better user experience on our web site**
- **Driving self-serve analytics for faster and more effective decision making**
- **Reducing duplication and error connecting back end and front end of our systems**
- **Monetization of data**
- **Increasing capacity for health research**
- **Helping us understand our subscribers, their purchase patterns and their outreach patterns, and where we can better serve them**
- **Increasing revenue**
- **Driving relevancy**
- **Increasing subscriber engagement**
- **Increasing our responsiveness**
- **Increasing our capacity for innovation**

Across the health care spectrum there are many areas where MedicAlert can choose to invest time and energy. Focusing our efforts on key populations that need our services and building a depth of expertise in these areas will enable us to have significant impact.

From impact comes trust and respect which is what will be required to expand our fundraising capacity. Our ability to share the impact of our donors’ contributions on helping us to grow our charitable impact will, in turn, begin a chain reaction that will broaden our base of support and enable us to more fully meet our mission and vision.

Supporting this work will be an advocacy platform buoyed by academic research. Our focus will be on systemic impacts of which a National Vulnerable Persons Registry is a cornerstone.

The growth and stability of our revenue is made possible through the continued focus within the other pillars of our plan. Going deep rather than wide creates the necessary structure to drive future success and will be a springboard to greater impact on people living in Canada who need us to ensure that high quality health information will be delivered when they need it to the people they need to assist in their time of need.

With the launch of this strategic plan MedicAlert will prioritize the following four strategies to transform our organization in service of our vision:

1. **Accelerate the process of becoming a digital first organization**
2. **Leverage our trusted charitable status to enhance our philanthropic revenue.**
3. **In collaboration with other health organizations, researchers and universities, advance research in enhancing support vulnerable people and other target populations.**
4. **Examine all current programs and projects to ensure alignment with our strategic plan and make the necessary adjustments, including winding down or cancel areas that are not in alignment.**

Excited About Our Future

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Our Strategic Plan sets the course for MedicAlert to further establish its importance as an essential service to subscribers and their families as well as an essential partner for first responders and health care systems across Canada. The Plan rests on a deep awareness that there is a lot of work to be done to transition from our legacy model. As we are committing to this plan, we are also committing to being responsive to the needs of vulnerable Canadians and the systems that seek to serve them. Guided by our vision, we will adjust our focus and resources. We are committed to ensuring that 'no one is left alone in their time of need.'



**For further
information,
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