



# **Business Plan 2007 – 2009:**

## **2008-09 Update**

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# BACKGROUND

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## Overview

SEARCH Canada acts as a resource and catalyst in the Alberta and Canada health system to strengthen the connections between research and practice, increase the capacity of organizations to make decisions on best evidence, and thus to improve health services and health outcomes. In implementing programs and services, SEARCH Canada works entirely in collaboration and partnership with member organizations, participants and stakeholders.

SEARCH Canada established a Board of Directors in November 2004 and began independent operations on April 1, 2005. However, SEARCH programs have functioned in Alberta since the Alberta Heritage Foundation for Medical Research (AHFMR), partnering with the Universities of Alberta and Calgary and Alberta's recently established regional health authorities, established the Swift Efficient Application of Research in Community Health Training Program (SEARCH) in 1996, and the Alberta Consultative Health Research Network (ACHRN) in 1998. In 2003, AHFMR developed a plan with its partners for the future of the SEARCH Program. The 2004-2009 Five-Year Strategic Plan called for a jointly funded, owned and governed not-for-profit organization called SEARCH Canada, which merged under one umbrella the SEARCH Program and ACHRN. The founding members in SEARCH Canada are AHFMR, the University of Calgary and all nine Alberta health regions

## Planning Context

In early 2005, the Board of Directors of SEARCH Canada endorsed the six core purposes of the Five-Year Plan and articulated the vision and mission of the new organization. Following the first year of independent operations, a strategic review by the Board reaffirmed Five-Year Plan and established developmental priorities to guide the remaining 3 years of the funding period, in light of accomplishments, experiences to date and the changing environment (see Appendix 4).

In addition to this planning process, a Three-Year Progress Review by an external expert panel occurred in December 2006. The recommendations of that panel confirmed the strategic priorities adopted by SEARCH Canada, and provided additional direction to inform planning for funding renewal. The panel identified the keys to SEARCH's success as

- the unique community pedagogy and faculty team;
- the ability to impact a wide range of human resource outcomes, such as leadership development, recruitment and retention;
- the strength of the collaborative network and organizational relationships;
- the ability to increase knowledge access and research capacity through the SEARCH Desktop offered through the Centre for Health Evidence (CHE);
- the province-wide system-level focus.

## PLANNING FRAMEWORK

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This Business Plan is intended to guide SEARCH Canada's operations for the last two years of its 2004-09 funding period. It supplements the *2004-09 Five Year Plan*, for which SEARCH Canada is accountable to its members. The 2008-09 Update provides a revised version of the 2007-09 Plan taking into account progress and learnings of the first year of the plan.

SEARCH Canada's business plan is aligned with and supports the plans and priority goals of its members and stakeholders, particularly in the areas of workforce and rural development. With its partnerships with academic institutions, health organizations and government agencies, SEARCH Canada is:

- Developing and delivering initiatives to educate, recruit and retain a highly qualified health workforce
- Delivering supportive programs and services in rural and remote communities
- Focusing research effort on issues identified as local and provincial health priorities
- Maximizing the use of research in practice, leading to effective, efficient health services for the benefit of Albertans.

Five core purposes define the long-term, system-wide outcomes to be accomplished through SEARCH Canada. Established in 1996, they were expanded in 2004 and refined in 2006. Four strategic priorities articulated in 2006 give a framework for choosing between opportunities and provide the basis for allocating resources and effort.

SEARCH Canada's five areas of operations and budget accountability work together in concert and coordinate efforts to achieve key results:

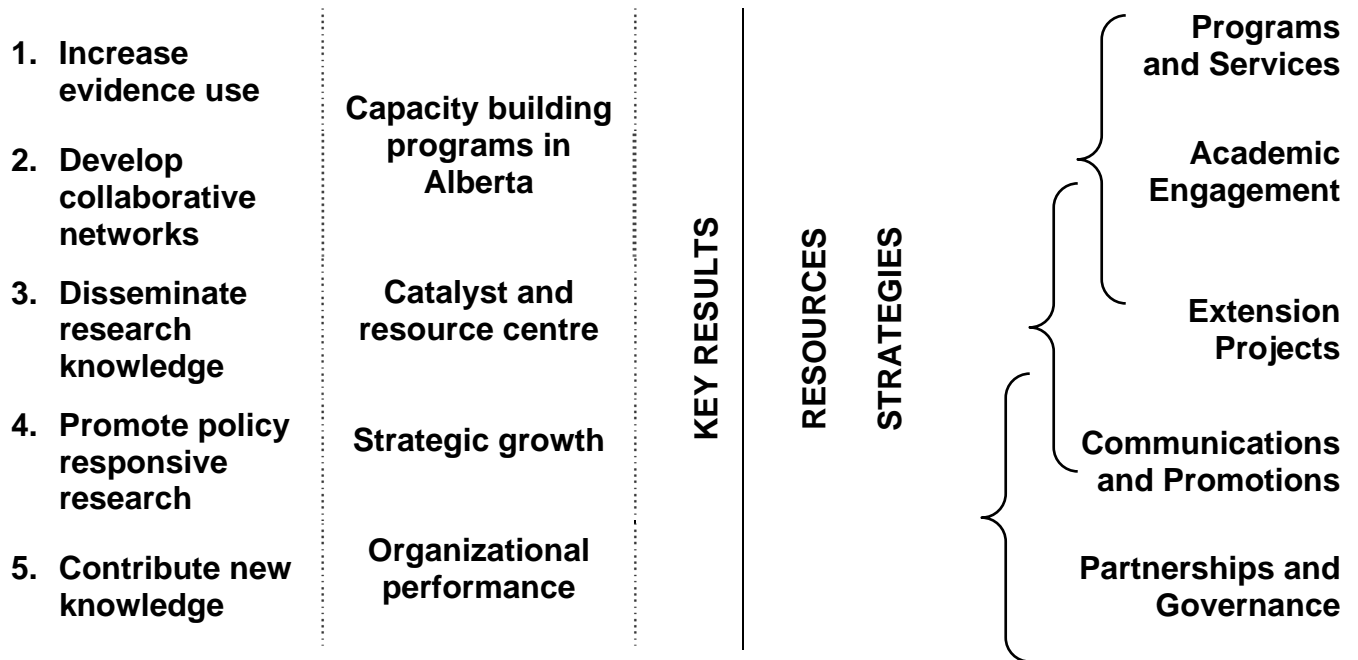
- Programs and Services
- Extension Projects
- Academic Engagement
- Communications and Promotion, and
- Partnerships and Governance

Primary responsibility for each strategic goal is aligned with one area of operations, but all the goals are supported by more than one operational section.

For each of the strategic goals, the Board approves key results and performance indicators. Management identifies strategies to achieve the goals and determines the required allocation of resources to achieve the expected results. The Board approves the budget proposal.

**Figure 1: Planning Framework**

<b>Five Year Plan 2004</b>	<b>Strategic Review 2006</b>	<b>Business Plan 2008</b>	<b>Operational Areas</b>
<i>Governance</i>		<i>Management</i>	
<b>Core Purposes</b>	<b>Strategic Goals</b>	<b>Budget Proposal</b>	<b>Workplans</b>



# MISSION

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SEARCH Canada exists to close the 20-year gap between what we do and what we know in health care and in so doing saves lives and money. Our vision reflects the evidence that doing what is known requires a systemic culture that supports people finding, assessing and using new ideas and information. Our mission reflects evidence that such cultures develop through organizations and an emphasis on people as much as information, and on the use of social networks to diffuse and apply knowledge.

## Our Vision is

*Creating Knowledge Cultures.*

## Our Mission is

*To help health organizations make the best decisions through the development of people, relationships and information.*

**Figure 2: Purpose**



## Our Core Purpose is

**To increase evidence use** by developing the capacity of health professionals and health organizations to use and disseminate current, relevant and appropriate information, to assist in identifying priority health issues and making decisions on these issues based on research results.

Four supporting goals help achieve our purpose:

1. **To develop collaborative networks** of expertise for knowledge exchange and health research.
2. **To disseminate research-based knowledge** and increase its use by increasing access throughout the health system.
3. **To promote the value of policy-responsive research** and applied research by creating innovative solutions to system challenges.
4. **To contribute new knowledge** about capacity-building for applied research and research use in the health system.

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SEARCH Canada's operations are guided by the following philosophical foundations:

## **Beliefs**

We believe that:

- In health system workplaces, knowledge is generated, selected and used by all
- Quality research requires the engagement of the whole health system
- Organizations know best how to build their own capacity
- Networks of diverse people create powerful learning and knowledge exchange

## **Principles**

SEARCH is committed to:

- Enhancing the growth of practicing professionals and applied researchers
- Collaborating with academic, service and government partners across the health system
- Working with both organizations and individuals
- Working with all sectors to integrate capacity into their core business
- Responding to the environments of individuals, organizations and the system
- Facilitating excellence in program design and delivery through innovation
- Leveraging SEARCH assets for future growth and benefit
- Managing and developing resources for sustainability and growth

## **Values**

These values guide our actions:

- Innovation and excellence
- Partnership, engagement, cooperation and inclusiveness
- Flexibility, relevance and responsiveness
- Learning and building on assets
- Accountability, sustainability and integration

# STRATEGIC PRIORITIES

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In order to achieve our mission, SEARCH Canada will continue to build on the primary strengths and defining attributes that have been the source of significant impact. While there are many opportunities for the application of these attributes to new endeavours, SEARCH Canada's strategic priorities reflect a commitment to ensure sustained value and impact from core programs. This strength can then be used to leverage new benefits for Canada's health system, by linking diversification in Alberta to core competencies, expanding support to others with a common vision and aligned mission, pursuing sustainable opportunities for programs beyond Alberta in partnership with others, and paying attention to continued organizational excellence.

The strategic priorities of SEARCH Canada for 2007-2009 are to:

## **1. Continue Capacity Building Programs in Alberta**

- To sustain and enhance core capacity building programs within the Alberta health system.
- To expand and diversify programs and partnerships with academic and health service organizations in Alberta.

## **2. Become a Catalyst and Resource Centre**

- To provide leadership, facilitation, ideas and materials to enhance the creation of knowledge cultures provincially, nationally and internationally.

## **3. Undertake Strategic Growth**

- To develop and provide additional programs and services to achieve the mission, where SEARCH adds value and based on a business case.

## **4. Ensure Organizational Excellence**

- To ensure optimum use of the capacity, expertise and resources of SEARCH Canada, internally and by partners.

# 1. Core Capacity Building in Alberta: Key Results

## GOAL

**To sustain and enhance core capacity building programs within the Alberta health system.**

### OPERATIONS ACCOUNTABILITY

Primary: Programs and Services

Supporting: Academic Engagement and Extension Projects

KEY RESULTS	PERFORMANCE INDICATORS
<ul style="list-style-type: none"> <li>▪ SEARCH Canada is used by health regions and other health agencies as a resource of choice for building organizational capacity.</li> <li>▪ SEARCH Canada courseware is deployed in accessible, flexible and customized ways for a diversity of organizations and participants.</li> <li>▪ Self-sustaining communities of practice emerge in response to shared interests and health system issues.</li> <li>▪ High quality, community based projects provide evidence for local decisions, and develop capacity across all partners.</li> <li>▪ Sponsoring organizations and participants are in a better position to apply the competencies developed through SEARCH Programs.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Increased levels and diversity of participation in SEARCH-facilitated programs, services and projects.</li> <li>▪ Amount of SEARCH curriculum available in modular format and deployed through a range of offerings: number of collaborative courseware projects underway and number of participants</li> <li>▪ Number of communities of practice facilitated through the SEARCH Network.</li> <li>▪ Initiation and completion rate of Classic local and provincial projects, and Custom capacity-building initiatives.</li> <li>▪ Developmental performance assessment is designed and provided for participants in SEARCH programs.</li> </ul>

## STRATEGIES

**Courseware Design and Delivery:** Further define processes and mechanisms for collaborative engagement and sharing of IP, in partnership with the Centre for Health Evidence enhance delivery options, and provide courseware offerings.

**Relevant Evidence Projects:** Facilitate Classic participant and Custom regional projects (primary, secondary and synthesis research) linked to organizational priorities.

**Communities of Practice from the SEARCH Network:** Initiate, facilitate and support communities of practice around areas of common interest (eg role, sector, geographic)

**Inclusive, Province-wide Recruitment and Engagement:** Implement targeted engagement strategies for SEARCH Classic participation and Custom activities.

## INDICATORS AND TARGETS

Performance Indicator	07- 08 Target	08-09 Target
	<ul style="list-style-type: none"> <li>✓ <b>Accomplished</b> ? <b>Changed</b></li> <li>○ <b>Underway</b> + <b>Added</b></li> </ul>	<p style="text-align: center;">Same</p> <p style="text-align: center;"><i>Revised/Added</i></p>
Increased levels and diversity of participation in SEARCH-facilitated programs, services and projects.	<ul style="list-style-type: none"> <li>✓ Custom activities (learning opportunities and/or project support) occurring in 6 health regions:</li> <li>+ <i>Mechanisms for ongoing collaboration established in 5 regions;</i></li> <li>+ <i>Sustained collaborative projects underway in 3 regions;</i></li> <li>+ <i>RDAs established in 5 regions</i></li> </ul>	<p><i>Mechanisms for ongoing collaboration established in all 9 regions</i></p> <p><i>Sustained collaborative projects underway in 5 regions</i></p> <p><i>RDAs established in 8 regions</i></p> <p>Applications to S VII include nine regions, continuing care, government, physicians, NGOs and the ACB.</p>
Amount of SEARCH curriculum available in modular format and deployed through a range of offerings.	<ul style="list-style-type: none"> <li>✓ 1/3 deployed: e-literacy courseware developed and deployed in 1 region</li> <li>? 2/3 converted : <i>clarified process and nature of curriculum and courseware development and priorities</i></li> </ul>	<p><i># of collaborative courseware projects underway : e-literacy running in 3 regions; 2 new courseware projects underway.</i></p> <p><i># of 'stand alone' curriculum element pilots underway : 2 pilot projects</i></p> <p>(range of offerings include on-line courses and workshop series)</p>
Number of communities of practice facilitated through the SEARCH Network.	<ul style="list-style-type: none"> <li>✓ 1 community of practice <i>initiated</i></li> </ul>	<ul style="list-style-type: none"> <li>✓ 2 additional communities of practice <i>initiated</i></li> <li><i>3 CoPs initiated</i></li> <li><i>3 CoPs ongoing</i></li> </ul>
Initiation and completion rate of Classic local and provincial projects, and Custom capacity-building initiatives.	<ul style="list-style-type: none"> <li>✓ SV local completion 80%</li> <li>✓ Provincial completion 80%</li> </ul>	<p>80% SVI local project completion</p> <p>80% SVI Provincial project completion</p> <p><i>70% completion by participants in courseware projects</i></p>
Developmental performance assessment is designed and provided for participants in SEARCH programs.	<ul style="list-style-type: none"> <li>○ Assessment approach designed and tested with SVI:</li> <li>+ <i>groundwork on pedagogy and principles completed;</i></li> <li>+ <i>pre- and post- skills assessment piloted</i></li> </ul>	<p><i>Assessment approach designed and implemented with SVII</i></p>

## 2. Extended Capacity Building in Alberta: Key Results

### GOAL

To expand and diversify programs and partnerships with academic and health service organizations in Alberta.

### OPERATIONS ACCOUNTABILITY

Primary: Extension Projects

Supporting: Programs & Services, Academic Engagement, Partnerships & Governance

KEY RESULTS	PERFORMANCE INDICATORS
<ul style="list-style-type: none"> <li>▪ Increased capacity of health care workers in the Continuing Care Sector to know and apply standards of care and understand the evidence for standards.</li> <li>▪ Development of a knowledge exchange network among Continuing Care health sector workers, led by Educator-Champions.</li> <li>▪ Increased capacity of rural and family physicians to use research evidence in their practices.</li> <li>▪ Increased access of health care practitioners in non academic settings to licensed health knowledge resources.</li> <li>▪ Participation in collaborative, province-wide approaches to meeting health human resources (HHR) needs.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Number of facilities with registrars and number of users registered and active and usage time per user.</li> <li>▪ Number of trained Educator-Champions and level of active information exchange in the network.</li> <li>▪ Partnership activities that target rural and family physicians.</li> <li>▪ Partnership strategy and plan to address knowledge resource gaps across provincially.</li> <li>▪ Identified program activities that align with and support Alberta's health human resources strategies/needs.</li> </ul>

### STRATEGIES

**Continuing Care Desktop and Network:** complete the Continuing Care Standards Project including enhancement activities, resource licensing and new applications

**Rural and Primary Care Physician Initiatives:** Initiate either the MSI- or ACB-funded initiative, and implement a physician-focused recruitment strategy for Classic

**Health Knowledge Resources:** Complete the needs analysis and develop coalition strategy and proposal for province-wide licensing.

**Alignment with HHR Needs:** leverage all programs and projects and align with HHR strategies of partners.

## INDICATORS AND TARGETS

Performance Indicator	07- 08 Target: ✓ <b>Accomplished</b> ? <b>Changed</b> ○ <b>Underway</b> + <b>Added</b>	08-09 Target Same <i>Revised/Added</i>
Number of facilities with registrars and number of users registered and active.	<ul style="list-style-type: none"> <li>✓ Desktop rollout to 12,000 users</li> <li>✓ In 100 facilities: 150</li> </ul>	Registration by 15,000 users In 200 (250) facilities Establish baseline usage patterns and benchmark
Number of trained Educator-Champions and level of active information exchange in the network.	<ul style="list-style-type: none"> <li>✓ Education of 150 champions: 400.</li> <li>✓ Network support mechanisms developed</li> </ul>	Self-initiated activities and information sharing among champions: <i>4 communities of practice initiated</i>
Partnership activities that target rural and family physicians.	<ul style="list-style-type: none"> <li>✓ Participation in one project proposal or plan: <i>MSI Foundation proposal and ACB proposal</i></li> </ul>	One <i>new</i> project implemented
Partnership activities that plan for or deliver access to knowledge resources across all workplaces.	<ul style="list-style-type: none"> <li>✓ Partners, concept and proposal developed :</li> <li>+ <i>Gap Analysis completed with HKN and CHE partners;</i></li> <li>+ <i>Participation in National VHL committee.</i></li> <li>+ <i>Continuing Care project delivering knowledge to 12,000 workers</i></li> </ul>	Proposal submitted and, if successful, initiated: <i>coalition developed and strategy drafted to move forward knowledge access agenda provincially</i>
Partnership activities that utilize SEARCH capacity for HHR development in new ways.	<ul style="list-style-type: none"> <li>? Partners, concept and proposal developed :</li> <li>+ <i>Classic local and provincial projects address HHR questions/needs</i></li> <li>+ <i>Continuing Care initiative addresses workforce development needs</i></li> </ul>	<i>All program activities support HHR strategies of regional partners: identify relevant needs, refine and align program and project activities</i>  (Proposal submitted and, if successful, initiated)

### 3. CATALYST AND RESOURCE: Key Results

#### GOAL

To provide leadership, facilitation, ideas and materials to enhance the creation of knowledge cultures provincially, nationally and internationally

#### OPERATIONS ACCOUNTABILITY

Primary: Academic Engagement

Supporting: Communications and Promotions, Programs and Services

KEY RESULTS	PERFORMANCE INDICATORS
<ul style="list-style-type: none"> <li>▪ The broad impacts of SEARCH activities are captured and disseminated.</li> <li>▪ SEARCH Canada is recognized for its expertise by knowledge transfer, health care and research agencies in Canada.</li> <li>▪ Involvement and collaboration with SEARCH Canada is highly valued by academic faculty in Alberta and beyond.</li> <li>▪ SEARCH Classic participants receive academic and/or continuing education credit when desired.</li> <li>▪ SEARCH Canada functions in a favourable environment in which it is recognized as a strategic resource.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Number and venue of published studies and presentations of SEARCH impacts and projects by staff, faculty or external evaluators and researchers.</li> <li>▪ Number and type of evaluation and research projects on SEARCH</li> <li>▪ Consultation requests to staff and faculty from local, regional, provincial and national organizations.</li> <li>▪ Number and range of academic faculty undertaking various roles with SEARCH.</li> <li>▪ Number of organizations providing credit for SEARCH Classic participation.</li> <li>▪ Number of grant applications submitted, supported or facilitated by SEARCH Canada.</li> </ul>

#### STRATEGIES

**Innovative Evaluation:** of individual, organizational and system development through context-based evaluation, including commissioned organizational case study research and re-development of the program evaluation framework

**Academic Engagement:** flexible model to engage faculty team and increased research and student involvement through Academic Co-Director roles.

**Credentialing of SEARCH programs:** by academic and professional institutions (prior learning and continuing competency credits)

**Events, publications, presentations:** that forward understanding of the conceptual and theoretical foundations of SEARCH.

**Stakeholder and government relationship management:** that maintains reputation, profile and collaborative partnerships.

## INDICATORS AND TARGETS

Performance Indicator	07- 08 Target	08-09 Target
	<ul style="list-style-type: none"> <li>✓ <b>Accomplished</b> ? <b>Changed</b></li> <li>○ <b>Underway</b> + <b>Added</b></li> </ul>	<p>Same</p> <p><i>Revised/Added</i></p>
Number and venue of published studies of SEARCH impacts and projects by participants, staff, faculty or external evaluators and researchers.	<ul style="list-style-type: none"> <li>✓ 1 paper submitted for peer review; &gt;3 submitted</li> <li>✓ &gt;2 international conference presentations</li> <li>+ Baseline of conferences attended, and conference priorities and plan established.</li> </ul>	<p>&gt;3 <i>papers</i> submitted for peer review;</p> <p>&gt; 1 non-peer reviewed publication</p> <p>Presentations related to SEARCH Canada made at</p> <p>&gt;2 provincial conferences</p> <p>&gt;2 national conferences</p> <p>&gt;2 international conference presentations</p> <p>Implementation of faculty conference support and plan.</p>
Consultation requests to staff, faculty, participants and managers from local, regional, provincial and national organizations.	<ul style="list-style-type: none"> <li>✓ Tracking process and baseline established</li> </ul>	<p>Increase in requests by 20%;</p> <p>SEARCH Canada nominated for one provincial or national award.</p>
Number and range of academic faculty undertaking various roles with SEARCH.	<ul style="list-style-type: none"> <li>✓ Academic director and mental health faculty member recruited;</li> <li>✓ Core faculty increased from 15 to 18;</li> <li>✓ 5 affiliate roles established</li> </ul>	<p>85% positions filled</p> <p>85% retention of faculty;</p> <p><i>Core faculty increased to 20</i></p> <p><i>Executive and practice-based roles established</i></p> <p>(Affiliate positions increase to 10)</p>
Number of organizations providing credit for SEARCH Classic participation.	<ul style="list-style-type: none"> <li>✓ 1 academic institution: <i>UofA for Nursing PhD</i></li> <li>✓ 2 professional organizations: <i>College of Respiratory Therapy and Community Medicine residency</i></li> </ul>	<p>2 academic institutions</p> <p>3 professional organizations</p>
Number of grant applications submitted, supported or facilitated by SEARCH Canada.	<ul style="list-style-type: none"> <li>✓ 5 grant applications :</li> <li>+ <i>supported : SPH to Health Canada, TREC to CIHR, RDC to AACTI</i></li> <li>+ <i>submitted : MSI, ACB</i></li> <li>+ <i>facilitated : team to CHSRF</i></li> </ul>	<p>5 grant applications</p>

## 4. STRATEGIC GROWTH: Key Results

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### GOAL

To develop and provide additional programs and services to achieve the mission where SEARCH adds value and based on a business case.

### OPERATIONS ACCOUNTABILITY

Primary: Partnerships and Governance

Supporting: Communications and Promotion, Extension Projects

KEY RESULTS	PERFORMANCE INDICATORS
<ul style="list-style-type: none"> <li>▪ Sustainable funding for core programming.</li> <li>▪ Diversified funding for extended programs.</li> <li>▪ New mechanisms are established for collaboration on capacity building initiatives with organizations within and outside Alberta.</li> <li>▪ Feasibility assessments are undertaken and pilot projects implemented where warranted.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Renewal and addition of member funding agreements.</li> <li>▪ Range of potential funding models and sources identified and used.</li> <li>▪ Number and quality of collaborative relationships within and outside Alberta.</li> <li>▪ Number and quality of feasibility assessments, business cases and pilot projects.</li> </ul>

### STRATEGIES

Build on current relationships and collaborations to sustain core resources and explore, identify and pursue new, mission-driven initiatives that include partners beyond Alberta through:

1. **Relationship development with partners and funders:** completion of the 2009-16 Strategic Plan and partnership renewal strategy and identification of opportunities for new partnership activities and diversified funding.
2. **Feasibility assessments and collaborative pilot projects:** of emerging opportunities with new organizations inside and outside Alberta, including National Collaborating Centre (NCC) projects, Western Canada Strategy (WCS), with project funding.

## INDICATORS AND TARGETS

Performance Indicator	07- 08 Target	08-09 Target
	<ul style="list-style-type: none"> <li>✓ <b>Accomplished</b>   ?   <b>Changed</b></li> <li>○ <b>Underway</b>   +   <b>Added</b></li> </ul>	<p>Same</p> <p><i>Revised/Added</i></p>
Renewal and addition of member funding agreements.	<ul style="list-style-type: none"> <li>○ Agreement in principle with members for renewal of funding</li> </ul>	<p>Funding agreements and UMA renewed with all member organizations</p> <ul style="list-style-type: none"> <li>✓ One new member organization</li> </ul>
Range of potential funding models and sources identified and used.	<ul style="list-style-type: none"> <li>✓ 4(2) additional funding sources/models are identified</li> </ul>	<ul style="list-style-type: none"> <li>✓ 3(2) additional funding sources are used</li> </ul>
Number and quality of relationships with Western Canada collaborators.	<ul style="list-style-type: none"> <li>✓ Active collaboration with 1 SK and 1 BC organization: <i>WCS project</i></li> </ul>	<p><i>Collaborative project implemented and evaluated with SK/BC</i></p> <p><i>Additional collaborative project underway in Western Canada</i></p> <p>(Active collaboration with 2 SK and 2 BC organizations)</p>
Number and quality of feasibility assessments, business cases and pilot projects.	<ul style="list-style-type: none"> <li>✓ 2 feasibility: 2 <i>NCC projects initiated; WCS project initiated</i></li> <li>○ 1 business case: <i>WCS project, ACB proposal, MSI proposal</i></li> </ul>	<p>3 (2) pilot projects: <i>NCC, WCS</i></p> <p>1 business case: <i>WCS</i></p>

## 5. ORGANIZATIONAL EXCELLENCE: Key Results

### GOAL

To ensure optimum use of the capacity, expertise and resources of SEARCH Canada, internally and by partners.

### OPERATIONS ACCOUNTABILITY

Primary: Partnerships and Governance

Supporting: All

KEY RESULTS	PERFORMANCE INDICATORS
<ul style="list-style-type: none"> <li>▪ Member organizations are satisfied with SEARCH Canada's accountability, transparency and performance.</li> <li>▪ SEARCH Canada activities reflect current evidence and innovation.</li> <li>▪ Financial targets are defined and achieved.</li> <li>▪ Various programs and operational units function in a seamless way for clients and collaborators.</li> <li>▪ All people working with SEARCH Canada are satisfied by their work and able to contribute to their full potential.</li> <li>▪ Enterprise risk management strategies are in place.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Attendance at member meetings, including AGM, and level of response to requests for Board nominations.</li> <li>▪ Feedback and response from external advisory groups.</li> <li>▪ Costs and revenues in comparison to targets on project and organizational basis.</li> <li>▪ People are cross-trained and able to participate in more than one program.</li> <li>▪ Feedback from clients.</li> <li>▪ Recruitment and retention rates for staff and faculty.</li> <li>▪ Board education opportunities and risk management policies.</li> </ul>

### STRATEGIES

**Integration Across Programs and Services:** Integrate management and delivery across programs and services, including continued creation of opportunities for coordination and collaboration across programs (both staff and faculty).

**Effective and Efficient Governance:** Ensure effective and efficient governance oversight through the Board of Directors, the Nominations Committee and the Members, and maintain a policy framework that meets best practice guidelines.

**External Advisory Groups:** Establish and maintain effective mechanisms for receiving and adopting stakeholder and expert advice on all aspects of programs and services. Mechanisms will include the Program Advisory Committee, and SEARCH Managers' meetings.

**Supporting and Developing People:** Develop an environment within which every employee and all others affiliated with SEARCH are able to contribute to the full extent of their ability and in areas of strength and interest.

## INDICATORS AND TARGETS

Performance Indicator	07- 08 Target	08-09 Target
	<ul style="list-style-type: none"> <li>✓ <b>Accomplished</b> ? <b>Not</b></li> <li>○ <b>Underway</b> + <b>Added</b></li> </ul>	<p>Same</p> <p><i>Revised/Added</i></p>
Member attendance at member AGM; response to requests for Board nominations.	? 100% attendance of member organizations: AGM cancelled; 100% response to resolutions; 2/2 response from metros and 1/7 response from rurals for nominating committee;	2(3) : 1 ratio of nominations for positions  <i>80% AGM attendance by member organizations</i>
Feedback and response from external advisory groups.	✓ Program Advisory Committees advises on programs design	<ul style="list-style-type: none"> <li>✓ Curriculum Advisory Committee advises on curriculum content</li> <li><i>External Commissioned Research team reports</i></li> <li><i>Stakeholders inform strategic plan</i></li> </ul>
Costs and revenues in comparison to targets on project and organizational basis.	<ul style="list-style-type: none"> <li>○ Organizational and project targets established</li> <li>○ Cost accounting systems implemented</li> </ul>	<p><i>40% total budget is from non-core revenue</i></p> <p><i>Overhead/administration charge formalize</i></p>
People cross-trained and able to participate in more than one program. Satisfaction reports from clients.	<ul style="list-style-type: none"> <li>✓ Cross training implemented across Custom and Classic programs.</li> <li>○ Clients report satisfaction with communication and coordination of activities</li> </ul>	<p>Program staff and faculty able to contribute to <i>all</i> (both) programs.</p> <p>Issues related to communication and coordination of activities are identified, tracked and resolved. Unresolved issues are recorded and reported to the CEO.</p>
Recruitment and retention rates for staff and key contractors.	<ul style="list-style-type: none"> <li>? 100% of 19 key positions filled: 85%;</li> <li>✓ turnover reduced from 35% to 10%;</li> <li>✓ Staff satisfaction baseline established;</li> <li>? 100% PD funds used: 50%</li> </ul>	<p>85% (100) of 19 key positions filled;</p> <p>Turnover &lt;10%</p> <p>Staff satisfaction measures improved;</p> <p>85% PD funds used.</p>
Board education opportunities and risk management policies	<ul style="list-style-type: none"> <li>✓ 1 Board education event on ERM is held;</li> <li>✓ CEO succession plan is in place</li> </ul>	<ul style="list-style-type: none"> <li>✓ Policy review identifies ERM policies in place.</li> <li>Board self-evaluation is completed and areas of focus or improvement are identified.</li> <li>Board members participate in strategic renewal as planned.</li> </ul>

## APPENDIX 1: Operations

Programs and Services	Activities	Clients
<p><b>SEARCH Classic</b></p> <p>Develops evidence-based practitioners in supportive organizational environments.</p>	<p>Two year cohort training program</p> <p>7 face to face 5-day residential modules</p> <p>Creating, Choosing and Using Evidence in Context curriculum</p> <p>Network development</p> <p>Informatics training</p> <p>Local decision support projects</p> <p>Priority-based provincial primary research projects</p> <p>Virtual learning community with knowledge management resources.</p>	<ul style="list-style-type: none"> <li>▪ Cohorts of 25-8 health professionals and their managers</li> <li>▪ 15 part time faculty</li> <li>▪ Health organizations:               <ul style="list-style-type: none"> <li>- Health authorities</li> <li>- Physicians</li> <li>- Municipal, provincial and federal government agencies</li> <li>- Community agencies.</li> </ul> </li> <li>▪ Post-secondary institutions and their faculty               <ul style="list-style-type: none"> <li>- Universities</li> <li>- Colleges</li> </ul> </li> </ul>
<p><b>SEARCH Custom</b></p> <p>Facilitates practice-driven research and local skill development for evidence use.</p>	<p>Region-based just-in-time research and evaluation support</p> <p>Project mentoring and collaboration</p> <p>Customized learning opportunities, including self-directed courseware</p> <p>Network maintenance and activation through Communities of Practice and Knowledge Events seed funding</p>	<ul style="list-style-type: none"> <li>▪ Health regions and personnel               <ul style="list-style-type: none"> <li>- Research and evaluation departments and leads</li> <li>- Professional practice departments</li> </ul> </li> <li>▪ Independent health practitioners</li> <li>▪ Post-secondary institutions and their faculty               <ul style="list-style-type: none"> <li>- Universities</li> <li>- Colleges</li> </ul> </li> </ul>
<p><b>Knowledge Services</b></p> <p>Provides access to research evidence and supports a virtual learning, practice and research community.</p>	<p>SEARCH Desktop virtual learning environment and knowledge management system, including</p> <ul style="list-style-type: none"> <li>▪ Licensed knowledge resources with search capabilities</li> <li>▪ Curriculum materials</li> <li>▪ Communication and collaboration tools</li> <li>▪ Project support tools</li> </ul>	<ul style="list-style-type: none"> <li>▪ Participants in SEARCH Classic</li> <li>▪ Participants in SEARCH Custom courseware projects</li> <li>▪ SEARCH Faculty</li> <li>▪ SEARCH Staff</li> </ul>

	<ul style="list-style-type: none"> <li>▪ Knowledge and information sources</li> <li>▪ Community information</li> </ul>	
<b>Academic Engagement</b>	<b>Activities</b>	<b>Clients</b>
<p><b>Faculty team</b> Engages academic researchers and teachers in capacity development for knowledge transfer.</p>	<p>Time and salary support for applied health researcher and teachers</p> <p>Design and delivery of innovative workplace learning curricular</p> <p>Project and participant mentoring</p>	<p>Alberta's universities and colleges, departments and faculties of health sciences, social sciences and business.</p> <p>20 core faculty members</p>
<p><b>Faculty development</b> Develops skills in and understanding of community learning and practice-based research.</p>	<p>Faculty committees, meetings and retreats on pedagogy, program design and courseware</p> <p>Faculty attendance and presentation at related conferences</p>	<p>SEARCH core faculty team</p> <p>Academic colleagues</p>
<p><b>Research development</b> Facilitates the use of SEARCH networks for research purposes.</p>	<p>Identification of opportunities to engage students and others with SEARCH participants and organizations</p> <p>"Think Tanks" in partnership with other organizations on topics of common interest</p> <p>Commissioned research projects</p>	<p>SEARCH Faculty</p> <p>Participating post-secondary departments and faculties</p> <p>Other researchers</p>
<b>Extension Projects</b>	<b>Activities</b>	<b>Clients</b>
<p><b>Continuing Care Standards initiative</b> Facilitates awareness and implementation of 24 standards for continuing health care.</p>	<p>In collaboration with CHE and AHW: Continuing Care Desktop design, rollout, enhancement and operations</p> <p>Evidence identification, appraisal and presentation for 24 Standards of Care</p> <p>Train the trainer, learning support and network development</p> <p>Pilot projects of e-learning for health care aide (HCA) curriculum and organization-specific desktops</p> <p>Licensing of knowledge resources.</p>	<p>Continuing care facilities province-wide</p> <p>Continuing care educators and leaders</p> <p>Continuing care workforce</p> <p>Alberta Health and Wellness</p> <p>Health regions</p>
<p><b>Rural and Primary Care Physician initiative</b> Develops physician skills and</p>	<p>In collaboration with CHE, RPAP, UofA and UofC: Develop and deliver accessible training and support for evidence use among physicians and primary care</p>	<p>Rural and remote family physicians and primary care teams</p> <p>Partner organizations</p>

knowledge in evidence based care.	teams	
<b>Health Knowledge Resource initiative</b> Pursues opportunities to increase access to research databases.	In collaboration with CHE and HKN, develop a proposal for province-wide knowledge resource licensing	Non-metro health regions Non-academic health care providers Capacity building projects and programs
<b>Health workforce initiative</b> Explores applications of the SEARCH model to workforce needs.	Identify and collaborate with partners to develop a proposal for SEARCH's contribution to province-wide health workforce development in a new skills area	Partner organizations Alberta Health and Wellness Health workers
<b>Communications and Promotions</b>	<b>Activities</b>	<b>Clients</b>
<b>Recognition and other events</b>	SEARCH Conference SEARCH Forum SEARCHing for Excellence Awards Faculty Recognition Emeritus Faculty Annual General Meeting and Think Tank	SEARCH Classic participants SEARCH Network members Member organizations SEARCH Managers Faculty members and their Deans and Directors All health sector and health research stakeholders
<b>Publications and communication materials</b>	Newsletters: SEARCH Light and Connections Pamphlets and Conference display Website and Annual Report Discussion papers, peer reviewed papers, conference abstracts	All health sector and health research stakeholders SEARCH Network members Public Faculty members and researchers
<b>Public and stakeholder relations</b>	Website Corporate identity and publications policy Quarterly and Annual reports Conference display	Public Members Stakeholders Government
<b>Internal communications</b>	SEARCH Views Key messages and briefing notes Staff meetings and retreats Intranet and Orientation	SEARCH Board members Staff Faculty and consultants

## **APPENDIX 2: Budget Documents**

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### **SEARCH Canada Proposed 2008 Operating Budget**

## 2008 Budget Overview

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### Overview

SEARCH Canada's 12 members contribute to the core funding envelope of the organization, under Funding Agreements to 2009. Core programs and services are provided in Alberta on a no-charge basis within the health system, in order to achieve the capacity-building mission and in accordance with the province-wide mandate. Non-core programs and services ("projects") are provided on a cost-recovery basis.

SEARCH Canada has operational contracts with the Centre for Health Evidence at the University of Alberta, for the deployment of the virtual learning community resources, and the Center for Health and Policy Studies at the University of Calgary, which houses staff who deliver the SEARCH Custom programming.

A strong, vibrant academic faculty team is critical to the success of SEARCH Canada and is the key to SEARCH's ability to continue to provide the core programming members expect. SEARCH currently engages faculty from six post-secondary institutions across Alberta under contractual arrangements with those institutions.

### Financial Mandate

SEARCH Canada's initial core funding was committed in 2004 for a 5 year period. Financial expectations for SEARCH are that during that 5 year period, the organization will conduct its operations in a manner that will not create a deficit over the 5 years combined. The goal of the organization is that at the conclusion of the 5 year period, in contemplation of renewing funding from all partners, the organization will be able to demonstrate an ability to deliver on the promises made to members in a financially responsible way, and to have leveraged core funding and capacity to deliver expanded programs and services through additional 'external' funding. The organization has created an internally restricted wind-up fund which would be used to transition a wind-up in the case where core funding was not renewed.

## 2008 Budget Assumptions

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The SEARCH Canada budget is prepared using the following assumptions:

### 1. Revenue

Grant Revenue is included at known grant amounts and only includes grants that were committed at the time of preparing the budget. Project revenue reflects non core projects undertaken on the basis of full cost recovery. All known project revenue is included, and revenue from projects in the proposal stage is included on best estimate of likelihood to succeed basis. Likelihood ranges from 20% to 95% and is weighted against the total anticipated size of the project.

Other revenue consists of interest income and is conservatively budgeted based on rates earned on recent GICs held by the organization.

### 2. Personnel

The personnel budget is based on twelve and one half (12.5) full time equivalent (FTE) employee positions (11.0 – 2007). As at March 6, 2008, 4 of these positions are vacant. It is expected that the cost of 0.5 FTEs will be absorbed directly through grants associated with new projects. Other human resource costs (university staff or consultants) appear within the relevant contracted services.

Positions with incumbents are budgeted at actual cost. All other positions have been budgeted at the maximum applicable salary range with various start dates depending on best estimates. Cost of living increases have been projected at 5% with a 2% merit pool also included.

### 3. Benefits

Benefits have been included at actual cost and are applied to the personnel budget of each position. An estimated increase to the overall benefit plan is included at 10% effective August 2008 which is based on management's best estimate. Although an actuarial valuation of the defined benefit pension plan is currently being undertaken, the results are unknown. The cost of the defined benefit pension plan has been budgeted at the actuary's best estimate.

### 4. Professional Development

2% of gross personnel costs are included for professional development costs.

### 5. Supplies and Services

Non-contractual related expenses have been budgeted based on actual expected requirements including an anticipated inflationary increase of 3.5%.

### 6. Contracted Services

Contracted services are included at actual amounts where a valid contract is in place. Where contracts are due for re-negotiation within the budget year, assumptions are applied to determine the effects of those costs. For 2007-08, assumptions related to contract renewal are:

- a) **CHE:** All other associated costs have been budgeted with the assumption of a 5% increase against costs of the 2006-2007 fiscal year.

- b) **Faculty Agreements:** Excepting one, all faculty agreements are not due for renewal until July 1, 2009. For the renewing contract, a 10% inflationary increase has been anticipated.

## **7. Corporate administration**

Administrative charges are not allocated to operational departments, but reflected in Partnerships and Governance.

Anticipated administrative recoveries related to the various extension projects are calculated and included in Partnership and Governance. Although allocation methods have not been finalized, conservative estimates included a 10% recovery factor which has been determined by management to be the minimum anticipated recovery.

## **8. Depreciation**

10 years straight line is used for office furniture & equipment.

4 years straight line is used for computer equipment.

All items of a capital nature which exceed \$1000 are capitalized and depreciated, items less than \$1000 would be expensed as incurred.

## **Expense Category Descriptions**

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### **Personnel:**

Salaries paid plus employer share of employee benefit programs (including professional development).

### **Operations:**

All costs associated with SEARCH Canada management meetings and the Program Advisory Committee.

### **SEARCH Classic:**

All costs associated with module delivery (participant, faculty, staff travel expenses, facility fees), project funding (seed funds) and manager meetings.

### **SEARCH Custom:**

Costs associated with SEARCH Network Committee and events, operational travel and meetings, consulting fees and custom project funding (seed funds).

### **Knowledge Services:**

All costs (outsourced through CHE) associated with SEARCH Desktop services to core programs: knowledge resource licenses, knowledge and curriculum management systems and technical support.

### **Faculty Team:**

Salary including benefits for lead, Classic and Custom faculty members in academic institutions, as well as support staff.

### **Research and Curriculum:**

Travel and facility costs for faculty meetings, retreats, and events.

**Communications and Promotions:**

Costs associated with communications materials and publications, events and awards, the SEARCH conference, contracted services for newsletters and website, internal communications, faculty conference presentations and attendance, and all related personnel costs.

**Governance:**

Honoraria and travel costs associated with all board-related activity including full board and committee meetings.

**Partnership Development:**

External consultant fees and business development activities, including legal costs, associated with external partnership development.

**Professional Services:**

External consultant fees for financial (including audit) and human resource services.

**Infrastructure:**

Sub-lease costs (including rent, utilities and operating costs), supplies and office services, equipment and depreciation, and information technology and general office administration.

**SEARCH Canada Statement of Operations for budget period April 1, 2008 to March 31, 2009**

DRAFT for Management Use Only	Budget 2008-2009	Forecast 2007-2008	Total Budget 2007-2008	Total Prior Year 2006-2007	Variance		Variance		Variance	
					Bud 08-09 vs Forecast	%	Bud 08-09 vs Bud 07-08	%	Bud 08-09 vs Act 06-07	%
<b>REVENUE</b>										
Core Grant	\$ 2,720,005	\$ 2,770,004	\$ 2,675,000	\$ 2,586,252	\$ (49,999)	(2%)	\$ 45,005	2%	\$ 133,753	5%
Extension Projects	\$ 1,249,826	\$ 485,010	\$ 440,000	\$ 548,616	\$ 764,816	61%	\$ 809,826	184%	\$ 701,210	128%
Anticipated Projects	\$ 385,958	\$ -	\$ -	\$ -	\$ 385,958	100%	\$ 385,958	-	\$ 385,958	-
Other	\$ 46,000	\$ 66,029	\$ 30,000	\$ 28,334	\$ (20,029)	(44%)	\$ 16,000	53%	\$ 17,666	62%
<b>TOTAL REVENUE</b>	<b>\$ 4,401,790</b>	<b>\$ 3,321,043</b>	<b>\$ 3,145,000</b>	<b>\$ 3,163,202</b>	<b>\$ 1,080,747</b>	<b>25%</b>	<b>\$ 1,256,790</b>	<b>40%</b>	<b>\$ 1,238,588</b>	<b>39%</b>
<b>PROGRAMS AND SERVICES</b>										
Personnel	\$ 590,013	\$ 430,968	\$ 592,755	\$ 397,122	\$ 159,046	27%	\$ (2,742)	(0%)	\$ 192,891	49%
Operations	\$ 28,911	\$ 18,542	\$ 14,120	\$ 3,010	\$ 10,369	36%	\$ 14,791	105%	\$ 25,901	861%
SEARCH Classic	\$ 284,500	\$ 308,377	\$ 335,315	\$ 239,804	\$ (23,877)	(8%)	\$ (50,815)	(15%)	\$ 44,696	19%
SEARCH Custom	\$ 86,000	\$ 57,540	\$ 83,000	\$ 40,668	\$ 28,460	33%	\$ 3,000	4%	\$ 45,332	111%
Knowledge Services	\$ 274,980	\$ 264,767	\$ 265,068	\$ 307,961	\$ 10,213	4%	\$ 9,912	4%	\$ (32,981)	(11%)
<b>TOTAL PROGRAMS AND SERVICES</b>	<b>\$ 1,264,404</b>	<b>\$ 1,080,193</b>	<b>\$ 1,290,258</b>	<b>\$ 988,565</b>	<b>\$ 184,211</b>	<b>15%</b>	<b>\$ (25,854)</b>	<b>(2%)</b>	<b>\$ 275,840</b>	<b>28%</b>
<b>ACADEMIC ENGAGEMENT</b>										
Faculty Team	\$ 548,906	\$ 412,496	\$ 444,437	\$ 289,628	\$ 136,410	25%	\$ 104,469	24%	\$ 259,278	90%
Research And Curriculum	\$ 61,734	\$ 153,756	\$ 67,600	\$ 93,821	\$ (92,021)	(149%)	\$ (5,866)	(9%)	\$ (32,087)	(34%)
<b>TOTAL ACADEMIC ENGAGEMENT</b>	<b>\$ 610,640</b>	<b>\$ 566,251</b>	<b>\$ 512,037</b>	<b>\$ 383,449</b>	<b>\$ 44,389</b>	<b>7%</b>	<b>\$ 98,603</b>	<b>19%</b>	<b>\$ 227,191</b>	<b>59%</b>
<b>TOTAL PROJECT EXPENSES</b>	<b>\$ 1,635,784</b>	<b>\$ 485,010</b>	<b>\$ 440,000</b>	<b>\$ 548,616</b>	<b>\$ 1,150,774</b>	<b>70%</b>	<b>\$ 1,195,784</b>	<b>272%</b>	<b>\$ 1,087,169</b>	<b>198%</b>
<b>TOTAL COMMUNICATIONS AND PROMOTIONS</b>	<b>\$ 326,262</b>	<b>\$ 295,874</b>	<b>\$ 287,104</b>	<b>\$ 162,967</b>	<b>\$ 30,388</b>	<b>9%</b>	<b>\$ 39,158</b>	<b>14%</b>	<b>\$ 163,294</b>	<b>100%</b>
<b>PARTNERSHIP AND GOVERNANCE</b>										
Personnel	\$ 401,838	\$ 324,956	\$ 309,190	\$ 283,105	\$ 76,882	19%	\$ 92,648	30%	\$ 118,734	42%
Governance	\$ 71,344	\$ 48,278	\$ 63,000	\$ 84,574	\$ 23,066	32%	\$ 8,344	13%	\$ (13,230)	(16%)
Partnership Development	\$ 89,653	\$ 86,621	\$ 102,000	\$ 119,912	\$ 3,032	3%	\$ (12,347)	(12%)	\$ (30,259)	(25%)
Professional Services	\$ 84,463	\$ 93,366	\$ 111,000	\$ 145,649	\$ (8,904)	(11%)	\$ (26,538)	(24%)	\$ (61,186)	(42%)
Infrastructure	\$ 172,979	\$ 157,959	\$ 157,660	\$ 172,647	\$ 15,020	9%	\$ 15,320	10%	\$ 332	0%
Administrative Recoveries	\$ (163,578)	\$ -	\$ -	\$ (28,066)	\$ (163,578)	100%	\$ (163,578)	-	\$ (135,512)	483%
<b>TOTAL PARTNERSHIP AND GOVERNANCE</b>	<b>\$ 656,698</b>	<b>\$ 711,181</b>	<b>\$ 742,850</b>	<b>\$ 777,820</b>	<b>\$ 109,096</b>	<b>17%</b>	<b>\$ 77,427</b>	<b>10%</b>	<b>\$ 14,391</b>	<b>2%</b>
<b>TOTAL EXPENSES</b>	<b>\$ 4,493,789</b>	<b>\$ 3,138,509</b>	<b>\$ 3,272,248</b>	<b>\$ 2,861,417</b>	<b>\$ 1,518,858</b>	<b>34%</b>	<b>\$ 1,385,119</b>	<b>42%</b>	<b>\$ 1,767,884</b>	<b>62%</b>
<b>EXCESS/(DEFICIENCY) OF REVENUE OVER EXPENSES</b>	<b>\$ (91,999)</b>	<b>\$ 182,534</b>	<b>\$ (127,248)</b>	<b>\$ 301,785</b>	<b>\$ (438,111)</b>	<b>476%</b>	<b>\$ (128,329)</b>	<b>101%</b>	<b>\$ (529,297)</b>	<b>(175%)</b>
Add:										
Forecast Opening Unrestricted Surplus	\$ 524,445									
<b>CLOSING UNRESTRICTED SURPLUS</b>	<b>\$ 432,445</b>									

# Proposed 2008 Budget: Explanatory Notes

## Budget 2008-2009 Deficit

The budget for 2008-2009 is put forward in a deficit position. The deficit reflects growth in program activities as personnel engaged in the past year are now able to deliver on program goals, and in areas identified as strategic priorities, such as academic engagement, extension projects and strategic growth. Whereas some additional costs are covered through external project funding, some projects leverage SEARCH's core funding and capacity. Direct costs are charged to extension projects on a full cost recovery basis wherever contractually possible. SEARCH has delivered on both the 2006-2007 budget and the 2007-2008 budget and carried forward a larger than estimated surplus. This surplus is available for use in 2008-2009 and beyond.

## Estimate 2007-2008

The estimate has been updated to reflect best known economic circumstances as of March 7, 2008.

## Grant Revenue

Grant revenue is anticipated to be less than the prior year estimate as the grant commitment from Alberta Mental Health Board realized \$120,000 in 2007-2008 and only \$70,000 in 2008-2009. This grant funds additional mental health involvement in the SEARCH VI program which commenced in April 2007. However, the addition of the University of Alberta membership added \$70,000 above budgeted revenue in 2007-2008, and this addition continues in 2008-2009.

## Project Revenue

Project revenue consists of the third year realization of the Continuing Care project, and the associated Continuing Care Enhancement grant and AIS grant, as well as smaller project commitments from the National Collaborating Centre and the Alberta Cancer Board Proposal Development. These are all known committed projects which total \$1,249,826 and are included in the 2008-2009 budget. Other potential projects which are currently at the proposal phase include MSI, Alberta Cancer Board, Capital Health Authority and the First Nation and Inuit Health Branch. These projects have been included at best estimate of probability of success applied to anticipated contract value. In total \$385,958 has been included in the 2008-2009 budget of the possible total \$890,000 contract value for these projects.

## Other Revenue

Other revenue includes interest income.

## Programs and Services

Increase in cost projected for 2008 compared to the 2007 estimate is mostly attributable to the personnel area. A Curriculum Resource Specialist as well as an Evaluation Specialist are both budgeted for 2008 starting July. These positions were also budgeted in 2007 however were not hired during the year.

## **Academic Engagement**

An increase in cost projected for 2008 compared to the 2007 estimate is partly due to filling faculty positions that were budgeted but vacant for part of 2007, and partly due to the implementation of a new faculty model to strengthen academic engagement. This includes an additional Academic Co-Director role of 0.5 FTE, a Senior Academic Advisor at 0.8 FTE, and additional faculty leadership positions in support of the Curriculum Review and Planning initiative and the EXTRA/SEARCH Commissioned Research project. .

## **Communications and Promotions**

Costs remain relatively similar compared to 2007. This is due to the budgeted occurrence of a couple of new events and activities to highlight SEARCH projects, support faculty publication and presentation efforts as well as a larger anticipated Annual General Meeting. From a cost perspective, these events will be comparable with the bi-annual SEARCH Network Conference and Forum that occurred in 2007. Overall, the increase in this area is attributable to the planned hire of a new administrative assistant to support these initiatives.

## **Partnership and Governance**

Increases in costs for 2008 are due to increases in personnel. It is anticipated that a new Director of Emerging Initiatives will be hired in 2008 on a full-time basis to meet the goals of the business plan in the areas of extended capacity building and strategic growth. This position will be absorbed 50% by SEARCH core funding and 50% by various new projects. As well, a 0.5 FTE Accounting Assistant was hired in January 2008 and is budgeted throughout the coming year. A one-year only increase is noted in the governance area where 3 retreats are planned in 2008 because one of the two budgeted for 2007 was deferred into 2008.

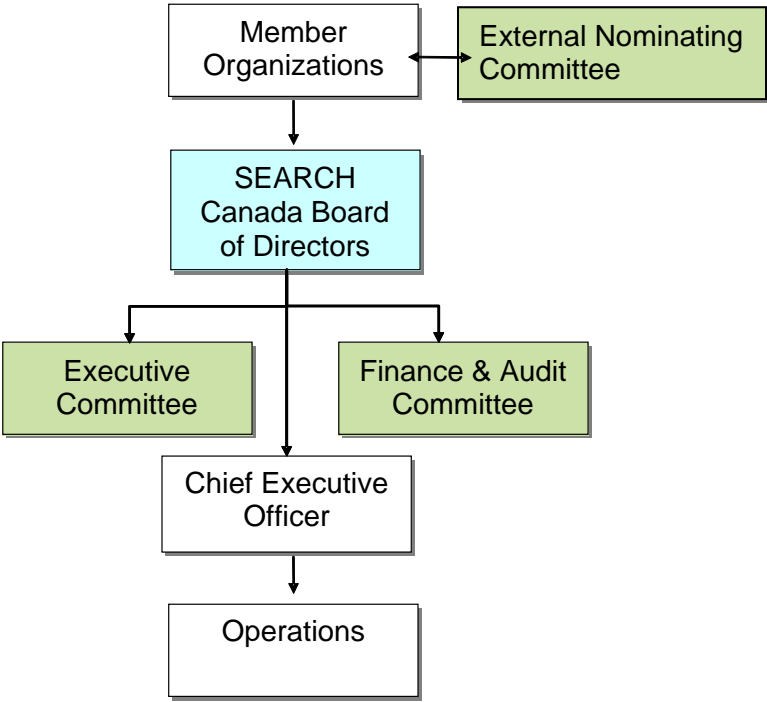
Also included is \$163,578 of anticipated administrative recovery on the various extension projects planned for 2008-2009.

## **Capital Expenditures**

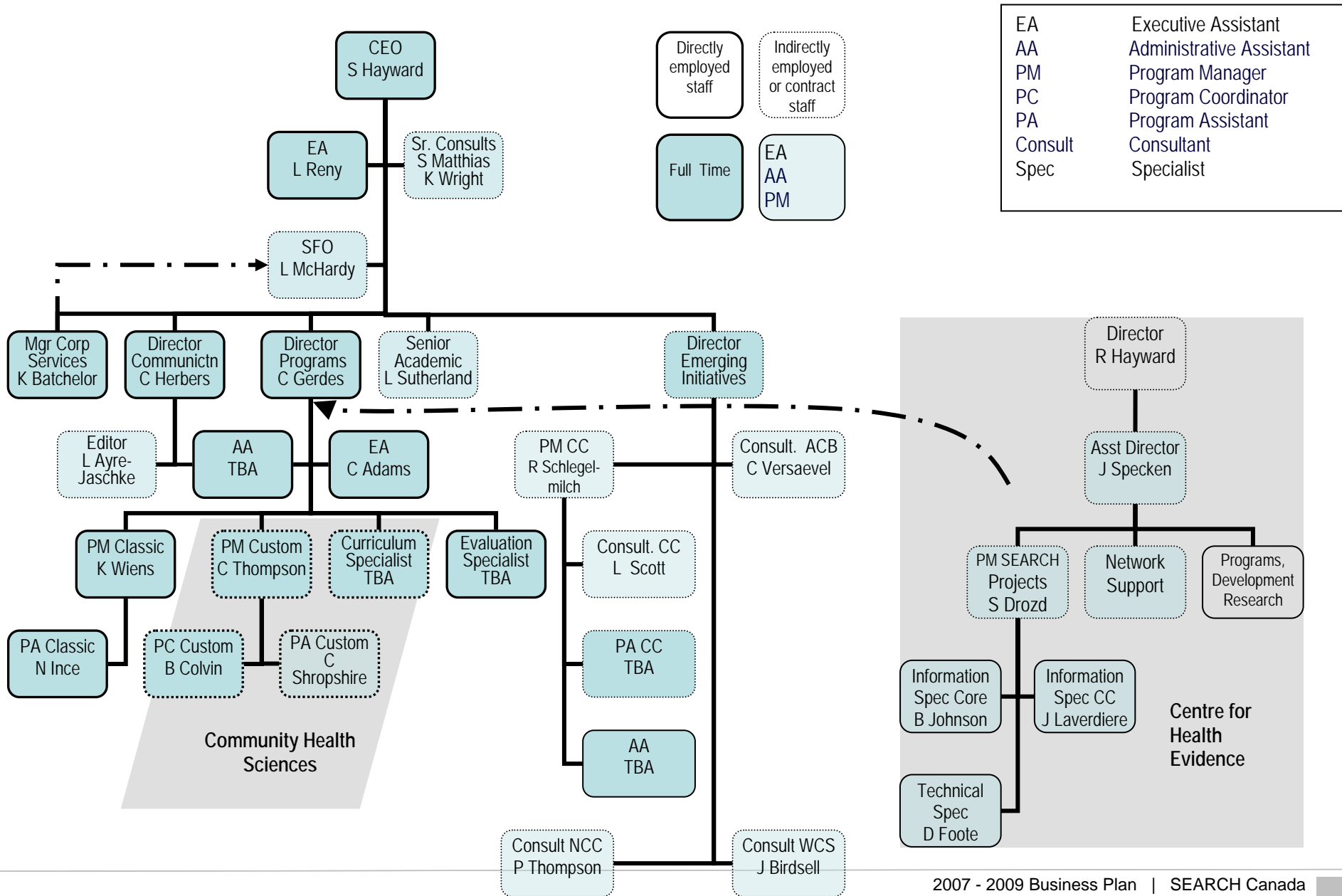
Included in this budget are anticipated capital expenditures totaling \$9,000 to purchase three laptop computers.

# APPENDIX 3: Organizational Charts

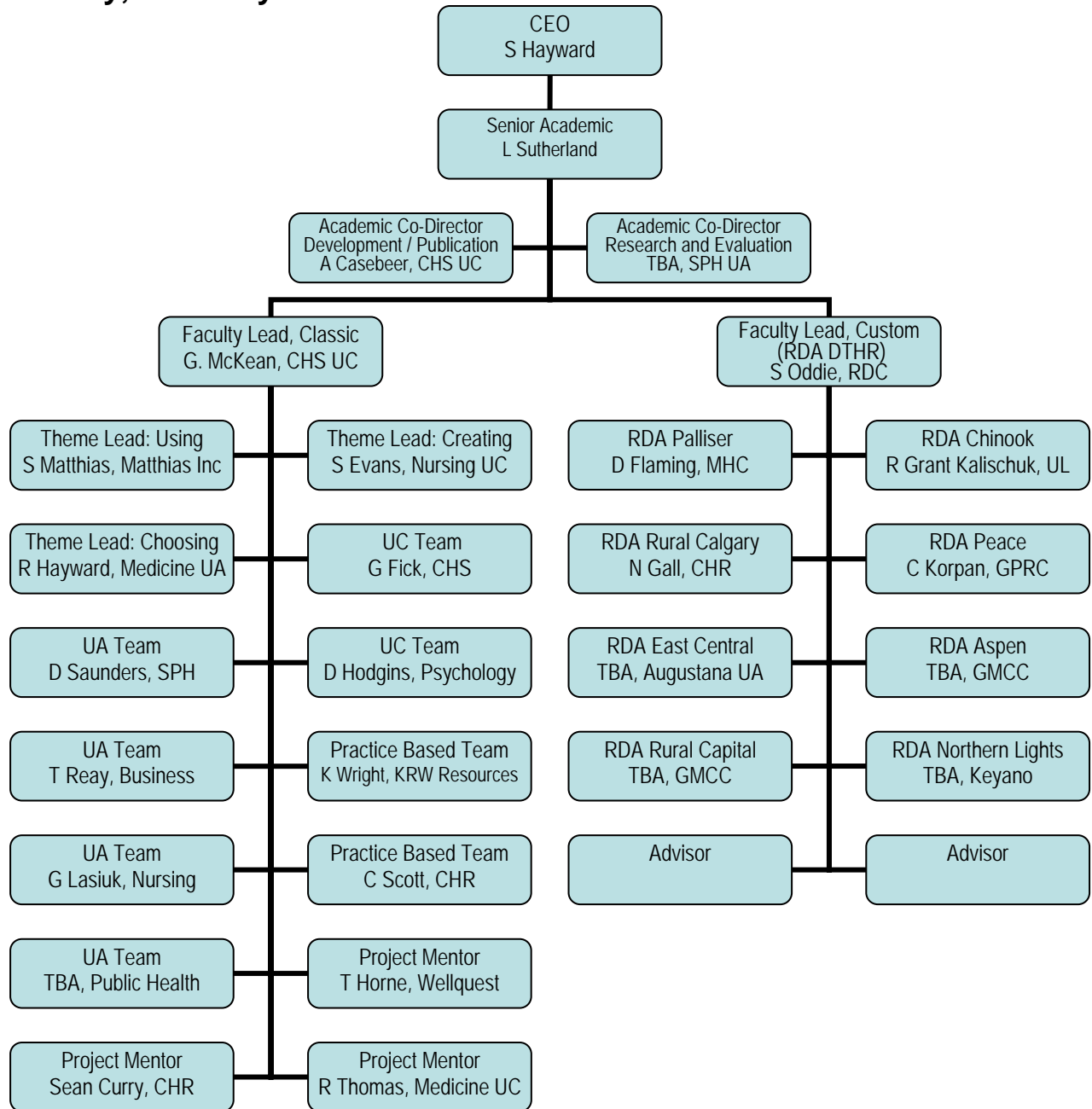
## Governance, February 2008



# Operations, February 2008



# Faculty, February 2008



## APPENDIX 4: Progress against the 2004-2009 Plan

In 2003, SEARCH Canada's member organizations accepted a Five-Year Plan that resulted from their wish to ensure:

- Sustained success of the SEARCH Program.
- Increased impact and value for partners, stakeholders and the Health System.
- Integration of SEARCH and its capacities into existing Health System structures and processes.
- Stronger response to needs and opportunities in Alberta.
- Further development of the province-wide network of health professionals and academics established through SEARCH.
- Shared leadership and commitment of partners to achieve the specific mission of the SEARCH Program.
- Strengthening of Alberta's leadership in the field of evidence-based health system development through applied research and its use in decisions.<sup>1</sup>

The plan described the vision and goals for the future and key strategies to achieve those goals. The key strategies and progress in their implementation are described below:

<b>Structure and Governance</b>	
<i>Plan 2004</i>	Transfer ownership, management and operation of SEARCH to a not-for-profit corporate entity, with founding members such as AHFMR, the Government of Alberta, the University of Alberta, the University of Calgary and all RHAs in Alberta.
<i>Progress 2007</i>	SEARCH operations transferred on April 1, 2005 to an independent not for profit organization, jointly funded and governed by 11 member organizations: AHFMR, the University of Calgary, all 9 Alberta health regions.  The University of Alberta joined as a member in 2007.
<b>Strengthen core programming</b>	
<i>Plan 2004</i>	Continue to offer the core SEARCH Training Program to health professionals nominated by Alberta's health authorities, the Ministry of Health and Wellness and others.  Develop and activate the health networks and collaboration initiated and supported by SEARCH to respond to the needs of the health system.
<i>Progress 2007</i>	Classic and Custom programs and services integrated, coordinated and aligned.  <b>SEARCH IV</b> completed June 2005 with 90% participation by health regions and 80% completion of 25 local evidence synthesis and application projects and 5 provincial research projects on priority themes.

<sup>1</sup> Five Year Plan 2004-2009, p.15-16, and p.26

	<p><b>SEARCH V</b> completed June 2007 with 100% participation by health regions and 95% project completion on priority themes.</p> <p><b>SEARCH VI</b> started May 2007, with 100% participation by health regions, as well as FNIHB, EMS, Bethany Care and Community Medicine residents.</p> <p><b>SEARCH Network</b> active in establishing 5 <b>Communities of Practice</b>, seed funded through SEARCH Custom. Network members are leaders in other provincial collaborations such as ARECCI and IRREN, and in local research and evaluation projects.</p> <p><b>SEARCH Custom</b> projects active in research and evaluation support and development in 6/9 health regions, in response to health region priorities. Local research networks supported through Research Development Advisors and Custom facilitation.</p> <p><b>Network of academic faculty</b> extended to 11 departments/faculties in 3 universities and 3 community colleges, as well as health region research departments and private sector.</p>
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**Develop new programming**

<p><i>Plan 2004</i></p>	<p>Develop new programs, products and services consistent with the vision and mission, which may include the following:</p> <ul style="list-style-type: none"> <li>▪ Programs for non-Alberta participants.</li> <li>▪ Programs for particular health regions, needs or audiences.</li> <li>▪ Collaborative research support services for multi-disciplinary teams in health regions, universities or other health system participants.</li> <li>▪ Information services, including an inventory of expertise, projects and people and extended knowledge access through the SEARCH Desktop.</li> <li>▪ Consulting services</li> </ul>
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<p><i>Progress 2007</i></p>	<p><i>New programs/initiatives:</i></p> <p><i>Out of Alberta:</i></p> <ul style="list-style-type: none"> <li>○ <b>Collaborative project</b> initiated with one BC and one SK health region. .</li> <li>○ <b>Public health</b> - feasibility projects to apply SEARCH Classic approaches for knowledge transfer, likely piloting in North West Territories.</li> </ul> <p><i>Particular regions, needs, audiences:</i></p> <ul style="list-style-type: none"> <li>○ <b>Mental health</b> sector capacity development initiative.</li> <li>○ <b>Communities of Practice</b> in immigrant health, interregional research/evaluation, and Chinook region.</li> <li>○ Numerous <b>region specific</b> ongoing projects, e.g. with respiratory therapy team (evidence literacy), speech pathology (screening), primary care (publication), program evaluation (courseware), professional development (clinical nurse consultants).</li> <li>○ <b>Module-linked</b> region-specific activities including: site visits, refreshers,</li> </ul>
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	<p>integrative consultation exercise (e.g. on Stroke Care, Emergency Waitlists)</p> <ul style="list-style-type: none"> <li>○ Two programs proposed with focus on <b>primary care</b> networks and rural physicians.</li> <li>○ <b>Continuing care</b> standards awareness project implemented desktop and training with 14,000 workers and 600 educator champions.</li> </ul> <p><i>Collaborative research support:</i></p> <ul style="list-style-type: none"> <li>○ Network of 5 <b>Research Development Advisors</b> established to provide consultation and access to expertise for health region personnel.</li> <li>○ <b>Collaborative research tools</b> designed, piloted and refine on SEARCH Classic desktop for provincial project teams.</li> <li>○ Proposal presented to MSI Foundation for capacity building and support for <b>community and practice-based research teams</b>.</li> <li>○ <b>National research team</b> established to undertake commissioned organizational case study research.</li> <li>○ <b>Student placement and curriculum sharing</b> arrangements developed with O'Brien Centre (UC), Western Regional Training Centre.</li> <li>○ <b>Jointly appointed and funded full time academic positions</b> established with School of Public Health (UA) and Department of Community Health Sciences (UC)</li> <li>○ <b>Faculty team expanded</b> from 10 to 20 members</li> <li>○ <b>Multiple research proposals</b> of academic partners supported.</li> </ul> <p><i>Information services</i></p> <ul style="list-style-type: none"> <li>○ Knowledge access and management services provided by the Centre for Health Evidence to <ul style="list-style-type: none"> <li>○ Local specific user groups in Peace Country, Capital Care, Aspen Health and Advance Practice Nurses.</li> <li>○ Continuing Care Project</li> <li>○ SEARCH Network of 200</li> </ul> </li> <li>○ Inventory of SEARCH projects completed.</li> </ul> <p><i>Consultation</i></p> <p>Expert advice of SEARCH faculty and staff sort widely on provincial and national advisory committees.</p>
<b>Alliances and Partnerships</b>	
<i>Plan 2004</i>	Form new alliances and partnerships, including with other AHFMR programs where this will enhance synergy and efficiency.
<i>Progress 2007</i>	Merger of SEARCH program with the <b>Alberta Consultative Health Research Network</b> (previously an AHFMR Special Initiatives Grant) completed in 2005.

Continued collaboration and leadership provided to the **Alberta Research Ethics Community Consensus Initiative** (of AHFMR) by SEARCH staff and faculty.

Formal operational agreements with the **Centre for Health Evidence, UofA** (strategic alliance and contractual) and the **Centre for Health and Policy Studies, UofC** (contractual) established in 2005 for program delivery and staffing.

Partnership with **Alberta Health and Wellness** established in 2006 to fund and implement the Continuing Care Desktop project.

Partnership with the **Alberta Mental Health Board** established in 2007 to fund additional SEARCH Classic participants and faculty.

Partnership with the **Alberta Association of Colleges and Technical Institutes** established 2007 to fund additional Research Development Advisors.

Partnership with the **Canadian Health Services Research Foundation** established 2007 to facilitate and fund a commissioned research study on organizational change.

Partnership with the **School of Public Health (UA)** established 2007 to fund a new full time faculty position cross appointed with SEARCH Canada and to submit joint proposal for practice-based research support.

Partnership with **Northern Health, BC**, and **Regina Qu'Appelle Health Region, SK**, established 2007 to fund a collaborative learning project.

Partnership with the **McMaster University's National Collaborating Centre for Methods and Tools** in public health established in 2007 to fund knowledge translation feasibility projects.

Collaboration agreement with the **O'Brien Centre (UC)** established 2007 for student placement.

Collaboration agreement with the **Research Transfer Network, Calgary Health Region, University of Calgary and Southern Alberta Child and Youth Health Network** to hold the Network Leadership Summits annually.

Collaboration with the **Institute for Health Economics** from 2005-2007 for the development and publication of two SEARCH projects as health technology assessment reports.

Affiliation agreement with the **Canadian Cochrane Centre and Network** for collaboration on dissemination and training for systematic reviews.

New partnerships established with the following academic institutions to participate in the faculty team:

- **Medicine Hat College (2005)**
- **Grande Prairie Regional College (2007)**
- **Faculty of Arts, University of Calgary (2007)**

<b>Awareness Strategy</b>	
<i>Plan 2004</i>	Implement an awareness strategy to sustain momentum and recognition that will ensure the program meets its goals.
<i>Progress 2007</i>	<p>SEARCH Canada visual and corporate identity established in 2005, with new logo, tag line, vision, mission, values and principles, and visual identity guidelines.</p> <p>Communication and awareness plan developed and implemented including:</p> <ul style="list-style-type: none"> <li>○ Government relations</li> <li>○ Member relations</li> <li>○ Media relations: local news events</li> <li>○ Recognition events, publications and presentations</li> <li>○ Marketing materials: website, video, conference display, pamphlets</li> <li>○ Academic conference submissions and presentations</li> <li>○ Expert Panel Review (2006) completed and report disseminated</li> <li>○ Quarterly and annual reports to members and stakeholders</li> <li>○ Newsletters and updates: SEARCH Light, SEARCH Connections and SEARCH Views.</li> </ul>
<b>Revenue</b>	
<i>Plan 2004</i>	Invest revenue from non-core services into new benefits for Alberta stakeholders. The new programs, products and services provided for clients outside Alberta will be delivered on a cost-plus basis and the revenue from these sales used to develop and refine the core programs for Alberta stakeholders.
<i>Progress 2007</i>	<p>Core programs funded under core funding resources.</p> <p>Business model refined to outline approach to extensions, including revenue-based projects undertaken at full cost recovery with allocation of management, infrastructure and administration cost wherever possible. Project-based accounting model implemented.</p> <p>Budget increased by 20% by 2007-08, and estimated by 40% by 2009, through non-core project funding.</p> <p>Financial leverage targets met.</p>
<b>Funding mechanisms</b>	
<i>Plan 2004</i>	Ensure that all funding mechanisms are designed with the highest level of sustainability and integration into core business processes.
<i>Progress 2007</i>	<p>Core funding model established as grant funding from twelve member organizations.</p> <p>Non-core project revenue and support received through:</p> <ul style="list-style-type: none"> <li>○ Contracts for service (e.g. AMHB)</li> <li>○ Grants (e.g. AHW, NCC, ACB)</li> <li>○ Matching funds (AACTI, SPH)</li> </ul>

## 2006: Opportunities and Challenges

In May 2006, the Board of Directors of SEARCH Canada reviewed the driving and restraining factors affecting SEARCH Canada (updating the Strengths, Threats and Trends work conducted in 2003.)

The 2004-2011 strategic development of SEARCH Canada needs to build on the following positive environmental factors:

- Impetus for innovation in the health system is high
- SEARCH Canada has achieved a level of recognition, experience and proven models
- There are potential needs developing from the rapid changes in the research and education sectors, including new community college mandate in applied research
- The information technology agenda is linking to a knowledge management agenda

SEARCH Canada's strategic development also needs to take into account and respond to the following environmental challenges:

- Turbulence in the organizational environment, in health and education, demands a pace of change that outstrips rational application of evidence to support decision-making
- Low recognition of SEARCH Canada's capability and potential, and a challenge to demonstrate value added
- A crowded field in terms of knowledge transfer initiatives, language, activities and engagement (compared to a decade ago)
- Career development in university academia under-values applied research and non-traditional practice-linked roles
- Uncertainty about sustainability of SEARCH Canada resourcing.

## APPENDIX 5: Acronym Dictionary

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AACTI	Alberta Association of Colleges and Technical Institutes
ACB	Alberta Cancer Board
ACHRN	Alberta Consultative Health Research Network
AHFMR	Alberta Heritage Foundation for Medical Research
AHR or ASPEN	Aspen Health Region
AHW	Alberta Health and Wellness
AMHB	Alberta Mental Health Board
ARECCI	Alberta Research Ethics Community Consensus Initiative (AHFMR)
BC	British Columbia
CADTH	Canadian Agency for Drugs and Technology in Health
CAHSPR	Canadian Association for Health Services and Policy Research
CCHSA	Canadian Council on Health Services Accreditation
CCNC	Canadian Cochrane Centre and Network
CDPAC	Chronic Disease Prevention Alliance of Canada
CHAPS	Centre for Health and Policy Studies (U of C)
CHA	Capital Health
CHE	Centre for Health Evidence (U of A)
CHR	Calgary Health Region
CHR	Chinook Health
CHSRF	Canadian Health Services Research Foundation
CIDA	Canadian International Development Agency
CIHI	Canadian Institute for Health Information
CIHR	Canadian Institutes of Health Research
CoP	Community of Practice
CPHA	Canadian Public Health Association
CPHI	Canadian Population Health Initiative
CPSI	Canadian Patient Safety Institute
CREBA	Community Research Ethics Board of Alberta
CRPC	Curriculum Review and Planning Committee (SEARCH)
DTHR	David Thompson Health Region
EBRI	Elizabeth Bruyere Research Institute (Ontario)
ECH	East Central Health
EHR	Electronic Health Record
EMR	Electronic Medical Record
ERM	Enterprise Risk Management
EXTRA	Executive Training for Research Application (CHSRF)
FTE	Full Time Equivalent
FNIHB	First Nations and Inuit Health Branch (Health Canada)

GMCC	Grant McEwan Community College
GPRC	Grande Prairie Regional College
HBA	Health Boards of Alberta
HCA	Health Care Aide
HHR	Health Human Resources
HIA	Health Information Act
HKN	Health Knowledge Network
HQCA	Health Quality Council of Alberta
HRM	Health Research Methods
HTA	Health Technology Assessment
ICSBHS	International Conference on the Scientific Basis of Health Services
IHE	Institute for Health Economics
IP	Intellectual Property
IPPH	Institute for Population and Public Health
LOI	Letter of Intent
MHC	Medicine Hat College
MoU	Memorandum of Understanding
MSFHR	Michael Smith Foundation for Health Research
MSI	Medical Services Insurance Foundation
NAPHRO	National Alliance of Provincial Health Research Organizations
NGO	Non-governmental Organization
NCCMT	National Collaborating Centre for Methods and Tools
NLHR	Northern Lights Health Region
NSHRF	Nova Scotia Health Research Foundation
PAC	Program Advisory Committee (SEARCH)
PCHR	Peace Country Health
PHAC	Public Health Agency of Canada
PHEN	Provincial Health Ethics Network
PHR	Palliser Health Region
RDA	Research Development Advisor
RDC	Red Deer College
REB	Research Ethics Board
RHA	Regional Health Authority
RPAP	Rural Physicians Action Plan
RTNA	Health Research Transfer Network of Alberta
SI	SEARCH I : first SEARCH cohort, 1996-1998
SII	SEARCH II: second SEARCH cohort, 1998-2000
SIII	SEARCH III: third SEARCH cohort, 2001-2003

SIV	SEARCH IV: fourth SEARCH cohort, 2003-2005
SV	SEARCH V: fifth SEARCH cohort, 2005-2007
SVI	SEARCH VI: sixth SEARCH cohort, 2007-2009
SEARCH	Swift Efficient Application of Research in Community Health
SHRF	Saskatchewan Health Research Foundation
SHRTN	Seniors Health Research Transfer Network
SK	Saskatchewan
SPH	School of Public Health (UofA)
TREC	Transfer of Research for Elder Care
U of A	University of Alberta
U of C	University of Calgary
U of L	University of Lethbridge
UMA	Unanimous Members' Agreement
WCS	Western Canada Strategy
WHO	World Health Organization
WRTC	Western Regional Training Centre (for health services research)