



de Souza Institute  
Educational Activities  
Annual Report

April 2013 - March 2014



## Executive Summary

Established in 2008, the de Souza Institute has educated nearly 6,000 nurses with the latest knowledge and practices in oncology and palliative care resulting in an 80% increase in the number of specialized nurses in Ontario. The Institute's activities are closely aligned with the Ontario Cancer Plan, 2011- 2015. Most nurses in chemotherapy suites across Ontario have completed de Souza's *Provincial Standardized Chemotherapy and Biotherapy* course, meeting CCOs standards for safe delivery of systemic treatment and care. Starting from April 2013, a new 3-year funding model was implemented, with decreased MOHLTC funding to \$2.0 million in 2013/14, \$1.6 million in 2014/15 and \$1.0 million in 2015-16. Building on the infrastructure and experiences developed over the past five years, de Souza Institute is tasked to maintain growth and develop a comprehensive sustainability strategy. The successes and challenges in the first year of the new 3-year funding model are highlighted:

### Course Development:

- Most courses were transitioned into online learning to reduce operating costs; and a new course fee structure was implemented at the beginning of this fiscal year.
- 5 new courses were added to the total course roster. A total of 60 offerings took place in this fiscal year. Among them, 8 offerings (13%) were cancelled due to low enrolments. Courses affected were: cancer prevention, psychosocial care, managing grief and loss and radiation oncology. These courses were well attended only when offered at no cost.
- **The number of enrolments dropped by 40% since April 2013, as shown in Figure 1.**

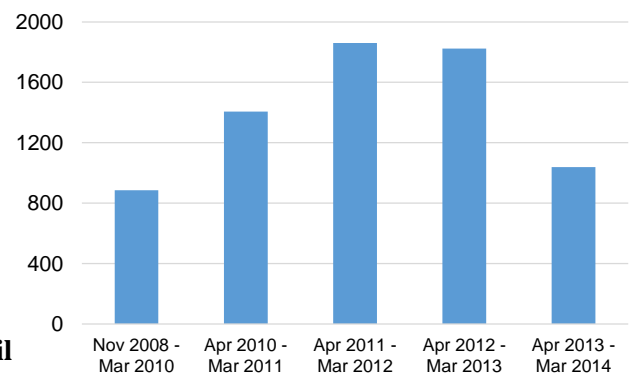


Figure 1

### Expansion of de Souza curriculum to a broader learner population

- de Souza continued to focus on supporting oncology nurses while reaching out to generalists and other health care providers. An oncology foundation course tailored for Emergency room nurses was developed. One third of de Souza courses deemed suitable for multidisciplinary providers were highlighted in the 2014/15 de Souza course calendar distributed to 500 health care organizations. Expected oncology competencies across professions are being developed by an expert advisory committee to be incorporated into the future course revision.
- **Almost all health care providers encounter cancer patients regardless of where they practice. Supporting the entire workforce with the latest evidence of cancer care will ensure quality services across Ontario.**

### Revenue Generation:

- The course fees were based on benchmarks from other CE programs in North America.
- In the first 12 months, the Institute generated \$201,000 with payment from 1,038 learners. Facilitator courses (e.g. train the trainer format) were free to support local capacity building.
- The Institute explored other revenue sources and received a \$200,000 one-time sponsorship for four targeted courses. The funding reduction and revenue generation is shown in Figure 2.

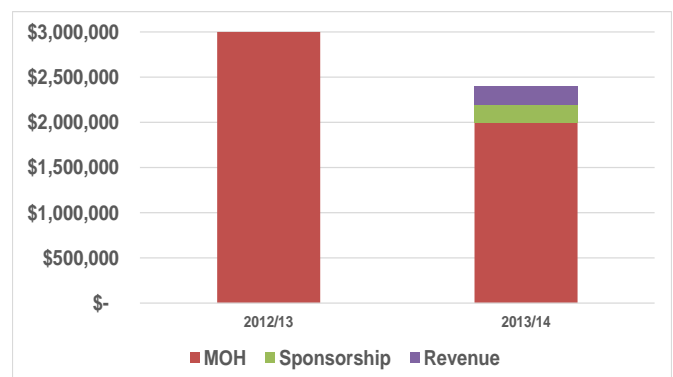
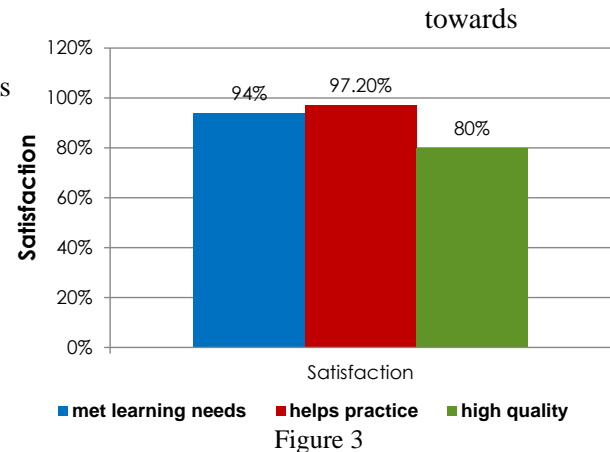


Figure 2

## Activities Towards Sustainability

- A provincial advisory committee has been established through the leadership of Cancer Care Ontario to provide guidance on sustainability strategies, including pursuit of sources of revenue beyond that of course fees.
- Business consultation: To guide business planning sustainability, the Institute hired a business development consultant to review current approaches and explore potential markets. The consultant found high needs for courses and very high learner satisfaction with de Souza courses (Figure 3). However, to sustain the Institute, each course offering would have to enroll 250 learners. This was not achieved in 2013/14. Factors such as lack of hospital budget funding for CE and nurse expectations for employers to sponsor course fees have limited enrolment. The business consultation result is attached to this report.
- To explore new revenue the Institute's director, Dr. Mary Jane Esplen, held multiple meetings and submitted proposals seeking partnerships with the Canadian Nurses Association and Canadian Association of Nurses in Oncology to bring de Souza courses across Canada. To attract new nurses into oncology and palliative care, Dr. Esplen will present to the Council of Ontario University Programs in Nursing to promote specialty training in higher education. Dialogue with private industries is currently underway for potential private donor sponsorship, as another source of revenue.
- The Institute hired two sales and marketing staff to travel across the province to promote de Souza courses. This includes site visits to highlight alignment of de Souza courses to the strategic priorities in a broad range of health care sector beyond cancer centres. de Souza courses can be readily applied as standardized high quality educational support for organizational changes and need. Specific areas where de Souza can play a role include: efficiency improvement, better process for enhanced patient safety, and human resources training for organization wide person-centred care.



Despite these efforts, the Institute is facing significant challenges to become a 100% self-sustaining entity. Barriers include: a weak provincial economy limiting funding availability for education and health care; hospital budget shortfall and a need to preserve clinical care taking precedent over staff development; a general lack of career development incentive for direct care nurses who are reluctant to pay for continuing education on their own; and a more competitive environment to solicit corporate sponsorship towards education. With these challenges, the short duration of three years is not sufficient for de Souza Institute to build awareness, develop partnership, obtain stable sponsors and sustain a high quality continuing education program.

In 2014/15, the Institute will continue its current efforts towards building sustainability. In particular, the Institute will explore opportunities to support MOHLTC priority initiatives using its innovative eLearning platform and the Institute's capability to provide high quality, evidence-based, and standardized education in a timely manner. The Institute could play a significant role in shaping the health care delivery and transformation in areas such as senior care and palliative care through workforce training. Details of sustainability activities in this fiscal year are provided in Appendix A. The team will continue to collect information on the needs for educational support from frontline providers, patients and families and from decision-makers.

## Background: The New Three Year Funding Model

de Souza Institute was established in 2008 through a \$15 million grant over five years from the Ontario Ministry of Health and Long-Term Care (MOHLTC) and in partnership with Cancer Care Ontario, Princess Margaret Hospital Foundation and University Health Network to provide continuing education to nurses working in Oncology and Palliative Care across Ontario. With this funding, the Institute developed an innovative educational model which includes a state-of-the-art information technology infrastructure, and has delivered evidence-based, timely and clinically relevant oncology and palliative care education. More than 30 high quality courses have been developed, with the majority of them being online, ensuring broad access by health care providers across the entire province.

Building on the learning platforms, tools and experiences from the initial MOHLTC funding, the current three year funding will be used to support sustainability building. MOHLTC funding follows a gradual funding decrease model from its 2.0 million in 2013/14, 1.6 million in 2014/15, and 1.0 million in 2015-16. de Souza Institute will acquire and build expertise in revenue generation over the three year funding period and develop a sustainability strategy.

The proposed *priorities* for 2013/14 include:

- Continue to create standardization in cancer care delivery across Ontario;
- Continue to partner with Cancer Centres, hospitals and community agencies to build oncology specialty education capacity across Ontario, e.g. de Souza expert facilitators in chemotherapy and psychosocial care and palliative care support in all LHINs;
- Develop new courses tailored for community and generalist nurses and RPNs;
- Develop and plan future revenue generation scenarios;
- Explore additional cost effective models.

Based on the above mentioned priorities, the Institute established the following targets for this fiscal year while transitioning to a new course fee based operation structure:

- Continue to support more than 5,000 nurses and other health care providers across Ontario;
- Expand expert facilitator series to support 30 facilitators across 14 regions to deliver de Souza standardized educational packages;
- Develop 5 new courses, based on needs assessment using state-of art information technology over the next two years.

## Overview of 12 months of business activities under the new funding model

Under the leadership and guidance from Cancer Care Ontario (CCO) and University Health Network, de Souza Institute completed its transition from free continuing education to a course fee based system while maintaining its high productivity and efficiency.

## Continue to create standardization in cancer care delivery across Ontario

**Chemotherapy and Biotherapy:** As part of the Ontario Cancer Plan to improve the performance of the cancer system, CCO requested that all nurses in chemotherapy suites across Ontario complete de Souza's *Provincial Standardized Chemotherapy and Biotherapy* course, meeting CCO's targets for standardized, evidence based and safe systemic treatment delivery across the province. Nurses in cancer centres and affiliated hospitals are expected to obtain oncology or palliative care specialty certification from the Canadian Nurses Association.

Aligned with the Ontario Cancer Plan 2011-2015, the de Souza team has rolled out the new online *Provincial Standardized Chemotherapy and Biotherapy* course twice in September 2013 and January 2014 to a total of 220 RNs. The online feature has been well-received with feedback suggesting its relevance for enhancing easy access, interactive activities supporting knowledge acquisition / retention around chemotherapy administration, and flexibility for tailoring to learning needs. In terms of the effectiveness in improving knowledge, when comparing entrance and exit exams, nurses scored 30% higher post course (Figure 4).

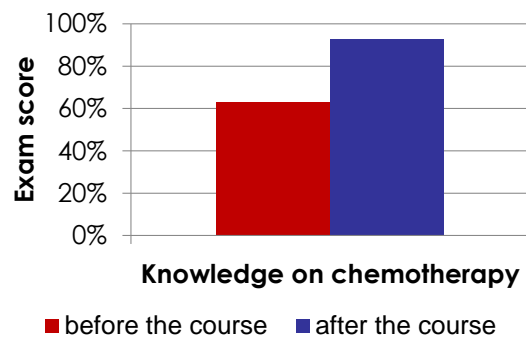


Figure 4

Local de Souza trained chemotherapy facilitators continue to lead the learning lab and subsequent preceptorship following the online course. A chemotherapy facilitator retreat was offered in February 2014 to offer facilitators latest best practices in medical education, to gather their feedback on the new online course from facilitators' perspective, and to identify gaps to be addressed in the new offering in 2014/15.

**Foundational knowledge in oncology:** The *Foundations in Oncology Nursing Practice* course was developed in 2010. The course covers four major cancer sites - breast cancer, prostate cancer, colon cancer and lung cancer - including cell biology/laboratory values, presenting symptoms, diagnosis, treatment modalities, outcomes, as well as psychosocial impact of these cancers on patients and families. In 2014, in order to tailor the course to a broader learner population, including those who work in emergency room in a general hospital, a *Foundations of Oncology for Emergency Room Nurses* online course was developed incorporating 9 common oncology emergency scenarios using case studies and discussions. Another course for generalists, *Foundations of Cancer Disease Sites*, was completed to cover an additional 20 cancer sites. Nurses who completed the *Foundations in Oncology Nursing Practice* course can continue on and "pick and choose to customize" the cancer disease sites within the course in order to focus on those cancers most relevant to their clinical practice.

**Introduction to Hospice Palliative Care:** The *Introduction to Hospice Palliative Care* course is a six week self-directed online course focused on the integration of palliative care domains, such as physical, psychological, social and spiritual care. Resources for pain assessment tools, complementary and alternative interventions, cultural and legal consideration are embedded to assist learners to comprehend and apply the knowledge. The first pilot offering was launched in May 2013 followed by four

subsequent offerings. A total of 69 nurses completed this course, with greater participation from the Greater Toronto areas and northern Ontario (Figure 5). Feedback from participants indicated that learners found the course provided relevant and concise content; useful case studies that helped increase learning and stimulate critical thinking; and reported that the comprehensive application through a single family case linking all domains of palliative care was effective. The case was illustrated by Toronto artist Susannah Bleasby, to describe a family going through their hospice palliative care journey via the use of visual arts. This learning format was highly endorsed by learners as being unique, relevant to practice and applicable to their work.

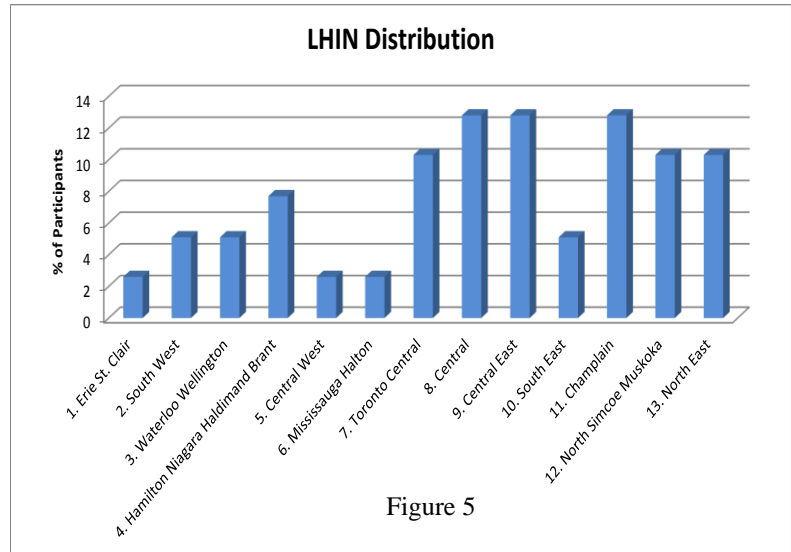


Figure 5

**Patient Teaching and Education:** The *Patient Teaching and Education* course was developed through a partnership with Cancer Care Ontario and University Health Network and built on the award winning program “Maximizing Patient Education Skills Workshop.” It provides an

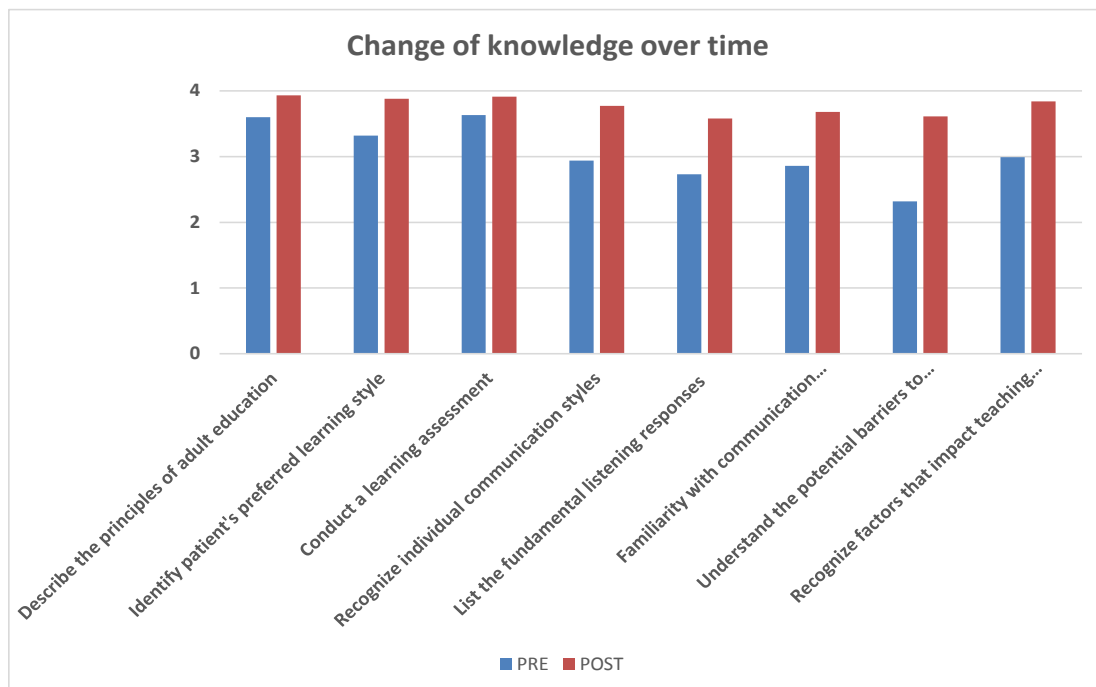


Figure 6

overview of adult learning principles, different learning styles and how they assist in the planning and effective delivery of patient teaching and education. This course was launched in January 2013 and repeated five times in this fiscal year. A total of 223 participants registered in the course. Seventy percent of them were direct care staff. Content areas for learning includes the identification of key elements in a successful patient education planning and execution, and a self-reflection on how the learning may be integrated into the participants' own clinical environments. Participants reported increased knowledge and confidence in all seventeen content areas. Seven content domain areas were randomly selected for reporting in Figure 6.

These selected samples illustrate outcomes from some of the more than 30 courses that de Souza continues to develop, refine and offer to support standardized cancer service delivery through high quality, accessible and clinically relevant continuing education.

### Continue to partner with Cancer Centres and build oncology specialty education capacity across Ontario

**de Souza expert facilitator** series was launched in 2012 and continued in 2013. A total of 30 chemo-facilitators have been trained and are currently active. These expert facilitators and champions work with their local hospitals to coordinate chemotherapy learning labs, invigilate course final exams and provide mentorship in chemotherapy safe delivery to further expand the reach of best practices across the province. Being the extension of de Souza Institute to all 14 regional LHINs, facilitators have first-hand knowledge on the strengths of the chemotherapy and biotherapy course and help to identify gaps to be addressed in future offerings. The goal of the facilitator series is to ensure that de Souza curriculum maintains a standardized quality and is the primary source of learning throughout Ontario by specialists and generalists. The development of facilitators allows for capacity building and delivery of the course at local jurisdictions.

In February 2014, the Institute organized a one day retreat on innovative strategies to facilitate learning. The keynote speaker Dr. Ivan Silver is a recipient of the prestigious President's Teaching Award from the Faculty of Medicine University of Toronto, as well as several national and international awards in Education. Dr. Silver shared with de Souza facilitators his teaching philosophy of building a strong relationship between educators and learners. Such relationship supports "*good conversation and exchange of ideas, mutual respect (including respect for autonomy), trust, genuineness, and interest in the other, playfulness, empathy and emotional warmth*" ([www.camh.net](http://www.camh.net)). He highlighted the impact of strong mentorship in the success of a clinical teaching program. The facilitators also reviewed enablers and barriers in facilitating continuing education uptake, including local culture, clinical context, as well as facilitator knowledge and teaching competencies. Facilitator support is an integral part of capacity building and the retreat will be offered annually, as well as extended to include other clinical areas such as psychosocial care and hospice palliative care.

**eMentorship program** was transferred to be solely managed by de Souza Institute in April 2013. Building on the success of the initial design of the eMentorship in career development, this program will further expand to include clinical mentorship leveraging de Souza facilitators, de Souza APNs and Scholars and other experienced oncology educators to roll out province wide clinical mentorship support for front line nurses.

## Tailoring courses for generalist nurses and RPNs

**Course packages:** With the comprehensive courses covering the continuum of cancer care, de Souza Institute has developed a series of course packages to support health care organizations towards better implementation of their organizational priorities. There are new course packages for nurses with differing level of oncology experiences. For example, an orientation and educational package suited for novice nurses, offerings suggested for mid-career experienced nurses, courses tailored for emergency room nurses, medical/ surgical nurses, aboriginal workers, as well as a series of courses packaged to support palliative care and home care.

**RPNs** play a significant role in hospital care, community services, long term care and home care. About 25% of existing de Souza learners are RPNs. Courses such as foundations in oncology, introduction to hospice palliative care, pain assessment and management, and patient teaching and education, are among the courses that are offered to RPNs and RNs. To further promote specialized oncology training at the college level, a joint program between Lambton College and de Souza Institute was launched in the fall 2013 to support a specialized post graduate certificate program with two streams: oncology and palliative care. Both streams of RPNs will complete courses from OntarioLearn, an online learning system across 20 colleges, as well as online courses from de Souza Institute. Graduates of this program will receive a graduation certificate in oncology or palliative care and, at the same time, also meet requirements for, and receive the de Souza Nurse Associate designate. This program will be especially appealing to RPNs who work with cancer patients in a broad range of health care settings, and allows for part time studying through the college. The joint program will also support RPNs by engaging them into de Souza's lifelong learning program that will support their needs beyond their college graduation. The first cohort of 12 RPNs began the program in fall 2013. It is anticipated that, because of the part- time nature of the program, RPNs will spend up to two years completing all requirements, thereby receiving the oncology/palliative care certificate and de Souza Nurse Association designation combination by fall 2015.

**Symptom management course series:** Cancer patients experience significant symptom distress, including examples such as fatigue, shortness of breath, pain, nausea and vomiting, depression and anxiety. These symptoms are also common in many other chronic diseases. With funding support from Cancer Care Ontario, the Institute initiated the development of a series of symptom management courses building on the evidence based algorithm developed by expert committees in CCO and across Canada. These courses will bring clinically-relevant, practical, and timely symptom management strategies to RNs, RPNs, and other providers in cancer care and beyond. The goals are to improve the quality of health care across settings and promote shared competencies across professions. The first two courses, dyspnea and depression, are currently under development. Seven other symptoms are being considered for development in the next few years.

## Develop strategies to build sustainability

A new Provincial Advisory Council was set up to guide the Institute in building its sustainability. Cancer Care Ontario (CCO) is overseeing the advisory council to inform a provincial strategy on cancer education for nurses and other healthcare providers, provide strategic direction to de Souza as the fiscal environment changes, and to recommendations to de Souza on how the operations will deliver on the strategy.

**Operational change** started in 2012 in anticipation of the new funding model. de Souza streamlined and realigned staff positions to correspond to a 30% funding reduction in 2013/14. The IT team led the implementation of a new online payment system to support the roll out of the new course fee structure in May 2013.

**Expansion of de Souza curriculum to inter-professional education:** de Souza Institute has begun expansion of curriculum to include other disciplines, to promote shared core competencies as well as team-based care.

The initial developments included

- Stakeholder focus groups from Toronto, London and Thunder Bay to seek input from multidisciplinary learners on their interest in continuing education courses in oncology that would support their practice. Two physician groups, two pharmacist groups, and two mixed provider groups (social worker, psychologists, OT/PT) were interviewed.
- de Souza educators reviewed the entire set of de Souza courses using the data from the focus groups to identify areas for adjustments and further refinement to prepare for learners from different health care disciplines.
- The Communication team designed the first de Souza course calendar covering 12 months of offerings of de Souza courses, organized into three terms - fall, winter and summer - in accordance with standard practices in all academic institutions. Courses are also searchable on the website by key words, by health care professions, and sorted in the alphabetical order so that multiple offerings of the same course can be found on the same screen. The IT team and administrative support revised the website and learner enrollment system (ePortfolio) to accommodate the expansion for acceptance of multidisciplinary learners in this fiscal year.

These changes aligned with ongoing work by an “Interdisciplinary Working Group”, with stakeholders including nurses, physicians, social workers, psychologists, and academics, to consider a conceptual model and shared competencies relevant for the field of oncology. This working group will inform de Souza in planning future curriculum and refining current offerings, as well as in marketing strategies to outreach to a multi-disciplinary audience.

**Revenue – course fees:** Through the above mentioned efforts in new content development, facilitator training, organization outreach, expansion to support the multidisciplinary team and a nation- wide communication campaign, de Souza was able to generate approximately \$201,000, or 10% of the total funding for 2014/15. Some of de Souza courses, e.g., facilitator courses to build capacity, continued to be offered at no cost. A total of 60 offerings took place in this fiscal

year. Among them, 8 offerings (13%) were cancelled due to low enrolments. Courses affected were: cancer prevention, psychosocial care, managing grief and loss and radiation oncology. This uptake is in contrast to previous rates for the same courses, which were well attended during the period of no cost. The overall enrolment for de Souza courses between April and March 2014 was 40% lower than that of the previous years, when all de Souza course were offered at no charge.

**Donation and/or sponsorship:** de Souza has received a \$200,000 one-time sponsorship for four targeted courses. Sponsorships and donations will help to reduce the funding shortfall. However, because of the uncertainty around future sponsorships, it remains unlikely sponsorship or donations alone will be effective in building ongoing sustainability for the Institute.

Based on the first 12 months of de Souza operations, despite the team's best efforts and continued high productivity and efficiency, the course fee based revenue has proven to be far short of funding needed for the operational dollars. With an additional half million funding reduction anticipated for fiscal 2014/15, de Souza operations will be severely hampered if no additional sources of revenue are secured. A sustainability and scenario planning report was submitted to MOHLTC in December 2013.

## Explore additional cost effective models of providing education throughout the province

### **Additional Business Opportunities – business development consultation:**

An experienced business consultant with past engagement with non for profit organizations was hired to support the Institute in formulating a path to sustainability given the funding environment. The work included qualitative interviews with 40 individuals:

- 13 Nurses: 3 nurses with a de Souza designation and 10 other nurses from across Ontario in Cancer Centres, regional hospitals, community care, palliative care, non-cancer-specific units who have taken at least one de Souza course;
- 14 Health care employers: 7 Nursing Executives from large institutions, 6 from smaller hospitals, and 1 from a hospice;
- 4 Regional Cancer Centre VPs from various regions of the province;
- 9 other informed individuals: associations (CANO, CAPO, CNA, Hospice & Palliative Care Ontario), de Souza Steering Committee members and other health care professionals.

Analysis was also conducted on de Souza financial & operational data to develop a financial model, given the size of market using statistics from CIHI and CNA.

Analysis of the interviews and financial status indicated that while there is significant interest in de Souza programs from both nurses and their employers, the Institute remains in peril if further funding is not secured

- Economic growth in Ontario continues is weak;
- Course revenue is unlikely to increase significantly in the near- to medium-term;
- No other source has yet generated significant funds to sustain the Institute.

Recommendations include aggressively pursuing alternative funding options in addition to government funding, including fundraising and partnerships etc., and in parallel, continue to build the organization's abilities to survive and scale up by fast-tracking marketing and sales capabilities and driving demand through marketing and sales activities.

**Marketing and Sales:** The Institute hired two full time sales and marketing staff to promote de Souza courses across the province, as a key strategy in the business development plan. Sales representatives and the director will conduct site visits to highlight alignment of de Souza courses to the strategic priorities of a particular organization beyond cancer centres. de Souza courses cover a broad range of topics and map out a learning pathway from novice to expert. Therefore, they can be readily applied as standardized evidence based educational products to support organizational needs. Specific examples include helping agencies towards efficiency improvement (e.g., symptom management), enhanced patient safety (e.g., systemic treatment), and human resources training to implement organization wide person-centred care initiative (e.g., patient teaching and education and psychosocial care). These are just a few of the examples of “course re-packaging” to target marketing to specific health care organizational need. In addition, de Souza can offer its IT expertise, health professional education expertise, and change management expertise to provide site specific consultation and needs assessment. The Institute can offer tailored strategies and pathways to help organizations building a high performing and LEAN enterprise.

The Institute's director, Dr. Mary Jane Esplen, has held multiple meetings and submitted proposals to develop potential partnerships with the Canadian Nurses Association and Canadian Association of Nurses in Oncology to assist in building the Institute nationally. To attract new nurses into oncology and palliative care, Dr. Esplen will present a student designation with the option to build towards a full designation to the Council of Ontario University Programs in Nursing to promote specialty training in higher education. New graduates with “extra” training in foundational oncology or palliative care - and a de Souza student designation - are more likely to obtain entry level positions in health care settings delivering cancer care. They are also more equipped to learn and succeed in high intensity environments, such as oncology or palliative care units.

Discussions with private industry are also underway to explore potential sponsorship to support the development of new courses, expand outreach, support continued offering of scholarships and to further address the training needs of specific professions.

Moving forward, the Institute will continue its current efforts towards building sustainability. In particular, the Institute will explore opportunities to support MOHLTC priority initiatives using the innovative eLearning platform and the Institute's capability to provide high quality evidence-based, and standardized education in a timely manner. The Institute could play a significant role in shaping and transforming health care delivery via a more standardized approach to supporting continuing education needs of front line staff. Specific areas where de Souza could play a significant role include province wide standardized workforce competency training in elderly care and palliative care. Details of sustainability activities in this fiscal year are provided in Appendix A.

## Summary of deliverables

Under the leadership of CCO and UHN, and by carrying out the organizational priorities outlined above, de Souza Institute achieved the following deliverables:

Original target Apr 13 - Mar 14	Delivered between Apr 13 - Mar 14
To continue to support its current ≥5,000 nurses and other providers across Ontario	<ul style="list-style-type: none"> <li>• All de Souza courses are being updated and revised annually to include latest evidence and practices and to incorporate learner feedback through evaluations.</li> <li>• Currently, 95% of de Souza courses are online.</li> <li>• New courses are being developed based on organizational priorities, including expansion to support generalists, community nurses and other health care providers.</li> <li>• Course packages with specific tailoring to specific learner populations e.g., novice nurses, emergency nurses or local needs, patient centred care training package have been launched and marketed.</li> </ul>
To expand its expert facilitator series to support 30 facilitators across 14 regional cancer centres to deliver de Souza standardized educational packages.	<p>de Souza facilitator courses are offered in chemotherapy, psychosocial and palliative/end of life care for nurses and other health professionals at the educator/mentorship role.</p> <p>The first facilitator retreat was organized in Feb 2014 to inspire and encourage innovation, identify gaps and develop knowledge translation strategies for educational support, and to further coordinate province wide roll out of de Souza courses.</p> <p>eMentorship will be expanded to include clinical support in 2014/15</p>
To develop 5 new courses over the next two years, most of which will be online and utilize the state-of-art information technology	<p>Five New courses were launched in 2013/14:</p> <ul style="list-style-type: none"> <li>• Introduction to Hospice Palliative Care</li> <li>• Patient Teaching and Education.</li> <li>• Foundations of Cancer Disease Sites (A, B, C series),</li> <li>• Foundations of Oncology for ER Nurses,</li> <li>• Introduction to Evidence Based Practices in Digital Era</li> </ul> <p>Three new courses are under development:</p> <ul style="list-style-type: none"> <li>• Survivorship Issues in Cancer Care</li> <li>• Cancer Care for Seniors</li> <li>• Symptom Management Series: Dyspnea, Depression</li> </ul> <p>Courses in development and going forward are designed to be interprofessional, wherever possible, for applications to teams and all health care providers</p>

## Building Sustainability

de Souza program continues to expand, following the direction set out by the Ontario Cancer Plan, and is tailoring to the needs of a broader range of multidisciplinary learner community and health care organizations. However, course fees alone cannot fully support the funding needs of de Souza operation posing risk to its sustainability.

- Since the introduction of de Souza course fee, the learner population has dropped by 40%.
- Providers indicated their inability to pay for continuing education, despite the cost of de Souza course fee being maintained at non-for-profit level.

Some of de Souza courses have fared better, e.g., standardized chemotherapy course linked into CCO performance indicators. Some organizations paid for course fees on behalf of nurses.

Additional sustainability strategies, e.g. securing donations, sponsorships, grants, partnerships will continue. Marketing and sales will be the emphasis in 2014/15 – the Institute will continue to push, adjust, and monitor progress in its efforts to build sustainability and growth.

## Conclusions

This annual report highlights de Souza's achievements in the first year under the new funding model as well as its efforts to date with revenue generation. In 2014/15, the Institute will focus on sustainability and continued growth via marketing and sales. At the same time, the Institute will continue to foster strong relationships with its new and existing partners and stakeholders; and provide high quality courses to meet the needs of health care professionals for ongoing knowledge and skills acquisition. We will continue to evaluate all services and collect information on needs for educational support from frontline providers, patients and families and from decision makers, and to develop de Souza curriculum accordingly, in order to support a standardized, high performing cancer care system in Ontario, and across Canada.

## **Additional supporting documents**

Appendix A Detailed description of de Souza sustainability activities to reach sustainability from 2013/14 to 2015/16: Page 15 - 28

Media Coverage: <http://www.desouzainstitute.com/in-the-news>

## Appendix A Detailed description of de Souza sustainability activities to reach sustainability from 2013/14 to 2015/16

Sustainability Plan for de Souza Institute —Year 1			
Component /Method	Action Steps	Timeline	Outcome
Implement : Mission, Vision, Develop Case for Support	<p><b>Vision:</b> To secure its position as a world leader in cancer care / palliative care excellence and innovation.</p> <p><b>Mission:</b> To inspire and empower healthcare professionals to provide the best cancer and palliative care through education and mentorship.</p>	Month 1-3	Regular meeting with CCO/UHN;
Research and identify potential stakeholders	<ul style="list-style-type: none"> <li>Meet and talk to agencies, community members about why this program is needed, who will benefit, position de Souza as the best organization to undertake it.</li> <li>Identify and talk to agencies, communities who might have common vision/mission or who might share interests with the program. CCO/UHN, CNA, CANO, ONA, RNAO, RPNAO, NPAO; Hospice and Palliative Care Ontario</li> <li>Communicate to existing base through tactics such as letters, social media, newsletters about the new business model.</li> <li>Communication packages continue to communicate about altered funding model and new “course fees”. (this was initiated Jan 1, 2013)</li> <li>Continued ongoing work with CCO to support CCO initiatives. CNA certification encouraged by CCO; Chemotherapy program now recognized and mandated as standardized training in Ontario by CCO.</li> <li>Update course calendar to reflect the new business model and course fees</li> <li>Build a detailed list of new stakeholders. Send communication packages and make site visits.</li> <li>Change all communication tools to reflect new brand and direction. (e.g. website, social media, etc.)</li> <li>Hire business developer to obtain specific data and prepare marketing plan/ recommendations towards sustainability.</li> <li>Use of local media; Provide communication packages and media news releases to promote de Souza and in any revenue generation</li> <li>Celebration of successes; e.g. de Souza nurse designates</li> </ul>	Month 8-12	<p>In person meeting, presentation to CNA, CANO, ONA, RNAO, RPNAO, NPAO; formal link with Windsor U Masters level program; and Lambton College for RPN; (receive de Souza designates upon graduation); Lambton and Windsor receiving applications; Students enrolled;</p> <p>Ongoing stake holder presentations/ meetings</p> <p>Final report by Business Developer complete</p> <p>Now implementing recommendations of business developer</p>
Communicate with stakeholders			

Sustainability Plan for de Souza Institute —Year 1			
Component /Method	Action Steps	Timeline	Outcome
Initiate relationship with potential stakeholders	<ul style="list-style-type: none"> <li>Schedule community/partner meetings.</li> <li>Select informal team of helpful agency representatives as advisory committee. Prepare invitations and ask folks who recommended individuals to invite them personally.</li> <li>Prepare new written materials for participants outlining the program's general purpose and vision. Language should match community interests garnered from earlier community interviews. New packages prepared: e.g. Courses that support patient-centered care; Palliative care series;</li> <li>Ongoing communications in response to needs or calls; e.g. Patient Centred Experience packages of education; Palliative care packages to support palliative care;</li> </ul>	Month 4 –ongoing	<p>Creation of new provincial Advisory committee for De Souza -Recruitment, via CCO; MOU drafted and sent to CANO for review; Advisory committee established; meetings ongoing</p> <p>Reach out to Palliative Care Networks- meetings held and presentations given; Discussions held with Canadian Virtual Hospice to prepare course for First Nations-ongoing discussions</p> <p>Meetings with Renal group of Ontario to discuss potential for similar approach to support certification;Awaiting further discussions</p> <p>Meetings with CNA to discuss possible collaborations/ partnerships-MOU ideas submitted; Awaiting follow up</p> <p>Marketing occurring with some uptake</p>

Sustainability Plan for de Souza Institute —Year 1			
Component /Method	Action Steps	Timeline	Outcome
Continue to cultivate stakeholders	<ul style="list-style-type: none"> <li>• Include shared vision meetings to get input and expand vision to more stakeholders. Two Ontario wide needs assessments conducted to identify needs and interests of other professions for expansion inter professionally.</li> <li>• Organized new team to focus on palliative care, in response to CPAC call for palliative care proposals (41 members across Canada)</li> </ul>	Month 4-ongoing	Formation of Inter-professional working group; Created “shared competencies” framework for de Souza to expand inter-professionally; Selection of competencies underway;
		(ongoing stakeholder meetings to cultivate interest/ marketing )	Written materials and course calendar for all professions. CPAC proposal on virtual classroom in Palliative Care submitted but unsuccessful
		Month -6-12	Discussions with potential Partners: Michener Institute, UHN International Centre for Education; Universities
			Outreach to Pharma;
		Month -6-12	Discussions being set up for follow up with CPAC; Hospice and Palliative Care groups;
			Invites to meetings
		Month 9-12	<b>No significant contracts to date but slow increases in uptake</b> by staff- but slow uptake due to financial constraints

Sustainability Plan for de Souza Institute —Year 1			
Component /Method	Action Steps	Timeline	Outcome
Create buy in	<ul style="list-style-type: none"> <li>Ongoing meetings to help create buy in: <ul style="list-style-type: none"> <li>Expanded vision that includes community stakeholders/potential partners</li> <li>Identification of interested individuals and organizations to continue to advise the project</li> </ul> </li> <li>Summary of meeting highlighting groups that participated and seemed most interested.</li> <li>Conference marketing to nurses in communities, outside Ontario and to specific sectors, for example, Canadian Hospice Palliative Care Association.</li> </ul>	<p>Month 4 -ongoing</p> <p>-ongoing development of new packages and packages of “professional services”</p>	<p>Create new learning packages; Additional focus on “Facilitator” courses; Chemo standardized training; now taking similar approach to build capacity in palliative care and Psycho-social Care to develop expert trainers throughout province. Standardized “facilitator series” aims to provide cancer agencies with local experts for teaching</p>
Make the ASK	<ul style="list-style-type: none"> <li>Determine best strategic partnerships and key community leaders to involve. Data being collected to guide this</li> <li>Determine appropriate level of collaborative commitment to ask for.</li> <li>Determine who should ask for partnership involvement. Jointly develop strong “case” for potential partner’s involvement.</li> <li>Exploration for role of decentralized model: e.g., de Souza educators throughout province</li> <li>De Souza Foundation –organized and beginning to meet to establish activities</li> <li>Seeking out grant opportunities to support some interim support and innovation. (e.g. CPAC proposal to support “virtual classroom in palliative care”; CIHR grant submitted to evaluate new counseling course to support distress screening in conjunction with CAPO/ IPODE); CBCF grant submitted to develop patient course materials for women with breast cancer and to evaluate the program</li> </ul>	<p>Month 5</p> <p>Month 5-8 (completed; in some cases ongoing)</p>	<p>Request made to Shoppers- Positive response for a proposal to be submitted to train Pharmacists across Canada</p> <p>Grants submitted for specific innovations or evaluations of programs. (awaiting feedback) Foundation board formed with first two meetings;-ongoing fund raising activity plans</p> <p>CIHR grant-successful CBCF grant-under review- Results will be known in May</p> <p>Requests made to RBC; TD (no concrete result to date)</p>

Sustainability Plan for de Souza Institute —Year 1			
Component /Method	Action Steps	Timeline	Outcome
Follow-up	<ul style="list-style-type: none"> <li>Formalize relationship with MOUs, formalize advisory committee roles, etc.</li> </ul>	<p>Month 5-8 (some ongoing; some complete e.g. Windsor U ; Lambton)</p> <p>Month 10-12-ongoing</p>	<p>MOU signed with CCO, Windsor, Lambton College; MOU submitted to CANO; declined at this point; “relationship” building under discussion to explore certification as mutual goals. MOU ideas submitted to CNA</p> <p>Implementation of new packages tailored to diff professionals; on specific health areas or issues; in urban/ rural; etc.</p> <p>Road trips (with Director etc) planned to discuss opportunities for de Souza to support specific local needs/ priorities</p> <p>Working group established to design “de Souza student” for marketing to undergraduate students/programs/</p>

Sustainability Plan for de Souza Institute —Year 1			
Component /Method	Action Steps	Timeline	Outcome
Be a Good Steward	Continue to cultivate current partners and new stakeholders through: <ul style="list-style-type: none"> <li>• Offering opportunities for continued involvement in shaping the program through regular meetings and dialogue.</li> <li>• Sharing the credit.</li> <li>• Celebrating small successes: Lambton/ de Souza designates</li> <li>• Seek out new partnerships, opportunities and common ground through stakeholder activities.</li> <li>• Making sure program is mutually beneficial to all partners. All existing MOUs have ongoing annual reviews to assess mutual benefit/ issues.</li> </ul>	Month 8-ongoing	Several- ongoing activities to celebrate/ profile De Souza designations or activities; Public announcement; press release for the joint de Souza/Windsor, de Souza/ Lambton program  Media- CTV –Grand River area; articles profiling de Souza designates (RNPAO; Midland news etc); e.g. Oncology nursing Day; held contests re Nurse stories
		Month 11-12- ongoing	Plans underway to profile two APN level designates in Brampton during nursing week  Outreach to profile de Souza nurses and de Souza supports to Cancer Community Based Organizations (e.g. CCS; CBCF; Colorectal Ca Assoc of Canada etc. for further profiling to patient groups; public campaigning)

<b>Sustainability Plan—Year 2</b>			
<b>Component /Method</b>	<b>Action Steps</b>	<b>Timeline</b>	<b>Outcome</b>
Implement and review Mission, Vision, Case for Support	<ul style="list-style-type: none"> <li>• Talk with staff, and partners and stakeholders about outcomes of year</li> <li>• Site Visits to Regional Cancer Centres to consider transition to new funding model and opportunity for partnerships; e.g. de Souza educators at sites; Brainstorming for centres to prepare for purchasing of packages e.g. Orientation packages, patient centred experience packages; Aiming to align with Center's strategic plans/ local needs.</li> <li>• Also will encourage each of the Cancer Regional Centres to consider outreaching to their foundations- to support staff educational needs.</li> <li>• Review progress toward goals, who will benefit, who else needs to be involved</li> <li>• Meet with LHIN leaders to market de Souza ; assess opportunities outside of Oncology</li> <li>• Review community needs and trends. Revise mission and vision as necessary. Plan to meet with CCAC leaders to explore current human resource/ educational needs to build capacity. In particular may focus on our offerings to support Palliative Care or Survivorship Area- to support community needs post acute care;</li> <li>• Sales Reps will also encourage uptake- by sectors beyond nursing, for example, PSW; Long term care; Social Workers, Rehab Medicine etc</li> <li>• Continue to provide annual report to track progress</li> <li>• Issue and mail out Year 2 course calendar. –ongoing- Calendars produced at least twice yearly and marketed widely through eblasts and mail outs</li> <li>• Implementation of ongoing communications plans to support marketing; sales reps; eblasts, social media and telephone marketing directly to leaders of agencies informing of upcoming offerings.</li> </ul>	Month 13-14 Ongoing	<p>Review of Year I revenue of 201k generated from course fee; Several positive media reports describing de Souza designates; Analysis of data collected towards business development plan</p> <p>Final Report from business consultation shown on Appendix B</p> <p>Two sales reps/ marketers selling products to regions throughout Ontario ; Tailoring existing products; Building “clinical cases” with applications to apply knowledge to variety of clinical areas , beyond oncology. This library will palliative care; specific culture; specific age group of patient; rural v/s urban or interprofessional vs nursing etc to allow courses to fit need/sale; Reach additional learners, e.g. more Med/Surg, ER or community nurses; GPs; Phamarcists; Longterm care; RPNs; Students</p>

<b>Sustainability Plan—Year 2</b>			
<b>Component /Method</b>	<b>Action Steps</b>	<b>Timeline</b>	<b>Outcome</b>
Research and identify potential stakeholders/ prospects	<ul style="list-style-type: none"> <li>Research corporations, regional cancer centres, local businesses, foundations other givers who have an interest; Several <b>ongoing</b> meetings with potential partners, stakeholders to identify opportunities to share resources or address a specific need.</li> <li>Solicit ideas from partners, staff, volunteers, advisory committee about contacts they might have to potential givers who share interests in program.</li> </ul>	Month 13-14	More strategic focus for example to community/ generalist sector; Consider work outside Oncology, e.g. , Renal; Mental Health; Palliative Care; Senior Strategy needs; Aboriginal Health
Communicate with stakeholders	<ul style="list-style-type: none"> <li><b>Ongoing marketing</b> and talk with health care organizations about de Souza and its potential benefits for them (Examples: other health care areas; disease sectors; community based organizations)</li> <li>Ask for their ideas or needs.</li> <li>Meet with Universities to assess interest in a) purchasing of courses for undergraduate program; or b) purchasing de Souza platform</li> <li>Working Group now meeting to discuss undergraduate partnerships for offerings to support 4<sup>th</sup> year students with de Souza designation</li> <li>Identify products or services that are particularly valued in the regional cancer program that could produce income to offset project expenses.</li> <li>Create a team and marketing plan to develop and market this business based on data collected in Year I (e.g. full time salesmen to be considered).</li> <li>With staff and advisory committee, discuss financial goal. Identify budget items that could be provided in-kind by partners, other stakeholders. Select methods and teams for fundraising/resource gathering for the year. Use more than one fundraising method (grant writing, direct mail, special event, in-kind resource gathering, personal solicitation).</li> <li>Cultivate relationship with media. Craft messages. Announce fundraising campaign. Highlight accomplishments. Share credits.</li> <li>Being present at important events to share the de Souza story</li> </ul>	Month 13-16 –ongoing	<p>Request for Proposals (ongoing)</p> <p>Demonstrated Interest to brainstorm to consider options</p>

<b>Sustainability Plan—Year 2</b>			
<b>Component /Method</b>	<b>Action Steps</b>	<b>Timeline</b>	<b>Outcome</b>
Initiate relationship with potential prospects	<ul style="list-style-type: none"> <li>• Prepare resource gathering plan with objectives and timelines.</li> <li>• Launch fundraising effort with foundation (e.g. \$5 million campaign).</li> <li>• Prepare written materials for solicitation teams outlining the program's vision, mission and case for support.</li> <li>• Two full time sales / marketers to “sell” de Souza programs: e.g. community agencies, cancer centers, other professional groups?</li> <li>• Tracking mechanisms in place to monitor “shifts” in uptake for Ministry reports /business development team</li> </ul>	Month 14 –Ongoing	
Continue to cultivate prospects	<ul style="list-style-type: none"> <li>• Invite prospects to tour program, review accomplishments, suggest improvements. Ask them who else should be involved.</li> <li>• Match language and outcomes to prospect's interests.</li> <li>• Will continue to look for opportunities for external grant funding for specific projects, including those that support patient care;</li> <li>• Exploration of opportunities with Canadian Cancer Society and Canadian Partnership of Cancer (to form partnerships or to obtain opportunities for specific proposal writing for financial support; or joint products)</li> <li>• Continue to invite prospects from outside Oncology to Align with Chronic Diseases and other priorities of Ministry and Long-term Care; Continue to invite prospects from disciplines beyond nursing to all health disciplines to address capacity needs; Continue to communicate/ Ministry meetings to inform potential use of de Souza platform</li> </ul>	Month 15 ongoing– Interim analyses will be submitted in Fall 2014	
Create buy in	<ul style="list-style-type: none"> <li>• Invite press to cover progress, highlight participants and outcomes.</li> <li>• Plan on-going meetings with local committee who actively participated in revenue generation. Celebrate successes. Ongoing media attention when designations reached- part of ongoing communications plan.</li> <li>• Outreach now occurring to community based organizations to further inform patient populations about the impact and work of de Souza Institute</li> </ul>	Month 15- ongoing	

<b>Sustainability Plan—Year 2</b>			
<b>Component /Method</b>	<b>Action Steps</b>	<b>Timeline</b>	<b>Outcome</b>
Make the ASK	<ul style="list-style-type: none"> <li>Depending on method being used, implement—write and submit grants, develop mailing list and pitch for direct mail, meet with prospects—ask for specific support –ongoing</li> <li>Direct sponsorship asks (e.g. pharmaceutical companies; private companies to sponsor “de Souza nurses”</li> <li>Outreach occurring to several Pharma companies for scholarship/ program funding or larger partnerships</li> </ul>	Month 16-18 –ongoing	
Follow-up	<ul style="list-style-type: none"> <li>Confirm pledges, follow up on grant requests (e.g. CBCF grant under review)</li> <li>Proposal submitted to Shoppers Drugmart for Pharmacy training</li> <li>Schedule to re-contact donors to thank and update on progress, build mailing list. Plan next part of fundraising effort.</li> <li>Foundation continues to look for opportunities and partner to create fund raising- event .</li> </ul>	Month 16-18 –ongoing	
Be a Good Steward	<p>Continue to cultivate current partners and new stakeholders through:</p> <ul style="list-style-type: none"> <li>Offering opportunities for continued involvement in the program</li> <li>Sharing the credit. Celebrating small successes ; new programs or milestones e.g. # de Souza designates; new de Souza designates</li> </ul> <p>Making sure donors/grant agencies are updated, invited.</p> <p>Offering through a partnership with C NA- opportunities for shared revenue or opportunities for shared international work (awaiting feedback from proposal of ideas).</p>	Month 18- ongoing	Media reports e.g. Kitchener CTV; Midland News; Durham Region etc.

<b>Sustainability Plan—Year 3</b>			
<i>Component /Method</i>	<i>Action Steps</i>	<i>Timeline</i>	<i>Outcome</i>
Implement and Review Mission, Vision, Case for Support	<ul style="list-style-type: none"> <li>Talk with staff, donors and community partners and stakeholders about outcomes of year 2.</li> <li>Review progress toward financial goals, who will benefit, who else needs to be involved</li> <li>Review community needs and trends and revise mission and vision as necessary. Need for restructuring will be determined by financial assessment and buy in by which stakeholders</li> <li>Continue annual report to summarize progress</li> </ul>	Month 24 -36	
Research and identify additional potential stakeholders/ prospects	<ul style="list-style-type: none"> <li>Research corporations, health care organizations, local businesses, foundations and other potential givers who have an interest in the work of de Souza to explore partnership (or purchasing of de Souza if financial sustainability is not successful- scenario #3).</li> <li>Continue to look for influential people who are stakeholders to act as program champions.</li> <li>Build an advisory committee with business leaders and other local influential community members.</li> <li>Ask for feedback from any corporation or foundation that did not fund. Use contact to build future relationship. Try to target next ask to their interests and philosophy.</li> <li>Solicit ideas from partners, staff, volunteers, advisory committee about contacts they might have to potential givers who share interests with your program.               <ul style="list-style-type: none"> <li>Review progress and need for restructuring;</li> <li>See above potential scenarios which will determine continued sustainability or discontinuation; Review impact of hiring two full time salespersons on uptake/ financial outcomes to inform strategy (e.g. if positive impact increase efforts with additional sales reps? Or alter strategy).</li> </ul> </li> </ul>	Month 25-36           Month 24	

<b>Sustainability Plan—Year 3</b>			
<b>Component /Method</b>	<b>Action Steps</b>	<b>Timeline</b>	<b>Outcome</b>
Communicate with stakeholders	<ul style="list-style-type: none"> <li>• Talk to health care organizations about how de Souza program can benefit their interests. Ask for their involvement.</li> <li>• Identify progress in income-producing products or services that have been made in offsetting expenses. Review and revise marketing plan.</li> <li>• With staff and advisory committee, identify budget items that could be provided in-kind by partners, funders, other stakeholders.</li> <li>• Determine core elements of the program. Brainstorm other means to provide them, beyond Ministry funding- e.g. would other agencies assume responsibility? Maintain CNA certification but discontinue other courses pending funding scenario?</li> <li>• Select methods for further resource gathering. Determine whether to repeat last year's methods. Use more than one fundraising method pending success to date, and build on successful fundraising activities.</li> <li>• Cultivate current and new relationships with media. Craft messages. Announce fundraising campaign's progress. Highlight accomplishments. Share credit with partners.</li> <li>• Being present at important events to share the de Souza story</li> </ul>	Month 25-26	
Continue to cultivate prospects	<ul style="list-style-type: none"> <li>• Invite prospects, donors to the program, review accomplishments, suggest improvements. Ask who else should be involved and how?</li> <li>• Match language and outcomes to potential prospect's interests.</li> <li>• Talk with partners about resources available to meet common goals and defray expenses</li> <li>• Continue to invite prospects from outside Oncology to Align with Chronic Diseases and other priorities of Ministry and Long-term Care; Continue to invite prospects from disciplines beyond nursing to all health disciplines to address capacity needs</li> </ul>	Month 27 -ongoing	
Create buy in	<ul style="list-style-type: none"> <li>• With fundraising committee, ask for donations, share solicitation responsibilities.</li> <li>• Invite press to cover progress, highlight participants and outcomes.</li> <li>• Plan on-going meetings with fundraising committee. Celebrate successes.</li> </ul>	Month 28 ongoing	

<b>Sustainability Plan—Year 3</b>			
<b>Component /Method</b>	<b>Action Steps</b>	<b>Timeline</b>	<b>Outcome</b>
Make the ASK	<ul style="list-style-type: none"> <li>Depending on method being used, implement—write and submit grants, develop mailing list and pitch for direct mail, meet with prospects—ask for specific support.</li> </ul>	Month 26-ongoing	
Follow-up	<ul style="list-style-type: none"> <li>Confirm pledges, follow up on grant requests</li> <li>Schedule to re-contact donors to thank and update on progress, build mailing list. Plan next part of fundraising effort.</li> </ul>	Month 26 - ongoing	
Be a Good Steward	Continue to cultivate current partners and new stakeholders through: <ul style="list-style-type: none"> <li>Offering opportunities for continued involvement in shaping the program</li> <li>Share credit, celebrate small successes;</li> <li>Make sure donors are updated, invited to be involved in new ways.</li> </ul>	Month 28 - ongoing	