



THE ITA WEGMAN ASSOCIATION STRATEGIC PLAN 2019 TO 2024

ORGANIZATIONAL MANDATES	SOLIDIFICATION OF ORGANIZATIONAL MISSIONS & VALUES
<ul style="list-style-type: none"> • Be fiscally responsible and accountable. 	<ul style="list-style-type: none"> • Maintain a system of effective financial management and resource allocation.
<ul style="list-style-type: none"> • Respect the unique differences in ability culture, ethnicity, spiritual beliefs and sexual preferences of people. 	<ul style="list-style-type: none"> • Are respectful in our responses to Companions, Coworkers, Volunteers, Community Partners and Staff.
<ul style="list-style-type: none"> • Base our support on anthroposophical ideals sound research and good practice standards. • Ensure comprehensive training of staff and volunteers. 	<ul style="list-style-type: none"> • Offer flexible support delivery. • Provide supports that strengthen companions through engagement, learning, information, support and advocacy.
<ul style="list-style-type: none"> • Place companions at the center of our work and centrally include companions in our work together 	<ul style="list-style-type: none"> • Create an environment conducive to inclusion, fulfillment, purpose and meaningful engagement. To promote and support a high standard of well being.
<ul style="list-style-type: none"> • Adhere to our Mission Statement, Organizational Philosophy, Values, Guiding Principles and Code of Ethics. 	<ul style="list-style-type: none"> • Create and develop supports that promote the health of the companions and safeguard their rights.
<p>ASSESSMENT & REVIEW OF STRENGTHS, WEAKNESSES, OPPORTUNITIES, THREATS</p> <p>This review is achieved by considering the following:</p>	
<p>Support Delivery & Feedback Surveys</p> <ul style="list-style-type: none"> • Family members and stakeholders, are given the opportunity to review support through satisfaction surveys, regular meetings and ongoing direct feedback. • Delivery, relationships/activity with companions provide feedback on how support is delivered, received, implemented and utilized. <p>Planning</p> <ul style="list-style-type: none"> • Continue to provide input into the creation and development of the strategic plan. • Collecting information from companions, family members, coworkers and stakeholders on an ongoing basis to support strategic planning efforts. Planning is communicated through the following channels: social media, website, newsletter, carrying groups to stakeholders and community members, coworkers to companions and companion family members. 	

EXTERNAL	STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
ECONOMIC CLIMATE	Strong economic climate allows for increased opportunity for growth and financial stability.	Unable to support current key programs and solidify future planning efforts.	Secure funding sources with the opportunity to examine opportunities to expand our program offerings.	Changes in funding structure and a reduction in provincial resources.
FUNDING	Current contract funding is supporting basic overall operational needs.	Financial security and organizational stability is dependent on the number of contracts confirmed.	Increase number of private contracts. Work with CLBC to produce a FGT that is representative of our support delivery	Ongoing challenges of sufficient funding, and in some cases, secured funding.
COMMUNITY MEMBERS	Relationships built to support increased awareness of needs and resources required to support the broader community.	Not all community members support or understand the needs of companions served.	Continue to build on existing relationships and incorporate successful strategies in areas where there is a struggle.	Community attitude towards residential care for companions who require this type of support to meet their needs.
SOCIAL CULTURE CHANGES	Able to address changes and identify needs.	Inability to meet changes in a timely manner.	Increased companion participation in community.	Changes are counter to Camphill philosophy.
OTHER AGENCIES	Collaborative working relationships with similar providers.	Finding collaborative opportunities that share similar philosophy and mission.	Opportunity to develop relationships which support additional program opportunities, or potential partnerships.	Other service providers not interested in partnerships / collaborations.



EXTERNAL CON'T	STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
REGULATORY AND LEGISLATIVE	Meet all municipal, provincial, and federal regulatory expectations.	Meeting expectations of changing legislation.	Keep informed of any regulatory changes to support growth.	Stay abreast of changing legislation as it can change quickly with limited notice.
INTERNAL	STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
BOARD PERFORMANCE	Strong leadership and organizational oversight.	Lack of direction / differing opinions. Lack of project engagement and follow through.	Increased stability and operational security.	Not working collaboratively / not following Camphill mandate.
SUPPORT DELIVERY	Support is provided to companions in a safe, secure and inviting environment.	Portable funding with fluctuating referrals.	Potential increase demand for service. Continue to work on diversifying and expanding services. Expand residential facilities to support increased capacity.	Selected contracting and lack of funding.
FUNDRAISING CAPABILITIES	Additional funding to support key programs. Engagement of a contract fundraiser.	Lack of comprehensive fundraising plan with specific strategies, support or direction.	Increased revenue that can be targeted to meet budget shortfalls, capital projects, or new programming.	Not developing a clear plan and policies providing clear oversight.



The Ita Wegman Association
of British Columbia

FINANCIAL	Association’s financial position comparable to previous year’s budget. Projections include maintaining budget lines that support a fiscally responsible, balanced budget.	Developing a budget that is representative of operational needs without running a deficit.	Work with CLBC to get contracts to be representative Expanding service areas to support more opportunity and increased revenue. Increased capacity with contract fundraiser for grants and donation opportunities. Increase number of residential spaces available.	Ensuring budget is followed and in line with meeting operational needs. Increase in accreditation associated expenses
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INTERNAL CON'T	STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
DECISION MAKING	Carrying Groups working collaboratively.	Meeting regularly and reaching consensus. Many tasks / projects without adequate resources to support the required deliverables.	Diversify and expand programs. Proactive engagement with decision making. Engage senior staff in projects accountabilities.	Time required for all to invest in consensus decision-making. Lack of required skills / competencies in senior staff.
INPUT FROM COMPANIONS, STAKEHOLDERS, COWORKERS	Feedback collected on a regular base with information used to support improvements.	Not fully utilizing feedback across all planning efforts.	Build involvement and participation in marketing and fundraising efforts.	None identified.
HUMAN RESOURCES	Coworker program requirements being met.	Recruitment/retention – securing and retaining	Opportunities to expand existing training structures to support and further	Not maintaining coworker need based on



The Ita Wegman Association
of British Columbia

		skilled and qualified coworkers. Ongoing training and development.	develop coworker and skill base.	limited qualified applicants.
HEALTH & SAFETY	All drills being conducted as per policy and maintaining the safety of sites (property repairs).	Being consistent in drills and health and safety needs. Communication between coworkers and maintenance staff.	Continue to build on consistency of drills and documentation being completed and updated on a regular basis.	Ensuring financial and labour stability to support property maintenance needs.
INFORMATION & COMMUNICATION	Communication structure developed to support more consistent, timely and fluid exchange of internal communication.	Documentation and circulation of information /communication not consistent through all sites or office areas.	Increased awareness and understanding of needs and ability to answer or deal with questions/concerns in a more timely manner.	Inconsistent communication and information sharing structures could result in a disruption of internal communication, as well as support services.

INTERNAL CON'T	STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
TECHNOLOGY	All association technology needs being monitored on a regular basis.	Clarity and accessibility of using technology to support program and organizational needs.	Look into how the website could be expanded and better utilized to support marketing and workshop sales.	Financial resources to maintain technology needs.

GOAL 1: FINANCIAL STABILITY AND SELF SUSTAINABILITY				
Strategic Priority 1				
Stability: Ensuring Ita Wegman Association is financially stable				
KEY ACTIVITIES	KEY ACTION EFFORTS	WHO WILL BE RESPONSIBLE	COMPLETION DATE	2024 EXPECTED OUTCOME
<i>Diversify funding sources</i>	<ol style="list-style-type: none"> 1. Research revenue opportunities 2. Explore social enterprise opportunities at the store 3. Explore, develop and secure ongoing funding for key programs 4. Develop relationships and opportunities with all levels of government, ministries and crown corporations. 5. Engage with CSSEA sector oversight 	<ol style="list-style-type: none"> 1. Coordinating Group, BOD 2. Treasurer, BOD, Carrying Group 3. PD, BA 4. PD/ FM, BA 5. BA 	<ol style="list-style-type: none"> 1. Stakeholders and strategy identified by the end of 2020/21 re-evaluate annually 2. begin 2019/20 fiscal year. Complete analysis 2020/21 3. begin 2019/20 fiscal year. re-evaluate annually 4. begin 2019/20 fiscal year re-evaluate annually 5. required annually 	<ol style="list-style-type: none"> 1. Revenue opportunities identified with strategy developed to access 2. Examination of community needs assessment / strategy developed to utilize 3. Strategy developed to identify funding sources to secure funding for key programs. 4. Identification of key relationships built/enhance - government, ministries and crown corporations 5. annual wage increases, sector analytics obtained

GOAL 1: FINANCIAL STABILITY AND SELF SUSTAINABILITY				
Strategic Priority 1				
Stability: Ensuring Ita Wegman Association is financially stable				
KEY ACTIVITIES	KEY ACTION EFFORTS	WHO WILL BE RESPONSIBLE	COMPLETION DATE	2024 EXPECTED OUTCOME
<i>Fundraising Activities</i>	<ol style="list-style-type: none"> 1. Identify and connect with prospective donors 2. Work with experienced contract fundraiser 3. Explore and apply for grant and foundation opportunities 4. Develop events 5. Steward donor relationships 6. Develop and expand retail sales via Glenora Farm website 7. Plan and policies developed and reviewed. 	<ol style="list-style-type: none"> 1. BA, Fundraising Comm., BOD 2. Business Administrator 3. Business Administrator, contracted Fundraiser 4. Fundraising Comm., BA, Carrying Coworker 5. Fundraising Comm., BA, BOD 6. BA, website developer 7. Fundraising Comm., BOD, BA 	<ol style="list-style-type: none"> 1. 2019/20 fiscal year and re-evaluate 2024 2. initiate 2019/20 fiscal year and re-evaluate annually 3. Initiate 2019/20 re-evaluate 2024 4. initiate 2019/20 and re-evaluate 2024 5. initiate 2019/20 re-evaluate 2024 6. initiate 2019/20 completion 2024 7. initiate 2019/20 completion 2021 	<ol style="list-style-type: none"> 1. Develop a donor database Potential grant / foundation opportunities identified Partners have been identified and a plan developed to build/enhance regular donations and engagement. 2. Foundational material developed 3 capital grants submitted 3. submit one grant application each with CFC and CF 4. 2 events developed and held netting \$10,000 5. Donors and sponsors feel informed and appreciated

				6. Build Glenora Farm Website purchasing platform 7. Fundraising plan and policies completed by Dec 2020
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GOAL 1: FINANCIAL STABILITY AND SELF SUSTAINABILITY				
Strategic Priority 2				
Sustainability: Ita Wegman Association to build a reserve of funds for future sustainability				
KEY ACTIVITIES	KEY ACTION EFFORTS	WHO WILL BE RESPONSIBLE	COMPLETION DATE	2024 EXPECTED OUTCOME
<i>Establish contingency funding</i>	<ul style="list-style-type: none"> • Create and invest surpluses to be designated for contingency 	<ul style="list-style-type: none"> • Finance Committee / Treasurer 	<ul style="list-style-type: none"> • Begin 2020/21 fiscal year 	<ol style="list-style-type: none"> 1. A template, process, understanding for contingency fund is established
<i>Recruit Board members who can assist with philanthropy</i>	<ul style="list-style-type: none"> • Review current needs and establish a list of potential candidates. 	<ul style="list-style-type: none"> • BOD • Fundraising Committee 	<ul style="list-style-type: none"> • 1 new member by 2019/20 ongoing as required 	<ol style="list-style-type: none"> 1. Review of need completed. 2. Increase communication and commitment to the Board.
<i>Increase community profile</i>	<ol style="list-style-type: none"> 1. Develop a comprehensive marketing and communication plan. 2. Update website / promotional material 	<ol style="list-style-type: none"> 1. DP/FM, BA, BOD, contracted Fundraiser 2. Business Administrator, website/newslett 	<ul style="list-style-type: none"> • start 2019/20 fiscal year Update annually • update website - ongoing, update promotional 	<ol style="list-style-type: none"> 1. Marketing and communication plan completed 2. All updates needed completed and needs re-evaluated

		er contractor, contract designer	materials every two years	
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GOAL 1: FINANCIAL STABILITY AND SELF SUSTAINABILITY				
Strategic Priority 3				
Human Capital: Ensuring Ita Wegman Association has a solid infrastructure				
KEY ACTIVITIES	KEY ACTION EFFORTS	WHO WILL BE RESPONSIBLE	COMPLETION DATE	2024 EXPECTED OUTCOME
<i>Allocate funding for increased administration needs</i>	<ul style="list-style-type: none"> • Build costs into contracts and grants. • Have representative Funding Guide Template 	<ul style="list-style-type: none"> • BA, Coordinating Group, Finance Committee and Treasurer 	<ul style="list-style-type: none"> • Review 2019/20 fiscal year Update annually 	1. Admin costs are sustained through secure funding
<i>Recruit and Retention of coworkers</i>	<ol style="list-style-type: none"> 1. Improve recruitment strategies, reviewing needs ongoing 2. Examine retention efforts including coworker feedback, training, incentives etc. 	<ol style="list-style-type: none"> 1. Admissions 2. PD, QCC, Carrying Group, Admissions 	<ol style="list-style-type: none"> 1. Review 2019/20 fiscal year Re-evaluate annually 2. Initiate 2019/20 fiscal year Re-evaluate annually 	<ol style="list-style-type: none"> 1. Recruitment efforts improved to make sure they are meeting program needs 2. Information collected and analysed re: retention efforts and strategies implemented

GOAL 2: ACCREDITATION				
Strategic Priority 1				
Accreditation: Ensuring ITA Wegman Association is ready and successfully completes accreditation process				
KEY ACTIVITIES	KEY ACTION EFFORTS	WHO WILL BE RESPONSIBLE	COMPLETION DATE	2024 EXPECTED OUTCOME
<i>Accreditation preparation</i>	<ol style="list-style-type: none"> 1. Completing preparation, planning and demonstrated conformance to CARF standards 2. Consultant hired to support preparation 	<ol style="list-style-type: none"> 1. Carrying Group, BOD, BA, Admissions 2. Carrying Group and Business Administrator, PD, FM 	<ol style="list-style-type: none"> 1. Begin 2018/19 fiscal year Continue on and beyond 2021 onsite survey 2. Started 2018/19 fiscal year 	<ol style="list-style-type: none"> 1. Survey successfully completed in 2021 - standards continue to be met 2. Consultant contract extended and working with Carrying Group, BA, PD/ FM

GOAL 3: EFFECTIVE, INTEGRATED CONTINUUM OF SUPPORT				
Strategic Priority 4				
Support / Programming: Ensuring ITA Wegman Association is strategic in providing support and programming				
KEY ACTIVITIES	KEY ACTION EFFORTS	WHO WILL BE RESPONSIBLE	COMPLETION DATE	2024 EXPECTED OUTCOME
<i>Collect coworker, companion and stakeholder feedback /evaluation</i>	<ol style="list-style-type: none"> 1. Collect and analyze data to identify trends and future needs 2. Develop format and plan in order to share outcomes from data analyzed 3. Format data for reporting to the Board 	<ol style="list-style-type: none"> 1. PD, FM, QCC 2. PD, FM, QCC 3. PD, FM, QCC 	<ol style="list-style-type: none"> 1. begin 2019/20 fiscal year 2. begin 2019/20 fiscal year 3. begin 2019/20 fiscal year 	<ol style="list-style-type: none"> 1. A formal process is used to collect and analyze data. Continue annually 2. Information is relayed regularly to companions, family members, coworkers,

				stakeholders and community 3. Board report includes statistics
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GOAL 4: FACILITY AND MAINTENANCE				
Strategic Priority 1				
Facility and Maintenance: Ensuring ITA Wegman Association is able to meet all facility, equipment and maintenance needs				
KEY ACTIVITIES	KEY ACTION EFFORTS	WHO WILL BE RESPONSIBLE	COMPLETION DATE	2024 EXPECTED OUTCOME
<i>Review and evaluate facility needs</i>	<ul style="list-style-type: none"> Complete review and evaluation of facility structural and maintenance needs. 	<ul style="list-style-type: none"> PD, FM, BA 	<ul style="list-style-type: none"> 2020/21 fiscal year And ongoing 	1. Evaluation completed with strategies determined to address needs identified.
<i>Review and evaluate program equipment needs</i>	<ul style="list-style-type: none"> Complete review and evaluation of program equipment needs i.e. farm tools, equipment etc. 	<ul style="list-style-type: none"> PD, FM, BA 	<ul style="list-style-type: none"> 2019/20 fiscal year And ongoing 	1. Evaluation completed with funding secured to acquire supplies.

GOAL 5: FUTURE PLANNING				
Strategic Priority 1				
Ensuring ITA Wegman Association is thinking forward / future to support program growth and stability				
KEY ACTIVITIES	KEY ACTION EFFORTS	WHO WILL BE RESPONSIBLE	COMPLETION DATE	2024 EXPECTED OUTCOME
<i>Evaluate technology needs and address</i>	<ul style="list-style-type: none"> Complete review and evaluation of technology needs 	<ul style="list-style-type: none"> BA, PD, FM, Carrying Coworker 	<ul style="list-style-type: none"> 2020/21 fiscal year 	1. Evaluation completed with strategies determined to address needs identified.

GOAL 6: FUTURE PLANNING				
Strategic Priority 2				
Ensuring ITA Wegman Association is thinking forward / future to support program growth and stability				
KEY ACTIVITIES	KEY ACTION EFFORTS	WHO WILL BE RESPONSIBLE	COMPLETION DATE	2024 EXPECTED OUTCOME
<i>Match revenue generating with annual growth goals</i>	<ul style="list-style-type: none"> Review program needs and secure / allocate funding 	<ul style="list-style-type: none"> Finance Committee and Treasurer 	<ul style="list-style-type: none"> Begin analysis 2019/20 fiscal year 	<ol style="list-style-type: none"> Revenue meets identified program needs
<i>Strengthen service /stakeholder partnerships</i>	<ol style="list-style-type: none"> Steward all funders and stakeholders Establish a presence at relevant funding and legislative tables Advocacy for continued government funding 	<ol style="list-style-type: none"> BOD, Fundraising Comm., BA, FM PD/FM, BA, BOD PD/FM, BOD, BA 	<ol style="list-style-type: none"> Ongoing with review each fiscal year Ongoing with review each fiscal year Ongoing with review each fiscal year 	<ol style="list-style-type: none"> Solid relationships with stakeholders Representation is effective and successful Funding to meet program needs

GOAL 7: SUCCESSION PLANNING				
Strategic Priority 2				
Ensuring ITA Wegman Association leadership is thinking forward and making appropriate planning for any succession needs.				
KEY ACTIVITIES	KEY ACTION EFFORTS	WHO WILL BE RESPONSIBLE	COMPLETION DATE	2024 EXPECTED OUTCOME
<i>Evaluate senior leadership succession needs and address</i>	<ul style="list-style-type: none"> • Complete review and evaluation of succession needs 	<ul style="list-style-type: none"> • BOD, BA, PD/FM, Admissions 	<ul style="list-style-type: none"> • initiate 2019/20, complete 2021/22 fiscal year 	1. Evaluation completed with strategies determined to address needs identified.