



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, Community Partners, and contractors.
<ul style="list-style-type: none"> • Base our programs and support delivery on anthroposophical ideals, sound research, continued education, and best practice standards. • Ensure comprehensive training of Coworkers, contractors, 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, representatives, and stakeholders are given the opportunity to review support through satisfaction surveys, weekly survey forms, regular meetings, and ongoing direct feedback. • Support delivery, relationships/activities with Companions provide feedback on how supports are delivered, received, implemented, and utilized. <p>Planning</p> <ul style="list-style-type: none"> • Continue to provide input into creating and developing the strategic plan. • Collecting information from Companions, Companion families and representatives, Coworkers, and stakeholders on an ongoing basis to support strategic planning efforts. Planning is communicated through the following channels: social media, website, newsletter, annual report, leadership groups to stakeholders and community members, Coworkers to Companions, and Companion families/representatives. 	

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. CLBC Contracts do not reflect the accurate costs associated with support delivery, nor do they account for accelerated inflation.	Increase the number of private contracts. Annual increase to be applied to private contracts. Increase the day program to allow for more participants. Work with CLBC to produce a full-cycle contract that is representative of our tiered support delivery and associated costs.	Ongoing challenges of sufficient funding, and in some cases, secured funding.
COMMUNITY MEMBERS	Build relationships to support increased awareness of needs and resources required to support Companions.	Not all community members understand the needs of Companions supported.	Continue to build on existing relationships and incorporate successful strategies in areas where there is a struggle. Engage with funders, social service groups, and individuals in the wider community.	Community attitude of un-acceptance / negative bias towards Companions who require individualized support.
SOCIAL CULTURE CHANGES	Able to address changes and identify needs.	Inability to meet changes in a timely manner.	Increased Coworker and Companion participation, in trainings offered online, in-house, and in the broader community.	Changes need to be adapted to reflect Camphill philosophy.
OTHER AGENCIES	Collaborative working relationships with similar providers.	Finding collaborative opportunities that share	Opportunity to develop relationships and	Other service providers are not interested in or are unaware of potential

		similar philosophy and mission.	additional programming or potential partnerships.	partnerships/collaboration opportunities. The social service sector experiences capacity issues and may not have the time, or resources to engage.
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EXTERNAL CON'T	STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
REGULATORY AND LEGISLATIVE	Meet all municipal, provincial, and federal regulatory expectations.	Meeting expectations of ever-changing legislation.	Keep informed of any regulatory changes to support growth.	Stay abreast of changing legislation and adapt in a timely manner.

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. Volunteer Board and capacity of Board members.
SUPPORT DELIVERY	Support is based on individual support needs and preferences. Support provided to Companions is delivered in a safe, secure, and inviting environment.	Portable funding with fluctuating referrals.	Potential increase in demand for service. Continue to work on diversifying and expanding programs. Expand day program workshops to allow for increased capacity.	The provincial contract is subject to funds available from CLBC. CLBC indicates their ongoing lack of funding. Contract negotiations with CLBC are lengthy and do not always result in contract increases, or appropriate funding for Companions supported.
FUNDRAISING CAPABILITIES	Additional funding to support key programs. Strong internal development team. Wider community and	Lack of comprehensive capital project 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 capital project plan and fundraising representatives not familiar with, or adhering

	stakeholder support of our programs. Ongoing engagement of a contract grant writer.			to IWA fundraising policies. Capacity challenges for the Board fundraising committee.
FINANCIAL	Association's financial position is comparable to the 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. Some elements of programming do not have stable and ongoing funding in place. Some capital projects are without adequate resources to support the required budget.	Work with CLBC to get contracts to be representative of disability needs. Expanding programming to support more opportunities and increased revenue. The creation of a clear capital project plan that supports contract grant writing to work at full capacity.	Ensuring the budget and capital project plan are followed and in line with meeting operational needs. Increase in program expenses (food, gas, materials, mortgage debt).
INTERNAL CON'T	STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
DECISION MAKING	Leadership Groups work collaboratively. Feedback from stakeholders is reviewed and adjustments are made as needed.	Reaching consensus amongst groups and group members.	Continue to engage internal stakeholders. Facilitate proactive engagement with decision-making. Engage leadership Coworkers in project accountabilities and track progress. Engage the Board of Directors in priority projects.	The time required for all to invest in consensus decision-making slows the process down. Indirect or inaccurate communication between individuals or groups threatens group productivity. Burnout and decision fatigue.
INPUT FROM COMPANIONS, STAKEHOLDERS, COWORKERS	Feedback is collected on a regular basis with information used to support improvements.	Not fully utilizing feedback across all planning efforts. Communicating changes made as a result of feedback obtained.	Build involvement and participation opportunities through increased engagement.	Irregular collection of feedback. timely processing of feedback data. Insufficient engagement in the feedback cycle.

HUMAN RESOURCES	Residential and day program Coworker placement requirements are being met. Administration placement requirements are being met, succession planning is happening on an ongoing basis and reviewed annually (Jan).	Recruitment/retention – securing and retaining skilled and qualified Coworkers. Ongoing training and development. Regular performance evaluations being held in a timely manner (2 weeks, 5 weeks, 3 months, and annually).	Opportunities to expand existing training structures to support and further develop the Coworker's skill set. Ongoing engagement with succession planning. Staff development opportunities that meet Association needs and match Coworker interests.	Insufficient Coworker capacity to deliver programs. Limited qualified applicants. Funding that matches the costs of increasing wages.
HEALTH & SAFETY	All drills are being conducted as per policies and we are maintaining the safety of our program sites (property repairs). Safety plans for all workshop areas are accurate and adhered to. Residential houses meet, or exceed Island Health licensing standards. Monthly joint health and safety meetings are held routinely, and concerns/deficiencies are resolved promptly.	Being consistent in drills across all Farm sites. Continue to identify and respond to emergent health and safety issues. Clear communication between Coworkers and maintenance staff.	Continue to build on the consistency of drills and ensure documentation is completed and updated on a regular basis. Continue to hold monthly Health and Safety meetings. Ensure clear communication with the maintenance team, Coworkers, and the administration team.	Ensuring financial and labour stability to support property maintenance needs.
INTERNAL CON'T	STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS

INFORMATION & COMMUNICATION	Communication structure has been developed to support a more consistent, timely, and fluid exchange of internal and external communication.	Documentation and circulation of information /communication are not consistent through all sites or office areas. Inaccurate information can be circulated.	Increased Coworker awareness and understanding of each group's responsibilities (mandates and definitions), and the organizational chart. Increase the leadership team's ability to answer or deal with questions/concerns in a timely manner (including debriefing and follow-up).	Inconsistent communication and information sharing structures could result in miscommunication and disruption of internal communication. Inaccurate communication and information sharing could result in interruptions to Companion support delivery.
INTERNAL CON'T	STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
TECHNOLOGY	IWA Information and Technology Plan governs the review of need and appropriate use of IWA technology and equipment.	Clarity regarding technology availability and appropriate use of technology. Increasing accessibility for Companions who use technology in support delivery. Out of date technology. Coworkers who do not understand how to use technology.	Implement Google Workspace for all Coworkers on payroll. Review how file sharing in the cloud could be utilized and improved. Train all Coworkers on appropriate technology use and maintenance. In-coming technology allows for increased productivity.	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>	Work with CLBC on a tiered contract that is reflective of program costs and disability needs of Companions.	Executive Group, Finance Committee, BOD.	Tiered proposal finalized July 2022. New contract in place in August 2022.	Cost of program support delivery covered by CLBC contracts.
	Research revenue opportunities.	Executive Group, Finance Committee, BOD	Stakeholders, and strategy identified by the end of 2022/23 re-evaluate each January.	Revenue opportunities are identified and a strategy to engage possible opportunities is in place. Progress is monitored at weekly finance committee meetings.
	Explore partnership opportunities with local school boards (create a transitional youth to adult program).	Executive Group, Core Group, Admin and Development Coordinator, Finance Committee, BOD	Begin reviewing the 2022/23 fiscal year. Partnership commitments in place 2023/2024 fiscal year.	The transitional youth to adult program has a completed logic model, project plan, secured budget, secured contractors, and timeline.
	Explore day program expansion opportunities and possible community partnerships (older adult population, food security organizations).	Executive Group, Core Group, Admin and Development Coordinator, Finance Committee, BOD.	Begin reviewing the 2022/23 fiscal year. Partnerships in place 2023/2024 fiscal year.	The day program expansion project has a completed logic model, project plan, secured budget, secured contractors, and timeline.
	Explore, develop and secure ongoing funding for a recreation program.	Executive Group, Admin and Development Coordinator, Finance Committee, BOD	Begin review of program funding needs in the 2022/23 fiscal year.	The recreation program has a completed logic model, project plan, secured budget, secured contractors, and timeline.

	Develop relationships and opportunities with all levels of government, ministries, and crown corporations.	Facility Manager, Business Administrator, Executive Group, Parents Group, BOD	Begin 2022/23 fiscal year. Re-evaluate annually (January)	Identification of key relationships built/enhanced - government, ministries, and crown corporations.
	Engage with CSSEA sector oversight	Business Administrator, Facility Manager, Bookkeeper	Ongoing annually with CSSEA surveys (May)	Review CSSEA survey outcomes including annual wage increases, and sector analytics.

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>	Steward donor relationships.	Business Administrator, Admin and Development Coordinator, Fundraising Cttee., BOD.	Adhere to donor recognition and stewardship policy. Adhere to IWA fundraising policies. Train fundraising committee on all existing and new fundraising policies by end of 2022. Review policies annually (January).	Donors and sponsors feel informed and appreciated. Increase new donors by 20 individuals a year. Increase of 5 new monthly donors each year.
	Capital project plan developed and reviewed. The ongoing production of an annual report. Create a Case for Support.	Business Administrator, Admin and Development Coordinator, Contract grant writer, Fundraising Cttee., BOD.	Initiate and review capital project plan annually (February). Create an annual report (August). Review Case for Support (January)	Capital project plan in place by Dec 2022. The case for Support in place, the Annual Report is available on the Glenora Farm Website and shared at the AGM.

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>	Create, track, and invest surpluses to be designated for contingency.	Finance Committee / Executive Group, BOD.	Review 2022/23 fiscal year.	A contingency fund is established.
<i>Recruit Board members who can assist with philanthropy</i>	Review current needs and establish a list of potential candidates.	BOD, Parent Group, Fundraising Committee.	One new member by 2022/23 and ongoing as required.	Review of needs completed. Board membership at optimal capacity with diverse Board members.
<i>Increase community profile</i>	Develop a fundraising and awareness package. Ongoing review and update of website / promotional materials.	Business Administrator, Admin and Development Coordinator, Fundraising Cttee., BOD, website/newsletter contractor.	Start 2019/20 fiscal year Update annually. Update website - as needed, update promotional materials every year. Release quarterly newsletters.	Fundraising and awareness package completed. Package in use at community events and fundraising opportunities. All updates needed are completed and re-evaluated annually (January).

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>	Build administrative costs into contracts and grants. Have representative CLBC contracts. Annual increase to private contracts.	Executive Group, Finance Committee, BOD.	Review 2022/23 fiscal year. Update annually with private contract renewals and CLBC contract negotiations.	Administration costs are sustained through secure funding.
<i>Recruit and Retention of coworkers</i>	Improve recruitment strategies and review succession planning. Examine retention efforts including Coworker feedback, training, and incentives.	Care Group, Executive Group, Admissions Coordinator, Core Group.	Review 2022/23 fiscal year Re-evaluate annually and as needed.	Recruitment efforts are in place. Retention of qualified Coworkers to meet program needs. Feedback is collected and analyzed to support enhanced retention efforts.

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>	Engaging with preparation, planning, and demonstrated conformance to CARF standards. A consultant has been hired to support preparation.	Executive Group, Accreditation working group, BOD.	Begin 2018/19 fiscal year, ongoing through 2022/23. Engage with a 2022 onsite survey.	Survey successfully completed in 2022 - 3 year accreditation awarded. CARF standards continue to be met for subsequent surveys. Consultant contract extended and continues to work with Executive Group,

				Accreditation working group, BOD.
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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>	Collect and analyze data to identify trends and future needs. Develop a format and plan in order to share outcomes from the data analyzed. Format data for reporting to all groups and stakeholders.	Facility Manager, House Coordinators, Workshop Leaders, Accreditation working group.	Begin 2019/20 fiscal year. Ongoing through 2022/23. Survey data is analyzed quarterly.	A formal process is used to collect and analyze data quarterly. Information is relayed regularly to Companions, Companion representatives, Coworkers, stakeholders, and the wider community. The annual report includes feedback data and statistics.

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>	Complete review and evaluation of facility structural and maintenance needs. Ongoing monthly joint health and safety meetings that identify facility needs.	Facility Manager, Business Administrator, Maintenance Manager.	2022/23 fiscal year and ongoing annually (January).	Evaluation completed with strategies determined to address any issues identified.

<i>Review and evaluate program equipment needs</i>	Complete review and evaluation of program equipment needs i.e. farm tools, equipment, etc.	Workshop Leaders, House Coordinators, Facility Manager, Business Administrator, Maintenance Manager.	Initiated 2019/20 fiscal year. Ongoing through 2022/23. Reviewed annually (February).	Evaluation completed with funding secured to acquire supplies.
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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 and address technology needs</i>	Complete review and evaluation of technology needs.	Business Administrator, Facility Manager	Initiated 2020/21 fiscal year. Ongoing through 2022/23 Reviewed annually (February)	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>	Review program needs and secure / allocate funding. Creation of Capital Project Plan, Human Resource Plan, Succession Plan, and program expansion planning.	Care Group, Executive Group, Finance Committee, and BOD.	Begin analysis 2019/20 fiscal year. Ongoing through 2022/23. Reviewed annually (February).	Revenue meets identified program needs.
<i>Strengthen service /stakeholder partnerships</i>	Maintain a positive working relationship with CLBC, Island Health, CARF, and all stakeholders.	Business Administrator, Facility Manager,	Ongoing with a review each fiscal CLBC contract cycle, CLBC	Positive, and mutually respectful relationship with all stakeholders.



	Establish a presence at relevant funding and legislative groups. Continued advocacy for appropriate government funding.	Executive Group, BOD Parents Group.	site visit, Island health inspection, and annually at fiscal year-end (March).	Representation is effective and successful. Funding to meet program needs.
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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 and address senior leadership succession needs</i>	An accurate IWA Succession Plan in place and reviewed annually.	Executive Group, Care Group, Accreditation working group, BOD	Initiated 2019/20. Ongoing through 2022/23, completed Succession Plan each year (January), or as needed.	Evaluation completed with strategies determined to address needs identified. IWA has qualified and stable senior leadership Coworkers.



THE ITA WEGMAN ASSOCIATION STRATEGIC PLAN 2019 TO 2024

ACHIEVEMENTS

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CHANGES

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