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# Strategic Planning Report

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January 2019

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Whitevalley Community  
Resource Centre

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**Why Strategic Plan**

Currently Whitevalley Community Resource Centre (WCRC) is not able to easily handle the increased service demands and is struggling to fill in gaps in local programming and services. We are told to expect an increase in the local population in the next 8 to 10 years as new businesses, new housing and increased services come to Lumby. To ensure that we have a stable foundation for the future WCRC will need to develop a strategic plan that continues to address creating a strong administrative and human resources foundation so that we can more easily meet demands.

Strategic Planning is a complex and detailed process. The Whitevalley Community Resource Centre Board revised (and is continuing to revise) the Mission and Vision statements separately from the strategic planning meeting to give intentional time to put thought and dialogue into the development of the Mission and Vision.

The SWOT analysis was also completed well in advance of the Strategic Planning meeting. This allowed for the Executive Director and Board the time to discuss the main priorities which were to be addressed/brainstormed during the planning meeting.

Completing these two major tasks prior to the planning meeting greatly benefitted the planning day. Pre-meeting work allowed the team to focus specifically on problem solving the three major challenges that are currently limiting the potential of the organization.

A Strategic Plan agenda was distributed well in advance of the meeting. This allowed the team to review the reason for Strategic Planning, the current Mission and Vision, review the SWOT analysis, and discuss the SMART (Specific, Measureable, Achievable, Relevant, Timely) lens model through which all ideas would be discussed.

**Mission and Vision**

<b>Current</b>	<b>Revised</b>
<p><b>Current Mission Statement</b></p> <p><i>Whitevalley Community Resource Centre promotes and supports the health and well-being of our community.</i></p>	<p><b>Revised Mission Statement</b></p> <p><i>Whitevalley Community Resource Centre promotes and supports the wellbeing of our community.</i></p>
<p><b>Current Vision Statement</b></p> <p><i>To provide inclusive and quality services that support the strengths of the community.</i></p>	<p><b>Revised Vision Statement</b></p> <p><i>Supporting our community so every person leads a healthy fulfilling life of self-reliance and dignity.</i></p>

## Strengths, Weaknesses, Opportunities and Threats

### 2018 SWOT Analysis – responses from ED and Staff *and Board in italics*

#### Strengths:

- Staff are passionate and capable
- Location is centralized
- Supportive Mayor and Council
- Strong team and support network, great working environment
- Friendly Environment
- Great service provider that has a great reputation in community
- Supportive ED
- Flexibility in working hours
- The addition of Safety policies for staff, addition of Health and Safety Committee
- Good money management
- Good partnerships in community
- Policies and Procedures are in place
- *Long standing employees*
- *ASP/SDC doing very well*
- *Connection with the schools*

#### Weaknesses:

- *administration funding* is not sustainable at current levels
- wages are not at industry level or competitive with Vernon market
- social media presence
- inability/difficulty replacing staff due to poor wages
- facility is crowded with no staff/board room for meetings which means transferring to offsite
- no BC association
- *lack of staff development budget* or limited budget - leaves staff at risk - need of non-violent crisis intervention training
- inability to access computer server files at home
- No air-conditioning
- Poor sound proofing means poor confidentiality
- Not enough paid hours to complete work in a timely manner
- Not having enough space to properly operate programs
- Lack of volunteers
- Low wages, lack of competitive wages
- Not enough counsellors
- Poor work stations, chairs, etc
- Mileage allocation not adequate
- Old building, poor air quality, plumbing, lighting, limited storage, tiny offices. etc
- *Competitive labor market making it difficult to find staff*

#### Opportunities:

- *Possibility of assistance through Lumby Council* to provide assistance with new facility as part of an inclusion package with new development and funds through development corporation, or economic development fund
- Better office space could led to more staff/volunteers being interested in WCRC
- Lumby is growing therefore there will be the need to increase our services
- Social Enterprise Opportunities: (After School Program, Summer Day Camp, currently providing a surplus; *pay for service*), Employee Assistance Programs, etc
- *Mission/Vision allows flexibility*
- *Contract negotiations*
- *Investors willing to build a building*

**Threats:**

- Retention of staff due to poor wages
- Health and Safety - Worksafe BC standards for building and workspaces
- Client behavioral issues, volatile situations with mental illness, drug addictions, anger issues and no training on how to handle or intervene especially if having to deal with issues outside of the office
- Low administration recovery dollars
- *Low wages* mean staff will leave
- Verbal abuse from clients and not being trained in ways to handle these issues
- Disrespectful volunteers in the Seniors program who often gossip and/or slander the Seniors team and program
- *Challenges recruiting staff*

## Moving Forward

How boards view the non-profit sector as a whole affects the decision making process. It was important to start the planning session off with some ground rules or framework as to how to address the challenges at hand. The team watched “The way we think about Charities is dead wrong” a TED talk by Dan Pallotta. This talk explained how charities in general have been hindering their progress and growth by thinking about things incorrectly. Non-profits have been confusing morality with frugality; this concept of keeping overhead and wages low so that they can provide more services and programs for the populations they are trying to support. It was explained how this concept has not only undermines growth, but puts non-profits at a great disadvantage.

Specifically he pointed out 5 disadvantages to this way of thinking:

- **Compensation:** Historically non-profit pay their staff low-wages, but if you want excellence in your organizations and you want to support long standing, experienced, professionals you have to be prepared to pay for them.
- **Advertising and Marketing:** Traditionally non-profits do advertising and marketing off the side of their desks and do not put dollars into these platforms that could potentially bring in revenue because people support agencies that they know about, believe in and can see are doing great things in their communities.
- **Risk Taking:** Non-profits shy away from using money to try new things because “all dollars need to go to the cause”, this kills innovation and opportunities to change \$1000 into \$10,000 through fundraising or other novel initiatives.
- **Time:** When the priorities are always on service delivery, non-profits do not allow the time for change. For example, if WCRC decides to build into their staff with competitive wages and staff development, they will need to allow the organization the time to go through a period of either reducing service hours, or at the very least, not increasing those hours.
- **Risk Capital:** Non-profits cannot use risk capital to attract funders

Dan Pallotta explained that these misguided beliefs come from the Puritan and Calvinist forefathers who believed that self-interest was negative. However this is counterproductive. Using overhead to support growth through fundraising, competitive salaries, new initiatives will in the long run bring in more money for the organization to use to support the needs of their clients.

## Priorities Discussed at the Strategic Planning Meeting

To ensure a productive strategic planning meeting the board and staff focused on three challenges: Administration Funding, Staff Retention, Recruitment and Development, and New Initiatives. Listed below are the introductions to the table discussions with the results listed in point form initiatives. After all ideas were presented then each participant was given one sticker per topic to place on their highest priority, these are then represented as “ratings” for each idea.

### Administration Funding

Currently WCRC is experiencing challenges in obtaining the administrative dollars to support the needed positions, duties and costs related to the administrative budget. The stability and viability of the organization as a whole is threatened if there is not a strong support system for our programs and services. Contract negotiations are not resulting in additional funds. In the 2019/20 fiscal year the organization will have approximately \$10,000 in additional deficit as the Pritchard Foundation donations have come to an end, and WCRC potentially uses an additional \$15,000 in reserves to balance an already too small budget. There are aspects of administration duties, such as social media and fundraising which are currently handled as “add ons” and are squeezed into the regular work schedule, which could be expanded if we had the resources.

#### **Outcomes from the Meeting and Rating with Executive Director Comments:**

<b>Outcomes from the Meeting</b>	<b>Rating</b>	<b>Executive Director Comments</b>
Amend funder contracts to include specific wages for ED, Bookkeeper, Contract Manager etc, rather than just one administration fee	<b>6</b>	This is how I have been writing applications and letter of requests prior to contract negotiations.
Pay someone to look for new grant initiatives	<b>4</b>	This would be more beneficial paired with a new position that took on more duties, as listed below.
<b>Develop and hire a new position of fundraiser and social media captain</b>	<b>13</b>	<b>If the board is willing to spend the money on this, a fundraising position would look at new initiatives and grants, RFPs, etc.</b>
Write a letter to RDNO		A letter was written and sent to the Board of Directors in mid-October 2018 with no response; Rick Fairbairn is looking into this.

### Staff Retention, Recruitment and Development

In order to continue to provide excellent services WCRC must have a full complement of staff who are fully trained, experienced and efficient, with good salaries, good training packages and wages that are similar to those in Vernon. Being able to hire and retain individuals with previous experience and training would greatly reduce time that administration and colleagues need to spend in training, orientation and staff development. The current labour market is fierce and finding staff has become increasingly challenging. For example, Whitevalley has been advertising for a counselor for months and we have received only four or five resumes; most from applicants who are not qualified. In addition, wages will need to be made comparable to Vernon, otherwise service delivery is directly affected when people leave positions or go on medical leave, as WCRC cannot currently replace people at their wage rates, because they are much lower than similar positions in other communities.

**Outcomes from the Meeting and Rating with Executive Director Comments:**

Outcomes from the Meeting	Rating	Executive Director Comments
Training: <ul style="list-style-type: none"> <li>• take advantage of free 1 hour webinars through HSABC</li> <li>• ensure that evaluations include clear training goals</li> </ul>	<b>2</b>	This is currently being done
Increase Salaries by Decreasing Services at contract renewals with funders	<b>10</b>	Funders know that this may be the way the board decides to go. I personally do not see any other options in the immediate future. Low wages are threatening service delivery and have caused destabilization with changes in the ED position. I have made headway with the School Based Outreach contracts and at the newly agreed to 60 hours per week, WCRC can see the increases in wages we have been aiming for.
Tutorial for staff on how to use mobile direct deposit of cheques during staff meeting		This can be done
Presentation to SD#22 Trustees and Administration at an open meeting to discuss disparities in funding with ED, Board and Councilors	<b>1</b>	Although the concept as admirable, the school trustees, once contacted, informed us that they do not have input into the operation budgets that include our contracts. It is an ED's job to present to The School District Director and Treasurer. It is the Board's role to ensure that the Village and local Trustees understand the issue and are well informed. Whitevalley has done an excellent job of keeping the Village and our school trustees informed of the issue and they have indicated their understanding of the issue and offered moral support.
Present to MLA and MP by mid-March to discuss disparities.		Again, this is a great concept and has been done on many levels, many times, including the support the mayor has given us discussing issues with the Minister of Child and Family Development. Another kick at the can could be undertaken if the board is interested, although it was rated zero.
Member of the Board could search and apply for staff training grants	<b>1</b>	
Regular/quarterly contact with social services trainers and ensure that WCRC are included in invites when training happens for:		Although this is already happening and funders/organizations agree to include WCRC in training, I find that there are often not enough spots available or notice is so short that WCRC

<ul style="list-style-type: none"> <li>• IHA</li> <li>• MCFD</li> <li>• NOYFSS</li> </ul>		cannot actually take advantage of opportunities.
Contact Community Futures to assist with accessing training for volunteers		Work BC is aware of our services and we have had a volunteer and staff person come forth from this partnership
Create incentives for volunteerism		
Applicant screening for counsellors and others to ensure that WCRC doesn't get applicants who are only going to stay for a short period and use WCRC as a stepping stone. Adjust the interview process to better identify individuals who would commit for at least a year.		This suggestion assumes that there are many applicants and that WCRC can screen for commitment. I do not see this as possible; it misses the mark. If wages were equal to that of Vernon this would not be an issue. The issue is that the low wages can only attract those who need experience on the job; skilled workers demand an adequate wage. Asking potential applicants if they would commit to an organization for a specific time period is only feasible for true "contract positions", not when you are hiring employees. In a caring social service field, we need to hope for the best for our employees and their families, support them to create the best lives for themselves as we would our clients. As an employer we offer the best supports we can for our staff, encourage, train and support them while they are with WCRC. If they leave for better opportunities we should encourage ongoing connections and partnerships with their new places of employment.
Increasing ED wages by reducing hours		The overall yearly wage for the ED position is a problem. Although you can increase the wage per hour, it is the yearly wage that needs to be addressed, <del>as it is not comparable with Vernon.</del>
Look into a Benefits package that is reasonable and mandatory for all staff	6	This was looked at in the past. If the money comes from program dollars rather than the employee's salary, it might be viable. But if the employer pays for the full benefit package then the benefits become taxable.

### **New Initiatives**

WCRC will consider new ways to support the organization to bring in additional dollars. Care will be taken to take on only those initiatives that will bring large funding opportunities, as small initiatives are too labour intensive without the revenue generation needed to support the organization as a whole. The team was told to explore initiatives such as social media presence, fundraising initiatives with an active committee, social enterprise, and pay for service programs.

**Outcomes from the Meeting and Rating with Executive Director Comments:**

Outcomes from the Meeting	Rating	Executive Director Comments
<p><b>Childcare for 5yr and under by starting small in a rental building, but taking advantage of the dollars that the BC government is now putting into this sector</b></p>	<p><b>11</b></p>	<p><b>This is a very viable option, as we have a strong ECE qualified individual on staff who is willing to coordinate this venture and is confident that new staff recruitment would not be an issue. The current Contract Manager is well versed in funding applications. Before this is explored or discussed with the community the ED would need to hold meetings to discuss partnership and support of the existing childcare provider in the Lumby. Efforts to ensure that WCRC did not undercut or disrupt her services would be essential.</b></p>
<p>Create an Active Fundraising Committee to look into the following:</p> <ul style="list-style-type: none"> <li>• Expanding the silent auction concept to include other communities</li> <li>• Create a large event that draws numerous people, talent shows, galas, etc</li> <li>• Create partnership with all the major players who continuously fundraise in the community to create one large event (celebrity golf tournament) and then split the proceeds</li> </ul>	<p><b>5</b></p>	<p>Regardless of whether WCRC decides to fundraise through a variety of events, or partner with the community to do a large event, or continue to only hold a once a year silent auction, it is imperative to start holding monthly (or bi-monthly) fundraising meetings again to discuss:</p> <ul style="list-style-type: none"> <li>• Fundraising events</li> <li>• Grant applications</li> <li>• RFPs</li> <li>• New funding opportunities</li> <li>• Social enterprise</li> <li>• New initiatives</li> </ul> <p>The strategic planning day has shown, having a group of people brainstorm new ideas, opportunities and building upon what currently exists is priceless. An ongoing committee would offer this same support to paid staff, keeping fundraising in the forefront of priorities.</p>
<p>Social Enterprise in Vernon or other locations where the population size is large enough to support the endeavor. Perhaps target the enterprise to support one program, such as Mental Health and partner with organizations such as Kindale and Venture Training to provide employment opportunities for those with developmental disabilities or health challenges.</p>	<p><b>5</b></p>	<p>This is a large undertaking, but could be discussed further with a committee as the right social enterprise development can be very profitable and there are grants and other opportunities for start-up dollars.</p>

<p><b>Fee for service: Currently we offer a volunteer driver program that provides rides to Vernon and Kelowna for seniors (especially for medical appointments, but also for shopping and other essentials). This program is not funded through any contracts. This would be an opportunity for a fee for service venture.</b></p>		<p><b>Although no one placed a dot beside this option, if BC Gaming funding does not cover the costs associated with this program, the Board will need to consider adopting a Fee for Service program to continue this service.</b></p>
<p>Develop a Global Scavenger Hunt done through the internet. This option would not be costly to start and could reach numerous participants</p>	<p><b>2</b></p>	<p>This idea be discussed at a committee level.</p>
<p>Christmas Village/Haunted House concept where a large event is held over a number of weeks which encourages lots of visitors. Participants are dressed in costumes, pictures with Santa, sleigh rides, hot chocolate, bonfires, etc.</p>		<p>This idea be discussed at a committee level.</p>
<p>Provide partnerships with WorkBC for opportunities for Youth – example youth teaching tech to seniors populations or others who need to know how to use their computers, phones, ipads or social media.</p>		<p>This would need further discussion with WorkBC. Although a great support to the community, I do not see it as a large revenue maker.</p>

### Next Steps and Priorities

The main priorities were identified by the group are as follows:

- Develop and hire a new fundraising and social media position
- Increase salaries by decreasing services at contract renewals
- Look into offering Childcare for 5 years old and under

Priorities not identified but that I would recommend-are as follows:

- Pay for Service for Volunteer Driver program especially if BC Gaming application does not cover all associated costs
- Developing a Fundraising committee to discuss all fundraising options, grants, RFPs, social enterprise and new initiatives

The board will discuss the outcomes at the next board meeting. Once priorities are officially adopted, then administrative staff can come up with a timeline and task lists.

Respectfully submitted,

Kelly Johnson

