

HEWLETT-PACKARD



# Benevolence Association

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## Strategic Plan

**Cindy Fairs, MA Leadership**

August 2015

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# EXECUTIVE SUMMARY

The Strategic Planning Session was conducted on July 23, 2015 and was held at the offices of Community Futures Boundary in Grand Forks, BC. There were eleven participants in attendance that included volunteers, staff and board members. For several months leading up to the Strategic Planning Session, a Consultant was hired to take the organization through a process to refine current policies and procedures and develop new ones for the operations of the organization including human resources and governance.

During the initial phase of the development it became clear that there was a fairly serious disharmonious workplace culture that existed and a lack of unity amongst the whole group. As expressed to the group, this often occurs when an organization goes through rapid growth in a very short period of time, as has occurred with Whispers. The organization, once called “Hands of Mercy” was a very small organization with one part-time staff member and a handful of volunteers. In 2005 it became known as Whispers of Hope and at one point was required to hold several garage sales just to keep its doors open. It was just after this that an opportunity arose to relocate to a property owned by the City of Grand Forks, BC and leased to the organization and two partnering organizations for a sum of \$1 per year. This move proved to be like a ‘windfall’ as the organization grew rapidly from the moment it opened its doors, and now, has one full time coordinator and two part-time employees including 125 volunteers with an annual operating budget of \$125,000 with continued growth pushing at the perimeters of its seams. All of this occurred in a short span of a year and a half.

The growth had occurred exponentially, and much faster than the organization was able to manage. As such, taking stock of the situation the board hired a consultant, and formed a Policy Committee to start the process. Through the initial development of the policy development there was confusion mostly over roles and responsibilities of management verses board members. The organization was a grass roots volunteer based organization and had mostly operated with board members conducting the day-to-day work. But now however, there was a major collision happening with members of the organization and expectations varying about who does what and how to do it. It was clear that restructuring and further change needed to occur before the organization would have a chance to be able to function without the chaos. Thus, through consultation with all stakeholders the transition to restructure started to occur several months prior to the Strategic Planning Session being held in July.

The objective of holding a Strategic Planning Session was to determine the following:

- 1) Revisit the mission and vision of the organization (as there was none in place other than a ‘purpose’ in the Constitution)
- 2) Identify what is working / not working (strengths & weaknesses, opportunities & threats)
- 3) Identify goals and objectives for the future
- 4) Develop a plan of action for the next 1 – 5 years

# PAST, PRESENT AND FUTURE

## Past

Several months prior to the Strategic Planning Session being held, there was a Thrift Store Coordinator, as well as, a Cook who both reported to the board, and another staff member who was a Backroom Supervisor who reported to the Thrift Store Coordinator. Confusion existed with both staff and volunteers in regards to who they were to take instruction from and to whom they reported. The same occurred with staff, as members of the board continued to volunteer in the thrift store and the kitchen.

*Present **Operational (primary focus: operations)** – The board does the work of the organization and manages as well as governs it. This is typical of a board in the ‘founding’ stage of an organization and of boards in organizations, such as service clubs, that have no staff and that must rely largely on board members and other volunteers to achieve their aims. Operational boards also have management responsibilities .Copyright © 2002, 2004, Mel Gill, Synergy Associates*

## Present

Through the restructuring, the Thrift Store Coordinator became the ‘Centre Coordinator’ and is now the only staff member who reports directly to the board; and now all staff members report to this individual. The Centre Coordinator also, recruits, screens and places volunteers however, other staff and volunteers may be assigned to oversee the work of volunteers in certain areas or with various tasks. The day-to-day operations and management of the organization is the responsibility of the Centre Coordinator, and the governance including the fiduciary responsibility of the organization is solely the boards. However, that being said, board members shall continue to be involved in the day-to-day functions, but working in the capacity as a volunteer.

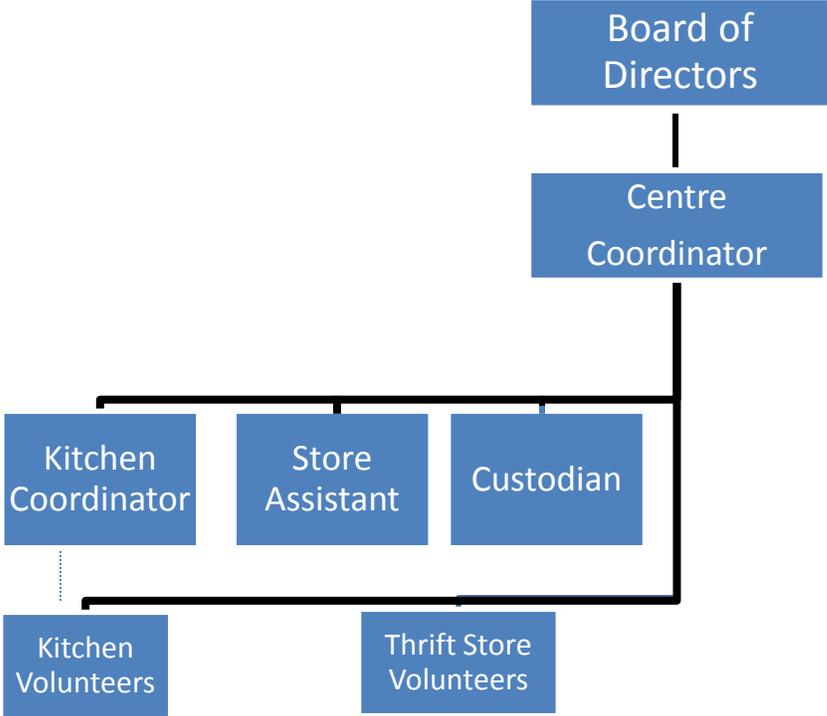
## Future

The future state of the organization will be successful if it is able to:

- Create an environment that will engage its board members, staff and volunteers in a harmonious and respectful way through being compassionate, loving towards others, dependable and resourceful in an environment that is safe, free of risks and welcoming.
- Increase its revenues that will enhance organizations ability to provide good nutritious meals and essentials to their clientele (guests)
- Work towards its vision of offering and providing greater resources to a larger clientele throughout the Kootenay Boundary (expansion) including expanded programs and services
- Create an opportunity for the organization to be sustainable over the long-term and to include greater revenues with more staffing and a facility that will support the growth.

Refer to the Conclusion of this Strategic Plan to determine Board Model for the future.

# ORGANIZATIONAL STRUCTURE – FLOW CHART



# ORGANIZATIONAL DESCRIPTION

## History

Whispers of Hope is a registered non-profit charitable organization established in 1996 and was originally named the “Hands of Mercy”. It formed by members of local faith groups who realized the need, not just for a cup of coffee, but for fellowship, bible studies and a warm place to gather. Over the years, a full community (soup) kitchen evolved and a thrift store was opened to help offset the cost of running the kitchen which feeds 30 – 45 guests daily, Monday – Friday. Whispers mission is to offset some of the impacts of poverty by assisting the needy with food, fellowship, and a space where all belong in the community.

Overview of major accomplishments & highlights during the history of the organization

- Established Hands of Mercy in 1996
- Feb 2005 – Changed from Hands of Mercy to Whispers of Hope Benevolence Association
- Feb 2005 – 2012 Unknown other than the organization was almost ready to close its doors due to the inability to pay its bills, and therefore, resorting to holding garage sales in order to keep its doors open. This occurred just prior to relocating to its current site on Riverside Dr.
- Dec 2012 - MAAP Project (Multi-Agency Accommodation Project) – A collaborative partnership developed between two other not-for profit organizations (Habitat for Humanity Boundary, later formed as Habitat for Humanity Southeast BC; and, BETHS – Boundary Emergency Transition & Housing Society) to create a permanent facility intended to meet the needs of individuals and families in the Boundary region who are homeless, hungry and/or unable to obtain decent, safe and affordable housing.
- Nov 2013 – Whispers of Hope Thrift Store and Community Kitchen opened to the public at new site – 7212 Riverside Drive, Grand Forks, BC.
- March 2015 – MAAP Project – Collapse of the MAAP due to City Council’s decision to delay support resulting in Habitat withdrawing from the project.
- June 2015 – Redevelopment of organizational needs; policy development, strategic plan.

## BACKGROUND

Leading up to the Strategic Planning Session the Consultant met with various stakeholder groups involving directors, staff, volunteers and clients throughout the process to determine needs, issues, risks, current cultural climate, roles and responsibilities and areas identified that required immediate attention to address problematic and most pressing issues.

A Policy Committee (a working group of the board consisting of 4 directors – Jake Raven, Theresa Raven, Kim Shulga, and Louise Heck) was formed to work with the Consultant, Cindy Fairs to establish a framework for the project, to support the efforts to develop the policies, and to be the liaisons with the Board of Directors of the organization. This process included consultation and regular meetings held with the Centre Coordinator to gather data, get input and elicit further direction to include other stakeholders including staff and volunteers, and clients as determined. The Consultant met on a weekly basis with the Policy Committee throughout a period of 3-months and consulted with staff as required. The Policy Committee liaised with the Board of Directors and gave regular reports and solicited feedback and approval as required.

To involve staff, volunteers and clients, a volunteer meeting (focus group) was held to ensure that their input was included. Information gathered from the volunteers incorporated their input and facilitated a process for understanding of the roles and responsibilities of volunteers, board members and staff. A SWOT analysis was used to obtain their perceptions of the strengths and weaknesses of the organization; operational requirements of the thrift store and community kitchen, and potential growth of programs including training opportunities and recognition.

In addition to the focus group, the Consultant met with the Board of Directors to share information that had been obtained from volunteers. Sharing of the information with others in this group determined that there was consistency of items identified as issues in the roles and responsibilities of the various stakeholders of the organization. Using the original flipcharts that were used at the focus group held with the volunteers, the Consultant posted them to share the information that had been purported by the volunteers.

With information collected from the stakeholder groups, the Consultant worked in accordance with the Policy Committee to develop Organizational Policies including Personnel Policies, Operational Policies, Governance Policies and Volunteer Guidelines. The conclusion of this portion of the project came to conclusion on June 15, 2015.

The Annual General Meeting was held on June 25, 2015, but with the intent to wait until the new board was in place before holding the Strategic Planning Session.

# VISION, MISSION, VALUES

Mission Statement (*to be changed at a Special Meeting or AGM of the membership*)

- a) To relieve those who suffer distress, loneliness or despair as a result of being disadvantaged or oppressed in their pursuit of basic human needs.
- b) To provide, for these people, a drop-in centre dedicated to their physical, spiritual and emotional well-being, where they and other compassionate people might offer each other acceptance, support, enrichment and hope, might share or exchange any surpluses of food, clothing or household goods, and enjoy the opportunity to participate in the operations of the centre.
- c) To nurture the community's concern for the circumstances of suffering and a willingness to respond to peoples' needs either directly or through support of social-service agencies.
- d) To cooperate with other persons, organizations, or authorities in arrangements, activities, or projects as shall be deemed to serve these purposes.

## VISION STATEMENT

***"Inspiring community connections one person at a time"***

## MISSION STATEMENT

***"Whispers of Hope is a non-profit charitable organization motivated to empower individuals by providing community support, nourishment and essentials in a safe welcoming environment."***

## ORGANIZATIONAL VALUES

*Loving*  
*Compassionate*  
*Respectful*  
*Dependable*  
*Resourceful*

# STRATEGIC PLANNING PROCESS & METHODOLOGY USED

Using a methodology of Action Research – basically using a reflective process of ‘thinking, observing, implementing and reflecting’ and asking ourselves ‘where are we at now’ taking into consideration our past, present and future state, and ‘how are we going to get there’ as a strategy to set goals and objectives and for moving forward.

- a) Where are we at now?
- b) Where do we want to be?
- c) How will we get there? (ask the question)
- d) Action – plan, explore, challenge, trial
- e) Reflect, Implement & Evaluate

Participants were asked numerous questions and through individual and group work were encouraged to reflect through feelings and observations and then responding to certain questions.

## Who are your clients / customers?

Participants were asked to identify who were their customers versus who were their clients. Determining the difference would help to define and know who they are serving. Participants were divided into three groups and were asked “Who are your clients/customers” – out of this question came some deeper exploration of who they define as clients versus customers.

### Group 1

- a) Those with mental health issues; homeless & addicts are *clients*
- b) larger community; tourists & visitors are *customers*

### Group 2

- a) Clients & customer for store – anyone, all walks of life but mostly females
- b) Restaurant – mostly single males and others, ‘regulars’ and those who come to socialize (customers and clients); many ‘are storytellers’

### Group 3

- a) Customers are the homeless, elderly, less fortunate looking for deals, kids, low income
- b) Clients are homeless, low-income; (some) come to socialize & some lonely

## What products and/or services do you provide?

- Physical things like clothing, shoes etc.
- Smiles, hugs, friendship
- Community support & advocacy, referrals, outreach and follow-up, a safe place; temporary shelter; community networking; and meeting clients basic needs

## What do you do best?

- (Offer) help; compassion, care about people; respond well; non-judgmental; listening (ear)

What do you do that no one else does?

- Provide provisions on a larger consistent scale
- Provide services without income testing.
- Opportunity to give more than other agencies and the reasons we can is that the resources do not cost a lot of money (as mostly donated)
  - o Clothing / food
  - o Hot nutritious meals daily
- Recycling & re-using

What VALUES govern the organization? – These responses came from the question being asked without any formal process, but rather a basic response articulated from participants.

- Kindness & helping
- Love for people
- God's work
- Humanitarian

### **Vision, Mission, Values Development Process**

Participants were lead through a fairly extensive process to determine the vision, mission and organizational values for the organization. First, the group was given explicit examples of the differences between Vision and Mission Statements, as well as, examples of organizational values and guiding principles

- Vision Statement – Focuses on the future state of an organization
- Mission Statement - concentrates on the present and is a declaration of an organization's core purpose and primary objectives.
- Organizational Values - Core values are fundamental beliefs of a person or organization. The core values are the guiding principles that dictate behavior and actions.

Placed into three groups, each group came up with what they determined was the purpose of the organization by preparing a collective statement on flipchart paper. These statements were posted around the room and each person was given a 'dot' and then asked to place it next to the statement that resonated best with them. The statement that got the most dots was the statement that would be reworked by the whole group until there was final consensus. Statements and words could be taken and used from the other two statements and incorporated into the final statement.

The following are the initial statements that were prepared and presented by the individual groups.

Group 1 - (6 dots) “Whispers of Hope is a non-profit organization motivated to empower individuals, through community support and resources by providing essential supplies and nourishment, as well as, a friendly and welcoming atmosphere. “

Group 2 – (4 dots) “Whispers of Hope is dedicated to providing nutritious meals in a safe, clean and welcoming environment that encourages social interaction and acceptance to all individuals in need.”

Group 3 – (1 dot) “Providing a safe and nourishing environment that consistently offers nutritious meals and quality used goods at prices affordable to all.”

The final Mission Statement reads as follows - **“Whispers of Hope is a non-profit organization motivated to empower individuals by providing community support, nourishment and essentials in a safe welcoming environment.”** *(The word ‘charitable’ has since been added by the Consultant as a recommendation to include in the final statement.)*

The process for developing the Vision Statement was done as an independent exercise first with examples shown on the overhead slide of well-known organizations such as the Salvation Army, the Canadian Cancer Society and Habitat for Humanity Canada.

With consensus from the group the final Vision Statement was developed and presented as : **“Inspiring community connections one person at a time”**

Working through a process of each participant first identifying their own core values, they were then asked to narrow down their personal core values from 20 to 5. These values were then written collectively onto a flipchart to be part of the whole groups core values inclusively. Participants were then given 8 ‘dots’ and asked to place a dot beside the words that best reflected what they believed should be part of the organizations values by aligning their core values with that of the organization. The following is a list of the core values that came out of the group as a whole. All of the other words had 0 – 3 dots, however, mindful that ALL of the words collected were represented as personal core values from the various participants.

#### GROUP VALUES

Committed	Cooperation	Compassion
Dependable	Empower	Courageous
Genuine	Gratitude	Helpful
Honest	Innovative	Inspiring
Kindness	Loving	Loyal
Positive	Resourceful	Respectful
Sincere	Teamwork	Trusting

#### Top Organizational Values identified (by vote)

- a) *Compassion* (8)
- b) *Respectful* (8)
- c) *Dependable* (7)
- d) *Loving* (4)
- e) *Resourceful* (3)

# STRATEGIC ANALYSIS

Using the methodology of the SWOT Analysis (Strengths, Weaknesses, Opportunities and Threats) we determined the following:

## Strengths (What is working well?)

- Operational Leadership (Management) – coordination & consistency of administration
- Volunteers
  - o The number of volunteers - 100+
  - o The hours contributed by volunteers
  - o The ‘mix’ of volunteers (diversity – good combination of men/women and younger and older volunteers)
- Family oriented / atmosphere / public image
- Layout / location / atmosphere
- The two organizations (includes BETH’s) – freedom to come & go
- Greeting the customers (like to be greeted by others and can be the highlight of both the volunteers day and as well as for the customer)
- Chance to help people / passion / caring / openness / non-judgmental / acceptance / generosity
- Person centered – (to meet) individual needs
- Witnessing the appreciation of the clients who give what they don’t have
- Friends, not just transients (the guests are not only transient people, but become friends with others)
- Safe (space for many)
- Honored to be a part of the organization
- Bartering (the exchange of goods available)
- Learning (educational)
  - o Learn to respect and accept by overcoming judgement of others
  - o Learn how to approach people
  - o Get to know oneself at the deep core (compassion)
- Gain work experience
  - o Sets mindset
  - o What we do hear will help the hearts of many
- Helps & heart-warming to eliminate heavy heartedness
- Breaks down barriers (i.e. community)
- Don’t want to be thanked
- Feel a part of the team
- Thankful, mindful (reminder) for what we are blessed with
- Altruism (from the heart)
- Resourceful
- Communication & outreach to (offer) other supports

## Weaknesses (What areas can the organization improve?)

- Funding – lack of stable / reliable funding
- Lack of Volunteers – unstable
- Service unknown to community / misunderstanding of our role in the community
- Space restrictions
- Lack of advertising for Thrift Store (needing signage)
- Lack of community support services to help individuals
- Disconnect from other local resources
- Lack of respect ‘out back’
  - o chairs, dishes etc., not being brought back in
  - o ashtrays not being cleaned
  - o threats from clients – Fear
- Lack of signage ‘out back’ Rules should be enforced
- Code of conduct (should be in place)
- Signage
  - o include clientele in process
  - o pic symbols needed
  - o Signs should be few and clear
- Hygiene – (need) adequate washing facility
- Donation box poorly displayed
- Human Resources / Management - confusion
- Need someone who can ‘put out fires’ and deal with conflict resolution (i.e. security)
- Lack of loyalty – staff/volunteers infighting
- Lack of confidentiality
- Lack of understanding of everybody’s role

Opportunities – (What are the opportunities for the organization?)

- Community support
- Organization growth
- Networking with other organizations
- Growth in diversity
- Opportunities for improvements on the premises
- Rebranding – Image
- Social Media
- Room for personal growth
- Employment
- Funding
- Education / Training
- Spiritual Growth on all levels
- Inclusion
- (A way) to introduce community to those forgotten
- (To have) - FUN
- Lack of understanding of everybody’s role

## Threats – What are the things that are threatening the existence of the organization?

- Unwelcomed client behavior
- City Councils actions - No lease
- Negative publicity – loss of trust
- Theft / damage
- Personal safety / health
  - o Communicable diseases
  - o Drug use & fall out
  - o Dogs – un-kenneled / unleashed
- Loss of funding / financial support
- Worry for ‘future home’
- (No) contingency fun

Note: Comments have also been included into the SWOT analysis from the focus group held previously with volunteers, and who may not have been attendance for the Strategic Planning Session.

## GOALS & OBJECTIVES

The SMART method is used to determine the goals and objectives.

S – Specific

M – Measureable

A – Attainable

R – Realistic

T – Time-bound

### One year goals – to be completed by June 2016

**Goal 1** - Complete Organizational Structural Change and Processes

**Objective** – Hire a consultant to guide the process and to work with the Board of Directors and Management to initiate the change process through good leadership and role modeling.

**Goal 2** – Strengthen relationship with community agencies, businesses and local government

**Objective** – Strengthen community relationships with individuals, businesses and government by providing consistent and non-hostile messaging; attending community events and meetings through networking; sending positive messages through communication strategies that align with the mission of the organization.

**Goal 3** - Create a more inclusive and respectful organizational culture (a strong unified team)

**Objective** – Enhance the organizational culture through good leadership and role modeling of good behavior by aligning and respecting the organizational values; by empowering members of the organization to include them in the decision making process; and by creating policies that are followed and enforced.

**Goal 4** – Increase revenues by 20% (\$125,000 to \$150,000)

**Objective** – Increase revenues of the organization by ensuring a safe and welcoming environment for customers; by having a happy and engaged workforce of volunteers and staff; and by increasing awareness by soliciting for more donated items through increased advertising and word of mouth

**Goal 5** – Develop programs offered to the homeless (i.e. Reading Program)

**Objective** – Develop a reading program through partnerships of other organizations and volunteerism; include clients in process.

**Goal 6** – Develop stronger communication plans & strategies

**Objective** – Develop stronger communication by creating new professional branding of a logo that will be displayed on all promotional materials; establish communication strategy & protocols (who, why, where, when); that is consistent with policies of the organization.

Two year goals to be completed by June 2017

**Goal 7** – Develop greater capacity to offer more services, programs and resources to the homeless and those living in poverty

**Objective** – Build capacity of the organization by recruiting more volunteers, increasing volunteer hours by enhancing volunteer roles; streamlining processes and volunteer protocols, providing training and education and volunteer support meetings; greater recognition opportunities; increasing the hours of operation for the Community Kitchen from 8 a.m. – 2 p.m. instead of closing at noon; increasing staffing levels from 3 to 5 to support the increased needs of the organization.

**Goal 8** – Beautify backyard area to include gazebo, garden and grass

**Objective** – Beautify the backyard area to enhance the quality of life for the homeless and to create an environment that would be respected by those who use it

**Goal 9** – Diversify Funding Sources

**Objective** – Diversify funding sources by securing a minimum of two \$5000 grants to support enhancements for a bathroom and air-conditioning and other resources that might be needed.

Three - Five year goals to be completed by 2020

**Goal 10** – Build new building (Capital Project)

**Objective** – Construct a new building that will become self-sustaining

**Goal 11**– Open second store in Castlegar (Partnership project)

**Objective** – Open a second store in another community that will create greater opportunities for sharing and distribution of goods and expanding resources.

# ACTION PLAN

## 1 Year Goals & Objectives

Goal	Objective	Responsibility	Time Frame	Status
<b>Goal 1</b> Complete Organizational Structural Change and Processes	Develop Policies	Consultant in collaboration with Brd	June 2015	Complete
	Create Organizational Change to Restructure staffing / reporting	Consultant in collaboration with Brd	June 2015	Complete
	Develop Handbooks and materials; forms	Consultant in collaboration with Brd	June 2015	Complete
	Carry out training / orientation for volunteers on roles & responsibilities; risks; procedures; protocols etc.	Management & Supervisors		
	Sign-off on agreements	Staff / Board / Volunteers	Sept 2015	
<b>Goal 2</b> Strengthen relationship with community agencies, businesses and local government	<ul style="list-style-type: none"> <li>- Complete Lease Agreement with City of Grand Forks</li> <li>- Attend functions &amp; events within the community and outlying areas (ie. Local community events)</li> <li>- Become a member of the Chamber of Commerce</li> <li>- Advertising (3 free spots / yr) with the Gazette</li> <li>- Submit press releases on various activities of the Centre</li> </ul>	Board of Directors  Management / Chair and/or Brd Mem.  Management / Brd  Management  Management / Chair or designate	Sept 2015 Ongoing	Complete
<b>Goal 3</b> Create a more inclusive and respectful organizational culture - (a strong unified team)	Hold AGM & recruit new members to the board	Board of Directors	June 2015	Complete
	Hold focus group for volunteers	Volunteers	May 2015	Complete
	Hold Strategic Planning Session	Board of Directors	July 2015	Complete
	Hold 2 – 3 social fun functions or events per year 1. 2. 3.	Board / Staff / Vol's		
	Promote the values of the organization by providing good leadership and role modeling in a professional manner.	Management / Board		

<p><b>Goal 4</b> Increase revenues by 20% (\$125,000 to \$150,000)</p>	<p>Create a safe welcoming environment for customers - develop &amp; maintain a happy and engaged workforce of volunteers and staff; - increase awareness by soliciting for more donated items through increased advertising &amp; word of mouth</p>	<p>Management / Staff / Volunteers  Management / Staff / Volunteers</p>	<p>June 2016</p>	
<p><b>Goal 5</b> Develop programs offered to the homeless (i.e. Reading Program)</p>	<p>Develop a reading program through partnerships of other organizations and volunteerism; include clients in process</p>	<p>Management / Staff / Volunteers</p>	<p>June 2016</p>	
<p><b>Goal 6</b> Develop stronger communication plans &amp; strategies</p>	<p>Develop stronger communication by creating new professional branding of a logo that will be displayed on all promotional materials; - establish communication strategy &amp; protocols (who, why, where, when); that is consistent with policies of the organization.</p>	<p>Management / Board</p>	<p>June 2016</p>	

Two Year Goals & Objectives

<p><b>Goal 7</b> Develop greater capacity to offer more services and programs to the homeless &amp; those living in poverty</p>	<p>Build capacity of the organization by - recruiting more volunteers (120 to 150) - increasing volunteer hours from (XXX to XXX) by enhancing volunteer roles; streamlining processes and volunteer protocols, providing training and education and volunteer support meetings; - provide greater recognition opportunities; - increasing the hours of operation for the Community Kitchen from 8 a.m. – 12 p.m. to 8 a.m. to 2 p.m.</p>		<p>June 2017  June 2017  June 2017  June 2017</p>	
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	- increasing staffing levels from 3 to 5 to support the increased needs of the organization.		June 2017	
<b>Goal 8</b> Beautify backyard area to include gazebo, garden and grass	Beautify the backyard by – developing a committee – obtaining sponsorship or grant to obtain funds – building a gazebo - growing and maintaining a garden - plant grass and maintain		June 2017	
<b>Goal 9</b> Diversify Funding Sources	Diversify funding sources by securing a minimum of two \$5000 grants to support enhancements for a bathroom and air-conditioning and other resources that might be needed.		June 2017	

Three – Five Year Goals & Objectives

<b>Goal 10</b> Build new building (Capital Project)	Construct a new building that will become self-sustaining by – creating a capital project team to work through the planning and the vision for the project – developing a plan – developing a fund development strategy to obtain grants and secure sponsorship		2020	
<b>Goal 11</b> Open second store in Castlegar (Partnership project)	Open a second store in another community that will create greater opportunities for sharing and distribution of goods and expanding resources by – developing partnership – recruit volunteers – hire staff		2020	

# MONITORING & EVALUATION PLAN

Leaders of the organization are responsible for communicating and setting clear direction for the organization. Implementation of the strategic plan is carried out by management and staff. Regular monitoring of the strategic plan to ensure that the targets are being met should be done fairly frequently. Adjustments can be made along the way as may be determined. A regular review of the strategic plan should be done annually with a target to conduct a formal review every two to three years.

The Strategic Plan is a 'living document' to be referred to and used as a guide.

## **Monitoring of the strategic plan:**

- Continue to monitor and assess situations and risks as they arise
- Assess any initiative or planning that takes place to ensure that it is working / not working
- Revisit the Mission and Vision and Values annually
- Evaluate and prioritize opportunities and initiatives
- Organize by developing frameworks and resources needed to ensure success

## **Recommendation**

To develop a Strategic Planning Committee to oversee the progress of the Strategic plan for the purpose of monitoring the progress /or lack of progress. The overall goal of evaluating the strategic plan is to see how well it is being monitored and followed and determining the (who, what, when, where, how) the activities are being achieved. Ongoing monitoring should answer the questions:

- a) Is what we are doing accomplishing our goal?
- b) If not, why not? What needs to happen to be able to progress as planned?
- c) Does it (the goal or strategy) need to be changed or eliminated?
- d) What else needs to happen or could be done differently?
- e) Don't forget to chart, record and highlight the successes!

# CONCLUSION

The organization has made tremendous strides over the course of the last several months to create a culture that is inclusive, loving, respectful and welcoming towards everyone. Gratitude is extended to everyone, including the directors, staff and volunteers who participated willingly throughout the process and who provided information and feedback as needed. Although for some, it was difficult to maneuver the transition, the way to a clearer path became visible as time went on and greater hope for the future of Whispers became apparent as barriers were broken down, trust ensued and people listened.

The board's decision to establish a Policy Committee was a very crucial beginning point to support the change process for this growing organization. Participants provided enlightenment throughout the duration of the project until its completion. Expression of their concerns, their willingness to be open and honest was critical, and very much appreciated. Confidentiality was respected and professionalism of the board and staff did not go unnoticed.

For purposes of determining the model or style of leadership that the board purports to be, it would be worthwhile to do some investigation of a Management Model and/or a Traditional Model to determine what model is best suited for this board. Going through any change initiative as Whispers has done requires further discussion and a close review of its purpose. In light of now having a Vision and Mission Statement will support the board to determine 'who' they are and 'how' they want to lead the organization. These two models are currently what the consultant sees as a cross-blend of the **current status** of this board and may take some time for it to move through the next phase to determine what kind of a board they aspire to be.

In conclusion, the goals and objectives set out by the organization can be attained through 'staying the course' and having a Vision and Mission supported by organizational values to guide the process for making decisions and conducting oneself in the workplace; and most importantly for role modeling and mentoring others that we engage. At the end of the day, this strategic plan is in place so that we are better able to empower those we work with and for whom we serve.

Respectfully,

Cindy Fairs, MA ~ Consultant

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