

Nelson CARES Society

Updated CONTINUOUS STRATEGIC PLAN

2019 to 2023

(Extended due to Executive Changeover)

DEVELOPED BY

THE BOARD OF DIRECTORS, EXECUTIVE DIRECTOR, & PROGRAM MANAGERS

Created March 23, 2013

Updated May 24, 2017

Updated October 10, 2017

Updated March 7, 2018

Updated March 7, 2019

**Reviewed by Board of Directors & Executive Director August 2022:
Approval to extend until Spring 2023**

Nelson CARES Society 4-Year Strategic Plan 2019- 2022 (2023 Extension)

A. CONTEXT

Vision: A healthy and inclusive community where complete respect for all individuals is an ordinary, everyday occurrence. *

Mission: Through community collaboration and service excellence, Nelson CARES Society works toward a socially just society by providing programs and initiatives in advocacy, housing, and employment services. Nelson CARES Society aims to be a reflection of the community it envisions.

Organizational Ends: Our mission includes the following ends:

1. Everyone has adequate and safe housing
2. Everyone has access to support and representation when they need it
3. Everyone has adequate means and resources to participate fully in community life

Organizational Values: Equality, respect, collaboration, diversity, transparency, accountability, integrity, environmental sustainability

Through our programs, we endeavour to facilitate personal capacity development. There is strong alignment between agency and community values.

B. SITUATIONAL ANALYSIS

The original strategic plan was developed in November 2007 and is reviewed and amended annually.

1. Key internal changes noted since the last strategic planning session in March 2018:

- a) Continued higher agency profile due to “Ready for Home” for CNOY 2019. Will review for 2023.
- b) Housing support worker position has proven to be effective for housing retention: supports, advocacy, building community, life skills, & assisting with health needs.
- c) Sustainable funding for the Advocacy Centre and the new Kootenay Seniors Program continues to be a concern, despite success acquiring some additional funding.
- d) Management: continue to increase the capacity for human resource management. Management team would benefit by frontline duties being reduced- increase in funded management hours.
- e) The organization is limited by a lack of suitable work space;
- f) Current lack of capacity to analyze program data
- g) Communication/partnership challenges with Interior Health services; MHSU and senior services.
- h) Stepping Stones staff joined CUPE 3999-2, February 25, 2019

2. Key trends predicted in the agency’s future environment include:

- a) Continued increased disparity between the ‘have & have not’s’.
- b) Attitudinal barriers in the community towards those more vulnerable, with particular concerns re: affordable housing.
- c) Dwindling support available for people with mental health and substance use issues.
- d) Growing population of seniors and young families.
- e) Increased demand for housing for seniors and people with disabilities.
- f) Politics: Current federal and provincial governments are supportive; however, the future of this is uncertain.

Updated: May 2017 and Oct; Mar 7, 2018; Mar 7, 2019, Aug-Oct. 2022
Progress Update 2018-2019: May 2018, Sept 2018, Feb 2019; Nov 2019; Extended to 2023

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- g) New city council and regional district directors opens doors to build new relationships.
- h) Increased need for accessibility in all its forms both programs and physical accessibility; lack of public awareness of the need for accessibility.
- i) Collective impact successes point to more internal and external partnerships and leveraging those relationships.
- j) Continued aging population in all of our services and staff.
- k) Gaps in service continue for Indigenous population; Truth and Reconciliation recommendations may increase need for services.

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Forces affecting our plans - to consider when looking ahead...	
Strengths	Challenges
<ul style="list-style-type: none"> <input type="checkbox"/> Staff are skilled, professional, committed, engaged, and mentored. <input type="checkbox"/> NCARES is well connected to and has a good understanding of the community. <input type="checkbox"/> The agency enjoys strong leadership at executive, management and governance levels. <input type="checkbox"/> The agency has a good reputation in the community and continues to adapt to deliver relevant programs. <input type="checkbox"/> The agency is adaptive and responsive to community needs and service gaps. <input type="checkbox"/> The agency is seen as fiscally well-managed and responsible. <input type="checkbox"/> NCARES engages in community development with other agencies. <input type="checkbox"/> The agency is seen as a community leader. <input type="checkbox"/> Diversity of programing provides structural and financial resilience. <input type="checkbox"/> Strong commitment of board members; recruitment of strong skill sets. <input type="checkbox"/> Clients report positive feeling of safety, comfort, and support. 	<ul style="list-style-type: none"> <input type="checkbox"/> Dependence on government and grant funding. <input type="checkbox"/> Resources are stretched. <input type="checkbox"/> Agency facility space is tight and limited. <input type="checkbox"/> Risk of overextending in relation to new projects and community development partnerships. <input type="checkbox"/> Many of those we serve are living with increasingly complex issues. <input type="checkbox"/> Stay within BC Housing budget and still address our needs – capital reserves and operational funding; balanced with rising costs. <input type="checkbox"/> Basic accessibility in community still not addressed adequately. <input type="checkbox"/> Frustration re lack of adequate communication by key providers, such as Interior Health (Mental Health), to meet specific client needs and successful partnerships. <input type="checkbox"/> Continued aging population in all of our services and staff. <input type="checkbox"/> Staff and Board burnout and recruitment.
Opportunities	Threats
<ul style="list-style-type: none"> <input type="checkbox"/> Leverage recognition of successful capital campaign. <input type="checkbox"/> Leverage the public trust for future fundraising opportunities. <input type="checkbox"/> Federal and province grants may increase, particularly regarding housing. <input type="checkbox"/> Two Cabinet MLA in our communities are potential political allies. <input type="checkbox"/> Address the needs of the most vulnerable. <input type="checkbox"/> Be proactive in approaching potential housing partners (e.g. Kiwanis, City). <input type="checkbox"/> Social enterprise models for employment and/or for funds. <input type="checkbox"/> Leverage positive relationships with funders and community partners. <input type="checkbox"/> Engage the board in community development. <input type="checkbox"/> Utilize shared services, networks, and resources provided by KBCSC. <input type="checkbox"/> CLBC Procurement opportunities. <input type="checkbox"/> Embrace the Truth and Reconciliation Recommendations where possible. <input type="checkbox"/> Succession planning for Board and Staff, capture knowledge management. 	<ul style="list-style-type: none"> <input type="checkbox"/> Limited funding – for innovation, needed staff and considering improvement (such as a living wage policy). <input type="checkbox"/> Lack of innovation for affordable housing solutions/collaborations in the region; lack of community collaborative vision. <input type="checkbox"/> Lack of provincial resources (e.g. housing with supports). <input type="checkbox"/> Polarized attitudes in community regarding vulnerable populations. <input type="checkbox"/> Aging Population (Services and Staff). <input type="checkbox"/> BC Housing Service Agreements up for change (Operating budget for SCL houses is insufficient to meet licensing requirements and has not been updated for years; in particular the underfunding of maintenance reserves and group home maintenance budgets. <input type="checkbox"/> High needs clients burning out staff

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C. STRATEGIC ISSUES The top 4 priorities ranked based on feedback – Current Housing, Funding, Human Resources, and Board Development.

In the course of planning, strategic issues were discussed and updated based on stakeholder, board, and staff feedback. The focus is on the following priorities:

1. Current Housing Work

- a. Completion of Lakeside Redevelopment and the beginning of Hall St projects require focused time and resources of ED and senior management staff.

2. Fund Development/Capital Campaign

- How to leverage success of recent capital campaigns to build relationships and partnerships with key agencies?
- How can we sustain momentum with existing donors and build long-term capacity to generate funds?

3. Human Resources

- How best to address need of management to oversee housing projects priorities?
- How can we bring more support to management for the range of human resources functions?
- How do we engage with unionized staff to continue to build positive relationships?

4. Board Development

- How do we recruit new members to maintain strengths, diversity and balance of skill set?
- How do we advocate for sustainable funding?
- How do we engage board members in community outreach?

5. Kootenay Seniors

- How do we grow and sustain program and funding?
- Provincial Gov't funding - transportation?

6. Role in Community Development

- What is the Board's role in providing leadership in community development work?
- How do we engage and support the Board in participating in community development?
- What are the communication channels between Board and Management Staff for effective knowledge management, so ED is kept informed of CD initiatives/ideas?)
- Can we advocate for consolidating some of the community initiative tables into one group – maybe with City?

7. Future Housing Work – Affordable Housing Committee

- Define what affordable housing is for NCARES.

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- ❑ How best to address complex housing needs in the community?
- ❑ How to manage future development?
- ❑ Can we address the loss of affordable housing in the broader community?
- ❑ Advocacy on subsidized housing at the Provincial level.
- ❑ Education to our community about how affordable housing is changing.
- ❑ Provide opportunities for municipality to invest.

D. GOALS AND OBJECTIVES

The updated goals and objectives are documented in the following chart. Note these do not include all of the ongoing activities of the operations of Nelson CARES Society – see Operational

GOAL (OUTCOME)	OBJECTIVES	RECOMMENDED STRATEGIES	TIMELINE	RESPONSIBILITY	STATUS Update -Nov 2019; Aug-Oct 2022
A. Services to Priority Beneficiaries					
1. Vulnerable populations have access to quality affordable and adequate housing.	a) Break ground on Hall Street project. (See Housing Plan 2015-25) b) Complete Lakeside Redevelopment.	<ul style="list-style-type: none"> ❑ Continue to work with BC Housing and City Spaces ❑ Work with BC Housing to adequately fund Lakeside Redevelopment project ❑ Invite City to participate in projects ❑ Use social enterprise principles to deal with opportunities as they arise. Re-negotiate BC Housing agreement re: Ready for Home model, property	Ongoing 2021	Affordable Accommodation Committee Executive Director and Staff	1.a. Hall Street construction underway- completion date November 2020 (41 rental units two x 3 group home site) Construction completed – April 2021 1.b. Lakeside construction underway- completion date November 2020 (47 units rental housing) Construction completed – July 2022 1.c. Actively building out housing management team. <ul style="list-style-type: none"> ● CNOY 2020 is being planned and fundraising goal is set at \$40K (exceeded \$45k) ● CNOY 2021 goal \$70k (exceeded \$90K)

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	c) Ensure sufficient supports are in place to manage housing assets	maintenance, Stepping Stones etc. Expand the role of the Housing Outreach Worker and secure funding for a permanent position. <input type="checkbox"/> Advocating with BC Housing for support worker for WSP; Cedar Grove and CMC. <input type="checkbox"/> Organize 2020 CNOY and confirm where funds to be directed. <input type="checkbox"/> Review organizational structure to include asset manager position.	By 2021 2020 2019/20	Executive Director Executive Director Community Relations Committee Executive Director	<ul style="list-style-type: none"> • Continue to advocate for funded support services with BCH. Currently there are no funding \$ available. • BCH Purchase of NSI April 2022—operating agreement in process • CNOY planning is underway – Saturday February 22, 2020 the goal is \$40K • CNOY 2021 goal \$70K • Asset Manager position is vacant as of November 5, 2019. Reviewing position. • Asset Manager secured Nov 15, 2020
2. Advocacy function is sustainable	a) Advocacy Centre has a long-term sustainability plan in preparation for Anonymous Donor funding ends.	<input type="checkbox"/> Pursue projects that have potential for contributing both services and resources to the goals of the program	2020	Staff- E.D. and Manager	2.a. ongoing -ED pursuing opportunities for growth and expansion

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	b) Raise awareness around unmet needs and gaps in services.	Advocate for change at a systemic level, through letters, provincial/community initiatives, and conversations.	2017-20	Board / Management	2.b. MSDPR has announced community outreach support access to entitlements. September 2022- ED communicating with MSDPR to include funding and resources for Mobile Team Supports to address opioid crisis; proposal Work in Progress (WiP)
3. Sustainable funding for Kootenay Seniors Program	a) Sustainable funding for Kootenay Seniors Program	<ul style="list-style-type: none"> □ Develop funding partnership with BC Transit – volunteer driver and regional bus services. 	2021	Program Manager	3.a. Manager is currently working on the plan. Advocating with Better at Home to be the regional hub. Program viability review underway by December 2019. -Program Manager pursuing additional funding supports for extended seniors supports & services
B. Community Development					
1. Nelson CARES reflects the community it envisions	<p>a) Participate in strategic relationships (partnerships, community committees and structures) that support the achievement of our vision and goals.</p> <p>b) Truth and Reconciliation Recommendations</p>	<ul style="list-style-type: none"> □ Increase Board member participation on community committees, freeing up the ED to focus on capital projects (KBCSSC; AFC; NELSON AT ITS BEST □ ED Participates in NCOH and Community Entity management □ Ensure alignment between each relationship and organizational vision and goals □ Participate in a collaborative review 	<p>Ongoing</p> <p>Ongoing</p> <p>Ongoing</p> <p>Ongoing</p>	<p>Board</p> <p>Executive Director, Senior Managers as applicable</p> <p>All ED, Senior</p>	Ongoing

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		of services with allied partners <input type="checkbox"/> Participation in opportunities provided by KBCoop	Ongoing	Management ED and Board	NCARES staff have participated in human resources development; technology planning; shared financial services and other training and partnership discussions.
C. Human Resource Development					
1. Nelson CARES Society values its human resources and has sufficient human resource capacity to carry out its mandate	a) Develop policies that promotes a healthy workplace and a culture of retention b) Build a positive relationship with new unionized staff	<input type="checkbox"/> Organize staff celebrations <input type="checkbox"/> Establish clear avenues for staff input and engagement <input type="checkbox"/> Develop staff training further (more options and timelier) – self-care focus with managers to develop individual strategies for their programs – participate in KBCSC and supporting staff input into planning <input type="checkbox"/> Foster a culture that honours a work-life balance for every employee	Annual activities	Board and Senior Management	Ongoing Staff events planned for December 2019 and May 2020 -2022 Continued pandemic disruptions postponed in-person larger gatherings; smaller gatherings encouraged, Staff appreciation via gift giving Ongoing training organized and offered to staff include first aid; MANDT and other related trainings as available. -by Fiscal Year End 2022-2023 teams encouraged to create education and training plans for staff needs

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	c) Create succession plans for critical positions and an approach for sudden vacancies.	<ul style="list-style-type: none"> □ Create succession planning plan as per HR specialist recommendations (Dec 2018) for structure and; □ Ensure effective management is in place to transition through change. □ Keep the organization financially healthy 	<p>2020</p> <p>Ongoing</p> <p>Ongoing</p>	<p>Executive Director</p> <p>ED and Board</p> <p>ED and Board</p>	<p>2022 New Executive Director hired April 1, 2022; probationary period 6 months</p> <p>Previous Executive Director worked with Finance manager to create a succession plan and hire staff to train in all aspects of financial services- underway. Succession training is underway in SCL.</p> <p>2022 – Evaluation of organizational needs for succession planning across all programs required by 2023</p> <p>Added Asset Manger to the management team. Goal is to permanently fill this position by February 2020. (Completed)</p> <p>NCARES is in good financial health. Continue to work with the Board to determine financial planning needs of the organization.</p>
2. Nelson CARES Society values its Board members contributions and has sufficient expertise and capacity to carry out its role.	a) Implement targeted Board recruitment strategies - and approaches for ongoing engagement of members.	<ul style="list-style-type: none"> □ Develop a skill inventory for board □ Complete board evaluation to identify skills needed in board recruitment. □ Use an annual Board evaluation 	2020	Board	<p>Completed skill matric 2019</p> <p>Completed 2019 evaluation</p> <p>Updated board pics and poster</p> <p>Board of Directors continued outreach for new members with 2 new directors added in July-Aug 2022.</p>

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		to plan board training. <input type="checkbox"/> Actively recruit new board members <input type="checkbox"/> Add board bios to photos and exhibit in places visible to front line staff			
D. Visibility					
1. Nelson CARES Society has a reputation in the community, and is well known, for its high - quality services.	a) Develop communication strategies, to meet targeted priorities and to maintain high reputation among stakeholders.	<input type="checkbox"/> Develop a communication plan that identifies strategies as needed <input type="checkbox"/> Look for ways to gather client feedback <input type="checkbox"/> Survey stakeholders and funders each two years (2019 last complete) to gather more 1-1 feedback and increase participation. <input type="checkbox"/> Implement the Communication Plan	2019/20 2021 2021 2020 Ongoing	Community Relations Committee Staff Board Board	Plan is underway. CR committee is planning for the next capital campaign to focus of Lakeside: <ul style="list-style-type: none"> • Exploring deepening affordability • Funding to build out the Kootenay Seniors program area • Working on campaign materials – including presentation and video • Stakeholder survey was complete in March 2019- Next is March 2021 • Launch date TBD
E. Sustainability					
1. Nelson CARES Society achieves long-term financial stability in	a) Develop campaign as needed for capital needs	<input type="checkbox"/> Design to be made re the specific need. Focus on the ‘cause’ of the work	2020	Board	See above for next capital campaign planning.

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order to offer consistent services & programs to clients and community	b) Nelson CARES is prepared for on-site accreditation Dec 2019.	<ul style="list-style-type: none"> □ Management and administration team to lead process □ Review and respond to standards related to Governance 	Ongoing to the fall of 2019	<p>Executive Director, Senior Management Team</p> <p>Board Ad Hoc Committee</p>	<p>Dates November 12-14, 2019 is the onsite survey Team has been working to review the standards and preparation as required. Prep team includes: Zhenia Salikin; Julie Lepine; Denver Ong; Axel McGown; Pam Leoppky; Lamourah Perron and Jenny Robinson</p> <p>Nov 14-16, 2022 onsite survey scheduled; New ED being briefed and trained on CARF process, standards, form requirements, and organizational preparation</p>
	c) Asset Transfer Recommendation – CMC and CGE (BCH)	<ul style="list-style-type: none"> □ Staff implement e-data for housing maintenance and asset management 		Staff	TBA – Awaiting BCH direction
2. Nelson CARES will have safe, adequate, and cost-effective space for its operations	a) Develop a long-range plan for accommodating the agency’s office-based services.	<ul style="list-style-type: none"> □ Ensure funding in place for desired options for relocation □ Work to relocate to the Hall Street location in 2021 <ul style="list-style-type: none"> ○ Leverage current assets ○ Invest in wholly owned property □ Continue to work with co-location partners 	2020/21	Executive Director	<p>In progress- NCARES offices including: SCL; CFIT; The Advocacy Centre and Victim Services; Affordable Housing and administration will move to 205 Hall Street when occupancy is permitted. This goal has been on our plan for many years- very happy and proud to see it finally coming off!!!</p> <p>Continue to work with co-location partners to plan for mutual programming opportunities and improved access for the community.</p>
3. Nelson CARES will exhibit a high degree of environmental stewardship.	a) Work for energy efficiency, a culture of recycling, and using an environment ‘lens’ on decisions.	<ul style="list-style-type: none"> □ Ensure energy efficiency at Ward Street Place □ Seek energy rebate from Nelson Hydro and Fortis BC re hot water tanks at WSP and furnace 	Ongoing	Board Management	Successfully funded new heatpumps for all commercial locations: planned completion is January/February 2020 or earlier. This will allow us to remove all old air conditions and improve costs for heating the spaces.

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		replacements in the CGE townhomes <input type="checkbox"/> Ask employees for recommendations in improving impact in operations			CMC and CGE locations are undergoing major renovations and energy upgrades- lightning; replacing appliances older than 14 years and water conservation devices.