

The Haven's 2010-2015 Strategic Plan (Summary)

Executive Summary

The intention of the 2010-2015 Strategic Plan is to identify the steps needed to strengthen The Haven and to ensure that it operates on a financially sustainable basis, accounting for all the costs of doing business. The plan contains a set of goals which together represent a course towards economic and organizational sustainability. There are four main areas of focus for the goals: Curriculum; Marketing; Facilities/Operations and Finance/Funding. The goals are based on a group of underlying Assumptions (Appendix A) and on the results of a Situational Analysis (Appendix B – see full version of the Strategic Plan) which provided important information on The Haven's current strengths and weaknesses.

The Haven's greatest assets are its programs and the faculty who teach them, and this plan adds a significant piece to what The Haven offers by developing a stream of programs focused on Couples. The Strategic Plan also builds on our current strengths by selecting some of our most successful leader-owned programs, marketing them more extensively and entering into co-ownership with the leader. Marketing is central to this plan as a way of increasing participant numbers and this plan ensures a long-term commitment to marketing by hiring a marketing coordinator and, as part of a comprehensive marketing plan, creating a number of short programs to offer a real introduction to Haven programs in various locations throughout North America.

Other goals in the Strategic Plan cover important areas such as:

- Consistently achieving an operating surplus in order to fund strategic investments.
- Addressing the issue of deferred maintenance and planning and initiating significant facilities upgrades.
- Establishing a long-term plan for fundraising.
- Setting targets for The Haven's Financial Aid Program and ensuring its ongoing support.
- Planning for succession within Haven faculty, assistants and interns.

The plan was developed in conjunction with a five-year forecast model which provides the financial roadmap towards sustainability. Once sustainability is achieved, the next step can be taken which will be to ensure that The Haven thrives in perpetuity.

The Plan – Focusing on Four Areas of Sustainability

Focus Area 1: Curriculum

Expand The Haven’s Curriculum by Creating a Relationships ‘Stream’ for Couples

The Haven will build up a program stream that is specifically targeted at relationship skills for couples, made up of a combination of existing and new programs.

Rationale

The Haven already has a number of programs, both Haven-owned and leader-owned, which focus on couples in relationships. Currently these are somewhat ‘isolated’ within the overall curriculum, and most of them expand their target audience to include a broader definition of relationships. By strengthening and reorganizing what The Haven currently offers, expanding our current expertise in this area, adding new Haven-owned programs and promoting the resulting program stream with a focused marketing effort, The Haven can successfully expand into a new market and attract an increased number of both current and new participants. This will in turn create synergy with the rest of The Haven’s curriculum.

The target audience for such programs already knows that they have needs. In this way they are easier to connect with than the audience for the less commonly understood area of ‘personal development’. Narrowing the focus of the programs on couples only, marketing efforts will be focused on a specific target audience with a clear marketing ‘message’, and will therefore be more effective.

Explore the Potential for Haven Programs for Business

The Haven will budget for exploring the potential of Haven programs focused on the business sector. This investment is planned to commence in 2012, and planning work is already underway.

Rationale

Haven teachings are relevant to the workplace and can offer businesses a pathway to improved communication, skills in dealing with conflict and greater teamwork. There are a number of faculty who are already working privately with businesses with great success. By working with businesses The Haven

would expand its reach, bring in more participants (who will attend other programs in the curriculum) and can increase onsite capacity on traditionally 'quiet' weekdays.

Plan for Faculty, Assistant and Intern Succession

The Haven will put a plan in place to ensure that we have an adequate number of well-qualified Faculty, Assistants and Interns, as required to support an increased number of programs and to compensate for natural attrition among these groups.

Rationale

Faculty, Assistants and Interns are a vital human resource that makes it possible for The Haven to offer high-quality learning experiences to participants. Without adequate numbers of Core Faculty and Core program Assistants, we would not be able to deliver our basic programming.

Interns in the Certificate and Diploma training programs add not only to our financial health by paying room, board, and tuition, but also add richness and depth to the Come Alives and Phases and form the pool from which are drawn future Assistants and Faculty.

Focus Area 2: Marketing

Make a Long-Term Commitment to Marketing The Haven's Programs

One of The Haven's greatest assets is its programs, in particular those which are grounded in the philosophies and ideas assembled by our founders. These form 'the dynamic and evolving foundation of what The Haven offers' (see Underlying Assumptions Appendix A). The Haven will make a long-term commitment to marketing its programs at a higher level than ever before. This will include the recruitment of a marketing coordinator and assigning an appropriate level of funding in order to create a comprehensive marketing strategy and plan for implementation. As part of this goal, a new approach to marketing will be developed and integrated through the creation of a set of programs to take 'on the road'. The Haven will also take steps to increase the geographic reach, absolute number, and activity level of our network of referrers and investigate the potential benefits of new media to marketing The Haven.

Rationale

By making a commitment of this kind and through the creation of a marketing plan, The Haven will be stronger in all aspects of its work. Such investment is key to ensuring the success of the curriculum goals described above.

By taking several short programs on the road, The Haven will significantly expand the opportunity for people to experience the best of what Haven programs have to offer without the accompanying expense of travel and accommodation. This will both increase the absolute number of people with a clear sense of what The Haven is about, and will allow us to extend our referral network into new geographic locations.

Referrals are and will likely remain the primary way that people learn about The Haven and ultimately decide to come here. By working more effectively with our current referrer network, increasing the number of active referrers in a given location, and the number of locations with active referrers, we will expand the number and geographical location of people who decide to attend Haven programs.

It is also important for The Haven to take advantage of the benefits new media offers and at the same time create a clearer, stronger positioning and public identity for The Haven; a message about what The Haven offers, and why people should care.

Market and Promote Selected Programs

The Haven, will identify leader-owned programs and, together with the program originator, re-work them as needed, market and develop them into co-owned programs.

Rationale

There will always be a place at The Haven for leader-owned programs which '[keep] our offerings fresh by cultivating and integrating new ideas that are in alignment with our philosophical foundation' (see Underlying Assumptions Appendix A). There are a number of these leader-owned programs at The Haven which have been running for a number of years, attracting reasonable numbers of participants, which do not currently receive significant marketing support. These programs focus on life issues which are very relevant to today's society, such as anger, anxiety, depression, loss, addictions and others, so they are relatively easy to promote. By putting selected programs through a process of review to ensure

their current relevance, and then investing in promoting those programs fully, the programs will attract an increased number of participants to The Haven.

Focus Area 3: Facilities and Operations

Prepare For and Commence Significant Planned Facilities Upgrade

The Haven will apply for and receive the rezoning necessary and then create a needs-based facilities master plan, and begin implementing that master plan with a significant upgrade to The Haven's facilities.

Rationale

The Underlying Assumptions (Appendix A) include the commitment to staying in The Haven's current property and location. It is important that the quality of the facility matches that of the learning opportunities

Some of The Haven's buildings are coming to end of their natural life and, with our current zoning, our options for improvement are limited, hence the urgent need for rezoning. Once that is in place, a master plan for facilities is required to ensure that capital investments are made wisely, and with a coherent long-term result in mind.

Perform Deferred Maintenance

The Haven will complete a comprehensive analysis of the facility, in order to identify and prioritize the accumulated deferred maintenance work into a five-year plan.

Rationale

In order to support participants in Haven programs and to ensure their comfort, an acceptable level of quality of session rooms, accommodations and common areas must be provided. In addition it is financially prudent to move to a situation where ongoing maintenance issues are dealt with before they arise.

Foster a Culture of Excellence at The Haven

It is stated in the Underlying Assumptions (Appendix A) that 'The Haven is committed to providing an appropriate compensation and benefits package and creating a healthy and constructive working environment'. In support of this, The Haven will promote and encourage continuous improvement in all areas of our operations. Managers and staff will consistently meet or exceed agreed upon standards of excellence in all departments . The Haven will create an environment that supports employees to improve skills, knowledge, and level of professionalism, Managers will be held accountable for financial results and employee performance in their departments through an interactive performance management system.

Rationale

Participants and other guests who have a high quality experience at The Haven are more likely to return in the future and to recommend The Haven to others. By creating a workplace where employees can add to their current skills and also benefit from a commitment to excellence, The Haven will be in a better position to retain and recruit suitably qualified personnel. Through trained, committed, and accountable employees there will be opportunities to identify and realize cost savings which will contribute to our bottom-line and enable The Haven to continue to invest in one of its most valuable resources: our people.

Focus Area 4: Fundraising and Financing

Establish a Comprehensive Fundraising Strategy and Plan for Implementation

The Haven will use fundraising as one of the ways to fund financial aid, major investments and capital projects in the next five years. This will be done in the context of a long-term plan which identifies The Haven's needs, how donations will be used and the benefits of each investment or project.

Rationale

As stated in the Underlying Assumptions, The Haven is a registered charity, and is therefore able to raise funds by connecting The Haven's needs with donor interests. Over the next five years, The Haven needs to invest in some major projects identified in this strategic plan (curriculum, marketing, facilities master plan) and initiate a program of capital projects. By creating a long-term fundraising plan that clearly identifies our needs and that is comprehensive, coherent and connects with donors in a relational way,

we can match the interests of our donors to The Haven's investment needs. This will maximize our ability to fundraise and will ensure that The Haven is able to pursue its mission and achieve its goals. This will also enable us to continue to fund the Financial Aid program so that it reaches its stated target.

Commitment to a Substantial and Stable Financial Aid Program

The Haven will set a target for financial aid (expressed as a percentage of total participant nights provided through financial aid) and ensure that the Financial Aid program will continue at an appropriate level of funding for the duration of this strategic plan.

Rationale

In the Underlying Assumptions (Appendix B), The Haven's commitment to accessibility and a Bursary/Student Aid program is clearly stated. To date this program has been tied directly to funds raised in the previous year. To ensure the future sustainability of this important program, a contingency fund will be created, so that the program is sustainable and continues, even if insufficient funds are raised to support it.

Establish, Achieve and Maintain Financial Sustainability

Within the next five years, The Haven will identify, achieve and maintain a financially sustainable position, which will include consistently achieving an operating surplus that will be used to help fund other strategic goals described in this plan.

Rationale

As identified in The Situation Analysis (Appendix B), the consequences of not operating in a financially sustainable manner have clearly included an ongoing underinvestment in The Haven's facilities and an inability to make major strategic investments. It is imperative for the future success of The Haven that steps are taken to ensure that these and other important issues are addressed.

Appendix A

Underlying Assumptions

Introduction

The purpose of this section is to describe the key assumptions that underlie the goals and approaches that will make up The Haven's 2010 five-year strategic plan.

The Assumptions

The Haven is committed to operating in a manner that is congruent with the ideas expressed in The Haven's vision, mission, values, philosophy, purpose and teaching principles.

The Haven will continue to operate indefinitely. We are in this for the long-haul, so goals and decisions should be made with continuity and a long-term time horizon in mind.

The Haven is committed to staying in its current property and location on Gabriola Island. The Haven property on Gabriola is a beautiful setting and container for participants' experiences. It has all the benefits of a remote setting, without being too difficult to get to. While Haven programs can and will be offered elsewhere, past participants' connection with the existing property is an important part of the goodwill that supports our referral-based marketing, and our connection-based fundraising.

The Haven is committed to providing high-quality, transformational learning experiences in a group setting. This is what makes us special, and we should direct our energies toward maintaining and improving this area of our work.

Haven programs are grounded in a common philosophical foundation. The philosophies and ideas that our founders have assembled – expressed in programs such as Come Alive and the Phase programs – are the dynamic and evolving foundation of what The Haven offers. This sets us apart from many other learning centers, and helps support participants seeing the value in taking additional programs that The Haven offers. In addition, we will continue The Haven's tradition of keeping our offerings fresh by cultivating and integrating new ideas that are in alignment with our philosophical foundation.

Serving the learning needs of a growing number of people is desirable, to the extent that it can be done without sacrificing the quality of learning experience that we offer. It is desirable for supporting our sustainability, and for making a bigger difference in the world.

Having an engaged and energized Faculty is essential to our ongoing success. The passion and caring of The Haven's faculty are essential to the learning and growth of our participants.

Retaining employees and faculty is important to the sustainability and success of The Haven. To support employee and faculty retention, The Haven is committed to providing an appropriate compensation and benefits package and creating a healthy and constructive working environment.

The Haven has chosen to be a registered charity as well as a charitable educational institution and this has some implications for how we do what we do:

The Haven is committed to keeping our programs accessible to a diverse range of people spanning a wide economic spectrum. This enriches the program experience, and as a charitable organization, this is an important part of the "social good" that we provide.

We will aim to keep our program prices as low as possible, in keeping with our other values and planning assumptions.

We are committed to a Bursary/Student Aid program as a means to include participants who can't afford our programs at their regular prices.

We can raise funds by connecting The Haven's needs with donor interests, which will support The Haven in meeting our important goals of sustainability, growth and accessibility.

As a Charity, we re-invest any surplus into the organization to ensure its future success in meeting the needs of our participants.

The Haven will operate in an environmentally sensitive and responsible manner.