



Comox Valley Elder College 2021-2023 STRATEGIC PLAN

12th February 2021

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PURPOSE:

The Strategic Planning Working Group (SPWG) is mandated to develop an updated strategic plan, intended to assist and guide in setting direction and establishing priorities for Comox Valley Elder College (CVEC), its Executive and its Standing Committees, during the next three to five years.

PROCESS:

Every third year the CVEC Executive undertakes a planning exercise with a five-year horizon. The resulting plan is reviewed in intervening years, with updates as appropriate. The process is the responsibility of the CVEC Vice-Chair, using such resources as deemed appropriate.

The SPWG for this 2021-2023 plan was established in August 2020. Of necessity the team had to work on-line, using Zoom technology. The SPWG was guided by CVEC Bylaws, Policies and Procedures, as detailed in the current CVEC Manual (December 2020). Previous plans, recommendations, updates and addenda were considered and an analysis of strengths, weaknesses, opportunities and threats (SWOT) was undertaken, which included inputs from CVEC Standing Committees and from the CVEC membership. The results of this are included here after our recommendations.

The SPWG process included a review of CVEC's Mission, Vision, Critical Success Factors, Key Performance Indicators and Operating Values, as defined on page 8.

OBSERVATIONS:

The CVEC success story continues as is evidenced by strong demand for courses, member feedback and the celebration of the 20th anniversary in 2019/20. The need to move from ‘in-person’ to ‘on-line’ opportunities, caused by the COVID-19 pandemic, only dented enthusiasm to participate – notwithstanding an obvious general preference for the ‘In-Person’ experience.

Much to the credit of many dedicated folk, recommendations made in the 2017 Plan have largely been successfully addressed. There remains, however, more work to be done in the areas of volunteer management and leadership, particularly in the recruitment and/or development of volunteers capable of and willing to direct and coordinate the work of our standing committees. The need for ‘working smarter’ continues and is ongoing.

MISSION:

We continue to believe that the current Mission Statement remains relevant and, with a small clarification, adequately describes CVEC. It should be readily quotable by most volunteers: ***“Enhancing the quality of life for older adults in our community, by offering affordable opportunities for continued learning”***.

VISION:

The SPWG concluded that CVEC’s vision statement could be improved by making it more inspirational. We suggest and recommend: ***“That CVEC is seen as a leader in providing programs that inspire and enable older adults in our community to continue learning and sharing their knowledge and skills”***.

VALUES:

A review of our values/guiding principles, which are intended as guides to the Executive, resulted in no recommendation for change. They are restated here:

- High ethical standards;
- Volunteer-driven, in terms of management and delivery;
- Self-funded operation;
- Delivery of high quality, enriching instruction in all areas;
- Responsiveness to member needs and interests;
- Inclusive (open to all, across our community and demographic);
- Collaborative – across all areas of CVEC and within NIC.

CRITICAL SUCCESS FACTORS:

Critical Success Factors (CSFs) are the necessary areas of focus where CVEC must get things right to successfully deliver on its mission and move towards its desired future. Overall, CVEC adapted quickly to the challenges presented by the Covid-19 pandemic and is functioning well. Our Recommendations below are aimed at strengthening the attention to these CSFs as well as to our analyses of member/volunteer feedback. Our SWOT analysis also developed against the CSF backdrop.

We reviewed the previously identified CSFs and found them to be essentially current. We repeat and redefine them as follows:

- **Course/Program Offerings:** CVEC must cater for a wide range of interests with high-quality programs and instruction, appropriate to the membership demographic and at reasonable cost. These opportunities must be regularly reviewed to ensure continuing interest.
- **Volunteer Support:** CVEC must provide an environment which consistently demonstrates a high-level of support and appreciation to ALL volunteers (whether instructor or operational) such that they derive high levels of satisfaction and inspire the participation of others.
- **Operations:** CVEC must demonstrate skillful, flexible management and a willingness to try new approaches and processes.
- **Member Relations:** We must maintain effective two-way communication channels and keep our membership well informed. We must strive to provide user-friendly, transparent processes for our dealings with the members (particularly about the registration process) and maintain awareness within the general community.
- **NIC Relations:** CVEC must recognize that NIC support is essential to its operation and maintain a relationship such that the College and CVEC openly demonstrate their support of and commitment to each other and to the community at large.

SPECIFIC RECOMMENDATIONS:

The Strategic Planning Working Group recommends that (not in strict order of priority):

1. A timely return to on-campus/in-class course offerings should be the primary focus, once COVID-related restrictions are lifted.

2. Opportunities available through use of on-line technologies must not be overlooked. These opportunities include:

- increasing the number of student spaces available;
- reaching more of the potential student base;
- making new material available.

Nevertheless, the executive should bear in mind limitations of the volunteer workforce when considering opportunities for expansion, particularly outside the Comox Valley. Care will also be needed with pricing structures, given that on-line access can be readily shared.

3. Serious and urgent action should be taken to address the challenge of recruiting and training Volunteer Leaders. While recognizing the efforts already made, this issue continues to have the potential to destroy CVEC. The Volunteer Support Committee needs Executive Committee help in:

- Finding new ways of attracting the talents and skills of experienced retirees flowing into the Comox Valley;
- Development of formal Training and Mentorship programs;
- Succession Planning.

4. A pro-active dialogue should be maintained with the President of NIC and with the leadership of the NIC School of Continuing Education and Training.

5. All Standing Committees should continue to identify where tasks might be addressed on a project basis rather than through longer-term committee membership, with a view to increasing Volunteer recruitment for such roles;

6. The Executive should maintain awareness of operational issues that might affect the naming or the Roles & Responsibilities of Standing Committees.

7. Action should be taken to develop an electronic archive for documents, photographs and news media reports to facilitate the transfer of responsibilities to incoming volunteer leaders, avoid loss of operational experience and optimize the use of volunteer time and effort.

8. Processes should be established and maintained to ensure that high-quality instruction is delivered on an ongoing basis, including for example:

- Further development of the Course Leaders Handbook, including references to guidance and training materials published by other 3rd Age Learning and online teaching organizations;
 - Maintenance of a team for technical support of online and combined In-person & online courses;
 - Monitoring of attendee fallout from individual courses;
 - The regular addition of new courses and removal of courses having low attendance.
9. Effective communications with potential members, Members, Volunteers and Course Leaders should be maintained and improved through all suitable means, including for example:
- Maintenance and regular updates of the online Course Guide;
 - Extension of the “reach” of the Connector using both online media and printed copies circulated to Libraries and other locations previously served by the Newsletter;
 - Posters and postings on social media, local news media, etc.;
 - Active marketing of CVEC, directed toward home buyers via realtors, the CV Welcome Wagon and the CV Newcomers Club, etc.;
 - A fillable Comment Form on the website that could act as an ‘Enquiry desk’, to address questions on CVEC structure *etc.*;
 - Surveys and in-person contact;
 - Minimizing the potential risks that could arise from an over-reliance on NIC expertise and/or software in respect of CVEC’s communications with its membership, perhaps by training of a Communications Committee member to be able to communicate directly with the membership, should the NIC Liaison be unavailable.
10. The performance of the Registration System should continue to be closely monitored in the context of the Policies, Guidelines and Processes laid out in Section 3.6 of the CVEC Governance Manual, which should be updated periodically, as required.
11. The Executive should consider establishing a Membership category to provide 50-55 year olds with the opportunity to enroll in any Courses that have vacancies one week prior to their first class.

12. The Executive and members of Standing Committees should actively seek ways to operate 'smarter' - optimizing the use of volunteer time and effort.

13. Key Performance Indicators (KPI) should be established and routinely monitored. It is recommended that only a small number of parameters be selected as KPI, for each of which the data should be easy to collect, meaningful and closely relevant to the Mission of CVEC.

The following KPI might be considered:

- Membership - number/ turnover rate;
- Number and type of courses offered - short/long - method of delivery;
- Total student spaces offered - and vacancy rate;
- Number of new courses offered each semester;
- Satisfaction ratings - from surveys of students/ volunteers;
- Volunteer vacancies - number/ turnover, *e.g.*:
 - Reasons for leaving;
 - The number of active Volunteers;
 - The number of new Volunteers within the previous 12 months;

14. The Executive, with the Member Support leadership, should consider how to enhance the benefits of CVEC membership and to encourage volunteering. Such enhancements might include:

- Facilitating the issue of an NIC Student Card to each CVEC Member;
- Bursaries for elders who cannot otherwise afford to take courses;
- Special benefits for Volunteers and Course Leaders; *e.g.* 20% off any courses taken and/or opportunities for advanced registration on courses.

SWOT ANALYSIS:

STRENGTHS	WEAKNESSES
Mature, well-established organisation (Competent Governance);	Difficulty implementing succession plans and filling leadership positions;
Community goodwill, accompanied by effective communications and social interactions;	Capacity to cope with increasing workload and volunteer turnover;
Dedicated, competent Volunteers and Course Leaders;	Scarcity of Course Leaders comfortable with on-line (Zoom) delivery and the need for more technical support especially if we scale up;
Proven ability to deliver programs on-line;	Danger of curriculum going stale;
Genuine and effective support from NIC;	Demand for registration on courses and lecture series cannot always be met (Supply / Demand);
Produce a diverse range of high quality courses and lectures;	Weak process for ensuring Quality of Instruction;
OPPORTUNITIES	THREATS
Substantial inflow of skilled, knowledgeable and open-minded seniors to the community, providing a source of Members, Volunteers and Course Leaders;	Change of circumstances that could adversely affect our relationship with, and support from, NIC;
Availability and acceptance of new technologies for program delivery, providing ease of physical access, increased opportunities for Members to access courses and opportunities to expand membership beyond the local area;	Competition from free or low cost on-line learning media;
Availability of a wide range of resources dedicated to the education and training of Volunteers;	Competition from within the community for Volunteers and Course Leaders;
On-line programming opens the option of collaborating with other organisations to access more Course Leaders and develop a wider range of courses;	Risk of Volunteer burnout due to work overload or prolonged service and recruiting challenges;
	Inability to meet demand for courses and course spaces, leading to loss of Members;
	Inability to offer In-Person learning/socializing events may lead to loss of Members;

DEFINITIONS:

Terminology used by SPWG:

It's important to note that these terms can be open to interpretation/usage, even used as synonyms - especially Mission, Vision and - more so - Objectives and Goals. Dictionary definitions are themselves confusing. However, it's important for common understanding that any strategic planning exercise agree to, use and report using a common interpretation. The following definitions were used in developing the present Strategic Plan in 2020/2021:

Mission: Communicating the PURPOSE of an organization - the business they are in. Mission may be self-generated or imposed by a higher authority.

Vision: Describes a desired future state - what an organization wants to look like/ achieve in the future. Provides the basis/underpinning for strategies designed to assist in bringing it about.

Critical Success Factors (CSF): Those (few) things that an organization MUST get right to be successful in delivering on its mission/mandate.

Values: Principles that will underlie actions, describing what an organization holds dear (even sacrosanct) as they carry out their operations.

Key Performance Indicators (KPI): Those Objective and quantifiable measurements which will allow effective monitoring of Critical Success Factors and organizational values.

Objective: The desired outcome of an action or several actions - a reason 'why', NB can exist at many levels. May require establishing strategies, plans and/or goals along the way. May be an 'end in itself' (e.g. to develop a Volunteer Charter) or form part of higher level objective (e.g. to promote volunteer well being). However, note that achievement of an objective may itself be seen as a goal.

Goal: A (measurable) step along the way to achieving something - a goal is specific in nature, an achievement that assists in reaching an objective - it may take the combination of several (or many) goals to achieve an objective. Or, the achievement of one or more objectives may itself be seen as 'the goal'.

Plan: Detailed proposals for doing, or achieving something - an objective or goal perhaps, sometimes referred to as tactics (*i.e.* tactical plans).

Strategy: A grand design or overall game plan - the big picture. May be at various levels - strategy might be, for instance, 'to make a plan or plans, establish a goal or goals; to quantify objectives or to establish/confirm mission/mandate, vision, values, or identify key performance indicators'. The tactics for doing (any of) these would be detailed in supporting plans.

STRATEGIC PLANNING TEAM:

This report was prepared, and is respectfully submitted by, The Strategic Planning Working Group:

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- Diane Keeling – CVEC Communications Committee
- Ian McIntyre – CVEC Instructor and former Member at Large
- Dennis McMahon – CVEC Member at Large
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- Olive Scott – Former CVEC Executive Member and Committee Chair
- Michael Syer – CVEC Immediate Past Chair
- Roger Taylor – Co-Chair, CVEC Curriculum Committee

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