Celebrating Sexuality, Dignity, and Choice:
Planned Parenthood Waterloo Region Strategic Plan
June 2014 - June 2016
Table of Contents

1.0 Executive Summary.........................................................................................................................3

2.0 Introduction........................................................................................................................................5

3.0 Vision, Mission, Values.....................................................................................................................6

4.0 Setting the Scene...............................................................................................................................7
   4.1 Internal Scan..................................................................................................................................7
   4.2 External Scan..................................................................................................................................7
   4.3 TeamVisioning...............................................................................................................................8

5.0 Strategic Pillars and Priorities Introduction.......................................................................................9
   5.1 Sustainable Financial Well-being.................................................................................................10
   5.2 Excellence in Programming............................................................................................................12
   5.3 Visible and Responsive Community Engagement .........................................................................14
   5.4 Organizational Resilience and Accountability .............................................................................17
   5.5 Exceptional Volunteer Contributions..............................................................................................20

6.0 Conclusion .........................................................................................................................................23
1.0 Executive Summary

In 1972, a group of dedicated volunteers established K-W Planned Parenthood, providing information, support, and resources to women and families about all-option pregnancy choice, sexual and reproductive health, and birth control and family planning.

More than 40 years later, Planned Parenthood Waterloo Region (PPWR) continues to be dedicated to the values of healthy sexuality, dignity and fully informed choice. Choice based pregnancy resources and support, engagement with new cultural and ethnic communities, respectful and inclusive gender and sexual health programs in schools, and outreach to sex workers that address their needs and vulnerabilities, are some of the ways PPWR continues to fulfil the mandate which has guided its long history.

Yet, the challenges of 1972 remain. Anti-choice forces are better organized today than at any time in PPWR’s history. Thorough and respectful sexual health education remains a challenge for young people to access and dynamic and ongoing shifts in the cultural and economic make-up of our region has created new needs and contexts for PPWR.

Now in our fifth decade of service to the communities of Waterloo Region, the Board and staff of PPWR have spent the last year reviewing our programs and services. Through this review, we have identified challenges we face to ensuring all women have access to the best and most comprehensive options and support for their pregnancies and their families. These challenges need to be considered, as PPWR continues to work to foster values which support respectful and healthy sexuality. Like the concerned citizens around their kitchen tables in the early 1970’s, PPWR, through its staff, Board, and supporters, are dedicated to meeting the ongoing and changing needs whatever the challenges.

Having looked back at the work that has been done at PPWR over the last four decades, we are now looking ahead. A team that includes our Executive Director, the President of the Board of Directors of PPWR, and volunteer Directors from the Board, have identified five strategic pillars, where we have significant and important strengths, but also where we face our most pressing challenges. Based on these pillars, we have developed a two year strategic plan to ensure that we continue to fulfil the promise to the women and families of Waterloo Region made by those dedicated volunteers in 1972.

These five pillars form the foundation for our continued success:

1. **Sustainable Financial Well-being**: We will broaden our donor base, increase revenue generation and grow our reserve fund so we can reach further into the community through nimble pro-active needs assessment.
2. **Excellence in Programming**: We will continue to achieve excellence in programming that meets the growing demand for services tailored to the needs and diversity of Waterloo Region, through meaningful community consultation.
3. **Visible and Responsive Community Engagement**: We will work even harder to ensure communities in Waterloo Region know who we are, what we do, and where to find us, building closer connections within those communities and between them and developing
synergies with other agencies and service providers to foster a holistic network that is accessible and responds to changing needs.

4. **Organizational Resilience and Accountability**: Policies and procedures, roles and guidelines will be updated to ensure clear internal and external communication, and ensure the organization is able to respond quickly and effectively to the evolving opportunities and needs within Waterloo Region.

5. **Exceptional Volunteer Contributions**: The breadth, skill set and diversity of the volunteer corps will be broadened and their contributions captured to ensure community transparency and long term relationships and partnerships.

The challenges of 1972 remain, while our communities and their needs have changed. PPWR has stayed active in meeting those challenges and addressing those changing needs. With our plans in place for the future, and with the continued support of our dedicated donors and friends, PPWR will move into the next decade with confidence, commitment, and compassion.

Together, we will chart a path through the next two years, building on our strengths and also building new ones:

- strengthening our position as a resilient and responsive community resource that all the communities of Waterloo Region can rely on;
- refining and enhancing our services, and identifying new needs and new resources, as the most comprehensive supporter of family well-being;
- continuing to champion informed choice by working to ensure everyone in Waterloo Region has access to the services and professionals they need to live healthy and safe sexual lives.

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2.0 Introduction

Planned Parenthood Waterloo Region (PPWR) is entering its fifth decade of service to Waterloo Region. Since opening its doors as a non-profit charitable organization in 1972, PPWR has worked tirelessly to address sexual health issues for people living in Waterloo Region.

Over the last forty years we have been welcomed, excluded and welcomed again as educators within our public and separate school systems. Providing services to the youth of Waterloo Region through workshops, theatre programs and educational services on healthy relationships, enthusiastic consent, and healthy sexuality for the whole LGBTQ spectrum has been a source of tremendous pride and accomplishment. As an organization, PPWR boasts dedicated staff and a growing corps of experienced and well-trained volunteers.

We are also proud of our focus on inclusivity and our ability to forge positive relationships with our community. For instance, we have seen rapid diversification in Waterloo Region in the last 40 years, and PPWR has been responsive to the changes initiated by this diversification. As our community has welcomed newcomers, immigrants and refugees from around the world, PPWR has been able to diversify its programming to meet the needs of our changing community. Most notably, PPWR launched the Women’s Health program in 2009. This program is tailored toward meeting the cultural and social needs of the region. PPWR is also proud to have forged partnerships with several other local organizations to form the Sex Workers Action Network (SWAN), a non-partisan group consisting of concerned individuals, including those with lived experience, agencies and groups committed to assisting and supporting individuals working in sex work.

Even though PPWR has taken many strides forward over the last forty years, PPWR continues to face multiple challenges. In particular, a consistent feature of PPWR’s history is the difficult financial and political climate in which we operate. As with all non-profit charitable organizations, funding is never secure. Despite a lean overhead budget, our demand for services and the funding climate over the last several years has meant that we have dipped into savings to make ends meet. We recognize this is not sustainable over the long-term, and that it is imperative we broaden and deepen our funding base, including individual donors, funders and foundations. We must dig deep, forge strong partnerships and work to further engage the community to ensure short and long term financial sustainability.

Our strategic plan is focused on the next two years. In this plan, we present a revised vision statement, mission statement and value statements that we feel are pivotal in shaping the organization’s strategic direction moving forward. We also share details about our strategic process, and how we conducted scans both internal and external to the organization, as well as a team visioning, to identify gaps and opportunities for change. Using our revised organizational statements and the information gathered through the scans and team vision, we outline five strategic pillars: 1) Sustainable Financial Well-being, 2) Excellence in Programming, 3) Visible and Responsive Community Engagement, 4) Organizational Resilience and Accountability, and 5) Exceptional Volunteer Contributions.
3.0 Our Vision, Mission and Values

Vision

Planned Parenthood Waterloo Region is committed to creating a community that celebrates sexuality, dignity, and choice.

Mission

Planned Parenthood Waterloo Region is a respected and nimble community hub providing accessible sexual, reproductive, and pregnancy health resources and support to the people of Waterloo Region. With professional and motivated staff, vibrant and committed volunteers, and an informed and growing donor base, we champion and foster choice, personal autonomy, and all healthy expressions of gender and sexuality.

Values:

Planned Parenthood Waterloo Region is committed to providing the support and services our clients and communities need in ways that promote these fundamental values:

- **Autonomy and Dignity**: we champion and support the right of every person to make independent decisions based on their values, beliefs, and circumstances
- **Knowledge and Choice**: we provide thorough and non-judgmental resources for people to live informed lives
- **Collaboration and Capacity Building**: we work with all communities of Waterloo Region, building our strengths and abilities together
- **Diversity and Respect**: we embrace and celebrate all expressions of gender, sex, sexuality, culture and beliefs
- **Healthy Sexuality and Sexual Health**: we support the whole person and their right to health, security, and well-being
- **Accessibility and Privacy**: we are committed to ensuring our programs and services are free from barriers and we always respect the privacy of our clients and communities
- **Integrity and Accountability**: professionalism and trust are the cornerstone of all the work we do
4.0 Setting the Scene for the Plan

Early in 2013, the Board of Directors, alongside PPWR’s Executive Director, Angie Murie, resolved to dedicate resources to producing a comprehensive strategic plan for PPWR.

The strategic planning committee worked diligently through 2013-2014 to re-vitalize PPWR’s Vision, Mission, and Values statement, and to identify priorities for the coming two years. Our starting point was a draft strategic document produced by PPWR’s Executive Director in late summer 2013. Using that foundational document, the strategic planning committee began its research.

We spent time collecting information about PPWR from internal and external sources to establish the context for the plan, and to help identify PPWR’s strengths, weaknesses as well as potential opportunities and threats moving forward. This information helped us identify areas for change. As a strategic planning team, we also took part in a visioning day to begin dreaming about what an ideal future at PPWR would look like. Taken together, this information was used to inform the planning process and to determine the strategic pillars for the plan (see section 5.0). Summaries of each of the actions we used to set the scene for the plan, are provided below.

4.1 Internal Analysis

As part of our internal analysis, we interviewed PPWR staff members through walking tours. Walking tours were used to engage informal, one-to-one conversations with staff members that lasted approximately an hour each. During the walking tours, staff members were asked a number of questions related to their experience working at PPWR (e.g., In your opinion, why is PPWR an important organization in Waterloo Region? Can you describe your experience working for PPWR? How might you be better supported in your role with PPWR?).

What did we find out? Overall, there is a strong sense of cohesion between staff members, which is a result of the staff’s strong working relationships with each other and the volunteers, and this contributes to the positive working culture at PPWR. Staff feel a sense of pride and dedication to their work at PPWR, because they are making a difference in the community, applying their knowledge in the real world, and building and developing new skills.

Staff talked about the unique programs and services offered at PPWR that are responsive, creative, and flexible. These programs and services continue to make an impact in Waterloo Region. In 2013, PPWR staff offered pregnancy options and reproductive health services to 734 clients (between the ages of 15 and 70) and distributed approximately 20,000 condoms (as well as lube and dental dams). PPWR ran multiple educational workshops, presentations and informational displays in schools and community groups in Waterloo Region. PPWR also hosted four Women’s Health programs tailored to reduce barriers for women who have immigrated to Canada. These multicultural programs were offered in Somali, Spanish, Pashto, and Arabic.

To determine who is utilizing the services, and to consider new areas for program development, staff identified the need for more in depth and ongoing evaluations of the current programming portfolio. Staff also talked about the need for stronger communication both within the organization, as well as with community stakeholders and partners. Finally staff noted the need for a more accessible workspace.
4.2 External Analysis
As part of our external analysis, we conducted an assessment of organizations in Waterloo Region currently providing programming or services related to sexual health. The external analysis also provided an opportunity to explore potential partnerships and synergies with community based organizations and agencies in the region. Finally, the external analysis gave us an opportunity to assess the current climate on sexual health issues and needs in Waterloo Region.

What did we find out? There are few areas where PPWR services and programs overlap with other community agencies (e.g., Public Health) in the region. But in those few instances, the overlap was deemed not substantial. PPWR services are quite unique, because PPWR is the only (sex positive and less clinical) provider of nuanced services/ referral and support during the abortion process. Although PPWR has a symbiotic relationship with Public Health, PPWR offers an explicitly pro-choice approach to sexual health.

The external scan also revealed the need for stronger partnerships between PPWR and other agencies, which could offset the costs of new programming and outreach opportunities.

The other major factor impacting PPWR identified through the external scan is the region’s current political climate, which has resulted in diminished sexual health funding opportunities. With this in mind, PPWR needs to consider new ways to secure funding to ensure PPWR’s services and programs continue, as PPWR moves into this strategic planning implementation period.

4.3 Team Vision
After completing the internal and external scans, the strategic planning team participated in a day long team visioning session, to consider what an ‘ideal’ PPWR would look like.

What did we find out? The members of the strategic planning team had a number of important visions for the future. Several of the major ideas to emerge from this visioning exercise include for PPWR, 1) to strengthen political support from all parties, 2) to enhance visibility and presence in the community, 3) to be the go-to place for inclusive, accessible sexual education, 4) to have a vibrant volunteer pool with secondary and post-secondary linkages to contribute to curriculum development and educational resources, 5) to be research driven, 6) to be responsive to marginalized populations, 7) to be responsive to changing technologies, 8) to be in a central and easily accessible location that is bigger and more expansive, offering fee-for services, 9) to have secure funding, time and resources, and 10) to have a symbiotic relationship between the Board and staff.

The visioning day also resulted in the identification of five strategic pillars that create the core of our strategic plan and are integral for the continued success of the organization. These five strategic pillars are detailed in the following section.
5.0 Strategic Pillars and Priorities

Our goal was to identify pillars that would support a re-invigorated Vision, Mission and Values statement to plan for a strong future of PPWR. The pillars of this plan are the result of our work, and are intended to build our reputation as a respected and nimble community hub providing accessible sexual, reproductive, and pregnancy health resources in Waterloo Region.

Below, in brief, are each of our pillars and our primary objectives for the next two years:

1. **Sustainable Financial Well-being**: We will broaden our donor base, increase revenue generation and grow our reserve fund so we can reach further into the community through nimble pro-active needs assessment.

2. **Excellence in Programming**: We will continue to achieve excellence in programming that meets the growing demand for services tailored to the needs and diversity of Waterloo Region, through meaningful community consultation.

3. **Visible and Responsive Community Engagement**: We will work even harder to ensure communities in Waterloo Region know who we are, what we do, and where to find us, building closer connections within those communities and between them and developing synergies with other agencies and service providers to foster a holistic network that is accessible and responds to changing needs.

4. **Organizational Resilience and Accountability**: Policies, procedures, roles and guidelines will be updated to ensure clear internal and external communication, and ensure the organization is able to respond quickly and effectively to the evolving opportunities and needs within Waterloo Region.

5. **Exceptional Volunteer Contributions**: The breadth, skill set and diversity of the volunteer corps will be broadened and their contributions captured to ensure community transparency and long term relationships and partnerships.

A more detailed outline of each of these pillars, including specific goals, strategic priority areas and an implementation plan is provided in the following sections.
5.1 Sustainable Financial Well-being

Setting the Context

Organizations dealing with issues of sexuality and sexual health face barriers to financial stability given the sensitive and controversial nature of the topic content. PPWR faces these barriers because of its commitment to pro-choice pregnancy options and the controversy surrounding abortion. As such, PPWR has to justify its programs while simultaneously trying to serve client needs. Not surprisingly, raising revenue has been historically difficult for PPWR, and is a situation not likely to change.

Needs Assessment

Dealing with financial uncertainty presents a major challenge to PPWR because it constrains the agency’s vitality, capacity and long term progress. Yet, creating financial stability at PPWR is fundamental to each of the pillars of our strategic plan and realizing our collective vision.

Not surprisingly, PPWR has a strong history of rising to meet financial challenges. In the past year alone, PPWR has made substantial strides towards increased financial stability. More specifically, by securing a Trillium Grant, we have been able to hire hiring a Resource Development Coordinator who will create new strategies to increase revenue and stability.

Setting Goals /Impact

To address these needs, the following will be accomplished in the current strategic plan implementation period for this strategic pillar:

1. To increase revenue generation;
2. to ensure consistent financial controls and fiscal oversight are maintained;
3. to increase financial resiliency.

Implementation Plan - Strategic Priority Areas

Strategic Priority 1 – Enhance Donor Engagement and Participation

1. Create an annual fundraising plan that will direct fundraiser initiatives for the Executive Director, Board, staff and other volunteers.
2. Increase and strengthen donor stewardship through an invigorated annual appeal campaign, identifying and encouraging new individual donors, salons and an annual signature fundraising event.
3. Create and implement a planned giving campaign.
4. Investigate income generating social entrepreneurship possibilities such as an in-house clinic and fee-for-service educational programs within the region

Strategy Priority 2 – Maintain Strong Financial Oversight

1. Strengthen policies and procedures related to financial controls for audits, recordkeeping, authorization, documentation, etc.
2. Ensure financial controls and fiscal oversight are maintained and compliant with local regulations.
3. Make sure new Board orientation practices include accessible education regarding financial matters and responsibilities.

Strategy Priority 3 – Ensure Financial Resiliency

1. Create a reserve fund program.
2. Increase endowment funding.
3. Ensure spending supports the goals of the strategic plan.
5.2 Excellence in Programming

Setting the Context

PPWR has a long history of providing consistent and valuable programming and services on sexual health. PPWR’s client-centered programs and services are innovative, unique, responsive, and accessible. Two of the main focus areas for PPWR’s programming and service portfolio include: ‘one-to-many’ education programs out in the community and ‘one-on-one’ client support and education at the PPWR office and elsewhere (based on need). Over the last four decades, PPWR’s programs and services have evolved to meet the changing demands of the organization’s diverse client base.

Needs Assessment

Our community scan has demonstrated that there are currently no other organizations in Waterloo Region which provide the same programs and services in the same accessible and responsive way as PPWR. In short, no one does what PPWR does, and PPWR’s programs and services are pivotal to Waterloo Region.

More specifically, demand for our services has never been greater and we continue to meet the shifting needs of Waterloo Region through innovative programming like the Women’s Health programs, Boys and Girls programs within schools and educational outreach in the public and separate school boards. We are increasing the scope and frequency of productive partnerships with community partners. Our external scan demonstrated that because of these values of collaboration and innovation we are sought out by other service providers in the community as a resource and partner.

To continue to be a leader on sexual health in the region, PPWR must continue to be a responsive and knowledgeable hub of expertise.

Setting Goals/Impact

The following will be accomplished in the current strategic plan implementation period for this strategic pillar:

1. Implement consistent evaluation practices to determine impact of programming;
2. Host regular meetings with community members and/or increase community consultation regarding programs and new program needs and directions;
3. Increase staffing support to meet the growing demand for services.

Implementation Plan – Strategic Priorities

Strategic Priority 1 – Strengthen and Expand Program Evaluation

1. Carry out a robust and inclusive evaluation of all PPWR programs to assess strengths, ongoing relevancy and opportunity for adaptation and growth.
2. Create new standards for annual evaluations and written reports on programming.
Strategic Priority 2 – Enhance Community Voices in Programming

1. Build in community feedback as a program deliverable for all ongoing and new programming.
2. Integrate community feedback into the development of new programming and assessment of ongoing programs (e.g., use of questionnaires, community forums, etc.).

Strategic Priority 3 – Commit to Program and Staff Growth

1. Provide opportunities for staff and volunteer professional development in current and emerging programming areas.
2. Ensure continued growth and resiliency of programs through increased staff hours and a commitment to staff retention and expansion as one of the central goals of our budgetary and financial planning.
5.3 Visible and Responsive Community Engagement

Setting the Context

PPWR is a resource rich information hub, located in downtown Kitchener, offering a range of flexible, responsive and accessible programs and services on sexual health. In 2013, PPWR celebrated its fortieth anniversary in Waterloo Region. As such, PPWR focused on raising awareness of sexual health issues through a number of channels including, most notably, a performance of The Vagina Monologues featuring members of the Wilfrid Laurier Centre for Women and Trans People, connecting and supporting The Museum and its exhibition on The Science of Sexuality, and hosting events to bring attention to International Women’s Day. PPWR is also currently focused on securing endorsements and garnering support for the organization and is working with high profile people, such as Sue Johanson who is a well-known Canadian public speaker and sex educator, to build awareness of the organization and its mission.

Needs assessment

Although the Planned Parenthood brand has strong international recognition, in Canada, this appears not to be the case. Our internal and external scans have shown one of the major barriers preventing PPWR from solidifying a stronger foothold and presence in Waterloo Region community is the simple fact that many people do not know what PPWR is all about. Based on the information collected from our internal and external scans, there appears to be ambiguity about what PPWR actually is and what PPWR does for Waterloo Region. On the one extreme, some people believe PPWR is anti-choice. A belief reinforced by the current politically conservative climate in Waterloo Region. In addition, misconceptions about PPWR also exist across generations, with many younger adults and teenagers having little knowledge of PPWR, its history in the community and its current mandate.

Another reason for PPWR’s weakened presence in Waterloo Region community is the decline in parent and sister agencies across the country. More specifically, the parent agency, Planned Parenthood Canada was renamed The Canadian Federation for Sexual Health in 2005 to more accurately reflect its mission and to speak to new generations. PPWR is one of three remaining Planned Parenthood organizations in Ontario (Toronto and Ottawa being the other two). This shift has created a disconnect in brand association and recognition for PPWR and the community.

An additional issue impacting PPWR’s presence in the community is its current office location. The current location, although safe and secure and on the bus route, has limited parking and individual office space and there is little room for intake of clients and private discussion spaces.

Finally, because of the strong demand for programming and services, PPWR has committed time and resources towards developing and delivering programs and towards securing needed finances to keep the programs up and running. The downside to this approach is that PPWR has had little time and minimal resources to devote to measuring and evaluating the programs and services provided, as well as advertising and marketing those programs to Waterloo Region. Although this has been the case over the short-term, we recognize enhanced evaluation of
programs and services is needed to maintain a strong programming and service portfolio over the long-term.

Setting Goals / Impact

Success for PPWR with this strategic pillar will be to build stronger awareness of PPWR in the region. In short, we want for all members of our community to know who we are, what we do, and where to find us through our community engagement initiatives that will foster stronger, and ongoing relationships with the communities we serve. To address these needs, the following will be accomplished in the current strategic plan implementation period for this strategic pillar:

1. better define our audience and target market (Who is using our services and why?);
2. collect strong data about our programs and services to clearly illustrate how we are serving the community and to establish baseline measures of our current impact;
3. enhance understanding of what our clients want from us and how they would like give feedback about our services and programs;
4. leverage current partnerships to enhance profile in the community and explore opportunities for collaboration;
5. explore new synergies with community agencies;
6. develop a marketing plan, to raise awareness, understanding, and our presence in the community, and to ensure the messaging we are delivering is clear and consistent.

We understand that financial limitations do minimize are choices for action. As such, we need to deal with affordable profile raising strategies in the short-term.

Implementation Plan – Strategic Priorities

Strategic Priority 1 – Design Evaluation Tools

1. Collect information about the image of PPWR. What do members of the community think PPWR is all about? (e.g., community booths, asking students before educational programs, poll through Facebook / Twitter, asking our donors, etc.).
2. Ask current clients, volunteers, and donors how they would like to give us feedback about our services and programs.
3. Develop evaluation tools based on the information collected from clients, volunteers and donors (e.g., surveys; interviews / feedback boxes/ program review forms / follow-ups).
4. Create an action plan for collecting feedback that stems from evaluation tools.
   a. Consider partnering with university / college programs to develop these tools.
5. Implement evaluation tools and track data collected from clients, volunteers and donors. The evaluation tools designed as part of this strategic priority will be used to inform the work of the other two strategic priorities.

Strategic Priority 2 – Establish a Plan for Public Relations

1. Identify community champions (e.g., volunteers) and train them to spread the word and raise awareness of PPWR.
2. Establish a speaker’s bureau.
3. Identify 2-3 PPWR spokespersons to take part in media commentary / coverage.
4. Review and learn from other non-profit charitable organizations and the tactics they are using to be visible in the community and raise their profiles, including how they use social media to enhance their visibility.
5. Look for, and embrace opportunities to engage in public speaking opportunities in the community through the identified PPWR spokespersons and a speaker’s bureau.
6. Use information from what other non-profit charitable organizations are doing to enhance visibility in the community to create and implement a one year marketing plan, including the ways PPWR will use social media to enhance access and awareness of its programs and services in Waterloo Region.
7. Streamline communication tools.

Strategic Priority 3 – Build Synergies

1. Review current partnership synergies. Which partnerships are benefiting us? If not, how can we reposition those partnerships to be beneficial for PPWR?
2. Outline a list of new community relationships to explore (can include corporate). Set up meetings with these organizations, to see what synergies might be possible and whether there are opportunities to share space (e.g., Universities / Colleges / Planned Parenthood Toronto).
5.4 Organizational Resilience and Accountability

Setting the Context

To provide support and services to diverse clients with complex needs requires a sound and effective organizational structure which ensures resilience, transparency, and accountability. But at the same time, this structure needs to be flexible and responsive as client needs change over time.

PPWR provides needed services, information, and other forms of support in areas which remain contentious and controversial. This is especially true in our commitment to ensuring all who need it have access to abortion, adoption and parenting information and services, but it is also true in those other areas of sexual and reproductive health such as consent, gendered violence, self-awareness and the right to fully informed and autonomous choice in all aspects of sexuality.

To meet that mission, our organization needs a strong set of best-practices which support and promote our values, ensuring that we engage with all of the communities we serve with the most effective and responsive programs possible. A strong set of best practices will not only ensure we are meeting the needs of our communities, but will make PPWR an effective advocate for choice and for sexual health and well-being in a political and religious climate where these things remain under regular attack.

Needs Assessment

A simple fact: the structure of authority, delegation, and accountability needs to be clear. There must be clear connections and consistencies between the by-laws, policies, and position mandates for staff.

In addressing the changing needs of their client base, many non-profit charitable organizations find that they are constantly working to re-assess these issues. Small non-profit organizations in particular often lack resources for a sustained and comprehensive ongoing review of issues of governance and best practices. They are too busy delivering front line services, scrambling for money, or just trying to meet the needs of their communities. It is a catch 22. If you move resources from front line services to strategic governance review, front line services, which are the only reason for the corporation to exist at all, suffer, which creates deepening vulnerabilities for what will always be a vulnerable operation. This is an obstacle that cannot be eliminated, though it can be better managed in both the short and long term.

To achieve the objective of better managing this ongoing challenge, PPWR must review carefully the structures and policies through which it provides its services, to refine and clarify these and to establish an ongoing process of review and innovation. This will include a clearer set of mandates for agency positions and accountability, clear and effective standards and policies governing the operation of the Board and its contributions to the day-to-day operation of the agency, and the development of a culture of consensus and collaboration in promoting our values and realizing our vision.
To ensure continuity, PPWR must develop effective means of communication, both within our organization, with service partners in the region, and most important, with the communities who need and use our services. This must include a sound strategy for both speaking to these partners and listening to them.

PPWR must also establish strong connections with the communities we serve, so that their needs are addressed as community and individual circumstances change. This must include more community participation in developing programs and practices and assessing their effectiveness.

Setting Goals/ Impacts

Strong and effective governance is not a straight-jacket, and it can never anticipate all challenges and obstacles. What it can and must do is provide all of those committed to the values and mission of PPWR a clear and effective set of tools for promoting those values, accomplishing that mission, and being able to respond quickly and conscientiously to the always changing needs of our communities.

To address these needs, the following will be accomplished during the current strategic plan implementation period:

1. develop a comprehensive plan to move towards collaborative decision making, programme development and evaluation which ensures all partners in our mission have an equal and effective voice;
2. complete a comprehensive revision of the by-laws of the corporation to establish effective mandates, lines of communication and accountability, and community involvement and oversight;
3. develop and implement a comprehensive policies and procedures manual, for both the Board, for staff, and for volunteers, including committee structures, responsibilities and expectations for Board members, staff position mandates, lines of reporting and accountability, limitations and requirements on discretionary authority and any other structural aspects of the operation of the agency and the Board which will reflect best practices and ensure all policies and procedures are consistent with our vision, mission and values;
4. create a timely and effective review structure for all organizational policies and practices that ensures regular input from all participants and also ensures policies and practices reflect the changing needs of the communities we serve.

Implementation Plan - Strategic Priorities

Strategic Priority 1- Governance Co-ordination

1. Collect and collate all relevant documents related to policies and procedures, and to position mandates and training, and where possible, get a clear sense of both their histories and the ways they are being used at the moment.
2. Ensure continued consistency with the by-laws, as they relate to statutory obligations.
3. Review best practice documents from other non-profit organizations providing similar
kinds of services, and where practical, consult with other non-profit organizations to understand both ongoing challenges and innovative best practices.

4. Recursively connect these to the by-laws and revise the by-laws as needed to ensure consistency throughout the governance structure.

Strategic Priority 2 – Best Practice Review and Implementation

1. Review and revise of all policies, procedures, and position mandates, to include detailed coverage of Board, staff, and volunteer mandates and obligations, clearly delineated lines of communication, authority and accountability, as well as policies for contingencies both negative and positive.
2. Working closely with staff, the Board, and volunteers, develop clear language and structures/processes that are transferrable to new staff, Board members, and volunteers longer term.
3. Establish clear new policies with respect to any statutory obligations (e.g., accessibility, privacy, etc.) and ensure these are also included in the by-law revisions where needed.
4. Ratify and implement the new by-laws, policies and procedures, position mandates, and communication and decision-making strategies, and incorporate these into the ongoing review of performance throughout the corporation.
5. Provide a detailed report on this implementation and review at the 2015 Annual General Meeting.

Strategic Priority 3 – Establish a Cycle of Ongoing Review

1. Establish a set of procedures for the annual review of policies and procedures, and of position mandates, as part of the evaluation of performance of the Board [that should be done annually] and of staff and volunteers. This will be part of the mandate of the executive, with appropriate community input, as part of its overall performance evaluation processes.
2. Ensure a ‘public’ version of these policies is developed for donors and clients that is made easily accessible.
5.5 Exceptional Volunteer Contributions

Setting the Context

PPWR depends on a committed corps of volunteers at every level of the organization. Our staff is small, incredibly dedicated, and very busy, so volunteers play an integral support role for the organization. At the Board level, volunteers serve on working committees helping with strategic planning, fundraising, events, finance, communications and governance.

Each fall, staff train up to twenty community members to join the volunteer program. These volunteers provide information about reproductive health, pregnancy options, birth control and healthy sexuality to PPWR clients who call or come into the office. Volunteers also facilitate pregnancy tests, and refer clients for social services assistance. The training process for volunteers is quite rigorous. Incoming volunteers are interviewed, and if selected, go through a 40 hour in-class training session. After in-class training is completed, new volunteers sit in on sessions with seasoned volunteers and then lead sessions with clients under the supervision of trained volunteers before meeting with clients one-on-one. In between meetings with clients, these volunteers help with routine administrative tasks in the office, fundraising and other tasks as their interests and skills allow.

To assist with our education programs, volunteers accompany our Community Education Coordinator to community outreach programs, providing assistance in educational presentations and attending sessions at different community settings, such as Mary’s Place. Volunteers also help with education through their participation in the theatre program. These interactive theatre performances focus on facilitating dialogue about healthy sexuality and relationships among youth, at schools and other public events.

Volunteers also play a critical role, as part of the Board of Directors of PPWR. Volunteers on the Board are active on committees, contributing to fundraising, governance, events planning, assisting with communications, and strategic planning. These committees have recently been re-invigorated with new terms of reference. Our revised terms of reference allow for volunteer membership on these committees outside of Board membership. Additionally, by fostering these committee volunteers, we pave the way for future Board recruitment.

PPWR volunteers are critical both to the future programming and economic sustainability and growth of PPWR. Volunteers bring energy and vitality to the organization, and Board volunteers bring expertise and experience. All volunteers need to be supported through strong policies and management to feel recognized as an integral part of the organization.

Finally, since the organization’s inception, PPWR’s volunteer pool has been predominantly recruited through partnerships with local universities. As part of this association, PPWR has been proud to also participate as a host for Master of Social Work students on placement from Wilfrid Laurier and the University of Waterloo. Placement students, while neither volunteers nor staff members, represent a resource to PPWR and the community. Their work with PPWR, doing research, working on special projects, and assisting with writing and meeting with clients, will continue to be nurtured and expanded. In so doing, PPWR builds relationships both with future leaders and potential partners in non-profits and does its part in educating the next generation of
sexual health workers, leaders and educators. This is a reciprocal relationship that reaps short and long term benefits for PPWR.

Needs assessment

In our planning assessment of volunteers and volunteer development, we found several areas that we can continue to improve upon. Many organizations like PPWR, who recruit volunteers from the student bodies of local universities and colleges, have issues with volunteer retention, as many volunteers are not permanent residents to the community. In the coming months, there is a need to expand our volunteer base by identifying new cohorts from Waterloo Region from which to recruit volunteers. PPWR needs to have a broad diversity of volunteers reflective of the community that we serve to add nuance and strength to all aspects of PPWR’s programming, services, and client relationships and to build broader public awareness of PPWR’s work.

When considering the volunteers work of the Board of Directors and the large amount of tasks and responsibilities Board members take on, there is a need for PPWR to consider new ways to introduce volunteers in ways that will support the Board’s work, bringing additional depth and experience to the Board while raising the profile of the organization in the region via these new relationships.

Additionally, there is a need for PPWR to think of new ways to enrich experiences for volunteers, so that all volunteers are motivated to increase the depth of their knowledge base and skill set. Essential to this is a re-commitment to diversifying the sorts of opportunities available for each volunteer.

Finally, our analysis showed that we could do more in terms of gathering strong metrics which capture the impact and commitment of our volunteers. These metrics will help tailor future volunteer recruitment processes and demonstrate PPWR’s impact to our funders, donors and within the communities we serve.

Setting Goals / Impact

To address these needs, the following will be accomplished during the current strategic plan implementation period:

1. grow our robust volunteer program to have long term volunteers who learn about meeting client needs and educational outreach, but who are also mentored to increase their own professional skill set through assisting with other activities which support our short and long term success like fundraising, events planning, educational outreach and non-profit administration;
2. ensure that volunteers are engaged during ‘downtime’- in between meetings with clients who come to access PPWR services;
3. formalize and strengthen volunteer recognition protocols;
4. ensure we build a volunteer program in which volunteers feel supported, appreciated and busy, and in which volunteers become lifelong donors;
5. expand participation on Board working committees to volunteers from outside of the Board to broaden PPWR’s scope and provide a strong recruitment avenue for future members of the Board of Directors;
6. encourage and motivate longer tenure of volunteers working for PPWR.

Implementation Plan: Strategic Priorities

Strategic Priority 1 – Assess Volunteer Needs

1. Complete a volunteer strengths/needs assessment for the organization as a whole.

Strategic Priority 2 – Identify and Develop New Volunteer Synergies

1. Identify core areas in fundraising, events and other ‘untapped’ areas in which volunteers can take a more active role.
2. Survey skills base of current and incoming volunteers to identify ways volunteers can be productively deployed to meet current and ongoing needs.
3. Develop a plan for stronger data gathering regarding the work of volunteers and skill sets of volunteers.
4. Diversify volunteer recruitment in the networks where we recruit volunteers and in the diversity of people who volunteer with PPWR.
5. Develop value-added incentives like letters of recognition and reference we can offer volunteers who contribute their time.

Strategic Priority 3 – Review and Evaluate Volunteer Initiatives, Needs and Successes

1. Conduct a follow up evaluation of all new volunteer initiatives, including a survey of all volunteers.
2. Re-assess evaluation against to-the-minute needs of the organization and clients.
3. Identify new cohorts within the region from which to recruit volunteers.
4. Establish a process of ongoing review of volunteer needs and strengths.
6.0 Conclusion

Over the last forty years, PPWR has worked to establish a strong reputation in Waterloo Region, as a responsive and nimble community hub focused on providing quality sexual health supports, services, and resources to the communities we serve. The positive effects we have had on people’s lives fuels our passion for the work we do and the mission we serve.

Despite the hard work and dedication from staff and volunteers over the years, we continue to face political, social, and financial challenges. To address these challenges, in 2013, we recognized the need to outline a strategic direction moving forward. As presented in this plan, we have set forth our strategic direction for the next two years through the creation of five strategic pillars which help align our decisions and actions, so we can continue to build on our strengths and maximize our opportunities.

We are confident the five pillars presented in this plan will effectively guide our work moving forward. But these pillars offer only the foundation for change. Continuing to meet the needs of our diverse communities will require more than adherence to these pillars and strategic priority areas. It will also require continued and active participation, commitment, and collaboration from staff, volunteers and our community partners.

Working together, we can achieve our strategic goals and solidify a vibrant future for PPWR in Waterloo Region, fulfilling our vision of a community where sexuality, dignity and choice continues to be celebrated.