

PENTICTON AND DISTRICT SOCIETY FOR COMMUNITY LIVING

POLICY: STRATEGIC PLANNING

SERVICE AREA: ALL AREAS

APPLIES TO: ALL PERSONNEL, SERVICE RECIPIENTS, STUDENTS, VISITORS AND VOLUNTEERS

PREAMBLE

Strategic planning is a critical process that ensures the Penticton and District Society for Community Living (PDSCL) effectively fulfills its mission and vision. Through structured planning, the organization sets clear strategies, goals, and priorities to drive long-term sustainability, service excellence, and community impact.

This process involves stakeholder engagement, environmental analysis, and goal setting to create a comprehensive roadmap that guides decision-making and resource allocation.

POLICY

The Board of Directors is responsible for overseeing the strategic planning process to ensure PDSCL remains responsive, innovative, and aligned with its core values. Strategic planning is conducted as needed, with a formalized plan developed and published every three to five years.

Key Components of the Strategic Plan

The strategic plan will:

- Define Organizational Direction: Reinforce the organization's vision, mission, values, and mandate.
- Assess Internal and External Factors:
 - Identify strengths, weaknesses, opportunities, and threats (SWOT analysis).
 - Analyze financial sustainability, sector trends, and emerging challenges.
- Engage Stakeholders: Gather input from:
 - Persons served, their families, and support networks.
 - Employees, leadership, and board members.
 - External partners, funders, and regulatory bodies.

Effective/Reviewed March 2025

- Establish Strategic Goals & Performance Indicators:
 - Define specific, measurable, achievable, relevant, and time-bound (SMART) objectives.
 - Assign responsibility for implementation at the governance, leadership, and operational levels.
- Outline Action Plans & Timelines:
 - Set clear milestones and deadlines for strategic initiatives.
 - Align resource allocation with priorities.
- Evaluate Organizational Capacity:
 - Assess service capacity and demographics of those served.
 - Identify areas for capacity building and workforce development.

Implementation & Oversight

- The Board of Directors, in consultation with the Chief Executive Officer (CEO), determines the timing and scope of formal strategic planning.
- The CEO is responsible for coordinating the process, ensuring alignment with policy requirements, and facilitating stakeholder participation.
- Once finalized, the CEO ensures broad dissemination of the strategic plan to:
 - Persons served, their families, and support networks.
 - Employees, leadership, management, and volunteers.
 - External stakeholders, funders, and partners.
- The strategic plan is monitored regularly, with progress reports provided to the Board and stakeholders. Adjustments may be made in response to changing circumstances, new opportunities, or emerging challenges.