



# Strategic Plan Example: Compassion Retreat Center

*This example of a strategic plan includes 2 of the 5 narratives highlighted in the Board Leadership Training.*

## **Current Service Environment Narrative (narrative #2): Compassion Retreat Center (CRC)**

The Compassion Retreat Center has a rich history and commitment to serving the persons with developmental disabilities community in our region, within 75 miles of our location, by providing camps, retreats, community gatherings, and volunteer opportunities.

The underlying promise in everything we do is to create a “yes you can” culture and environment. This community is used to being told “No you can’t.” We seek to change the narrative of opportunity. Clients can expect a safe, fun-filled, and personally cared-for experience at CRC.

However, during the pandemic, we had to pause nearly all services, camps, and retreats. Through post-pandemic research, we have discovered there is **less** support available now than there was prior to the pandemic. Furthermore, there does not appear to be any significant new responses to addressing this growing gap within the broader community. 3 other service providers that were operating in our region prior to the pandemic have closed permanently. The only other service provider in our region is providing 2 weeks of programming annually for persons with developmental disabilities.

Our research has identified 17 organizations as potential new partners to fill and help support our programs year-round. This research concluded that the number one expressed need in the short term is to have a place for day outings and events.

Longer term this community needs a dedicated camp, retreat, and community center. To respond to both short-term and long-term needs, Compassion Retreat Center is repurposing a current youth camp area. This is a mission-critical component to fulfill CRC’s strategic intent with a specific focus on those who are under-supported, marginalized, and overlooked.

*“Our 28-year-old son is developmentally disabled. He wants to come to everything CRC provides. We are so grateful to CRC for creating opportunities that help him, and in turn, bless our family.” — Parent*

*Adapted from the work of John Pearson by Ed McDowell for Murdock Trust 1/5/2021*



## Strategic Plan Example (*cont.*)

### Future Service Environment Narrative (*narrative #4*): **Compassion Retreat Center (CRC)**

As Compassion Retreat Center looks ahead to the next three years a few things have become very clear:

1. Creating a “yes you can” environment for persons with developmental disabilities must permeate everything we do moving forward.
2. CRC needs to take a bigger leadership role in our partnerships with organizations working with persons who are developmentally disabled on the development and implementation of new initiatives.
3. For planning purposes, we see the target audience as stable to modestly growing.
4. For competition purposes, we see CRC as being the only viable year-round option in the region over the next three years. We believe this to be true based on the permanent closure of other camps in our region during the pandemic. Should a new competitor emerge during this three-year time frame, we would welcome and collaborate with them toward their success, as the needs exceed what we will be able to provide.
5. We have identified the following areas of service (programming) to be developed:
  - a. ½ day recreational and engagement programs for partner agencies to utilize. In 2023 we will launch “Climbing Higher” a day-use recreational program.
  - b. Day camps that can be offered year-round. Each session of camp ranges from 3-5 days long. In 2024 CRC will launch a new day camp program for Persons with Developmental Disabilities.
  - c. A community center where families and organizations can gather in a place for day and overnight events that are appropriately designed and equipped to meet the most common needs of persons with developmental disabilities.
  - d. Pilot an overnight camp model that provides a unique camp experience for persons with developmental disabilities while also providing a needed respite for caregivers and families.
  - e. Provide a place where families with persons of developmental disabilities can worship together, knowing they will be accepted and valued.
6. The current facility needs to be replaced, not repurposed, to meet the strategic needs identified above.
  - a. A year-round overnight retreat center is being designed for 100 person capacity.
  - b. Each lodging unit will have one private bathroom per 4 beds.
  - c. The meeting room will be designed for a 150-person capacity in both a dining and meeting room configuration.
  - d. An indoor swimming pool designed for persons with developmental disabilities.
7. The resources needed for success in our future environment include:
  - a. A full-time year-round director will be needed to coordinate, collaborate, facilitate, and support the accomplishment of this future service environment.
  - b. Estimated cost for completion is \$10 million.
    - i. The timeline for fundraising is 2023-2025 (Feasibility, campaign, etc.)
    - ii. The timeline for construction/completion is 2027.
  - c. Recruit and onboard 20-25 partner organizations.
    - i. Cultivate a collaborative operational/business model.

This future service environment represents a strategic response to the needs and realities identified in our research.



# Strategic Plan Example (cont.)

## THE ROLLING 3-YEAR STRATEGIC PLAN TEMPLATE

### Promise

*Describes WHY the organization exists:* Persons with developmental disabilities, and their families experience a “yes you can” experience in a camp/retreat setting.

### Mission

*Describes WHAT the organization does:* Compassion Retreat Center provides “yes you can” experiences by creating and operating camps, retreats, events, and facilities in a way that supports persons with developmental disabilities and their families.

### Future Direction

*Describes WHERE the organization is going:* Compassion Retreat Center is building a new retreat center for 100 people that is specifically designed for persons with developmental disabilities. This will expand year-round opportunities to meet the growing need in the region.

### Values

*Describes what will always be true of your organization in pursuing mission:*

Compassion Retreat Center will always be known for its “Yes You Can” culture in a “no you can’t world” for persons with developmental disabilities. CRC will be known as a team of people who demonstrate care through a combination of compassion and professionalism. People will consistently experience unconditional love in a place where the property and program promote personal growth, a strong community, and practical safety.

### Tag Line or Slogan

*Unique Identifier of the organization that speaks to the Promise: “Yes You Can!”*

### Top Action Steps Over the Next 3 Years

*Describes what will always be true of your organization in pursuing mission (no more than 5 in any one year; updated annually):*

Compassion Retreat Center has identified the following strategic priorities over the next three years:

1. Launch a day-use recreational program in 2023 to better support partner agencies.
2. Launch a year-round day camp program with the first-day camp to operate in 2024.
3. Build a year-round retreat center, complete with dining, meeting, lodging, and recreational space with capacity for a 100 persons with developmental disabilities.
4. Conduct a \$10 million capital campaign for the new retreat center.



## Strategic Plan Example (cont.)

### THE ROLLING 3-YEAR STRATEGIC PLAN TEMPLATE (cont.)

TOP ACTION STEPS	YEAR 1 GOAL(S)	YEAR 2 GOAL(S)	YEAR 3 GOAL(S)	YEAR 4 AND BEYOND GOAL(S)
<b>#1:</b> “Climbing Higher” – Day use recreational program	<ul style="list-style-type: none"> <li>Develop the program in the spring of 2023.</li> <li>Launch 3-day use recreational opportunities in the fall of 2023.</li> </ul>	<ul style="list-style-type: none"> <li>Refine the program from lessons learned in the winter of 2024.</li> <li>Offer 6-day use recreational opportunities in the summer and fall of 2024.</li> </ul>	<ul style="list-style-type: none"> <li>Continue to refine and improve the program in the winter of 2025.</li> <li>Offer 10-12 day use recreational opportunities in the Spring, Summer, and Fall of 2025.</li> </ul>	<ul style="list-style-type: none"> <li>Maximize the day use recreational program at 12-18 offerings per year.</li> </ul>
<b>#2:</b> Launch a new Day Camp Program	<ul style="list-style-type: none"> <li>Hire a day camp director in the summer of 2023.</li> <li>Design the program in the fall of 2023.</li> </ul>	<ul style="list-style-type: none"> <li>Launch a new day camp program with 3 sessions of camp at 4 days each session with a goal of 40 campers per session.</li> </ul>	<ul style="list-style-type: none"> <li>Refine the program in the winter of 2025.</li> <li>Expand the program to 6 sessions in 2025 with a goal of 50 campers per session.</li> </ul>	<ul style="list-style-type: none"> <li>Grow the program to 6 sessions in the summer, 3 in the fall, and 3 in the spring with a goal of 50 campers per session.</li> </ul>
<b>#3:</b> Design and Build a new retreat center for persons with developmental disabilities with an occupancy of 100 people.	<ul style="list-style-type: none"> <li>Design the facility including meeting/dining area, lodging, swimming pool, and outdoor recreation for 100 people, with the priority of the design to meet the needs of persons with developmental disabilities.</li> </ul>	<ul style="list-style-type: none"> <li>Seek building permits and begin land development once appropriate permits have been obtained.</li> </ul>	<ul style="list-style-type: none"> <li>Build the retreat center.</li> </ul>	<ul style="list-style-type: none"> <li>Open the retreat center, inviting persons with developmental disabilities to help dedicate and have first use of the new property.</li> </ul>
<b>#4:</b> Conduct a \$10 million capital campaign for the new retreat center.	<ul style="list-style-type: none"> <li>Develop the Case Statement in the winter of 2023.</li> <li>Conduct a feasibility study in the summer/fall of 2023.</li> </ul>	<ul style="list-style-type: none"> <li>Raise 70% of the campaign through Major Donors/grants/Foundations.</li> </ul>	<ul style="list-style-type: none"> <li>Raise the remaining 30% through a broad-reaching campaign, creating opportunities for everyone to help.</li> </ul>	<ul style="list-style-type: none"> <li>Follow up on the campaign, pledge fulfillment, etc...</li> </ul>
<b>#5:</b>				

**Note:** Limit this page to the Organization’s strategic next steps and goals. Departments, teams or divisions of the organization should develop their own set of measurable initiatives and tactics that focus on achieving the strategic next steps and goals of the organization.