

Whistler Institute Strategic Plan Framework

20 June 2023

Mission	Influencing change and inspiring minds through education and thought leadership to meet the needs of the Whistler Resort and community			
Core Values <i>"Lens" for all actions</i>	In everything we do, we are inspiring, impactful, and inclusive . Inspiring: personal and professional development through innovative ideas and programs Impactful: influencing change Inclusive: responsive to our diverse community			
Focus Areas	Whistler Institute Speaker Series	Whistler Institute Learning Programs	Financial Sustainability	Organizational Excellence
Goal	To incubate new ideas, stimulate discussion, and inspire action around major issues facing the world today and into the future.	To deliver programs in a variety of disciplines that provide professional development, credentials, and recognition.	To be financially self-sustaining.	To be an effective and successful voice for learning in Whistler.
In 10 years / by 2033 ...	The Whistler Institute hosts a globally relevant annual event with 1,000+ participants.	Whistler is a shared or satellite campus that educates 1,000+ learners annually.	Annual endowments and activities fund annual operating costs.	
Target audience	Residents, 2 nd homeowners, visitors and others interested in timely global issues	Local workforce members wishing to gain accreditation Residents who desire professional development Visitors wishing to learn in a different setting; visitors looking for additional/enhanced experiences in Whistler	Major donors Monthly donors Sponsors/corporate partners Grantors Education providers/partners	Board Staff
Value proposition	WI brings world-class ideas and speakers to Whistler to help meet a thirst for big thinking and to inspire personal action.	WI delivers professional development and accreditation/learning programs for the Whistler community, so participants don't need to leave home, and for visitors seeking additional/enhances experiences in Whistler.	WI leverages your financial contribution to deliver excellent learning programs at good value and showcases your leadership and commitment to education.	WI brings inspiring, relevant, and diverse educational programs and speakers to Whistler, helping position Whistler as the place for lifelong learning and thought leadership.
3 Year Highly Achievable Goal (HAG)	A diverse governance Board at full complement oversees a full time Executive Director, Event Production, Marketing and Fundraising Team and a secure sustainable model for funding to offer 4 annual themed events, 1 annual program, and courses with 200+ participants annually.			

<p>Descriptions of success in 2-3 years</p>	<p>The Speaker Series raises awareness and understanding of topical major global issues.</p> <p>Speaker Series events have high appeal to locals and others, and are attended by a diversity of participants, many of whom are repeat attendees.</p> <p>Speaker Series events sell out and begin to generate profits that support Whistler Institute's programs.</p> <p>Speaker Series ideas are considered or incorporated into local discourse and initiatives.</p> <p>WI is starting to be recognized for and is in demand as a thought-leadership partner. [moved from 4th column]</p>	<p>Post-secondary education programs are readily available, known about, and well-attended and are beginning to meet the accreditation and learning needs of our community.</p> <p>Programs relevant to Indigenous communities (e.g. Lil'wat Nation) that meet their members' needs are offered.</p> <p>WI is starting to be recognized and sought out as a learning partner to deliver programming.</p>	<p>WI is financially sustainable/secure, including having long-term financial partnerships in place.</p>	<p>WI has the resources to deliver world class programming.</p> <p>WI has strong collaborative partnerships with key influencers, post-secondary institutions and Whistler organizations.</p> <p>WI brand is clear, compelling and well known/understood, and our programs are cohesive and aligned.</p> <p>The WI board is diverse, representing new segments of the community, and board positions are sought after.</p> <p>Effective governance mechanisms are in place to provide oversight and decision-making/alignment.</p>
<p>3 Year HAG #s. By June 30, 2026...</p>	<p>WI delivered 4 speaker events throughout the year</p>	<p>Annual programming reaches 200 learners</p> <p>One program in place (e.g. Culinary, ECE, Carpentry)</p>	<p>WI generates:</p> <ul style="list-style-type: none"> \$165K in fundraising and grants \$75K through operations (\$35K events, \$25K program, \$15K general) <p>Expenses do not exceed \$200K</p> <p>\$70K cash on hand</p>	<p>Staff:</p> <ul style="list-style-type: none"> Full time ED Part time Marketing & Bookkeeper Contract Event producer, Program Coordinator, Fundraiser <p>Board:</p> <ul style="list-style-type: none"> 11 Board members 4 Friends of the Board (non voting)
<p>3HAG reliant on...</p>		<p>Partnership management process and pipeline</p>	<p>Organized fundraising program with contract person in place</p>	<p>Full time ED Board that is stable and financially literate Physical office Representation at key community events</p>

<p>1 Year HAG #s and priorities. By June 30, 2024...</p> <p>➤ Owner</p>	<p>WI delivered 4 events</p> <p>➤ Executive Director</p>	<p>WI delivered 6 courses</p> <p>➤ Executive Director</p>	<p>WI raised \$120K</p> <p>Revenue via Operations \$30K</p> <p>Revenue Fundraising and grants \$120K</p> <p>Cash on hand \$30K</p> <p>Fee for Service Agreement with RMOW</p> <p>➤ Fundraising Committee</p>	<p>FT ED joins Jan 1, 2024</p> <p>Pipeline for 4 new board members in place</p> <p>Contract fundraiser in place</p> <p>➤ Governance Committee</p>
<p>90 Day HAG #s and priorities. By Sept 30, 2023</p>	<p>Executive Director & Speaker Committee:</p> <p>Confirm 2 Speaker events</p>		<p>Revenue via Operations \$10K via Speaker Series</p> <p>Revenue via Fundraising and grants \$27.5K</p> <p>Expenses not to exceed \$20K</p> <p>Cash on hand \$54K</p> <p>Executive Director:</p> <p>Submit fee for service application RMOW</p> <p>Complete ECE Grant application</p> <p>Fundraising Committee:</p> <p>Create plan to achieve fundraising goal of \$120K by Aug 31, 23</p>	<p>Governance Committee:</p> <p>Target 4 potential new Board members</p> <p>Recruit 2+ new board members and identify executive and committee chairs</p> <p>Post job ad for new ED</p>

From 2022 framework – enhanced by 3 year, 1 year, and 90 day Highly Achievable Goals (HAGs) at 2023 session:

Focus Areas	Whistler Institute Speaker Series	Whistler Institute Learning Programs	Financial Sustainability	Organizational Excellence
Directions	<ol style="list-style-type: none"> 1. Identify topics/themes on an annual basis that are global in nature but have local relevance, and secure respected experts to speak. 2. Identify all events/conferences in Whistler or have relevance to Whistler where the WI can pursue a speaker for the WI Speaker Series. 3. Clarify criteria/decision-making framework for selecting and executing Speaker Series topics, based on outcomes that align with goals and values, and design for diversity. 4. Identify strategies for further engaging residents on Speaker Series topics. 5. Identify learning opportunities (and formats) that would be of interest to residents and visitors, including programming during off-peak times. 	<ol style="list-style-type: none"> 1. Identify and deliver, in partnership with post-secondary institutions, a targeted set of local education programs that provide recognition/accreditation for our local workforce. 2. Develop, with Indigenous communities (e.g. Lil'wat Nation), programs that meet their members' emerging needs, and can be shared and customized by other Indigenous communities. 3. Research conferences and events coming to Whistler each year and seek opportunities with partners to offer professional development programming. 4. Develop and implement a strategy to identify/test product-market fit for programs and courses, considering the post-pandemic learning context. 	<ol style="list-style-type: none"> 1. Develop a fundraising strategy (including individual donor/sponsor, foundation and government funding) focused on the organization's mission and complete offerings package.** 2. Seek opportunities for board members to meet with potential donors. 	<ol style="list-style-type: none"> 1. Develop a board skills matrix and succession strategy (including list of prospective board members) to ensure diversity and representation. 2. Develop and implement a communications strategy that raises awareness of the WI and the role of lifelong learning.** 3. Regularly review and update governance practices and procedures.
Key Performance Indicators	# of Speaker Series events # of attendees	# of programs delivered, including number of First Nations focused programs # of participants getting certification # of attendees/participants	\$ raised \$ and type of donors	Level of recognition of the WI by the community # of applications for board of director positions # of applications for board of director positions from BIPOC individuals

** indicate the directions that were identified as the highest priority.