

2023-2028

# STRATEGIC PLAN

---



# LAND ACKNOWLEDGEMENT

On behalf of our organization, we would like to acknowledge that we are on Treaty 6 territory and the homeland of Metis Region 4. This land is home to many diverse groups of Indigenous peoples including the Cree, Dene, Blackfoot, Saulteaux, Alexis Nakota Sioux, Inuit, and Metis.

Our organization is committed to working towards reconciliation, recognizing that this whole area benefits from the use of these lands. We are committed to a stance of learning to deepen our understanding of Indigenous cultures and communities.

As an organization dedicated to serving individuals with diverse abilities, we acknowledge that the concept of disability is a colonial construct or way of looking at things. Indigenous worldviews guide a practice of working with others that recognizes all the elements of one's being: the physical, spiritual, emotional, and mental health of an individual. It is whole and relational, and supports the belief that each aspect of an individual's self-esteem, life circumstance, and capacity for self-empowerment are intricately connected.

Just as Indigenous worldviews incorporate all stages of life, all directions, all elements, and all seasons of life and nature, the work to effectively walk alongside Indigenous individuals and acknowledge them must be actioned and honored in all parts of our work. We are committed to this way of being & learning.



## A LETTER FROM THE CEO

Think about the essence of what made the best times of your life so good.

You were likely part of a community of people that supported you. You had a proud purpose in life - whether through work or volunteering. People depended on you and you had a responsibility to contribute. You had a safe home you helped care for and make your own, and you felt a level of mental fitness, physical health and control over your life. You chose things that brought you joy and comfort. You knew people accepted you for who you are, not for who you pretended to be. In short, you were included, accepted, and safe.

It is no different for someone with an intellectual disability - they experience their lives in the same way.

When they feel fully included as part of a community that accepts the gifts and skills they have to offer, their lives are good. As you read this, you know it and you believe it. Yet, today, people with diverse abilities are still often forgotten, marginalized, or managed in our society.

Dr. Winnifred Stewart, the founder of this organization, believed intensely in not allowing people with intellectual disabilities to be ignored or excluded. In that spirit, we have developed a strategic plan built around a vision that people with diverse abilities will have a voice, a choice, and a place to belong for their entire lives.

We will relentlessly reach towards that vision by supporting people to work, play, learn and have a home over their adult lifespan. We will help change the way people with intellectual disabilities are thought of and spoken about. We are committed to changing our own practices so that people with diverse abilities are more fully immersed in the community in a safe and fulfilling way.

We have an ambitious agenda for the next five years. But we will not do it alone. We will need you to walk alongside us if we are to succeed. We would love for you to join this fulfilling journey.

Yours in partnership and learning,



A handwritten signature in black ink that reads "Emily Ruttan".

Emily Ruttan, Chief Executive Officer  
Winnifred Stewart Association & Foundation

# INTRODUCTION

This strategic plan represents the first joint strategic plan for the Winnifred Stewart Association & Foundation in the organization's 70-year history. It not only articulates a new **Vision, Mission, and Values** for the organization, but it sets bold new strategic directions and expectations, while still connecting to the foundation set by Dr. Winnifred Stewart, the organization's namesake - that people with diverse abilities deserve more and better.



This plan defines the north star of the organization through a new vision; describes its mission in clear terms; sets new values for its staff and governance bodies; outlines the **principles** that will shape the work the organization does; sets priorities and critical actions to accomplish those **priorities**; and provides outcomes and indicators to measure progress and success.

This plan pushes Winnifred Stewart to relentlessly support people to work, play, learn and have a home over their adult lifespan; change the way people with intellectual disabilities are thought of and spoken about; and commits us to changing our own practices so that people with diverse abilities are more fully immersed in the community in a safe and fulfilling way.

Winnifred Stewart and her son, Parker



## IMAGES AND ART

The photographs you see throughout the document give you a sense of the vibrant lives of people supported by Winnifred Stewart and the team working every day. The tree paintings you see throughout are part of a long term values exploration project that residents, individuals, staff members, board members and visitors have participated in for the last year. Giving everyone the same tools to work with and the same amount of time, we asked each participant the same two questions each representing two trees: What do you **value** in life or at Winnifred Stewart? What do you **like about** life or your time at Winnifred Stewart?

The hundreds of pieces and the values, hopes and qualities of life they expressed informed the process and the content of this plan. In every session to build our values or the plan itself, these paintings filled the walls, giving participants a chance to reflect on the common values and experiences we see as important.

## A NOTE ON LANGUAGE

You may note throughout the document that ‘intellectual disabilities’ and people with ‘diverse abilities’ are used interchangeably throughout the strategic plan and in the work of Winnifred Stewart generally. In our work, Winnifred Stewart’s working definition of people with ‘diverse abilities’ or ‘intellectual disabilities’ are those that may have some challenges in cognitive functioning, communication, and independent living skills that show up anytime before a person is an adult or even before birth.

The reason for this interchangeable approach is simple: while there are many terms and labels applied throughout our sector, Winnifred Stewart has resolved not to affix any standard label to anyone in our community. Our principle, in line with our organizational values, is to ask the people we support how they want to be referred to and we honour that choice. That is why we also use the word individuals when we describe the people we support.

We talk about inclusion through this document and we look to Inclusion Alberta to help define this: “Inclusion happens when the lives of children and adults with intellectual disabilities unfold no differently; immersed together with their non-disabled peers in the same pathways and experience of life common to us all.”

# VISION

People with diverse abilities will have a **voice**, a **choice**, and a **place** to belong for their entire lives.

# MISSION

Winnifred Stewart walks alongside adults with intellectual disabilities, amplifying their right to belong and fostering community inclusion.

# VALUES

## WE MAKE DECISIONS WITH PEOPLE, NOT FOR THEM

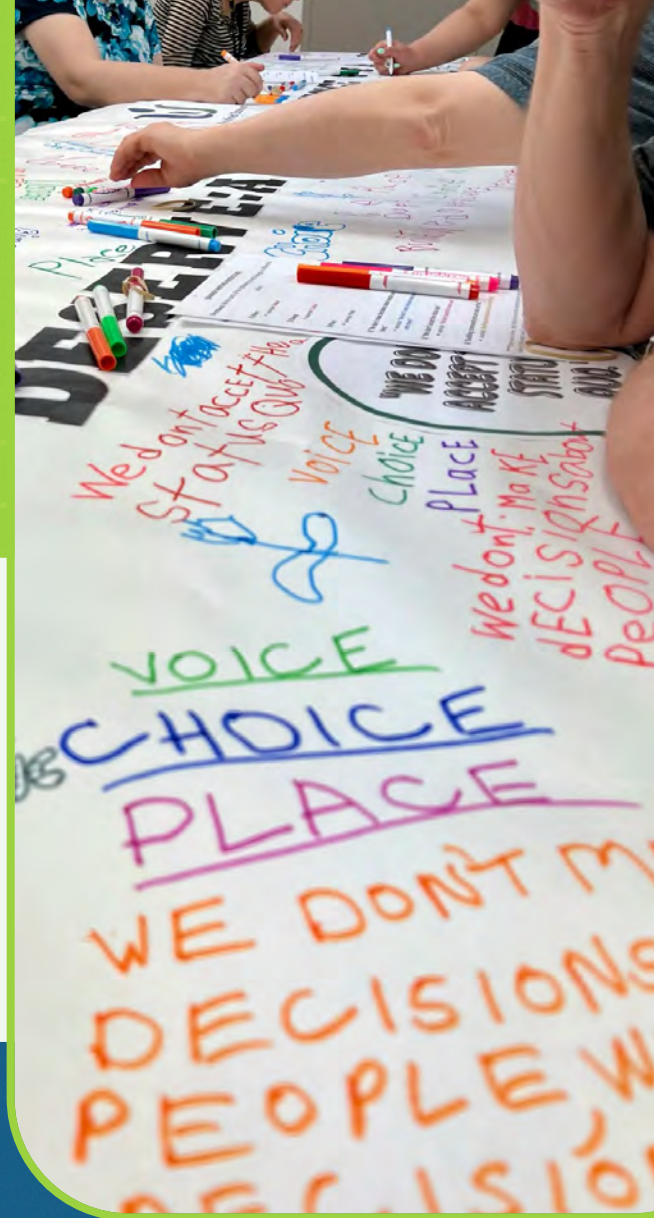
Each of us has a unique, multi-faceted identity and set of needs. The more that we listen, define our shared goals and take action together, the greater the impact we can make.

## CREATING COMMUNITY ONE CONNECTION AT A TIME

We believe that everything we do is elevated when we work cohesively, along with the support of our partners and allies, to lift everyone up and feel part of a healthy, connected, and inclusive community.

## WE CHALLENGE THE STATUS QUO

The change we want to see in our world requires us to be bold, to challenge the status quo, model the way and invite our partners, stakeholders, and community to do the same. It is not always easy, but it is always worth it.



# STRATEGIC PRINCIPLES

Our strategic principles provide guidance to effectively and meaningfully plan and implement our strategic priorities. They take our priorities from being an operational to-do list and give them a specific ethos to follow and lens to use – they define the specific way **all** our priorities will be delivered.

## Making a Disruptive Impact

We commit to focusing on contributing to new standards and effective practices for our whole sector that model full inclusion. We know this starts by looking at our own operations and building connections between the individuals we support, their personal community and the broader community.

## Striving to Ensure Everyone is Seen, Heard, and Valued

We know that social, biological and environmental factors make up one's experience and these factors can contribute to social inequity, injustice and discrimination. We are committed to using multiple lenses to design, deliver, and evaluate our work, and apply what we learn to directly confront and address oppression, prejudice, and stigma.

## Pursuing Organizational Excellence

We are fully committed to advancing our practices and focusing on mastery in our work. No matter how effective we are, we will always ask what we can learn from: the people we support, our team and other organizations, and how we can apply those learnings to better support people with intellectual disabilities.





# STRATEGIC PRIORITIES

While the strategic *principles* define the specific way **all** our priorities will be delivered; the strategic priorities are the specific directions and actions we will take to fulfill the ambition of our strategic plan. Each priority is organized under the pillars in our Vision, which are: **Voice**, **Choice**, and **Place**. A fourth pillar has been added—support for our **Cause**, describing the essential elements of revenue generation that enable all other areas of the strategy is the responsibility of a dedicated, structured team.

## UNDER EACH STRATEGIC PRIORITY ARE A SET OF:

### 1 DESIRED OUTCOMES

The change we will see as a result of our work.

### 2 CRITICAL ACTIONS

The tactical direction to deliver each priority.

### 3 KEY PERFORMANCE INDICATORS

What we will quantify to measure progress.



# VOICE

**STRATEGIC PRIORITY:** Amplify, elevate, and advance the needs and interests of those we support to be fully included.

**Summary:** Strengthen our communications and external advocacy by sharing compelling stories, rallying passionate influencers and community ambassadors to change the public's perceptions of people with intellectual disabilities within our community and create a platform to elevate their voice.

## Desired Outcomes

- The community of advocates for people with diverse abilities grows in both recognition and influence.
- The voices of people with diverse abilities are more visibly included in public discourse.
- Guardians, families, and our sector workforce identify as and feel supported to be both allies and ambassadors for Winnifred Stewart, and the people it supports.

### Critical Actions

- Create a framework to share the stories of the individuals we support and desire to support, our team, our partners, and our community to inspire hope, model excellence in inclusion and demonstrate impact.
- Optimize Winnifred Stewart's known identities and create a plan to activate them to clarify the organization's contemporary purpose, and develop a campaign targeting employers for the Joey Moss Memorial Fund Employment program.
- Actively communicate with, engage, and educate the guardians and families of the people that we support, and support them to be ambassadors for the organization and advocates for the needs of their loved ones.
- Create training that supports Winnifred Stewart's Board and staff to be aligned, proactive, and impactful with their communication efforts. *(See corresponding action under Cause).*
- Lead the creation of robust, visible communications and participatory engagement opportunities that challenge Albertans to get to know, understand, and appreciate the lived experiences, needs, and interests of people with intellectual disabilities. *(See corresponding action under Cause).*

### Key Performance Indicators

- Number of stories from residents, individuals, guardians, families, employers, and stakeholders collected and shared broadly.
- Increase in impact recognition with target audiences over the life of the employer campaign and implementation of the storytelling framework with our partners.
- Number of guardians and families that sign-up for Winnifred Stewart communication channels.
- Sentiment of staff, guardians, and families regarding their comfort acting as allies and ambassadors for Winnifred Stewart and the people it supports.
- Increase in social media reach and engagement against set targets.



# CHOICE

**STRATEGIC PRIORITY:** Focus programs and supports that create opportunities for people with intellectual disabilities to build relationships, make choices, and enrich their lives in work, learning, and play.

**Summary:** Finding innovative and effective ways to enrich the life experiences of people with diverse abilities, including by encouraging, supporting, and acting as allies for them to make informed choices for themselves within inclusive, supportive communities and environments.

## Desired Outcome

- individuals are introduced to and supported by increasingly effective opportunities and a spectrum of programs that build relationships and offer the opportunity to make self-directed choices that enhance their daily living and overall quality of life.

### Critical Actions

- Determine how to apply a deinstitutionalization lens to the development of new programs and the iteration of existing programs.
- Define and implement an engagement-based approach and program review to identify and better understand the types of programs and supports desired by people with intellectual disabilities through the course of their lives, the supports Winnifred Stewart will deliver and specialize in, and where to seek support from our partners and community based supports.
- Prototype and pilot models that facilitate people with diverse abilities' inclusion in the community.
- Create training that supports Winnifred Stewart's Board and staff to be aligned, proactive, and impactful with their communication efforts. *(See corresponding action under Cause).*
- Ensure access to predictable, accessible community-based supports that have continuity to larger systems and professional services.

### Key Performance Indicators

- Growth in community-supported/connected programs for people with intellectual disabilities.
- Guardians, families and individuals' satisfaction with referrals to external programs and the programs themselves.
- Guardians, families and individuals' satisfaction with Winnifred Stewarts programs and services
- Guardians, families and individuals' satisfaction with daily living and quality of life for individuals.



# CHOICE

**STRATEGIC PRIORITY:** Invest in opportunities and partnerships that create visible change for people with diverse abilities in work, learning and play.

**Summary:** A focus on creating change for the people we support through strong alliances, partnerships, programs and other opportunities that contribute to a culture of inclusion.

## Desired Outcomes

- Invest in high value strategic partnerships with a relational focus that create visible change over the entire life spectrum of individuals with intellectual disabilities.
- Winnifred Stewart, along with allied group home operators, successfully raises funds, awareness and engagement to evolve the group home model to model inclusion and to strengthen life safety group home requirements.
- Winnifred Stewart with our partners facilitates meaningful, sustainable employment throughout Alberta for people with diverse abilities through the Joey Moss Memorial Fund.

## Critical Actions

- Create a clear definition of who Winnifred Stewart supports and how as a fundamental component of how it chooses partnerships to address gaps in support model and evolves its own programs.
- Develop a process that demands we apply a lens to all partnership decisions that ensures we advance full inclusion.
- Explore and enter into partnerships with aligned agencies that operate group homes to launch a campaign for how group homes can move towards inclusion and advocate for support to meet life safety requirements.
- Explore platforms and/or services - including through available partnership opportunities - that help to scale employment opportunities for people with intellectual disabilities and/or create them in new geographic areas (i.e. outside of Edmonton) and support partner organizations.

## Key Performance Indicators

- Number of programs, supports, and education & employment opportunities people with diverse abilities have access to through Winnifred Stewart or our partnerships.
- Individuals' satisfaction with programs, supports, and education & employment that opportunities people with diverse abilities have access to through Winnifred Stewart or our partnerships.
- People supported through Winnifred Stewart and its partnerships are from all adult age groups.
- Partner awareness of Winnifred Stewart's service profile (i.e. who we support) and programs offered.
- Partner satisfaction working with the Winnifred Stewart team to provide program access and overcome service gaps offered.
- Number of employers who express interest in participating in Winnifred Stewart-supported partner employment programs.
- The number of employers who participate in and employ people with diverse abilities.



# PLACE

**STRATEGIC PRIORITY:** Enhancing integrated community-based supports across the lifespan of an individual with a place to call home.

**Summary:** This priority makes sense of the word “place” in two ways. It refers to people with diverse abilities knowing that they always have a place - they belong - through every stage of their adult life. It also refers to a physical home - a place for the people we support to live and have their full spectrum of needs met within their home and connected community.



## Desired Outcomes

- Winnifred Stewart operates a fiscally sustainable housing program.
- Winnifred Stewart offers affordable, accessible, community-based housing options for people with intellectual disabilities.
- People who access our housing have chosen housing that meets their wishes, are satisfied with their housing, have the support required to live as independently as possible, and have access to different housing if their wishes or needs evolve.

## Critical Actions

- Implement a building and asset management program that delivers an optimal balance between owned and market housing, while ensuring adequate, accessible housing for people with diverse abilities that rely on Winnifred Stewart for a place to call home.
- Develop an individual support framework to help the people we support access community-based programs and supports to help them thrive in their chosen housing, systems, and professional services.

## Key Performance Indicators

- Capital and operational budget lines related to housing assets and maintenance.
- Individual satisfaction with available partner and community-based programs and supports, and their experience accessing them through Winnifred Stewart.
- Individual satisfaction with housing.
- Increases in the number of individuals living in individualized, personalized living arrangements and/or the reduction of people living in large, congregated living arrangements.



# PLACE

**STRATEGIC PRIORITY:** Make planned, steady and consistent progress towards modelling full inclusion in our programs and residences.

**Summary:** Beginning with the recognition of the inherent rights, capabilities and responsibilities of individuals with intellectual disabilities, we will make steady shifts in our approaches and operations to deinstitutionalize our home support services. Through this, we know that individuals will have stronger connections to their personal support networks and the broader community.

## Desired Outcomes

- Winnifred Stewart has an evidence-informed plan for deinstitutionalization.
- Winnifred Stewart documents lessons learned and opportunities for continuous improvement to support more effective outcomes over time.

### Critical Actions

- Develop a deinstitutionalization plan based on promoting increasing levels of inclusion, independence, and equality within the community. The plan should focus on elements of organizational culture and residential processes that require updating.
- Create a “lessons learned” resource from deinstitutionalization efforts to share with other organizations and present to stakeholders.

### Key Performance Indicators

- Demonstrated and described process and program improvements that support leading edge practices on de-institutionalization.
- Number of stakeholders that demonstrate interest in (e.g. request resources, attend presentations) Winnifred Stewart’s resources and experiences.



# CAUSE

**STRATEGIC PRIORITY:** Develop stronger relationships to capture all the ways giving is represented within the donor spectrum.

**Summary:** We engage with our donors and supporters to understand what is important to them and how it aligns with our vision for the future. We want to invite all types of engagement and cultivate and sustain engagement over time. Mutually respectful and beneficial relationships - in all parts of the engagement spectrum - are key to this.

## Desired Outcomes

- Winnifred Stewart executive leaders and Board members clearly understand how they contribute to brand, reputation, and fund development.
- Winnifred Stewart supports and is equipped to cultivate relationships and generate revenue through all types of donor offerings, effective outcomes over time.
- Winnifred Stewart runs an effective capital campaign to meet its capital requirements.
- Winnifred Stewart receives donor support from a broad base of demographics.

## Critical Actions

- Establish executive and Board-level roles and expectations related to revenue generation, including accessing grants and pursuing fundraising opportunities.
- Define Foundation Board roles in ongoing organizational communications and engagement efforts to support brand and profile building (see corresponding action under Voice).
- Identify, cultivate and tend relationships within the donor spectrum throughout Alberta. The donor spectrum includes everything from in-kind giving (e.g. volunteers donating their time and talents, non-cash gifts, product donations) and one-time donors to major gifts and planned giving.
- Build out stronger policy, process and systems to increase Winnifred Stewart's fundraising capacity and capabilities.
- Create a capital campaign to match Winnifred Stewart's planned program and service evolutions.
- Develop a strategy specifically targeted at addressing Winnifred Stewart's aging donor base.

## Key Performance Indicators

- Percentage of fundraising target hit.
- Progress toward five-year fundraising goal.
- Progress toward capital campaign goal.
- Donor demographics.



# CAUSE

**STRATEGIC PRIORITY:** Drive revenue generation through social enterprise efforts

**Summary:** Social enterprise refers to lines of business for a charity or non-profit that generate revenue. Empties to WINN is our social enterprise - something that can inspire us to think beyond government funding and donations to create different types of value that generates ongoing revenue. There are many successful social enterprise models in Alberta supporting social sector organizations – Empties to WINN should be among the best, and we will make it grow.

## Desired Outcomes

- Winnifred Stewart furthers its social impact through revenue-generating lines of business.
- Winnifred Stewart optimizes its Empties to WINN and social enterprise opportunities to maximize profitability and support its social impact.

## Critical Actions

- Complete market viability and profitability research on Empties to WINN and apply these learnings to further expand and optimize the social enterprise program.
- Develop the Empties to WINN business plan to focus on growth and profitability as a social enterprise.

## Key Performance Indicators

- Container collection market share for Empties To WINN.
- Percentage growth year-over-year in profit and cash invested into Winnifred Stewart.

# THANK YOU



I value my friends and staff  
I like the staff  
I value my friends  
I value my friends and staff

I value my friends and staff  
I like the staff  
I value my friends  
I value my friends and staff

I value my friends and staff  
I like the staff  
I value my friends  
I value my friends and staff

I value my friends and staff  
I like the staff  
I value my friends  
I value my friends and staff

I value my friends and staff  
I like the staff  
I value my friends  
I value my friends and staff

I value my friends and staff  
I like the staff  
I value my friends  
I value my friends and staff

I value my friends and staff  
I like the staff  
I value my friends  
I value my friends and staff

I value my friends and staff  
I like the staff  
I value my friends  
I value my friends and staff

I value my friends and staff  
I like the staff  
I value my friends  
I value my friends and staff

I value my friends and staff  
I like the staff  
I value my friends  
I value my friends and staff

I value my friends and staff  
I like the staff  
I value my friends  
I value my friends and staff

I value my friends and staff  
I like the staff  
I value my friends  
I value my friends and staff

I value my friends and staff  
I like the staff  
I value my friends  
I value my friends and staff

I value my friends and staff  
I like the staff  
I value my friends  
I value my friends and staff

I value my friends and staff  
I like the staff  
I value my friends  
I value my friends and staff

I value my friends and staff  
I like the staff  
I value my friends  
I value my friends and staff

I value my friends and staff  
I like the staff  
I value my friends  
I value my friends and staff

I value my friends and staff  
I like the staff  
I value my friends  
I value my friends and staff

I value my friends and staff  
I like the staff  
I value my friends  
I value my friends and staff

I value my friends and staff  
I like the staff  
I value my friends  
I value my friends and staff

I value my friends and staff  
I like the staff  
I value my friends  
I value my friends and staff

I value my friends and staff  
I like the staff  
I value my friends  
I value my friends and staff

I value my friends and staff  
I like the staff  
I value my friends  
I value my friends and staff

I value my friends and staff  
I like the staff  
I value my friends  
I value my friends and staff

I value my friends and staff  
I like the staff  
I value my friends  
I value my friends and staff

I value my friends and staff  
I like the staff  
I value my friends  
I value my friends and staff

I value my friends and staff  
I like the staff  
I value my friends  
I value my friends and staff

I value my friends and staff  
I like the staff  
I value my friends  
I value my friends and staff

I value my friends and staff  
I like the staff  
I value my friends  
I value my friends and staff

I value my friends and staff  
I like the staff  
I value my friends  
I value my friends and staff

I value my friends and staff  
I like the staff  
I value my friends  
I value my friends and staff