

**Opportunity Works**  
**Strategic Plan**  
**2010-2015**





## Our Vision

Individuals facing mental health challenges are healthy, successful, and contribute meaningfully to their communities.

## Our Mission

Opportunity Works provides unique peer coaching and education to aspiring entrepreneurs who live with mental illness.

## Strategic Plan

### Introduction

Opportunity Works has created the following plan to govern its strategy.

We recognize that as circumstances change for Opportunity Works, this plan will need to be re-visited and revised to meet changing circumstances. The following demonstrates how Opportunity Works intends to address the needs of the people we serve.

### How to Read this Plan

For the sake of clarity we have presented this plan as a series of tables designed to respond to particular areas of opportunity and challenge for the organization.

Each table contains a description of a challenge or opportunity that will be addressed, a list of actions we will take in order to address the challenge or opportunity, an explanation of what resources we will need in order to take those actions, and the outcomes we are seeking as a result of our action. The tables have been organized in this manner to ensure that the plan remains useful and widely used during its currency and to ensure that we remain accountable for Opportunity Works' success.

## Priorities Under this Plan

In allocating its resources and time, Opportunity Works will address our challenges and opportunities in the following priority:

Subject	Priority Level Of Subject in Plan
Program Improvements	High
Sustainability	High
Stigma	High
Public Profile	Moderate
Board Governance	Moderate
Relationships with the Business Community	Moderate
Organizational Relevance	Low
Growth Opportunities	Low

## The Term of this Plan

Opportunity Works will put this plan into practice from 2010 to 2015. Please note that under the section entitled *Organizational Relevance* Opportunity Works has included several mechanisms whereby this plan can be updated and adjusted.


## What is not in this Plan

There is or will be a separate financial plan, a marketing plan, and a fund development plan, all of which build on the basic framework set out in this Strategic Plan. These have been kept out of this Strategic Plan as they require more detail and greater flexibility than this outline provides.



**Opportunity Works Strategic Plan**

**Program Improvements**


Explanation	What will Opportunity Works do about it?	When?	With what resources?	How will we know we're successful?
<p>Mobility issues and travel distance are a barrier to accessing Opportunity Works services for some participants</p>	<p>Develop online coaching enhancement for those participants challenged by mobility issues and/or travel distance.</p>	<p>Beginning in August 2009 a trial with a small group began. In the summer of 2010 we will evaluate the impact of this program, and if it works well we will begin to promote online coaching.</p>	<p>Coaches, information technology support staff.</p>	<p>Outcome Measures results show improvement in self rating of mental health and business skill development outcomes by participants using online coaching.</p>
<p>Participants need privacy for coaching sessions and some events and workshops require a larger space than is currently available.</p>	<p>We have found a space that has private offices for coaching sessions, and will be collaborating with another human service agency in the community to share their large meeting space.</p>	<p>Early 2010.</p>	<p>Local organizations that have space they are willing to make available to us.</p>	<p>There is privacy for coaching sessions, and a space adequate for events and workshops.</p>
<p>There is a need to provide ongoing support to long term participants who do not require regular coaching and support. At the same time long term participants can benefit from opportunities to provide leadership and give back to the community.</p> 	<p>Create an 'Alumni' program, with coaching sessions as required to help participants maintain stability. Participants in the program will take a leadership role in Opportunity Works, such as Peering into Business networking group meetings, workshops and within the organization. Providing opportunities for ongoing growth will be a key element of this program. This program will build on what Opportunity Works currently provides. Participants will have a significant role in the design, implementation and running of this program.</p>	<p>The program will enter a design phase in March 2010. It will be formalized in the Fall of 2010.</p>	<p>Participants, staff, funders.</p>	<p>Participants who take part in this program report feeling satisfied with their opportunities to provide leadership in the peer support community. They also report that there is adequate support to maintain their stability and wellness.</p>

**Opportunity Works Strategic Plan**

**Sustainability with Limited Resources**

Explanation	What will Opportunity Works do about it?	When?	With what resources?	How will we know we're successful?
Opportunity Works must ensure its long-term viability, in the context of limited staff and financial resources. Being efficient in ongoing operations is difficult for a small organization.	Evaluate availability of funding specifically directed for sustainability.	2010 and ongoing	Organizational Sustainability Committee	Supports, both financial and other, are available for sustainability.
	Assess proportion of budget spent on sustainability activities.	2010 and ongoing	Organizational Sustainability Committee	
	Assess the availability of outside supports not previously used such as outside consultants.	2010 and ongoing	Organizational Sustainability Committee	
	Create an Alumni program. Please see Program Improvements Strategic Goal.	Please see Program Improvements Strategic Goal.	Please see Program Improvements Strategic Goal.	Please see Program Improvements Strategic Goal.
	Increase membership.	Ongoing.	Staff, volunteers, board, participants, members.	Membership increases.
	Make efficient and sustainable use of the services of volunteers.	Ongoing.	Staff, volunteer coordinator.	Volunteers continue to contribute to help sustain the organization.

### Sustainability with Limited Resources

Explanation	What will Opportunity Works do about it?	When?	With what resources?	How will we know we're successful?
	<p>Evaluate top operating position title and role to ensure viability and sustainability of the position. Identify key responsibilities of position. Retire or delegate non-key responsibilities. Assess relative/standard responsibility level and remuneration. Ensure a succession plan is in place.</p>	<p>2010.</p>	<p>Personnel Committee.</p>	<p>During the annual performance evaluation management personnel report that they enjoy their jobs and will consider themselves effective in their roles.</p> <p>Participants, staff, funders, board, members and volunteers consider management to be effective. This information will be gathered through informal contact, as well as any written or verbal communications made from these groups to the staff or board of Opportunity Works.</p>

## Opportunity Works Strategic Plan

### Stigma

Opportunity Works is not an advocacy organization. Opportunity Works will, however, address the social stigma associated with mental illness in two ways: First, to the extent that Opportunity Works' participants, staff, and volunteers demonstrate success in their capacity to succeed in life while being mindful of their mental health, they will be an example of how consumers of mental health services can be positively engaged in the community. Secondly, Opportunity Works will work directly to challenge the social stigma associated with mental illness to the extent it interferes with the accomplishment of its mission and vision.

Explanation	What will Opportunity Works do about it?	When?	With what resources?	How will we know we're successful?
1. Some entrepreneurs who might be able to benefit from Opportunity Works' services consider it to be a sign of failure on their part to require mental health support.	1a. Opportunity Works will enhance the intake experience to emphasize that using the tool of peer coaching is a positive, effective use of resources for a business.	1a. The intake process will be examined in the fall of 2010, but its assessment will be an ongoing activity throughout the course of this plan.	1a. Staff	1a. New participants report that the intake process is a positive experience. This will be measured as part of the participant milestones
	1b. Opportunity Works will enhance the physical environment in order to support a business friendly environment.	1b. We will be relocating in 2010.	1b. Funders, staff, volunteers.	1b. Opportunity Works physical environment is business friendly
	1c. Opportunity Works will help the business community recognize the importance of balance between economic success and mental health.	1c. Please see Relations with the Business Community.	1c. Please see Relations with the Business Community.	1c. Please see Relations with the Business Community.


## Stigma

Explanation	What will Opportunity Works do about it?	When?	With what resources?	How will we know we're successful?
	1d. Staff training in business management skills will further enhance the value the community places on their work	1d.Ongoing.	1d. Other self-employment oriented agencies, educational institutions and funders.	1d. Participants will report that they are receiving coaching that helps them with business issues.
2. Relationships with funders other than government and foundations can be challenging due to mental health stigma.	2a. In approaching potential funders, Opportunity Works will emphasize that the success of Opportunity Works' programs benefit the business community by bringing otherwise under- or unemployed Calgarians into the marketplace.	2a.Ongoing.	2a. Staff, Fund Development Committee.	2a. Potential funders will be willing to support Opportunity Works not only because it is a worthy cause, but also because they see the benefit to themselves of developing a healthy community of entrepreneurs.
3. Opportunity Works could be more effective if there was a reduction in the broad societal stigma around mental illness	3a. Opportunity Works will prepare and deliver information and education sessions that will work to reduce stigma, alone and in collaboration with other organizations, in various public venues. Please see Relations with the Business Community for more detail.	Ongoing	3a. Staff and volunteers.	3. The Calgary and global view of mental health is transformed from seeing it as a problem to seeing diversity as a strength. For example, more positive community attitudes and media reporting. This will not be directly measured.

## Stigma

Explanation	What will Opportunity Works do about it?	When?	With what resources?	How will we know we're successful?
	<p>3b. Opportunity Works will approach media outlets who may be interested in the work of Opportunity Works, with an emphasis on publications or parts of publications that are focused on business issues. The main aim will be to make it unremarkable that someone with mental health challenges would be interested and competent in self-employment, and that being conscious of one's mental health is just as important for any entrepreneur as being aware of one's physical or fiscal health.</p>		<p>3b. Staff and Marketing Committee. Please see Marketing plan, available by request.</p>	

## Stigma

Explanation	What will Opportunity Works do about it?	When?	With what resources?	How will we know we're successful?
	<p>3c. Opportunity Works will focus its communications with the public on the positive goal of achieving mental health in the workplace rather than on the negative goal of avoiding or ameliorating mental illness. As an analogy, Apple Computers carried out a very successful advertising campaign in the 1990s called "think different" which emphasized the positive attribute of their products in that they worked differently from the mainstream of computing and by extension permitted the products' users to behave in a more unique manner. Opportunity Works' public communications will emphasize the positive attributes of diversity in cognitive approaches.</p>		<p>3c. Staff, board and volunteers</p>	

Opportunity Works Strategic Plan

Public Profile

Explanation	What will Opportunity Works do about it?	When?	With what resources?	How will we know we're successful?
Opportunity Works and its peer coaching model is not well-known or understood in the Calgary community.	Integrate opportunities to explain peer coaching into existing public events	As opportunities present themselves.	Staff, volunteers, board, participants, existing Opportunity Works events	Each time Opportunity Works has an opportunity to educate the public about peer coaching at an existing public event, it does so.
	Develop, maintain and update promotional plan.	February 2010.	Marketing Committee	We maintain an effective and flexible plan that responds to organizational needs
	Opportunity Works staff and volunteers will make use of opportunities to interact with the public and continue to set up opportunities for participants to promote business services and products	Ongoing.	Staff, volunteers, board, participants	We make public presentations, and host information tables.
	Opportunity Works will hold events that will receive attention from local media	Ongoing.	Special Events Committee, Marketing Committee, staff.	We receive media coverage at at least one event each year.


## Public Profile

Explanation	What will Opportunity Works do about it?	When?	With what resources?	How will we know we're successful?
	Opportunity Works will host or co-host, or present papers at, conferences providing it with an opportunity to explain its work and expand on the peer mentoring process. Opportunity Works staff will receive training in small business skills, entrepreneurship and to some degree in mental health issues and will make use of those opportunities to explain Opportunity Works' peer coaching model.	2011 and after.	Staff, volunteers, board, participants	We will host or co-host, or present papers at least one conference in 2011, and every other year thereafter.
	Opportunity Works will work with mental health organizations using the peer model to develop a broad societal acceptance of peer mentoring as a model for service delivery.	Ongoing.	Staff, participants	Partners will be identified, and joint projects or advocacy groups set in motion
	Opportunity Works will invite examination and study by academic institutions of the peer mentoring model	2012 and after.	Academic institutions.	Opportunity Works is involved with research projects.
	Opportunity Works will take steps to raise awareness among psychiatrists, psychologists and therapists of Opportunity Works' peer coaching model as an option for their patients.	Ongoing.	Staff, volunteers, board, participants	Increased referrals from psychiatrists, psychologists and therapists.



Opportunity Works Strategic Plan

Board Governance

Explanation	What will Opportunity Works do about it?	When?	With what resources?	How will we know we're successful?
 <p>Opportunity Works needs to ensure that we have an effective board</p>	Continually recruit a strong board, with a sufficiency of competent board members.	Ongoing.	Governance Enhancement Committee, volunteer coordinator, board members	There is an adequate number of board members, with the appropriate skills to perform all of the duties of the board of directors, and there are enough people who want to be on the board so that members can be rotated. While "adequate number" and "appropriate skills" cannot be measured objectively or defined precisely, success will be apparent from the improved function of the board.
	Determine "Why would a person want to volunteer on the OW board?" Survey current and past board members on this topic.	Before 2010 AGM.	Governance Enhancement Committee	Opportunity Works recruits efficiently, focusing on individuals who will want to be on the board and be effective on the board.
	Establish procedure for interviewing potential board members, orienting them, establishing areas of interest and availability, and providing them with a board mentor.	Before 2010 AGM.	Governance Enhancement Committee, staff, board members.	Procedure is in place.
	Retain and empower board members.	Ongoing.	Board Members, Staff, Governance Enhancement Committee.	Board members report that they feel good about their work and are inspired.

Opportunity Works Strategic Plan

Relations with the Business Community

Explanation	What will Opportunity Works do about it?	When?	With what resources?	How will we know we're successful?
Opportunity Works will strengthen connections and increase Opportunity Works' profile among entrepreneurs within the Calgary community.	Opportunity Works will recruit board members with entrepreneurial backgrounds and/or demonstrated capacity to connect with the entrepreneurial community.	September 2010 Annual General Meeting and ongoing.	Board Members, staff, Governance Enhancement Committee, memberships in Volunteer Calgary and Calgary Chamber of Commerce.	Members of the Calgary entrepreneurial community will be aware of Opportunity Works and may self-refer to Opportunity Works.
	Opportunity Works will carry out public events that solidify the relationship between Opportunity Works and the business community. Events will be advertised to the business and professional community.	Spring of 2010 and ongoing.	Board, Staff, Volunteers, Marketing Committee, Special Events Committee.	Entrepreneurs will consider the work of OW to be beneficial to the success of their own businesses and to the health of the market generally and as a result entrepreneurs will provide financial and other support to Opportunity Works.
	The External Review Committee will exist to provide input from the business community on Opportunity Works' relevance to the Calgary entrepreneurial community's needs. Please see Organizational Relevance for details.	Please see Organizational Relevance for details.	Please see Organizational Relevance for details.	On an ongoing basis, members of the Calgary business community will consider Opportunity Works to be performing a useful role in the Calgary community and will express an enhanced understanding of the value of mental health in their own daily lives. We recognize that this is not something that can be quantified.

### Relations with the Business Community


Explanation	What will Opportunity Works do about it?	When?	With what resources?	How will we know we're successful?
	<p>Opportunity Works will seek out individuals in the business community with connection or personal experience to mental health to encourage their involvement as a volunteer for fundraising and/or profile-raising activities.</p>	<p>2013.</p>	<p>Board, staff, volunteers.</p>	<p>Opportunity Works will cultivate positive relationships with potential donors in the business community. There will be an increase in private and corporate funding sources, and increased public profile.</p>

Opportunity Works Strategic Plan

Organizational Relevance


Explanation	What will Opportunity Works do about it?	When?	With what resources?	How will we know we're successful?
<p>Opportunity Works is only valuable to the community so long as its mission and its work is of service to the mental health community, business community and greater Calgary community.</p>	<p>Opportunity Works will maintain the Organizational Sustainability Committee, made up of directors, participants, volunteers and staff whose task is in part to ensure that Opportunity Works remains of relevance to all people who can potentially benefit from its services.</p>	<p>Ongoing.</p>	<p>Volunteers, board, staff.</p>	<p>Opportunity Works participants, volunteers, funders and supporters consider OW to be of value to the community. We will not be conducting a formal survey.</p> <p>People and communities that could benefit from Opportunity Works' expertise come forward to make use of those services and report them to be helpful in improving their well-being.</p>
	<p>The External Review Committee, an advisory group of outside business-people and representatives of other mental health organizations, will be created to meet annually and act as an outside check on the degree to which Opportunity Works continues to perform a useful function.</p>	<p>March 2010 and ongoing.</p>	<p>The Board Chair will invite agencies to appoint members to the outside advisory group. Volunteer Coordinator.</p>	<p>Funders and supporters consider and report that Opportunity Works consistently and continuously provides services that benefit the community.</p> <p>Opportunity Works will have a strong case for organizational relevance that it can share with potential financial and volunteer supporters and participants.</p> <p>The Board of Opportunity Works is able to use survey results to fine-tune this strategic plan during its currency.</p>

## Organizational Relevance

Explanation	What will Opportunity Works do about it?	When?	With what resources?	How will we know we're successful?
	<p>Opportunity Works will ask and/or encourage outside academic institutions to examine Opportunity Works' relevance to the needs of the community. The focus will be on honing and fortifying Opportunity Works' outcome measures. We will capture the greater community impact that Opportunity Works has, and the long term outcomes experienced by participants.</p>	<p>2010</p>	<p>Staff, academic institution(s), board, volunteers.</p>	<p>Opportunity Works is able to enhance our strengths and continually review our programs for possible improvement.</p> <p>Participants receive the supports they need, when they need them, in order to succeed.</p>
	<p>Opportunity Works will survey participants, referral sources, members of the Calgary business community, funders and volunteers. Opportunity Works will make the survey results available to stakeholders and will use these survey results to pursue continuous improvement.</p>	<p>Survey data will be collected continuously. Analysis of the survey data will occur beginning March of 2013 and annually thereafter.</p>	<p>Staff, Organizational Sustainability Committee.</p>	

**Opportunity Works Strategic Plan**

**Growth Opportunities**

Explanation	What will Opportunity Works do about it?	When?	With what resources?	How will we know we're successful?
<p>Opportunity Works will remain open to opportunities to grow and develop the services it renders to the community and to serve more communities. At the same time, Opportunity Works must balance an openness to growth with the need to remain focused on achieving its mission and vision.</p> 	<p>Opportunity Works will assess leveraging its program model to serve new client groups. For example;</p> <ul style="list-style-type: none"> <li>- Forming alliances in providing services with other organizations.</li> <li>- Accessing clients from employee assistance programs.</li> <li>- Serving some clients on a fee-for-service basis, including doing so on a sliding scale, where this will permit Opportunity Works serve a wider group of people who could be helped by our services.</li> <li>- Marketing made-in-Opportunity Works tools to other organizations.</li> <li>- Marketing some form of Opportunity Works' program online.</li> </ul>	<p>Opportunity Works will pursue these opportunities as they become available. Targeted work to grow Opportunity Works will begin in 2013.</p>	<p>Board, staff, volunteers, potential new funders.</p>	<p>Viability of growth opportunities is evaluated and promising opportunities are pursued.</p>