

## Strategic Plan 2022-2026

The Board of CWCF has decided to recommend a continuation of the last Strategic Plan with some refinements. For the first time in 2018, CWCF hired an external consultant to develop the 2018-2022 Strategic Plan. The reason for the continuation is that this process was very thorough, and the Board believes that the work done is still relevant today.

The additions are primarily around the Racial Justice work (which was not in the last Plan though was in effect added by the Board, through the leadership of the JEDDI Committee) as well as to strengthen the activities under Building the Solidarity Economy. Regarding the budget column, these items are in the current year's budget and presumably can be continued into future years, unless noted in a comment.

### I. Engage and Strengthen Current Members

Key Activity	Details	Budget
1. Engage worker co-op members in a variety of ways; in-person, social media, and conferences	<ul style="list-style-type: none"> <li>Launch annual new email /telephone campaign to all members to check in with them and see how they are doing.</li> </ul>	Staff time
	<ul style="list-style-type: none"> <li>Visit in person or virtually a minimum of 50% of our regular members annually</li> </ul>	\$5,000 annually for travel
	<ul style="list-style-type: none"> <li>Continue the member profile section of the newsletter and profile one member per newsletter.</li> <li>Include other types of members in the profiles including associate, developers, regional (Quebec) federations, and members of the regional federations.</li> </ul>	Staff time
	<ul style="list-style-type: none"> <li>Continue blog to post on our website, social media and in our newsletter.</li> <li>Explore and follow up on new focus areas, e.g., on co-ops in BIPOC communities/ JEDDI work, co-ops and climate change,</li> </ul>	Staff time

Key Activity	Details	Budget
	the Solidarity Economy, and the continuing ICA consultations on the Co-op Identity Statement.	
	<ul style="list-style-type: none"> <li>• Develop and implement a Social Media strategy to engage members, potential members and allies within our overall Communications strategy/plan.</li> <li>• Social media platforms currently include Instagram, Facebook, (Twitter) &amp; YouTube. Add as well, Linked-In going forward and eventually, TikTok.</li> <li>• Include Academy introductory videos on CWCF's YouTube channel &amp; website.</li> </ul>	Staff time
	<ul style="list-style-type: none"> <li>• Provide incentives, travel subsidies and other support, when possible, to engage more members to attend our conferences.</li> <li>• Bring in excellent worker co-op movement speakers from around the world through technology.</li> <li>• Provide virtual/hybrid options to the extent feasible.</li> </ul>	\$5,000 annually for incentives and subsidies. Add conference budget of at least \$3,000 for hybrid conference support.
2. Improve the Technical Assistance Program including grants component	<ul style="list-style-type: none"> <li>• Increase the top limit of the grants and increase the overall budget to allow increased development for worker co-operatives.</li> </ul>	\$55,000/annum (\$4,000 top limit for each grant,)
	<ul style="list-style-type: none"> <li>• Promote the TA grants to members noting the increase in amounts.</li> <li>• Follow-up with articles about recipients of TA grants to highlight them.</li> </ul>	Staff time
	<ul style="list-style-type: none"> <li>• Continue to vet and ensure that the TA grants that are approved retain quality consultants.</li> </ul>	Staff time
	<ul style="list-style-type: none"> <li>• Continue to use the final evaluation form to obtain feedback prior to paying out the developer/ consultant.</li> <li>• Consider implementing a one-time survey on past recipients to determine value, process, etc. on the TA program.</li> </ul>	Staff time
3. Build up and strengthen leadership	<ul style="list-style-type: none"> <li>• Develop a strategy/plan for volunteer recruitment including board members and committee members.</li> <li>• Develop a more formal board orientation.</li> <li>• Engage in succession planning for both staff and board.</li> </ul>	Budget TBD Staff time

Key Activity	Details	Budget
	<ul style="list-style-type: none"> <li>Develop more information around board governance and the importance of member engagement with CWCF (e.g., AGM/Board).</li> </ul>	
4. Recruit new regular members	<ul style="list-style-type: none"> <li>Research a list of worker (and multi-stakeholder) co-ops and implement membership drive to invite these potential members to join CWCF.</li> </ul>	Staff time
5. Grow the Tenacity Works Investment Fund	<ul style="list-style-type: none"> <li>Apply for capital from the Social Finance Fund to the degree it's relevant for our Fund.</li> <li>If/ when the federal CEBA loans come due (currently scheduled for 12/23), offer TW Fund loans to enable members to pay back a portion fully, and thereby keep the grant portion.</li> </ul>	Staff time Investment Review budget
	<ul style="list-style-type: none"> <li>The new interest rate is 4-8% range that can be determined by the investment committee depending on the risk level of the loan.</li> </ul>	
6. Enhance management skills in worker co-ops	<ul style="list-style-type: none"> <li>Continue to offer our Worker Co-op 101 series.</li> <li>Develop a Worker Co-op 201 series.</li> <li>Develop and offer other one-off webinars as pertinent.</li> </ul>	Budget TBD
	<ul style="list-style-type: none"> <li>Continue to offer an intensive worker co-op session at our annual conference</li> </ul>	Included in conference budget
	<ul style="list-style-type: none"> <li>Consider offering a worker co-op cloud bookkeeping service &amp; other back-end services, potentially in conjunction with BCCA/ACCA.</li> </ul>	Budget TBD
7. Work more closely with the Quebec Worker Co-op Federations	<ul style="list-style-type: none"> <li>Collaborate around the fall 2023 conference in Quebec City.</li> <li>Collaborate on federal lobbying issues</li> </ul>	Staff time

## II. Build Awareness and Scale Up Worker Co-ops

Key Activity	Details	Budget
8. Support worker co-op development	<ul style="list-style-type: none"> <li>• See also the TA grant program.</li> <li>• Consider developing a template feasibility/business plan for one of the following industry sectors with particular interest in / need for worker co-op development: home care, platform co-ops, etc.</li> </ul>	Budget undetermined (Possibly to be sourced elsewhere)
9. Promote and demonstrate the value of the worker co-op model	<ul style="list-style-type: none"> <li>• Develop and promote a case study, brief, and/or blog series to highlight the value of the worker co-op model, including worker co-op successes, and rationale.</li> <li>• Worker co-op profiles.</li> <li>• Social media posts highlighting the value of the worker co-op model.</li> </ul>	Staff time
10. Offer and continually improve the worker co-op start-up training program, Worker Co-op Academy	<ul style="list-style-type: none"> <li>• Hold two intakes per year in spring and fall</li> </ul>	\$40,000 per annum
11. Develop a marketing strategy for co-op business succession	<ul style="list-style-type: none"> <li>• Through the JEDDI Business Conversion project, develop a marketing strategy focused on Equity-Deserving Groups.</li> <li>• Identify and target a minimum of one opportunity for conversion in conjunction with the JEDDI project</li> </ul>	Initial budget of \$10,000 to develop the opportunity
12. Engage in federal and provincial lobbying on worker co-op interests	<ul style="list-style-type: none"> <li>• Analyze CWCF's lobby priorities, deciding which elements to keep, which to amend or remove, and what to add - all with the goal of supporting the development and strengthening of worker co-ops.</li> </ul>	\$10,000 to \$30,000 to be confirmed annually by the board.

### III. Build the Solidarity Economy

Key Activity	Details	Budget
13. Collectively collaborate with solidarity economy organizations	<ul style="list-style-type: none"> <li>Seek to collaborate effectively with other organizations working in co-op development across Canada, in conjunction with CMC and CoopZone.</li> <li>Develop a strategy for an Ecosystem development project</li> <li>Continue to engage to enact the Solidarity Principles.</li> <li>Collaborate with trade union initiatives which have interest in worker co-ops, e.g., SEIU, UCI (Union-Coops Initiative in BC), Steelworkers.</li> </ul>	Staff time.
14. Increase racial justice in the worker co-op movement	<ul style="list-style-type: none"> <li>Seek funds or sponsorship to leverage CWCF's funds for grants and bursaries.</li> <li>Implement Action Plan</li> <li>Complete the initial JEDDI Business Conversion project and seek to continue the development by supporting new conversions.</li> </ul>	<p>\$17,000 annually for grants / bursaries.</p> <p>Part of the Racial Justice Action plan is a needs assessment; this would need a budget of \$5,000 - \$15,000, TBC.</p>

### IV. Other CWCF Strategies and Activities

Key Activity	Details	Budget
15. Communicating our strategic plan	<ul style="list-style-type: none"> <li>Develop an updated communications strategy and action plan and update this plan annually.</li> </ul>	Staff time
16. Provide and promote other continuing member services: the RRSP/ TFSA program, and insurance programs	<ul style="list-style-type: none"> <li>Promote CWCF's Common Good Capital Registered Plans program to improve access to capital for community economic development.</li> <li>Promote Co-operators' Member Benefits Program and Co-op Guard</li> </ul>	Staff time