



Transition and Renewal – What’s Next for The Haven

Business Plan for 2018 – 2020

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Executive Overview

The Haven is more than an educational facility that focusses on personal and professional development. It is also a caring and compassionate community that works together to ensure our participants, guests, faculty and staff are making a difference in the world. The Haven is a place that transforms lives thereby bringing positive change into the world through personal growth and realizing our full human potential. We are part of a world-wide movement that provides a container for self-discovery and exploration that has unlimited potential.

And now, The Haven is undergoing its own transformation as we transition from the hands-on leadership of the founders; to the startup, implementation and nurturing of a not for profit organization; to the current state of affairs in 2018 and where we find ourselves today.

The organization has now reached a maturity level in the life-cycle of a non-profit organization that is typical and predictive. A place where maintaining the status quo will no longer serve us or allow for the growth we need to reach our objectives. History is instructive and can teach us valuable lessons. It is imperative that we sustain and build on the core programming that has formed the foundational building blocks of who we are. Our history cannot, however, determine our future and we need to forge a path of renewal, revitalization and emergence that will support the long term sustainability of the organization for generations to come. Our focus needs to be client-centered marketing, with a strong emphasis on leading edge programming, that continually challenges our relevancy and provides what seekers are searching for, not just what will sell. We need to rebuild our financial footings through expanding our reach and exploring new markets.

The Haven needs to rise as a world renowned personal development center that is full to capacity every day. Our unique proprietary programming can inspire and attract seekers from around the globe. Our growing suite of complimentary programming is inclusive and appeals to a diverse cross section of humanity. Our physical location and facilities create the perfect learning environment where everyone feels welcome and well taken care of. Our ability to offer alternative delivery methods allows us to engage cultures in both remote locations and online learning which extends our reach into the world.

I believe we, the Haven community, have an opportunity to lead and create a world that is a better place to live! If we are going to have the type of social impact we are capable of, it will require all of us to pitch in and bang the drum together. This Business Plan will outline those goals and objectives for the next 18 to 24 months that will secure our future and allow for the growth and rejuvenation necessary to carry the Haven into the future.



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Haven Foundation

Vision

The Haven is an exceptional institution creating a relational world where every person is whole and responsible for themselves and their environment, and where all life is met with dignity and respect, open curiosity, and loving compassion.

Mission

The essence of The Haven is human connection and recognition, supported by our structure and spirit. To support each participant in fulfilling their potential, we operate a residential training center providing high-quality, transformational learning experiences in a group setting. We promote self-responsibility, effective communication, healthy relationships and integration of body-mind-spirit through experiential learning. We operate with love, integrity and respect for humanity and our environment and we manage our resources responsibly and effectively.

Values

- Loving – caring, direct honest communication, active kindness and the acceptance and consideration of self and others.
- Integrity – ensuring our words match our behaviour in a context of personal and collective accountability.
- Joy – in celebrating and sharing who we are and what we offer.
- Freedom – illustrated through open and passionate questioning. delete
- Respect – through valuing differences and through consideration of others.
- Self-Responsibility – through every person taking ownership for their part in every life situation, including one’s own patterns of behavior and impact.
- Relationship – it is in relationship with others that we can best heal past wounds, learn about ourselves in the present and create the future for ourselves that we desire.



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Global Ends

The Haven Foundation operates using Policy Governance®, an integrated board leadership paradigm created by Dr. John Carver. Policy Governance separates issues of organizational *purpose* (Ends) from all other organizational issues (Means). Primary importance is placed on Ends, special types of goals that designate the *results* for which the organization exists, the *recipients* or beneficiaries of the results, and the *resources* required to achieve the results.

- **Results** – participants leave Haven programs curious about and engaged in self-responsible relational living.
- **Recipients** – people of diverse backgrounds and perspectives who are willing and able to take advantage of the Haven educational format.
- **Resources** – the majority of the funds generated by the organization is used to achieve the global ends.



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Assumptions

A set of assumptions was identified for the 2015 Strategic Plan by the Haven Foundation Board. These assumptions remain true for this revised plan as summarized below.

Longevity – we will operate indefinitely; our decision-making process considers future impact.

Location – we will maintain our physical presence on Gabriola Island and conduct operations year-round, including accommodations and food services.

Educational format – we will continue to offer transformative learning experiences in a group setting, grounded in a common, dynamic, and evolving philosophical foundation expressed in programs such as Come Alive and the Living Alive Phase programs. We strive for a rich synergy of Haven-developed and leader-owned programs. Our programs are educational – not substitutes for psychotherapy or medical therapy.

Growth – we will seek opportunities to expand our educational reach to make a bigger difference in the world.

Team – we will continue to engage, energize and retain our faculty and staff, recognizing that their passion and caring are essential to the learning and growth of our program participants.

Charitable purpose – we will keep our programs accessible to people with diverse backgrounds, perspectives and economics; we will offer financial aid to participants in need; and, we will invest any surplus to achieve the global ends.

Responsible – we will operate in a manner that yields a positive environmental and social impact - our results and achievements will be attained through sustainable and responsible activities.



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Risks

Many of the risks associated with our 2015 plan remain true for this revised plan. The opportunity offered to The Haven is to mitigate many of these risks by means of the goals presented in this document.

Therefore for the purpose of this document our risks are such that.....

Water... regulatory restrictions and limited water source options will combine to interrupt our ability to operate on Gabriola.

Succession... we will not successfully attract, recruit and train the next generations of faculty, staff and board. Even if we are successful, we are not able to maintain the same high level of quality.

Facilities... economics will not allow us to upgrade and replace aging facilities and infrastructure.

Revenue and Fundraising... we will be unsuccessful in maintaining and developing adequate sources of operating revenue and new sources of fundraising revenue, remaining reliant upon a limited pool of past participants and donors.

Referrals... we will be unsuccessful in developing new ways to attract participants, remaining reliant upon a limited pool of personal references.

Curriculum... the Haven core curriculum and/or its method of delivery does not remain relevant for future generations, or we don't do a good enough job of communicating its relevance and offering it in formats that are accessible to a greater number of people. Same is to be said for Leader-led programs. These programs are not considered leading edge and aligned with what personal growth seekers are searching for.



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Goals

Relationships

- 1 Strategic Partnerships
- 2 Community Connections
- 3 Holistic Centers Network

Programs

- 4 Come Alive 24 plus 3
- 5 Expanding Haven Programs
- 6 Program Completion Rates
- 7 Tuition Pricing

Operations

- 8 Balanced budget for 2019
 - 9 Realign the Program Calendar
 - 10 Occupancy
 - 11 Stay water smart
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Relationships	Strategic Partnerships	
1	Goal	<p>Cultivating partnerships that further The Haven’s mission will be our catalyst for growth in 2018 and beyond – relationships with professional associations, large businesses, organized labour, community groups, education and training organizations, and more. Establish new long term, sustainable, major partnerships with compatible organizations that will extend the reach of the Haven and establish new markets. Our challenge will be to modify some of our existing programming to accommodate a new audience in an environment that is supportive of what businesses and organizations need in the world today. We will need to be mindful that groups from within the same organization will present new challenges within the context of sharing personal information while being respectful of personal privacy.</p>
	Rationale	<p>Word of mouth referrals are diminishing and we need to find new avenues that will broaden our reach and ensure The Haven attracts sufficient future participants to meet its financial goals.</p> <p>This is also a key element which contributes to the Havens influence in creating a better world to live in.</p>
	Strategies	<p>Encourage engagement of the Haven community to bring forward possibilities/opportunities/contact information to meet with or call on professional associations, large businesses, organized labour, education and training organizations etc.</p> <p>New programming may need to be developed to ensure we are not ignoring the elephant in the room. “Being vulnerable” with your real everyday co-workers. Focusing on the Haven models at the onset could lead to further engagement at the discretion of the group. It is very likely we will need to be more mindful of issues such as vulnerability and bodywork without accepting this will be the same in every case while ensuring we always leave the choice to go deeper on the table.</p>



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Create a targeted “connectors” initiative that encourages our program leadership to identify and approach participants who have the potential to provide connections from within their community.

Communications through traditional methods (website, FaceBook, e-news etc.) and new social media channels as well as our internal leadership network with an appeal to forward contact information to the ED where these opportunities might exist.

Targets

Establish 3 new partnerships in 2018 and with a goal to add three more in 2019



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Relationships	Community Connections	
2	Goal	Establish a number of strong connections and allies within our immediate Gabriola community that will assist with projecting the Haven we want to be known as, rather than the reputation that has preceded us. Rather than being perceived as secretive, isolated and detached, become integrated and an inclusive community partner that can pull us together, contributing to the growth and reputation of the Gabriola community.
	Rationale	We are a reflection of our community. Community relations is critical to the success of our organization – our brand and integrity are influenced by the perception of the community and it is critical to have good relationships that will foster positive feedback and referrals
	Strategies	Pursue community organizations that have the most potential impact on our brand and employees, and engage them in a meaningful and substantial manner, thereby becoming more involved as a community leader, as opposed to a bystander.
	Targets	Engage with and establish strong relations with 3 community organizations in 2018 with the intent to continue to grow those numbers in 2019 wherever possible. There are a limited number of organizations to engage with in the community of Gabriola



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Relationships	Holistic Centers Network	
3	Goal	Increase the Havens exposure to potential clients through building relationships with other centers inside the Holistic Centers Network . As a partner of the network we could encourage collaboration and promotion of one another’s centers with the goal of sharing information for the benefit of the participants which will ultimately benefit all the centers engaged in the network.
	Rationale	The HCN offers a platform for us to engage with similar organizations around the world, to collaborate, learn and address common challenges and opportunities. The Haven has participated with this network for many years, and has hosted the 2006 and 2014 Centers Gatherings.
	Strategy	Ensure that The Haven participates in the monthly HCN web meetings. E.D. and other staff member (s) to attend the HCN’s Centers Gathering. Determine potential projects to work with other centers on areas of mutual interest i.e. a program information sharing platform that can be promoted, shared and used by participants of all HCN organizations
	Target	Nurture three new relationships with similar centers in the spirit of collaboration and learning



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Programs	Come Alive 24 plus 3	
4	Goal	The Haven needs to significantly increase/grow our overall participants per program in the coming months and to retain/grow those increases over the years until we maximize our program and facility capacity. Ultimately the goal of The Haven is to broaden our reach in the world, making it an attractive and exciting place where people want to come to learn.
	Rationale	Numbers don’t lie. Over the last ten years there has been no discernable increase in participants per program for either our core programs or for our third party leader led programs. Conferences and workshops tend to fill gaps where and when opportunities align.
	Strategy	<p>Implement an incentive plan that provides a discount for new Come Alive participants which will immediately secure additional referrals.</p> <p>Identify partners that can provide a compatible target audience and would benefit themselves by receiving a credit for educational programming at the Haven. If both the referees and referrers receive an equal and mutual benefit we create a win/win/win for both the participants and the Haven.</p> <p>Accelerate our internal and external marketing plans. Internally through engaging the Haven community as ambassadors of our organization and externally through raising the bar on traditional marketing practices with our catalogue, brochures and other outreach opportunities as well as working on developing and activating new opportunities in digital marketing and social media.</p>
	Targets	Every Come Alive program should have a minimum of 24 participants. This will allow us to revitalize some word of mouth referrals as the Come Alive program is the foundational program from which most other referrals originate from. In conjunction with Come Alive 24 all other Haven programs should attract at least three more participants per program.



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Programs	Expanding Havens Programs	
5	Goal	To grow The Havens’ programming calendar, expanding both core curriculum programs and third party leader led programs.
	Rationale	As the interests and needs of our existing markets change, and as we seek new markets, we need to remain relevant and attractive. Leader-driven programs offer a low-risk opportunity to test new program topics and new audiences. Our challenge is to add a few repeatable, sustainable programs in 2018, and establish a new team that can further expand our core program breadth in 2019, and beyond.
	Strategy	<p>Investigate creating core programs in new areas:</p> <ul style="list-style-type: none"> ➤ Haven for business. ➤ Haven young adult programs ➤ Introduce a Haven specific Yoga stream <p>Create a new genre of third party leading edge programming:</p> <ul style="list-style-type: none"> ➤ Outdoors and Nature ➤ Diversity and Inclusion ➤ Popular speakers series <p>Establish a new role; Director of Program Development, focused on this objective</p> <p>Seek input from Haven Community, Faculty, Management and Board</p>
	Targets	Bring the new position of Director of Program Development on line. Identify as a minimum 3 new third party leader led programs for 2018 and get them on the schedule to fill existing gaps. Work towards implementing 30 to 40 new programs by the end of 2019. Begin to work on creating some new Haven core programs, adding at least one new core program for 2019 and continue to explore creating a new stream of programming in Business or Yoga.



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Programs	Program Completion Rates	
6	Goal	To ensure that a greater percentage of programs listed in our calendar and are scheduled to run actually run.
	Rationale	2017 completion rate was approx. 78%. Of the 90 programs scheduled, 19 did not run, due primarily to low enrolment. This contributed to a loss of over 400 participant nights.
	Strategy	<p>Institute a marketing strategy to assist leaders in ways to increase their own reach within their own networks and help promote programs on behalf of other leaders.</p> <p>Extend our reach through a digital and social media strategy that will help The Haven expand into new markets with new target audiences</p> <p>Offer flexibility in program pricing through incentives to attract the right participants at the right time</p>
	Targets	To deliver 90% of the scheduled programs on our calendar



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Programs	Tuition pricing	
7	Goal	To ensure the cost of program delivery, plus a small margin to build an operating reserve, is reflected in the tuition fees that are charged for our programs.
	Rationale	Historically, tuition has been marginally increased year to year, across the board, by an arbitrary amount based upon previous years and a subjective sense of <i>market ceiling</i> . Unfortunately, there has been no relational context developed to determine the true cost of program delivery.
	Strategy	During 2018, we will detail our costs and conduct a competitive analysis, determine our most popular and profitable programs, and develop a new pricing rationale. We will create a new, sustainable predictive model for all programs that can be relied upon for future price structuring.
	Target	By July 1 we will have determined the cost of program delivery and will determine new pricing for 2019 that will include a margin of 10% to build an operating reserve



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OPERATIONS A Balanced Budget for 2019		
8	Goal	The 2019 budget will be predicated on revenue being equal to or exceeding expenditures and having a positive cash position for the budget year.
	Rationale	In the past, budgets have been largely based upon historical performance and a subjective sense of potential. Prior to mid-2017, cash position forecasts were not included in the board package.
	Strategy	<p>Use models and predictive tools to make data-driven decisions, design an achievable balanced budget for 2019</p> <p>Operate to yield a positive annual cash position based on what predictive and historical information we have at our disposal. The most difficult part of this strategy being complete as we do have a model in place that can determine what our overall cash position is and will be both monthly and annually.</p>
	Target	Balanced budget and positive cash position for 2019 fiscal year



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Operations	Realign the program calendar	
9	Goal	To increase efficiency and effectiveness of operations by changing aspects of how we currently run programs.
	Rationale	Earlier access to <i>next year’s</i> program calendar will maximize convenience for participants and facilitate advanced marketing campaigns. Start dates will be aligned to improve labour efficiencies, and better enable our employees to plan their work life. Considerable cost savings can be achieved through this kind of approach, as well as increased opportunities for interdepartmental efficiency.
	Strategy	<p>Adjust program start dates, meals, room set up, department organization, hours of operation etc. to optimize operations and eliminate expensive redundancy and exceptions.</p> <p>Utilize technology to support these changes and ensure that they work.</p> <p>Allocate resources to make calendar publication a priority, standardize start dates of 2019 programs (certain days of the week).</p>
	Target	By Sept 1 st our realigned program schedule will be complete and will include new programming and pricing for 2019



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OPERATIONS	Occupancy	
10	Goal	To ensure that The Haven operates at an occupancy level that allows for financial and operational efficiency.
	Rationale	2017 saw 7196 nights for 51% occupancy. 2018 budget is 6631 nights for 49% occupancy.
	Strategy	Fill 3 gaps in the 2018 programming schedule with additional programs, conferences or events; Plan for no significant gaps in the 2019 program
	Target	Challenge for 2018 is 55% occupancy with 7330 nights, 6% more than budget. Our overall 3 year goal should be to secure a consistent occupancy rate of 70 to 80 %



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OPERATIONS Stay water smart	
11	<p>Goal To ensure that The Haven will have sustainable, safe and sufficient sources of water.</p> <hr/> <p>Rationale Water has been a precious resource throughout The Haven’s history, and it is not possible for The Haven to operate without sufficient supply. We are fortunate to have an established culture of water conservation and planning for the future including water as a vital component. As climatic conditions change, The Haven needs to do more to ensure that we can continue to operate on Gabriola Island. The Haven is well positioned to be at the leading edge of commercial water management.</p> <hr/> <p>Strategy Every possible step is taken to ensure that The Haven uses the minimal amount of water needed, and that we deal with waste water sustainably and in the most environmentally friendly way possible. We will:</p> <ul style="list-style-type: none"> ➤ Continue to reduce our reliance on groundwater by increasing water collection from other sources. ➤ Increase the amount of water storage capacity on The Haven property. ➤ Ensure that water is included as a key component in every planning process. ➤ Ensure that all appliances are water efficient. <p>Continue to work with VIHA, the Ministry of Environment and other regulatory authorities to ensure that our water supply is both safe and sustainable.</p> <hr/> <p>Targets Our target is to ensure there is always an adequate water supply on the property at all times. This would be for the use of our guests and facilities and ensure there is adequate reserve should there be an emergency. Water reserves should never drop below 50 % of our storage capacity.</p>



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What does success look like?

In an organization such as The Haven, success can be challenging to measure, and it is important that we do our best and continue to improve how we monitor and ensure follow through on this plan. In addition, The Haven needs to remain open to new opportunities and adapt to an ever-changing global environment.

By the end of 2019 we should be seeing a number of telltale signs that the goals we have set for ourselves are making a difference. Financially we will have achieved a balanced budget and may see a small surplus come available to begin building a reserve. This is dependent on a number of other goals materializing. The most obvious indicator of growth will be attributed to a measured increase in our overall participant night numbers and to see more consistency in the number of guests we have on the property at any one time. Marketing strategies regarding partnership development and expanding our reach will have resulted in new markets and groups finding the Haven and expanding our referral network. Revitalizing our core curriculum and leader led program inventory have contributed to renewal and growth. All of these factors have led to stronger occupancy numbers and strengthened our operational efficiency. The Haven community has a new-found confidence in the future which perpetuates growth and abundance.

All of the goals identified in this plan have numerical or operational targets set for 2018/2019 and will be monitored regularly but in no case less than 6 month intervals. This will allow us to monitor our progress to determine how and why we are either achieving or not achieving the expectations and targets we have set out. With our immediate plans having come to fruition, we will be revising the Business Plan in late 2020 to reflect confidence in our future, having set a strong foundation for the sustainability and longevity of the Haven.