



Research Report FOR *Strategic Planning*

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INTRODUCTION

and Background

WHAT IS STRATEGIC PLANNING AND WHY IS IT IMPORTANT?

There is a moment in every organization's growth when it becomes important to take stock of what has been achieved, and to plan for the years ahead. Formally known as a strategic planning process, this 'taking-stock' involves a preliminary stage where the current state of the organization is assessed, and a planning stage, where the organization's leadership strategizes for the future.

For an organization to thrive and continue to stay relevant to the population it serves, it must be able to predict and adapt to changes; changes in the environment in which it functions, and changes in the needs of the population it serves. By engaging in strategic planning, the leaders of an organization are able to figure out, through a deliberative process, where they are, where they want to go, and how they want to get thereⁱ.

Strategic planning is essential for many reasons. In The Psychology of Planning in Organizations, the authors break this down into three levels: individual, team and organizational. On the individual level, they suggest that strategic planning improves performanceⁱⁱ. This translates into more focused and goal-oriented work from employees, who are better able to understand their role and how it furthers the overall goal of the organization.

A good strategic plan not only influences individuals within organizations, but it also influences the teams these individuals are a part of. By having a common goal, teams are better able to define their responsibilities and this allows them to collaborate more effectively with each other to achieve the goal. In addition, leaders are better able to understand the culture within which these teams work. For example, through the creation and implementation of a strategic plan, leaders are better able to understand the problems that hinder collaboration between teams, and this allows them to come up with ways to resolve these problems.

Finally, at the organizational level, if done well, strategic planning results in a clear and easy-to-understand plan which can easily be communicated to staff and stakeholders for implementation.

HOW SHOULD STRATEGIC PLANNING BE DONE?

There is no 'one right way' to engage in strategic planning, however, including the opinions of stakeholders and organizational members, using a participatory and learning framework encourages sustainable and relevant community developmentⁱⁱⁱ. In 2010, the Association for Strategic Planning (ASP) released a document that outlined the most important attributes of a quality strategic plan. The first attribute, according to the ASP, was that a good strategic plan uses a "systems based approach"^{iv}. By assessing the resources available, leaders should be able to come up with "clearly defined goals, determine how those goals will be achieved, how progress will be measured and what corrective measures will be taken"^v. It is important to note that, the future is unpredictable, no matter how well leaders plan, for a strategic plan to be effective, it should have enough flexibility to adapt to unexpected events that could be faced during the implementation of the plan^{vi}.

Another attribute of a good strategic plan, according to the ASP, is that it involve an assessment of the internal state (mission, vision and core values) and external state (customer and stakeholder needs and expectations) of the organization. Finally, that in the long-term, it can be incorporated into the organization's work culture, because it is easy to understand and simple to implement. This can be achieved by having clearly defined goals and an effective way to measure results periodically. To add to this, some researchers emphasize the importance of timelines for the objectives of the strategic plan^{vii}. Much of the literature, including the few articles discussed here, point to the importance of strategic planning in ensuring that an organization is meeting its goals and staying relevant to the people they support.

In early 2013, the Elizabeth Fry Society of Calgary (EFry) created a three year strategic plan. The primary goals articulated in that plan were to clearly define the agency's identity, improve communications with community partners and stakeholders and increase funding diversification. 2016 marks the end of the 2013 strategic plan, precipitating the need for an updated plan and priorities. This document details the approach and process that were used to assess the effectiveness of EFry's work internally and within the community and to propose several recommendations for short-term and long-term priorities for discussion and prioritization.

BACKGROUND *and Approach*

THE FOLLOWING METHODS WERE USED TO CREATE THIS RESEARCH REPORT TO INFORM THE STRATEGIC PLANNING PROCESS:

- 1. Environmental Scan:** A scan of external factors and resources that impact EFry's work included an online search to find information about how other Elizabeth Fry 'chapters' conduct their strategic planning and to assess their priorities. 23 EFry 'sites' from across Canada were examined to determine which had developed strategic plans and/or made the results of their plans and progress publically available. Five provided details about their strategic plans.
- 2. A Review of EFry's Internal Documents:** This review included Board meeting minutes, the 2013 strategic plan and a review of financial documents. A meeting was also held with the EFry Evaluation Specialist to understand the evaluation methods that EFry uses to assess its programs. This was done to understand the organization's goals and progress over the last few years.
- 3. Relevant Research, Policies and Community Initiatives:** A number of statistics related to crime rates, incarceration and recidivism rates were reviewed, as were several research reports that examine the relationship between poverty, homelessness and justice issues. In addition, policies and community initiatives related to homelessness, poverty reduction and/or that have ties to the justice system or Indigenous peoples were also reviewed. These provide some background and context to the external factors that influence EFry's work and can be helpful in determining leverage points and opportunities.
- 4. SWOT Interviews with Staff, Volunteers and Clients:** "Strengths, Weaknesses, Opportunities, and Threats" (SWOT) discussions were conducted with staff, volunteers and women accessing EFry programs. Staff participated in a group discussion and submitted written reports for each individual program. Volunteers and women were interviewed individually to get their unique perspectives and experiences with EFry's work. In total 32 people provided feedback.

- 5. Online Survey to Community Partners:** An online survey was distributed to 117 of EFry's community partners, 49 responses were collected (41.8% response rate). Questions focussed on stakeholder knowledge of EFry's services, role in the community and suggestions for program and organizational enhancements.
- 6. Meeting with Board of Directors:** At this meeting, the findings from the SWOT interviews with staff, volunteers and women were presented. This was done to share learnings to date, obtain valuable feedback, as well as to generate ideas on what strategic goals the Board would like to prioritize. This information helped shape the recommendations proposed in this report.

Results

EFRY'S ACROSS CANADA

The websites of all the Elizabeth Fry organizations in Canada were reviewed, except for Quebec, as their documents are in French. In general, most Elizabeth Fry organizations had few documents to suggest that they engaged in formal strategic planning. Many of them had annual reports which detailed the activities of the organization, and some mentioned goals for the following year.

The Elizabeth Fry chapters in Toronto and Edmonton had the most detailed and comprehensive strategic plans. They had clearly defined goals, and a well-established system of reviewing the goals yearly to assess the progress that had been made towards achieving them. In particular, the Edmonton strategic plan was embedded in all of the organization's program objectives, so that every year there was an effort to highlight how the program's activities contributed to the achievement of the strategic plan.

The goals from Edmonton's 2011-2013 strategic plan were:

STABILITY: ensure the organization has a strong infrastructure

INTEGRATION: improve community integration for women and girls to reduce the effects of criminalization

PREVENTION: empower women and girls to stop criminalization

ADVOCACY: protect the human rights of women and girls who are, or may be at risk of becoming criminalized

EFS Toronto had a 2013-2016 strategic plan. The three main goals of the plan were:

1. Prioritizing women with complex needs
 - a. Working towards a comprehensive housing plan for criminalized women
 - b. Utilizing a wrap-around service approach throughout their programs
 - c. Making Aboriginal women a priority group throughout the organization
2. Delivering high quality, client-centred and accessible programs and services
 - a. Developing an organizational development plan and achieving quality targets
 - b. Implementing an organizational Theory of Change Model
 - c. Working with criminalized women towards sustainable livelihoods
3. Building organizational capacity to meet these goals
 - a. Developing financial and human resource strategies complementary to the strategic objectives
 - b. Developing an organizational public relations/communications strategy
 - c. More effectively advocate and be a voice for criminalized women
 - d. Implementing a facilities expansion campaign.

The Canadian Association of Elizabeth Fry Societies (CAEFS) publishes annual reports that highlight the work of the CAEFS for that year. There were discussions about creating a strategic plan, but one could not be located on their website. Overall, CAEFS work was on a national scale that is, advocating for law reforms and intervening in high profile legal cases. More detail about each of the EFry's reviewed can be found in Appendix A.

REVIEW OF *Internal Documents*

Several EFry documents were reviewed to understand the background issues, priorities and progress since the previous strategic planning process. Specifically, the 2013-2016 Strategic Plan, Board meeting minutes, annual reports and financial documents. This review revealed that previous organizational priorities were identified as Agency Identity, or revising the vision, mission and values of EFry; Communications, or strengthening relationships between EFry and their stakeholders; Funding Diversification, or increasing sources of funding. Another issue that was identified was difficulties recruiting and retaining staff, Board members and volunteers. Review of the Board meeting

minutes and annual reports shows that significant progress has been made in all of these areas. For example, formalized volunteer processes have been implemented including a pre-screening process; a review and enhancement of staff benefits; consistent and evidence-based program evaluation methods are in place; EFry staff participated in a group process to update the vision, mission and values; significant time and effort has been spent engaging community partners including formalized partnerships with several community groups; and a well-developed public awareness, communication and social media plan is underway (a highlight was the well-attended and high profile event including Piper Kerman). This progress is important to note as EFry engages in an updated strategic planning process and organizational priority setting. More detail about these documents can be found in Appendix B.

ENVIRONMENTAL SCAN:

*Broad External
Factors that Impact
EFry*

Several statistics, policies and community initiatives are summarized below to show the environment within which EFry operates and the external factors that impact the organization's work. This adds context beyond EFry's internal programming and provides information about broader 'community-wide' initiatives and issues that could be important partnerships or leverage points for EFry priority setting.

STATISTICS AND RESEARCH REPORTS

Crime Statistics

Women:

In 2014/2015, women accounted for 15% of overall admissions to provincial/territorial correctional services. They accounted for a higher proportion of community admissions (20%) than custody admissions (13%).

Indigenous Peoples:

Indigenous adults are overrepresented in provincial/territorial correctional services, as they accounted for one-quarter (25%) of admissions in 2014/2015 while representing about 3% of the Canadian adult population.

With regard to federal correctional services, Indigenous adults accounted for 22% of admissions to sentenced custody in 2014/2015. The overrepresentation of Indigenous adults was more pronounced for women than men. Indigenous women accounted for 38% of female admissions to provincial/territorial sentenced custody, while the comparable figure for Indigenous males was 24%. In the federal correctional services, Indigenous women represented 31% while Indigenous men accounted for 22% of admissions to sentenced custody.

Newcomers

Detention of newcomers and immigrants is argued to be amongst the fastest growing group of incarcerated people in Canada. “The Canadian government jailed 87,317 migrants without charges between 2006 and 2014... including 807 children”^{viii}. This is the only group in Canada who can be detained without any criminal charges. The federal government has prioritized increasing the numbers of refugees and immigrants to Canada in the coming years.

Crime rates

The most recently reported aggregate numbers from Calgary Police services are from 2013. They show 7,638 person-related crimes (homicides, sexual offenses, robberies, and assaults), 40,847 property crimes, 7,223 criminal code violations and 1,744 drug related charges (possession and trafficking)^{ix}. Overall, Calgary crime rates have increased in the last year after several years of decline^x. Calgary police report the almost 30% increase is due to the downturn in the economy and increased issues related to fentanyl and methamphetamine use. Calgary currently leads the country in the Crime Severity Index (CSI) which measures frequency and severity of police reported crimes. The most commonly reported crimes were break and enter, robbery under \$500 and car theft.

Recidivism rates

Factors that influence rates of re-offense have been argued by the Ministry of Community Safety and Correctional Services of Ontario as anti-social attitudes, anti-social peers, anti-social personality pattern, history of anti-social behaviour, family/marital factors, education/employment factors, lack of pro-social leisure activities and substance abuse. Several studies have argued that incarceration leads to higher recidivism rates than community-based alternatives.^{xi}

Correctional Services Canada does not have recent statistics on recidivism rates. Reasons they cite for this are:

- There isn't a commonly accepted definition of recidivism, it is understood differently by different organizations, including new crimes committed, breach of conditions, new crimes that result in incarceration or just new charges

- Recidivism rates vary greatly amongst different ‘offender’ groups and offenses so choosing one ‘average’ isn't reflective of actual recidivism
- Discrepancies in the length of time we consider when we talk about recidivism (short-term vs. long-term)

The most recent statistics available are for ‘reconviction’ rates (new crimes that result in new charges) for federal offenders and are several years old. For example, in 1995 the reconviction rate was 44% for violent crimes and 30% for non-violent convictions. Women are reconvicted less often than men and the rates are higher for Indigenous women than non-Indigenous 58% versus 53%.^{xii} While Corrections Canada did not cite reasons for these differences, a report from the US shows that recidivism rates for women are typically lower than men because they have fewer convictions overall and typically commit less serious offences than men and are therefore often referred to community-based alternatives to incarceration^{xiii}. Dawn Harvard, the interim president of the Native Women's Association of Canada argues that Indigenous women are overrepresented in correctional facilities because the justice system lacks an understanding of the impact of poverty on women's crime and further argues that the system is racist and expects Indigenous people to “do bad things”^{xiv}. Ms. Harvard argues that there is a lack of understanding of the broader political, social and economic factors that impact Indigenous peoples, and that lack of understanding leads to more punitive responses than for non-Indigenous people.

Costs

According to Alberta Justice, in 2014-2015, 2000 people across Alberta were incarcerated for failure to pay a fine. The total cost to taxpayers is estimated to be \$800,000 annually. This doesn't include costs associated with policing or the courts. Further, there are an estimated 90,000 outstanding warrants for ‘petty’ offences (jaywalking, trespassing, and riding the c-train without paying the fare)^{xv}. Annually it can cost up to \$114,000 at the federal level and \$41,000 at the provincial level to incarcerate someone for one year. For every dollar spent on alternative measures such as community-based diversion programs, six dollars can be saved in corrections costs.^{xvi}

However, an alternative measure initiative which was passed in 2016 as Bill 9 (An Act to Modernize Enforcement of Provincial Offences) has drawn both praise and criticism. It eliminates jail time for inability to pay fines. However, the alternatives proposed in the Bill may do more harm than good. Failure to pay fines may result in an inability to register a vehicle until the fines are paid, as unpaid tickets under \$1000 will be referred to Registry agents. These measures may have a severe impact on low income individuals who cannot afford to pay the tickets and are therefore forced to drive without registration and insurance.

Relationship between Poverty and Crime

- [The Counter Point \(2014\)](#)
“... the reality is that being born into a low-income family significantly increases one's odds of facing numerous health, financial and social challenges. One of these social challenges is becoming involved in criminal behaviour.”^{xvii}
The document elaborates on this by stating that growing up in a low-income family increases the likelihood that children will face challenges like homelessness, exposure to and experience of abuse, difficulties finding quality employment, among others. These challenges limit the children's opportunities, increasing their likelihood of being involved in criminal behaviour.
- [The Effects of Poverty on Children \(1997\)](#)
Low income may lead to residence in neighborhoods characterized by social disorganization (crime, many unemployed adults, and neighbors not monitoring the behavior of adolescents) and few resources for child development (playgrounds, child care, health care facilities, parks, after-school programs).^{xviii}
- [A Statistical Snapshot of Youth at Risk and Youth Offending In Canada \(2016\)](#)
In 2009, the national unemployment rate was 15% for youth aged 15 to 24, the highest among all age groups (7% for adults aged 25 to 54 and 55 to 64, and 4% for people aged 65 and over). Unemployment rates of Indigenous youth were at least twice as high as non-Indigenous youth in the western provinces. Compared to non-Indigenous children (18%), a greater proportion of young Indigenous children under the age of 6 were living in low-income economic families: 49% of off-reserve First Nations children and 32% of Métis children.^{xix}
- [Crimes of Desperation: The Truth About Poverty Related Crime \(2008\)](#)
The authors of this Calgary report argued that the majority of women's crime is survival or poverty related. This report argues that 80% of the crime that women commit is because of poverty, almost 40% of which is specific to failure to pay a fine^{xx}.

Relationship between Incarceration and Unemployment after Release

- [Crime and Unemployment: What's the link? \(2009\)](#)
This factsheet from John Howard Society discusses the role of employment in protecting against incarceration, and how employment post-incarceration can decrease recidivism rates. There are many factors that hinder former inmates from securing employment upon release eg: possession of a criminal record, little knowledge of new technologies (eg:

internet or email use) or latest developments in their prior line of work and development of anti-social skills to survive in prison but are detrimental in a work setting.^{xxi}

- [Adult Correctional Statistics in Canada, 2010/2011](#)
Although it was difficult to find unemployment statistics from Correction Services Canada (CSC), the CSC has argued that employment assistance is one of the top six needs of inmates. “A substantial proportion of offenders also displayed needs in the areas of social interaction (85%), attitude (77%), employment (70%), community functioning (69%) and family or marital issues (50%).”^{xxii}
- [Predicting Community Employment for Federal Offenders on Conditional Release \(2005\)](#)
This study found that a variety of factors impact the likelihood that a former inmate will find employment after incarceration. The factors discussed were existing unemployment rates in the region/province, the offender's intention to find work (informed by his/her perceptions of the likelihood that they will be able to find work), and social support.^{xxiii}

Housing and Homelessness for Individuals Released from Incarceration

- [Homelessness as Viewed by Incarcerated Women: Participatory Research \(2012\)](#)
In this study, based in BC, “56% of participants stated that homelessness contributed to their return to crime. Finding housing upon release was a problem for 63% ... Women indicated that a successful housing plan should incorporate flexible staged housing.” The primary argument in this study is that access to safe, affordable and sustainable housing is a major deterrent to involvement in crime. The authors argue that the cycle of homelessness, poverty and crime for survival purposes that many women are trapped in, is directly related a lack of suitable housing. They further argue that provision of housing is a necessary first step to reducing survival or poverty related crime.^{xxiv}
- [A Multisite Outcome Evaluation of Washington State's Re-entry Housing Program for High Risk Offenders](#)
This study demonstrates the relationship between housing and recidivism. The authors state that “without a stable place to live, it is difficult to address issues related to the cumulative effect of having a prison record, living in poverty, and managing the deficits caused by a lack of education, unemployment, substance abuse, and/or mental health problems.” Hence a successful re-entry program should include the provision of stable housing to increase successful outcomes for ex-offenders^{xxv}.

- [Homeless and Incarcerated: An Epidemiological Study from Canada \(2014\)](#)

This study compared the incarcerated homeless to the never incarcerated homeless. They found higher substance abuse rates and prevalence of depressive and psychotic disorders among the incarcerated homeless, compared to the never incarcerated. The authors suggested that these factors combined increase the risk of homelessness among the incarcerated by undermining their ability to maintain social ties and economic stability.^{xvvi}

- [Homeless and Jailed: Jailed and Homeless \(2010\)](#)

A survey of 363 incarcerated men in Toronto, showed that 32% of them were homeless upon release. If this study is reflective of the broader prison population, one in three incarcerated inmates are at risk of being discharged to the streets following release. The authors suggest that this easily-identifiable group of people should be targeted for discharge planning including access to housing and income supports to reduce future homelessness and potentially recidivism.^{xvii}

MUNICIPAL, PROVINCIAL AND FEDERAL INITIATIVES AND POLICIES

Several initiatives are currently underway with strong alignment to EFry's work. Several at the municipal, provincial and federal level are summarized below.

Municipal

1. [Calgary's 10 Year Plan to End Homelessness and the Plan to End Aboriginal Homelessness](#)

Calgary's plan^{xviii} calls for system wide approaches to address the intersections of social issues including poverty and family violence and involvement in the health and justice systems. Their primary strategy is to increase the availability of housing and support options, one of the strategies is to target policy change to incentivize the development of affordable housing options. The 10 Year Plan prioritizes a 'systems' approach to ending homelessness which includes a call for collaboration and integrated service delivery amongst public systems including the Justice system for adults and youth.

There is also a locally developed Plan to End Aboriginal Homelessness, an initiative by the Aboriginal Standing Committee on Housing and Homelessness, which is supported by the Calgary Homeless Foundation. This Plan highlights the link between structural issues and vulnerability for Indigenous peoples. Specifically, this plan calls for culturally appropriate discharge planning from public institutions including jails and expanded housing programs

designed specifically for and by Indigenous peoples.

2. [Calgary's Poverty Reduction Strategy](#)

Vibrant Communities Calgary is the steward of Calgary's poverty reduction strategy, Enough for All (E4A)^{xix}. E4A includes several strategies targeted at increasing access to services and social supports, reducing barriers and increasing income and assets for vulnerable Calgarians. There are several goals and strategies in the report including raising public awareness of poverty and its related issues, ensuring basic needs are met, engaging the business sector in strategies to increase access to sustainable employment and influencing changes to public policy to increase incomes. One of the working groups from E4A is specific to the Justice sector, this group is involved in streamlining access to legal services for low income Calgarians, providing training to justice officials of the effects of poverty and advocating for changes to improve collaboration. Within E4A is a strategy specific to reducing poverty for Indigenous peoples. This group is hosting a number of Elder teaching circles on the effects of colonization including residential schools, is developing an Indigenous gathering place or cultural centre, and calls for multi-sectoral collaboration to address the overrepresentation of Indigenous peoples in Canada's public systems including child welfare, emergency shelters and jails

3. [Municipal legislation on low-income transit pass](#)

ByLaws: Panhandling, Loitering, Transit, Public Intoxication, Bylaws are often reviewed and there may be opportunities to participate in public consultations and/or influence revisions including penalties for infractions. EFry Calgary, in partnership with Vibrant Communities Calgary is currently leading a research project on the impact of giving and receiving bylaw tickets for these minor offences. Findings from this research will be used to influence policy development related to bylaw enforcement processes and alternatives to ticketing and will include an examination of the financial and social returns on investment for proposed alternate approaches.

4. [City of Calgary Housing Incentive Program](#)

The program is intended to encourage development of affordable housing and stimulate the economy. The program is funded by the Community Economic Resiliency Fund.

The program has two components:

- A grant of up to \$50,000 to cover pre-development activities associated with an affordable housing project;
- A rebate on all City development fees related to an affordable housing project.

This is a limited-term project that covers fees and expenses incurred between January 1, 2016 and December 31, 2017.

Provincial

1. Alberta Provincial Government addresses issues of Indigenous Incarceration.^{xxx} The Justice Ministry publically states an interest in increased community-based alternatives and Indigenous programming in jails.

2. **Alberta's Addiction and Mental Health Strategy:**
The Strategy outlines 5 main goals it hopes to achieve:

- a. Improve the health and mental well-being of Albertans in all areas of the province, by ensuring Albertans have access to effective health promotion, prevention and timely intervention and treatment.
- b. Position individuals and families at the centre of high quality, effective and integrated addiction and mental health services and supports, so their needs are met and problems related to addiction and mental health decrease in the province.
- c. Improve the capacity of the [addiction and mental health] workforce to effectively address addiction, mental health problems and mental illness.
- d. Increase public awareness and understanding of addiction, mental health problems and mental illness, thereby reducing stigmatization and barriers to access.
- e. Apply informed practice(s) and continually evaluate all policy and service delivery approaches to ensure and demonstrate value. The addiction and mental health system must be accessible, responsive and accountable^{xxxi}.

- **Child Tax Benefits**

The Canada Child Benefit (CCB) is a tax-free, monthly payment provided by Canada Revenue Agency to eligible families. This benefit is designed to assist parents with the cost of raising children under 18 years of age.

Canada Child Benefit amounts are based on adjusted family net income, the number of children living in the household and the age of each child. Families with less than \$30,000 in adjusted family net income are eligible

for the maximum benefit. Households who qualify for the maximum amount of Canada Child Benefits receive up to:

- \$6,400 annually for each child less than six years of age
- \$5,400 annually for each child who is six through 17 years of age

If your child currently qualifies for the Child Disability Benefit, an additional Child Disability Benefit of up to \$2,730 annually will be added to your Canada Child Benefits.

Alberta has recently implemented a provincial child benefit. All families earning less than \$41,220 per year, including those accessing government financial benefits as their primary source of income, are eligible to receive the new Alberta Child Benefit. The maximum annual benefit is \$1,100 for families with one child, and up to \$2,750 for families with four or more children^{xxxi}.

3. **Alberta Works programming**

Alberta Works helps unemployed and low-income Albertans meet their basic needs and find jobs. Some of the services they provide include: employment services, income support, health benefits and child support services^{xxxi}. Although it is widely known that the financial amounts that individuals and families receive is far below what is required to meet basic needs in Calgary.

4. **A Plan for Alberta: Ending Homelessness in 10 Years**

The Plan is based on the goal of ending homelessness in Alberta by 2019 recognizing and supporting community-led action on homelessness, and aims to coordinate province-wide efforts. Under the housing first philosophy, investments are focused on three key areas:

- Rapid re-housing of homeless Albertans, moving them from streets and shelters into permanent housing.
- Providing client-centered supports to re-housed clients, helping them obtain the assistance they need to restore their stability and maintain their housing.
- Preventing homelessness through emergency assistance and by providing adequate and accessible government programs and services to Albertans^{xxxi}.

5. Provincial Needs Assessment for Safe Consumption Services

The recent opioid crisis has led to renewed interest in addiction and harm reduction services. Alberta Health has announced \$500,000 for harm reduction needs assessment studies in seven municipalities in Alberta. Calgary's project is being launched in the spring of 2017 and is being led by HIV Link and Safeworks.

Federal

1. The Indigenous Languages Act,

Introduced to forge a new relationship with Indigenous people^{xxxv}. This proposed Act Includes five priority areas including an inquiry into missing and murdered Indigenous women, investment in Indigenous education, lifting the 2% cap on Indigenous funding, implementing all of the calls to action from the Truth and Reconciliation report and repealing legislation imposed upon Indigenous peoples.

2. Truth and Reconciliation Act

In 2015 the Truth and Reconciliation Commission (TRC) released a report that included 94 calls to action to “redress the legacy of residential schools and advance the process of reconciliation”.^{xxxvi} The calls to action are focussed on public systems that affect Indigenous populations such as child welfare, health, education, language and culture and the justice system. The TRC has developed 18 calls to action specific to the justice system. They include cultural competency training for lawyers, including human rights and anti-racism; a required course for law students on the history and legacy of residential schools; for all levels of government to commit to eliminating the over-representation of Indigenous adults and youth in custody; to provide funding for appropriate community-based alternatives to incarceration; to reform the justice system to better respond to the needs of people with FASD; to reduce barriers to implementing new lodging houses; to provide culturally relevant services to inmates on substance use, family violence and overcoming experiences of sexual abuse; to publish data on the victimization of Indigenous peoples and to create a public inquiry into the abuses and remedies for the disproportionate victimization of Indigenous women and girls including missing and murdered, and links between victimization and the intergenerational legacy of residential schools.

3. Low Income Cut Off Criteria

The low income cut-offs (LICOs) are income thresholds below which a family will likely devote a larger share of its income on the necessities of food, shelter and clothing than the average family. The approach is essentially to estimate an income threshold at which families are expected to spend 20 percentage points more than the average family on

food, shelter and clothing. The LICO set for a municipality is based on the size of the city. For a family of four living in a community with a population of 30,000 to 999,999, the LICO is calculated as \$21,359^{xxxvii}. LICO is often used as an eligibility criteria for access to subsidized services. Cost of living are not considered. This can create issues in large cities like Calgary with higher than average costs and/or in large families where costs are higher.

4. Federal Budget for Housing and Homelessness

The Federal Budget for 2016 states, “To give Canadians greater access to more affordable housing, Budget 2016 proposes to invest \$2.3 billion over two years, starting in 2016–17”. Of this amount, \$2.2 billion reflects the Government's commitment to invest in social infrastructure, including \$739 million for First Nations, Inuit and northern housing. A significant portion of the \$2.3 billion investment will be allocated to provinces and territories, which can identify communities where the need for affordable housing is greatest. Investing in affordable housing will provide targeted support to those who need it most and create good jobs that help grow Canada's economy in a clean and sustainable way.

To ensure that these investments are most effective and to help the social housing sector achieve self-reliance, the Government will consult with provinces and territories, Indigenous and other communities, and key stakeholders in the coming year to develop a National Housing Strategy^{xxxviii}.”

5. National Anti-Drug Strategy

Through the National Anti-Drug Strategy, the Government of Canada contributes to safer and healthier communities by helping prevent use, treat dependency and reduce production and distribution of illicit drugs as well as by addressing prescription drug abuse.

Launched in 2007, the Strategy is carried out by 12 federal departments and agencies, and led by the Department of Justice Canada. It has three action plans:

- The Prevention Action Plan, which aims to prevent illicit drug use and prescription drug abuse;
- The Treatment Action Plan, which aims to treat those with drug dependencies; and
- The Enforcement Action Plan, which aims to combat the production and distribution of illicit drugs^{xxxix}.

6. Adult and Youth Alternative Measures Program

The Alternative Measures Program (AMP) is a program that is offered to persons involved in minor offences that either do not have a criminal record or, on the program's discretion, to those who have less than two offences on their record (generally the offences on your record must be old e.g. not recent). The intention of AMP is to allow persons involved in minor offences who have little experience with the criminal justice system, a chance avoid a criminal record. If you are accepted into the program, upon completion, the Crown will withdraw the charges against you (i.e. you will not have a criminal record). Although you will not have a criminal conviction and thus have no record, the fact that you participated in the program will show on CPIC (a police database); this is essentially to ensure that a person does not get AMP more than once^{xl}.

In 2012 the Youth Criminal Justice Act (YCJA) underwent several revisions including promoting the use of extrajudicial sanctions (alternatives to incarceration) for less serious offences. These include, having accused youth participate in the 'fixing' of property damage, vandalism etc. and including victims and families in decision making. Results have shown an overall decline in incarceration rates for youth of approximately 20% across the country. However, amongst the fastest growing incarcerated youth populations are immigrant/refugee youth and Indigenous youth. Some researchers have argued that immigrant/refugee families may be struggling with adapting to a new country, language and culture and may also be fleeing violence from war torn countries. These issues leave parents overwhelmed and unable to cope with problems their youth may be struggling with. Parents may also be working multiple jobs and/or struggling with low income, adding to their stress and subsequent difficulties with parenting. Immigrant and refugee youth may be struggling in school and socially and may not have access to healthy social supports. Bullying may also be a factor^{xli}.

In 2014-2015 33% of admissions to federal corrections were Indigenous youth. This number remains relatively unchanged since the revisions to the YCJA. While the YCJA calls for specific alternatives to incarceration for Indigenous youth, 52% of Indigenous youth charged were sent to correctional facilities while only 42% of charges against non-Indigenous youth resulted in custody^{xlii}. A study in Vancouver argued one reason

could be that police target Indigenous youth, a study from Hamilton Ontario argued that the reasons are "institutional racism"^{xliii}.

Results from EFry's own programming show that the majority of youth served by EFry have multiple charges to deal with, have complex issues including mental health issues and addictions, have unstable home lives and have experienced violence and/or profound trauma. A third of youth served by EFry had no familial or professional supports and although Indigenous youth were less represented in out of custody hearings, they had the highest rate of administrative charges, meaning they hadn't be able or willing to follow up with expectations from previous charges. Particular attention needs to be paid when youth do not have family supports, have different cultural or language needs and have complex or extreme emotional and behavioural issues.

7. Liberal.ca: A New Plan for Canadian Immigration

On their website, the Liberal government has outlined some initiatives they are committed to implementing, to improve the immigration system in Canada. Some of these include:

- Nearly doubling the budget for family class immigration processing, in order to restore processing times to the levels achieved before the Harper decade.
- Doubling the number of new applications allowed each year, for parents and grandparents, from 5,000 to 10,000.
- Providing greater access to applicants with Canadian siblings, by granting additional points under the Express Entry system. There will also be a review of the program, ensuring that processing times are efficient.
- Restoring the maximum age for dependents to 22 instead of 19, allowing Canadians – often live-in caregivers – to bring their children to Canada
- Granting immediate permanent residency to new spouses entering Canada, rather than imposing a two-year conditional status that puts spouses – often women – in a position of extreme vulnerability.

This however contrasts with news reports that state that under the Liberal government, citizenship revocations have increased. “The Trudeau cabinet was sworn in on Nov. 4, 2015. That month saw 21 revocation decisions. The following month there were 59. The year 2016 averaged 13 decisions a month up to Aug. 31, the latest data CBC News has been able to obtain. The monthly average under the Harper government from 2013 to 2015 was only 2.4 cases a month^{xliv}.”

INTERVIEWS WITH *Staff, Volunteers and Women*

Staff participated in a group interview and submitted written SWOT reports of their programs. Volunteer's participated in one-on-one interviews. Their responses to the questions of EFY strengths, weaknesses, opportunities and threats are summarized below.

EFY STRENGTHS:

- The diverse educational and work background of the EFry staff creates an environment where there is a wealth of knowledge within the organization that staff can rely on to provide services
- There is great collaboration amongst staff, resulting in a cohesive and effective approach to supporting women
- EFry offers programs that attempt to address women's issues in a holistic way, any issue that jeopardizes a client's well-being is addressed. Staff felt that this is in contrast to other programs in the community, which focus on addressing one issue
- EFry offers many cultural programs from Indigenous values
- EFry staff have fostered collaborative relationships with community partners which allows for streamlined referrals, that is, EFry has a very good reputation in community
- The Executive Director is currently involved with a number of groups in the community (eg: Recovery Task Force and Aboriginal Standing Committee on Housing & Homelessness).
- The Program Manager meets often with personnel at the Courts and parole. And one of the staff is involved with the Coordinated Access and Assessment Group.

- EFry works closely with the Calgary Legal Guidance, Poverty Reduction Coalition and Athabasca University. The organization has in the past partnered with the Calgary John Howard Society, CLG, Alpha House and the Women's Resource Centre to conduct surveys.
- EFry fills a need or gap – have a niche in the community – provide essential services
- Have links to national EFRY and others across the country
- Diversity of staff (many of the staff have worked in various roles in the agency, ie. moved from one role to another, or have moved from other parts of the sector, thus they have a wealth of experience in the field).
- EFry is fiscally responsible
- There is a built-in evaluation processes for continuous quality improvement
- EFry fosters an inclusive organizational culture – “everyone is welcome”
- Clear mission, vision and mandate

PROGRAM STRENGTHS:

PCOP: works closely with the Calgary Remand Centre, the Lethbridge Correctional Centre, Alpha House and Berkana House

Court Programs: they work closely with various courts in Calgary, Airdrie, Okotoks, Didsbury, Cochrane and Canmore.

Indigenous Programming: There are partnerships with Elders within the community to guide programs and give information on Indigenous-informed practices. EFry also has a close relationship with the Aboriginal Standing Committee on Housing and Homelessness.

SAGE Program: Partnerships with Elders within the Community (eg: sweats, talking circles, bannock/moccasin making), makeovers conducted by Making Changes (donated business clothing and awareness around the proper attire to wear for job interviews), and partnerships with various organizations for work placements (eg: Women's Centre, Brown Bagging for Kids)

CAPI: works with the LINC programs, CIWA, Immigrant Services Calgary, Centre for Newcomers, Chinook Learning Services and the Calgary Immigrant Education Society.

WEAKNESSES (AREAS TO STRENGTHEN):

- Volunteer processes and procedures need enhancing including recruitment, training, screening, orientation and engagement (NOTE: initiatives are already underway to address this)
- Increased presence and profile in the community through increased public awareness and social media. This is good for donor relations as well as strengthened community collaborations (Note: initiatives are already underway to address this)
- Alternative funding options to hire more staff including administrative support and to address programmatic gaps, and potentially reduce workloads
- Leverage strategic partnerships and linkages with the national EFry and other stakeholders to elevate the conversation away from crime towards poverty, and away from individual issues towards structural gaps, systems issues

OPPORTUNITIES:

- Federal and provincial governments have different values, ideology, and priorities. The timing is good to capitalize on these opportunities
- The Truth and Reconciliation Commission report creates an opportunity to enhance the profile of structural issues related to colonization and the role that EFry can play to support women in particular
- Leverage the city wide work related to Calgary's poverty reduction strategy and Plans to End Homelessness
- Leverage staff connections, networks and contacts by creating an accessible tool where staff can share useful information that other staff might find beneficial
- Great partnerships exist with community organizations. These relationships can be strengthened to ensure more community resources are available to EFry clients

THREATS:

- The downturn in the economy has significantly impacted donations
- The public's view of EFry and its services, impacts how much financial donation is received from the public
- EFry's mission to support women involved with the criminal justice system, is difficult to get public support for
- Changes to public policy – for example, news of the federal

government increasing the number of beds in federal prisons, and increased court fees, mean more barriers for women and potentially an increase in demand for EFry services over the next few months/ years

- Changes in funder priorities
- Community capacity issues related to available and affordable housing for women
- Heavy reliance on volunteers
- Staff turnover due to seeking higher wages

SUMMARY OF WOMEN'S RESPONSES

Strengths:

- The staff are very dedicated to their work, and they ensure that every woman is well taken of
- The Indigenous centred programs are very important for women, as these provide a sense of identity and belonging
- Women find a lot of a value in EFry programs, for example, two of the women credited the SAGE program for their continued personal growth
- "Staff are friendly and dependable. No matter what issues women face, they know they can rely on EFry staff to help resolve them"

Weaknesses:

- Women reported no weaknesses

Opportunities:

- Expand Indigenous-centred programming. The ones they have are working well, and women would like to see these expanded
- One woman recommended a Life Skills class because formerly incarcerated women face new realities, mainly due to their newly-acquired criminal record
- Another woman suggested First Aid and self-defence classes to help single women and mothers better protect themselves
- Other suggestions for classes were: Yoga, arts and crafts and more recreational programs
- Some of the women stated during the summer there is a decrease in how often programs are offered and expressed a need for expansion

Threats:

- None of the women expressed any threats

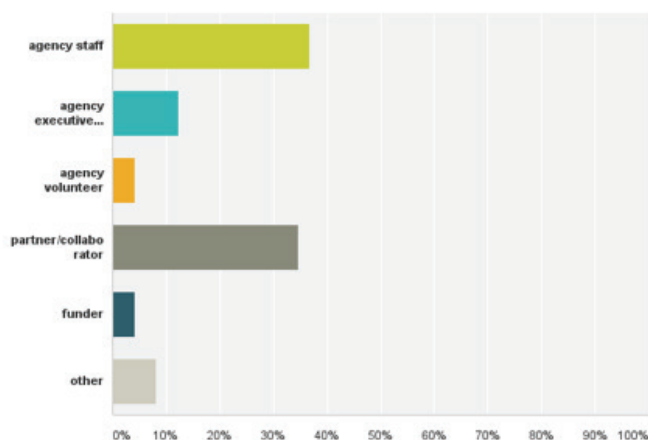
ONLINE SURVEY

to Community Partners

Responses from 47 surveys have been summarized below.

Q1 What is your role?

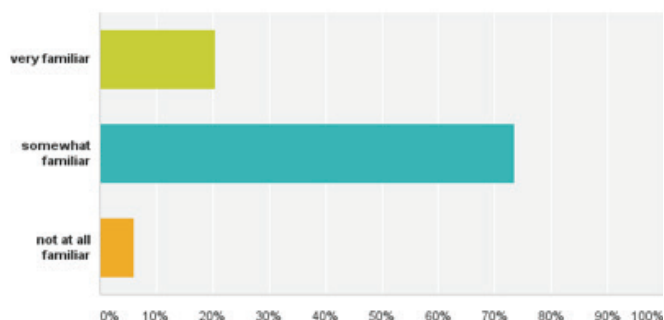
Answered: 49 Skipped: 0



- “To assist marginalized women who are involved in the Criminal Justice System. Assist these women with removing barriers, and gain access to services to help support themselves in creating a life free of violence, marginalization and poverty”
- Other responses included advocacy, information, referral, system navigation, programming and housing (Berkana)
- One mentioned poverty and one mentioned Indigenous women

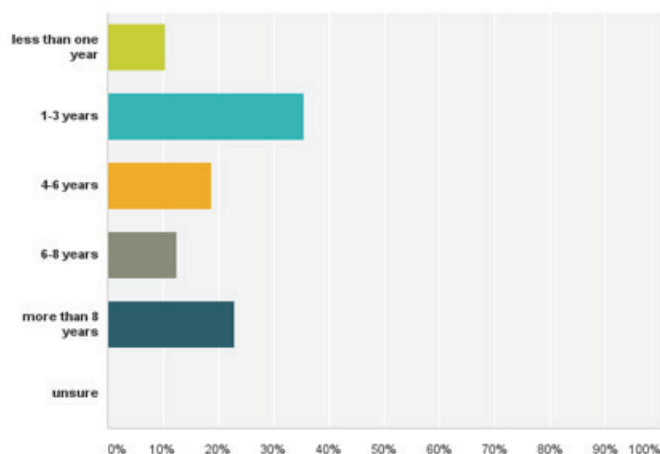
Q4 How familiar are you with Efry programs?

Answered: 49 Skipped: 0



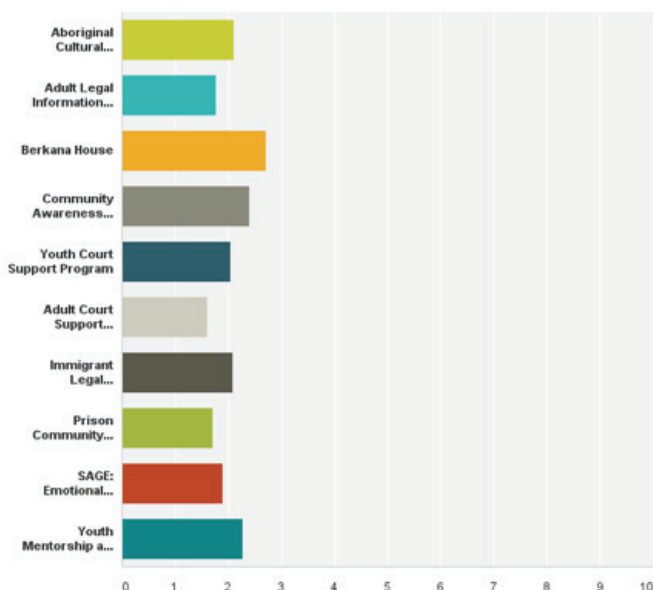
Q2 How long have you worked and/or collaborated with the Elizabeth Fry Society of Calgary (EFRY)

Answered: 48 Skipped: 1



Q5 If you answered 'very or somewhat' to question 4, please rate the importance of each program

Answered: 47 Skipped: 2



The purpose of Elizabeth Fry Society?

- 34 responses stated that EFRY supports women involved in the justice system
- 10 responses named legal and 'other' issues like newcomer supports, violence and homelessness or talked about 'vulnerable women' more broadly than just within the justice system

What are EFRY's strengths?

1. Leadership, a strong committed executive director (ED) and a clear vision and mission
1. Programs that are inclusive, creative and important
1. Staff are good advocates, easy to work with, knowledgeable, dedicated, passionate, respectful and give quick responses
1. Their national network and community partnerships
1. Volunteers
1. Staff are non-judgmental and inclusive "meeting women where they are at"
1. Staff understand the intersection of race, poverty and crime
1. EFry provides important supports for women

What areas need to be strengthened?

1. **Increased funding and capacity to expand and bridge gaps and build connections and for more administrative support for ED
2. Improved communication with community to strengthen referrals and follow-up
3. **Increased public awareness and a higher profile
4. Improve training for volunteers
5. Coordination and/or provision of housing
6. More detail and information on programs on the website
7. Enhance advocacy and public policy influence

How could current programs be improved?

1. Expand follow-up and referral services
2. **More funds for expansion including: rural outreach, to strengthen staff model and increase public awareness, to go with clients to get i.d., housing, and to reduce staff workloads
3. Increased exposure and awareness
4. Measure progress and share the results
5. Expand collaboration with other agencies working with the same women and to improve diverse cultural supports, access to housing, and community integration

6. Engage more Elders, explicit and intentional use of ceremony and Indigenous spirituality

What new programs should be added to address emergent gaps or needs?

1. **Housing and basic needs
2. Expand prison outreach program, expand immigrant programs
3. More language classes and traditional skills classes
4. "Is there an addiction program at EFry?"
5. Programs to support youth in transition
6. Provide legal support for non-profits and host community workshops on legal education
7. A program for seniors
8. Find ways to bridge gaps between health and justice
9. Follow-up with women when they are done programs
10. Indigenous historical trauma
11. Counselling and mentorship (peer support)

Do you have anything else to add?

1. Most said 'no'
2. "EFry does a great job and I am honored to work with them"
3. "We welcome more communications and collaborations"

**said most often

DISCUSSION *and Implications*

Following a review of multiple documents and discussions with a variety of stakeholders, it is evident that Elizabeth Fry Society of Calgary has made great strides both internally and within community to strengthen its role and reputation working alongside marginalized women. The information gathering process has revealed strong community support, important partnerships and collaborations with other community initiatives,

improved volunteer recruitment processes and an enhanced social media presence. For example, volunteer screening, recruitment and training initiatives have been developed to streamline processes and improve volunteer relations. As well, a communication strategy to build EFry's profile, brand and donations is underway, for example the well-attended Piper Kerman event. Internally, efforts have also been made to build in continuous learning and evaluation of the impact of EFry programs and succession planning has begun.

A major theme emerging from the information was the sense of appreciation and gratitude that partners, women, volunteers and staff felt for working with and being involved with EFry. This strength comes from EFry's inclusive approach, important niche position in the community and non-governmental nature which allows the organization to tailor its programs to specifically meet women's needs. However, much of EFry's funding comes from donations and small grants and as evidenced by the current economic climate, donations can be unreliable and precarious. Given that suggestions from all parties included expansion of programs, enhanced internal supports and strengthened partnerships, it is important that EFry continues to work on the 2013 goal of increasing funding diversification.

Communication and public awareness was another major theme that emerged. Not unlike in 2013 where the focus was on communication between the organization and stakeholders, many of the interviewees and survey respondents highlighted the importance of communication within the organization and increased public awareness of EFry and its work. A third theme is related to advancing policy and advocacy work. Many stakeholders felt that EFry's position in relation to the national network was an asset to be leveraged in terms of advancing structural changes. Given the far reaching impact that changes to public policy can have on the lives of vulnerable women, prioritizing systems level advocacy and public policy advancement is an important consideration.

Recommendations

Several recommendations are highlighted below, these are suggestions for enhancing existing practices and building on the existing strengths and assets at EFry.

ORGANIZATIONAL PRIORITIES

- 1. Seek Additional Funding to Expand Current Programming**
Executive Director should continue to seek out and submit grant applications for program expansions and an enhanced staffing model, including support for administration. One

example is to align with other organizations on funding applications (e.g. partner with an organization that provides affordable housing and EFry could provide programmatic supports). Utilize existing internal capacity to include evidence-based evaluative results of EFry's 'successes'. Attention to Indigenous and newcomer youth programming, inclusive of the effects of trauma, is important to prioritize given the over-representation of these groups in the justice system and the specific cultural differences and needs that make these groups vulnerable.

- 2. Enhanced Partnerships with Community Initiatives and Service Providers**

Seek out opportunities to partner with the City's Enough for All Poverty Reduction Initiative (E4A), The Plans to End Homelessness and the Truth and Reconciliation Commission to leverage connections and partner on public events. For example, EFry could offer sessions on the criminalization of women and the relationship between poverty and women's crime at Vibrant Communities Calgary's quarterly community consultation events. EFry could also support the priorities of the Poverty Reduction strategy specific to Indigenous peoples.

Enhance and strengthen partnerships with agencies that provide services to similar clients that EFry does not have resources/mandate for. For example, addictions, poverty and justice system involvement are closely related. EFry does not offer addictions programs but could partner with organizations that do to ensure seamless access and reduce gaps and silos.

- 3. Build the EFry Brand and Profile**

Continue and build on the momentum of the Piper Kerman event to raise EFry profile and solicit donations with a follow-up, high profile event in 2018. Leverage the Board of Directors personal and professional networks to publicize the event and encourage donations.

- 4. Define Core and Ancillary Services**

Determine the role that EFry should play in community housing initiatives (i.e. is this a core service or should EFry leverage community partnerships to provide programming within existing housing programs).

- 5. Utilize Internal Evaluation Resources to Assess Progress Towards Goals**

Publish the final strategic plan on the website and create progress reports at least annually that can also be published. This will help improve transparency and accountability and could potentially be a resource for other organizations including EFry's across Canada to share learnings.

GOVERNANCE PRIORITIES

6. Board of Directors to Expand and Enhance EFry's Core Funding and Diversify Available Resources

Develop a five year plan for the EFry Board of Directors to leverage their personal and professional networks for fundraising and community engagement. For example, engage known philanthropists and champions in the community to support EFry financially and with messaging. Philanthropic dollars often come with 'fewer' strings attached than government funding and therefore create flexible and adaptable opportunities.

Seek new partnerships including the faith community for financial and in-kind support including volunteer recruitment. This plan should include timelines, key deliverables and an assessment of outcomes.

7. Enhanced and Clarified Role of the Board in Succession Planning, Advocacy and Strategic Initiatives

Implement the 2016 succession plan for senior leadership and the Board of Directors to ensure seamless transition as staff and Board move on from EFry. Develop Board led volunteer committees and subcommittees to develop and advance policy briefs related to emergent issues and to leverage networks for fundraising and increased public awareness, that is, volunteers could be recruited by Board members for time limited project work.

Several existing initiatives have been highlighted in this report, as have relevant policies and government priorities. Strategic priorities with these existing groups create collective and collaborative opportunities to advance asks to all levels of government in the areas of discharge planning, alternative measures, consequences for bylaw infractions, increasing access to affordable housing options, government financial benefits and initiatives specific to Indigenous and immigrant/refugee women and youth. EFry, in partnership with existing groups, could develop a policy agenda for both long and short-term priorities. Board support could include leveraging networks to develop a government relations strategy.

APPENDIX *A*

OTHER ELIZABETH FRY CHAPTERS AND THEIR STRATEGIC PLANNING PROCESSES

1. Canadian Association of Elizabeth Fry Societies(CAEFS) (Annual Reports 2010-2015):

There was no strategic plan posted however, several years of annual reports were reviewed.

Each report contained a President's Report (a quick run-down of all the work CAEFS had been involved throughout the year), a Treasury Report, and the Executive Director's Report. Occasionally, it contained information about future strategic plans. However, from the annual reports, it appeared that the CAEFS did not develop a strategic plan. Each year's report was a continuation of the work from the previous year, with the occasional addition of one or two new projects. Overall, CAEFS work was on a national scale that is, advocating for law reforms and intervening in high profile cases.

2. Elizabeth Fry Society of Ottawa (EFS of Ottawa)

EFS Ottawa had a strategic plan in 2008. It included goals such as:

1. To assess the organization structures and improve the human resource management structures of the organization
2. To develop a business model for the delivery of residential services to clients which ensures both sustainability and fiscal responsibility
3. To outline options and undertake the relocation of the administrative offices
4. To standardize communications both internally and externally within the agency
5. To review the financial resources and strategies for the organization in order to ensure financial sustainability
6. To enhance the delivery of programs and services by undertaking evaluations of services
7. To explore the role of the Agency in providing services to transgendered individuals.

However, since 2008, there was little mention of the strategic plan and how many of its goals had been accomplished.

3. EFS of Toronto

EFS Toronto had a 2013-2016 organizational strategic plan which included very detailed goals and how they are going to achieve them.

The three main goals of the strategic plan were:

1. Prioritizing women with complex needs

- a. Working towards a comprehensive housing plan for criminalized women
- b. Utilizing a wrap-around service approach throughout their programs
- c. Making Aboriginal women a priority group throughout the organization

2. Delivering high quality, client-centred and accessible programs and services

- a. Developing an organizational development plan and achieving quality targets
- b. Implementing an organizational Theory of Change Model
- c. Working with criminalized women towards sustainable livelihoods

3. Building organizational capacity to meet these goals

- a. Developing financial and human resources strategies complementary to the strategic objectives
- b. Developing an organizational public relations/communications strategy
- c. More effectively advocate and be a voice for criminalized women
- d. Implementing a facilities expansion campaign.

In addition, the 2013 report contained a profile of each program offered by the organization. These profiles contained information about: program goals, programs offered, results of those programs, highlights, challenges and future directions.

Included in the 2013 report was a section on objectives (the milestones which need to be reached in order to accomplish the Model for Change (Theory of Change Model goal in the strategic plan). This section contained information on the outcomes and indicators of successfully accomplishing these objectives.

The objectives of the Model for Change goal were:

- Serving Criminalized Women: To develop and implement a service model for holistic and integrated programming that contributes to advancing the sustainable livelihoods of criminalized women

- Policy and Public Education to Decriminalize Women's Lives: To directly affect policies, regulations and public perceptions that negatively affect criminalized women and their families in Toronto.

4. EFS of Greater Vancouver

There was no mention of a strategic plan on their website or in a google search. Annual reports were examined from 2009 to 2015. Many of the annual reports contain highlights and accomplishments from the year such as:

- Overview of Organizational accomplishments
- Overview of program accomplishments
- Financial reports

However, in the 2015 report, it was mentioned that a strategic plan would be created soon, to better guide the organization's work. The plan would include goals like:

- Diversify funding base and operations to ensure long term sustainability
- Expand work with JustKids through partnerships with the UN child welfare network and Child Rights Connect
- Stay committed to providing women-only services

5. EFS of Edmonton

EFS Edmonton created a strategic plan in 2010 to guide their organization's operations through to 2013. EFS Edmonton also publishes detailed annual reports every year. Each report contains the following sections:

- **Vision, Mission and Objectives:** This is where the strategic plan is outlined. Each goal in the plan has a description, and two main ways to achieve it.
- **Board President's Report:** A quick summary of the work EFS Edmonton has done throughout the year
- **Executive Director's Report:** Detailed descriptions of EFS Edmonton's achievements throughout the year. It also contains descriptions of the progress made to achieve the goals in the strategic plan.
- **Program Reports:** Each program has its own goals to achieve for the year; goals which directly contribute to the organization's strategic plan. In this section of the annual report, program leaders describe their work, and the successes and challenges they have faced throughout the year.

In the 2014 annual report, we expected to see the creation of a new strategic plan. However, the same plan from 2011-2013 was being used again. The goals of the 2011-2013 strategic plan were:

- **Stability:** ensure the organization has a strong infrastructure

- **Integration:** improve community integration for women and girls to reduce the effects of criminalization
- **Prevention:** empower women and girls to stop criminalization
- **Advocacy:** protect the human rights of women and girls who are, or may be at risk of becoming criminalized

APPENDIX *B*

DETAILED RESULTS FROM THE DOCUMENT REVIEW

A summary of the documents reviewed appears in the matrix below:

Document	Purpose	Findings
2013-2016 Strategic Planning Document	<p>The plan contains an overview of the general state of the organization in 2013 and what their strategic issues were.</p> <p>It gives an insight into what direction EFry has been going for the last three years.</p>	<p>The main strategic goals in 2013 were:</p> <ul style="list-style-type: none"> Agency Identity (revising the mission, vision and values to better reflect the EFry Calgary's work) Communications (strengthen communication between the EFry and its stakeholders, as well as the general public) Funding Diversification (find more ways to raise funds for EFry programs) <p>There was no mention of how the progress of these strategic goals would be measured over time or how progress towards the goals would be assessed and/or reported.</p> <p>However, as noted in the discussion section of this report – several initiatives are currently existing or underway.</p>
The Hindsight Group Report	<p>Prior to 2007, EFry identified an issue with staff and Board member retention. This caused concern about sustainable leadership and program delivery.</p> <p>This report was put together in 2007 to guide EFry through transition planning to improve stability and organizational effectiveness.</p>	<p>The document contains some key information that will be useful for current strategic planning purposes.</p> <p>The five main areas that were assessed in the report were: Funding resources, Communications, Governance, Administration, Programs and Reputation Management.</p> <p>Although this document is from 2007 it still provides useful information about key issues in the past, and whether these issues persist today.</p>
2013 Board Meeting Minutes vs 2013 Strategic Plan	2013 Board meeting minutes were reviewed to assess progress towards the identified goals in the 2013 strategic plan	Several initiatives were undertaken in 2013, the ones that were directly linked to the strategic plan were: development of a communication's plan, new partnership with the Mustard Seed, increased use of website and social media, tracking of donor funding.
2014 Board Meeting Minutes vs 2013 Strategic Plan	2014 Board meeting minutes were also reviewed to further assess progress towards the strategic plan.	<p>The work directly related to the strategic plan was: revision of the mission and values, getting a new sign for the office, and looking into receiving unrestricted funding from 100 Women Who Care.</p> <p>Throughout 2014, the Executive Director met with existing partners and stakeholders to strengthen EFry's relationships with them.</p>
2014 Program Evaluations	Detailed monthly program evaluations have been included in the Board meeting minutes since new leadership was engaged. This gives an account of the strengths and challenges of each program.	<p>In 2014, building a volunteer core and recruiting volunteers were on-going issues for some programs.</p> <p>There were some general management issues reported in some of the programs but by the end of the year most of these issues had been resolved.</p> <p>Changes to Legal Aid eligibility affected the delivery of all the legal programs EFry offers. The programs saw an increase in clients asking for services that EFry typically does not provide.</p>

The review of the financial documents did not yield anything of significance to the strategic planning process. So, no findings have been included in this document.

The meeting with the evaluation specialist was to help the student assistant to get a better understanding of how EFry Calgary operates, especially with regards to how programs are evaluated. Since the meeting had no direct impact on the strategic planning process, no findings have been reported in this document.

Endnotes

- i Bryson, J. M. (2011). *Strategic Planning for Public and Nonprofit Organizations: A Guide to Strengthening and Sustaining Organizational Achievement*. Hoboken, NJ: John Wiley & Sons.
- ii Savage, N., Marlow, S., & Salas, E. (2015). Examining the Multi-Level Effects of Organizational Planning on Performance. In M. D. Mumford & M. Frese (Eds.), *The Psychology of Planning in Organizations: Research and Applications* (pp. 186-193). London: Routledge.
- iii Labbe, et al, (2015)
- iv Association for Strategic Planning (2010, December 18). *Best Practices for Qualifying Strategic Planning & Management Frameworks*. Retrieved January 08, 2016, from <http://www.strategyassociation.org/>
- v *ibid*
- vi Mintzberg, H. (1978). Patterns in Strategy Formation. *Management Science*, 24(9), 934-948.
- vii Tasler, N. (2015, May 18). Explain Your New Strategy By Emphasizing What It Isn't. Retrieved January 8, 2016, from <https://hbr.org/2015/05/explain-your-new-strategy-by-emphasizing-what-it-isnt>
- viii <http://www.neverhome.ca/detention/>
- ix <http://www.calgary.ca/cps/Documents/statistical-reports/2013-annual-statistical-report.pdf>
- x <http://www.calgary.ca/cps/Pages/Statistics/Calgary-Police-statistical-reports.aspx>
- xi <http://www.statcan.gc.ca/pub/85-002-x/85-002-x2006007-eng.pdf>
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- xxviii <http://vibrantcalgary.com/wp-content/uploads/2016/10/Enough-for-All-Strategy.pdf>
- xxx (<http://calgaryherald.com/news/politics/alberta-confronts-issue-of-indigenous-incarceration>)
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