



Lake Windermere Ambassadors Strategic Plan - 2021

Executive Summary

Following an organizational assessment by Columbia Basin Trust Non-Profit Advisor, Kevin Allen, it was recommended that the Lake Windermere Ambassadors Society (LWA) would benefit from the creation of a strategic plan that would guide organizational programming and goal setting.

The Lake Windermere Ambassadors Society completed a virtual strategic planning session on February 6, 2021. The session participants included:

- Paul Christy – Chair
- Shawn Risdale – Vice-Chair
- Taoya Shaefer – Treasurer
- Jennifer Beverley – Secretary
- Buzz Harmsworth - Director
- Gurmeet Brar – Director
- Max Fanderl – Director
- Susan Clovechok – Area F representative
- Ute Juras – District of Invermere representative
- Shannon McGinty – Program Coordinator
- Nancy Wilson – Columbia Lake Stewardship Society (CLSS) representative

Prior to the session, data was provided to participants from two (2) surveys. The first survey was sent to board directors, Area F and District of Invermere representatives, a Shuswap First Nation representative, a representative of the Columbia Lake Stewardship Society and to the Program Coordinator. This survey was completed by 11 respondents. The data is summarized in a separate report.

The community survey was distributed by social media and by directors to their email contact lists. This survey was completed by 90 respondents. The data collected in the community survey is also summarized in a separate report.

Using a round table format, the planning session participants identified the most relevant Strengths, Weaknesses, Opportunities and Threats of the organization. The summary of the session findings is below.

Strategic Planning Session – Summary of Strengths, Weaknesses, Opportunities and Threats

Strengths	Weaknesses
<ul style="list-style-type: none"> 💧 Program Coordinator 💧 Community support 💧 Steady financing 💧 Relationship with Columbia Lake Stewardship Society (CLSS) 💧 Support of local government 💧 Board diversity 💧 Collaboration with other non-profits 💧 Education and outreach “Education > Enforcement” 💧 Maintain health of lake 💧 Support recreation 💧 Social media, Instagram 	<ul style="list-style-type: none"> 💧 Lack of sustainable funding 💧 Volunteer burnout 💧 Lack of data regarding impact of boat recreation (particularly in light of changes in boat manufacturing) 💧 Insufficient support from all levels of government 💧 Lack of enforcement of lake regulations (What are the regulations? How enforced?) 💧 Lack of succession planning (Staff and board members) 💧 Lack of membership engagement (Need to review the membership criteria) 💧 Lack of board diversity – this is a requirement as the designated Lake Management Committee (Consideration to include representatives from lakeside communities, part-time residents, agriculture, industrial, First Nations) 💧 Board retention 💧 Need more information on the effect on wildlife 💧 Lack of understanding of LWA 💧 Balancing conservation vs. recreation 💧 Should the jurisdiction covered by LWA include foreshore lands? 💧 Division between residents and non-residents (There is an assumed bias that all part-time residents love power boating) 💧 Lack of outreach to community groups 💧 Perception that LWA panders to boat users

Opportunities

- 💧 Increased collaboration with CLSS, Living Lakes Canada and other water stewardship organizations (Including sharing data and board-to-board)
- 💧 Collaboration with conservation groups like Wildsight and Lake Windermere Rod and Gun Club
- 💧 Change in behaviour of lake users
- 💧 Improve connections with second homeowners and power boat users
- 💧 Increase area of jurisdiction
- 💧 Increase outreach – surveys?
- 💧 Electric boats?
- 💧 Advocate for different types of recreation on the lake
- 💧 Educate on the impact of use including impact on wildlife (Many do not realize the damage being caused)
- 💧 Use of technology (Use of Zoom meetings may encourage a part-time resident to be on the board, use of webinars, improve social media management through use of a platform like Hootsuite)
- 💧 Improve relationships with community associations (Membership drives, outreach fundraising, AGM presentations and potential board members)
- 💧 Be more specific in education – Should there be an annual message?
- 💧 Increase diversity of board members
- 💧 Eliminate Us vs. Them mentality
- 💧 Capacity study
- 💧 Advocate for increased enforcement (Government agencies do not talk to each other)
- 💧 Youth engagement
- 💧 More staff
- 💧 Tiered board system (To engage volunteers that cannot commit to being a full-time board member, like students)

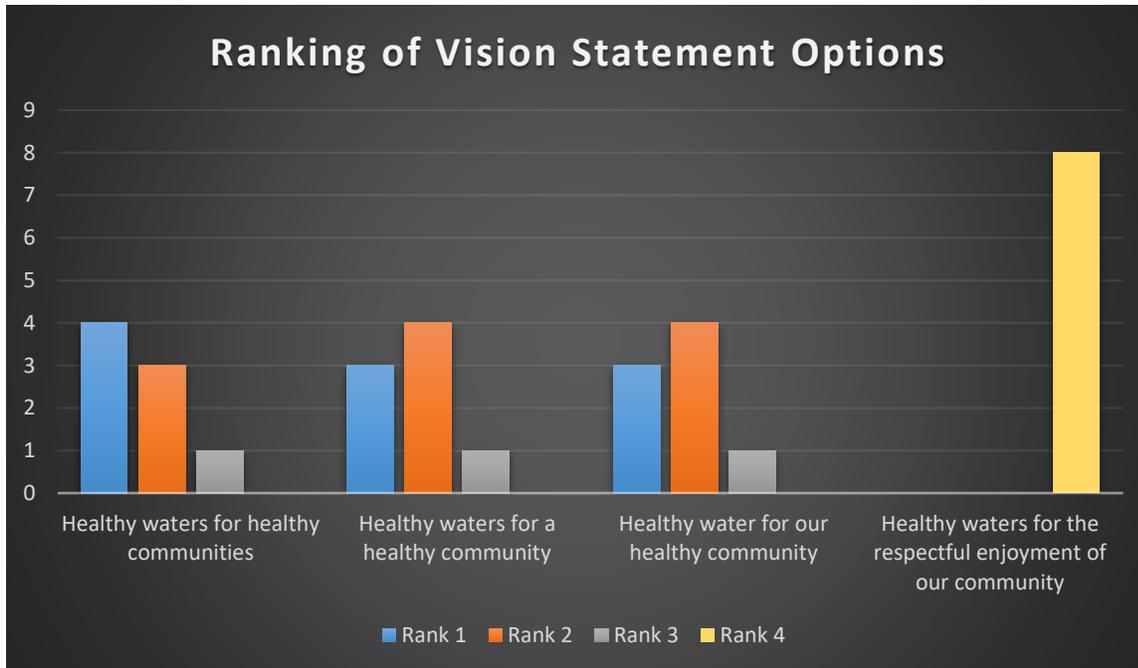
Threats

- 💧 Organization loses relevance
- 💧 Loss of Program Coordinator; lack of continuity
- 💧 Lose status as Lake Windermere Management Committee; too much focus on conservation could increase this risk.
- 💧 Loss of board history with board turnover
- 💧 Not meeting quorum at board meetings – Need more board members
- 💧 Perception that the organization is against motorized boating
- 💧 Lack of enforcement and updated regulations from government agencies
- 💧 Residents and visitors don't understand importance of lake health
- 💧 Continued development around the lake
- 💧 No involvement in the District of Invermere Athalmer Neighbourhood Project
- 💧 No funding for staff (only for project costs)
- 💧 Boat impact study vs. number of boats on the lake

Opportunities	Threats
<ul style="list-style-type: none"><li data-bbox="203 352 570 384">💧 Wildlife/bird/fish studies<li data-bbox="203 390 768 464">💧 Participation in the District of Invermere Athalmer neighbourhood plan	

Vision Statement

The Vision Statement provides a clear picture of where you want to be as an organization in 3 to 5 years. It is an aspirational statement that creates a rallying point for all stakeholders. The participants supported the use of a simplified Vision Statement. A survey of session participants ranked the Vision Statement options as follows:



The majority of participants selected “**Healthy waters for healthy communities**” as the number one choice for the organization Vision Statement.

Mission Statement

The Mission Statement is a concise description of the purpose of the organization. Elements of the previous Vision Statement were combined with the existing Mission Statement to create a new, refined Mission Statement for the organization.

“Through collaboration with community sectors and a balanced management approach that supports recreational and traditional uses, high fish and wildlife values, and economic prosperity; the Lake Windermere Ambassadors serve as a resource for projects benefiting the ecological health of Lake Windermere.”



Value Statement

The Value Statements depict the priorities in how the organization carries out activities with stakeholders. The Value Statement for Lake Windermere Ambassadors remain unchanged from the previous Strategic Plan:

- 💧 ***Ecologically healthy Lake Windermere***
- 💧 ***Balanced and respectful uses of Lake Windermere***
- 💧 ***Local input in planning and management of Lake Windermere and its watershed***

Strategic Goals

Goals were identified from having taken a wide look around the outside of the organization (an external analysis) and a careful look inside the organization (an internal analysis). The strategic goals address the most important issues of the organization.

Goal One – Create a Sustainable Organization

Objective: Lake Windermere Ambassadors is able to sustain itself over the long term, perpetuating its ability to fulfill its mission. This is obtained through financial sustainability and succession planning for directors and staff.

Financial Sustainability

Tactic	Responsibility	Timeline	Priority
Develop an annual budget to identify how much funding (fees and/or fundraising) is needed to offset expenses. Particularly identify any deficits to know how much funding is needed so that fundraising targets and/or fees can be adjusted accordingly.	SM/Board	August 2021 – First draft of budget presented to board September 2021 – Final draft of budget approved. (YE is September 30)	High
Allocate sufficient funding to administration and programs. Develop program-based budget that identify expected revenues and expenses associated with each program along with a percentage allocation of overhead to each.	SM/Board	August 2021 – First draft of budget presented to board September 2021 – Final draft of budget approved. (YE is September 30)	High
Track expenditures and revenue to promptly address financial priorities and issues. Include financial updates in quarterly board packages. (Including a Budget vs. Actual)	SM/Board	March 2021 – SM to connect with bookkeeper to enter budget numbers into QuickBooks. April 2021 – 1 st and 2 nd quarter financial are presented to board.	High
Create, or update, the annual giving membership program. Update the definition of a member and associated benefits. (Currently, there is no fee for membership, by donation only.)	SM/Board	February 2022 – Prior to the 2022 Annual General Meeting. (Changes to BC Societies bylaws need to be approved at Annual General Meetings.)	High

Tactic	Responsibility	Timeline	Priority
Create a policy to establish adequate reserves and to do contingency planning. Establish a policy to set aside some percentage of revenue to be available in case of emergency.	SM/JB	July 2021 – Policy created prior to creation of draft operating budget.	Medium
Research the establishment of an endowment fund with the Columbia Valley Community Foundation. Revenue earned on an endowment fund creates a long-term revenue stream for the organization.	SM	April 2021 – Contact Caitlin Hall-Sharp from the Columbia Valley Community Foundation to do a presentation to the board about the establishment of an agency endowment fund.	Medium
Increase regular donations to the organization:			
<ul style="list-style-type: none"> 💧 Update profile on CanadaHelps online giving portal 	SM	May 2021	Medium
<ul style="list-style-type: none"> 💧 Create a “Donate Now” button on website (that connects to the CanadaHelps online portal or PayPal account) 💧 Create a policy for the minimum donation that will receive a charitable receipt (\$25.00) and update wording on website. 	SM	July 2021	Medium



Tactic	Responsibility	Timeline	Priority
Create new fundraising options for the organization:			
 Investigate a gas tax or other type of boat user fee as a source of revenue for LWA	SM	2022	Medium
 Work with Columbia Basin Environmental Education Network (CBEEN) to create items that may be sold through their online learning store	SM	May 2021 – Meet with Duncan Whittick (CBEEN, Executive Director) to determine potential items that LWA could offer on the online store. May 2021 – December 2021 – Apply for grants to support the program.	Low
 Implement one (1) fundraising idea with a local business or businesses	SM	June 2021 – Implement program to take advantage of summer tourist season.	Low

Board Sustainability

Tactic	Responsibility	Timeline	Priority
<p>Create organization committees to assist with program implementation.</p> <ul style="list-style-type: none"> 💧 One committee per strategic goal 💧 Public access committee (Suggested members: Gurmeet Brar and Bill Ark) 💧 Boat study committee (Suggested members: Gurmeet Brar and Max Fanderl) 	SM/Board	May 2021 – SM and board to determine types of committees	High
Update the organization Terms of Reference regarding term limits for board directors (and overall review of Terms of Reference)	SM/Board	February 2022 – Prior to March 2022 Annual General Meeting.	High
Develop an organizational policy for the recruitment of three types of volunteers: Board directors, committee volunteers and program volunteers.	SM/JB	September 2021 – SM provides draft policy to board for approval	Medium
Increase membership engagement through participation as a committee or program volunteer.	SM/Board	June 2021 – SM and board to encourage current members to participate on the newly created committees.	Medium
Establish regular board training (minimum of one board training per fiscal year). Board directors are responsible for the legal governance of the organization; it is important to provide regular reminders of responsibilities.	SM/Board	July 2021 – Financial literacy expert to provide training on reading financial statements (including questions to ask and items to watch for). To be completed prior to budget process in August 2021	Medium



Tactic	Responsibility	Timeline	Priority
Include strategic plan discussions on quarterly board meeting agendas. (Strategic plan tactics and goals to be reviewed annually; prior to Annual General Meeting in March.)	SM	June 2021 – First update on Strategic Plan (any new initiatives that arise at regular board meetings to be included in the Strategic Plan tactics)	Medium

Goal Two – Enhance Education and Communication to the Community

Objective: Lake Windermere Ambassadors is recognized as the lead advocate for the health of the Lake Windermere.

Education/Communication

Tactic	Responsibility	Timeline	Priority
Promote the Green Boating Guide within the community. Hold a minimum of four (4) boat launch information sessions throughout the summer. (Between Pete’s Marina and boat launches on the east side of the lake.)	SM	July 2021 – August 2021	High
Recruit and train ten (10) citizen scientist volunteers. Create a minimum of one (1) volunteer training video or Instagram reel. (See August 21, 2020 training video created by interim program coordinator, Georgia Peck.)	SM	July 2021 – August 2021	High
Produce and give presentations to government about 2021 water data	SM	November 2021 – February 2022	High
Host one shoreline cleanup in the spring and one shoreline cleanup in the fall	SM/Board	April 2021 – October 2021	High

Tactic	Responsibility	Timeline	Priority
<p>Create an annual marketing communications plan including a social media strategy.</p> <ul style="list-style-type: none"> 💧 Include timelines for publishing articles in the CV Pioneer and on the website. 💧 Attend a minimum of six (6) farmer's markets 💧 Choose one marketing focus area per season. (4 focus areas per year) 💧 Website upgrades (Ensure it is included in 2021-2022 annual budget) 	SM	<p>April 2021 – Presentation at April 2021 board meeting. (For the balance of the fiscal year, 2020-2021.)</p> <p>August 2021 – Update marketing plan for 2021-2022 budget.</p>	High
<p>Create an educational brochure with the findings from the April 2020 Living Lakes Canada FIMP report. (Foreshore Integrated Management Plan)</p>	SM	<p>July 2021 – Brochure created in summer 2021 for distribution in late summer 2021 or summer 2022.</p>	Medium
<p>Continue partnership with Toby Creek Nordic to educate winter lake users.</p>	SM	<p>Ongoing</p>	Medium
<p>Host one (1) educational webinar.</p>	SM	<p>November 2021 – Host the webinar in November 2021. Topic to be determined with the board. May liaise with Duncan Whittick (CBEEN) in regard to topics and marketing ideas.</p>	Medium
<p>Create one (1) program for elementary or middle school students. Explore the option of teacher training focused on certain ages.</p>	SM	<p>December 2021</p>	Medium

Tactic	Responsibility	Timeline	Priority
<p>Liaise with Pete’s Marina, Shadybrook Marina and Columbia River Paddle to encourage the distribution of boating regulations and management plan designations, safe boating practices and codes of conduct for Lake Windermere, applicable to motor boats and personal watercraft. (See Lake Windermere Management Plan for Boat Traffic Code of Conduct)</p>	SM	June 2021	Medium
<p>Complete a community survey to understand demographics, interests and focus areas.</p> <ul style="list-style-type: none"> 💧 Follow-up to community survey undertaken as part of 2021 Strategic Planning 	SM	November 2021 – February 2022	Medium
<p>Run four (4) kids’ summer activity camps.</p> <ul style="list-style-type: none"> 💧 Include two (2) camps for Shuswap Indian Band and Akisq’nuk First Nation 	SM	July 2021 – August 2021	Low
<p>Create an education piece (pamphlet) about the importance of Lake Windermere to birds and the number of at-risk birds utilizing the lake as a significant habitat.</p>	SM	July 2021 – Brochure created in summer 2021 for distribution in late summer 2021 or summer 2022.	Low



Tactic	Responsibility	Timeline	Priority
Develop program for high school students (offer volunteer opportunities to high school students; offer volunteer opportunities to graduating high school students that need to fulfill minimum volunteer requirements.) Liaise with College of the Rockies to engage students enrolled in Environmental Science program.	SM	2022	Low

Goal Three – Maintain and Increase Collaboration with Indigenous Peoples and Community Stakeholders

Objective: Lake Windermere Ambassadors is a valued and respected partner with community stakeholders.

Tactic	Responsibility	Timeline	Priority
Participate in the planning for the Athalmer Neighbourhood project.	SM	Ongoing	High
Host one AGM in the spring and present 2021 - 2022 work plan.	SM	March 2021	High
Attend two (2) lakeside community association annual general meetings. Write an update for community association newsletters. (Encourage community and lakefront property owners to enhance habitat along the foreshore fronting their property.)	SM	April 2021 – Deadline to create update for community association newsletters. April 2021 - September 2021 – Timeframe to attend two (2) annual general meetings	High
Renegotiate a third Lake Windermere Management Committee on a 5-year agreement <ul style="list-style-type: none"> 💧 Work with District of Invermere and Regional District of East Kootenay to determine role of LWA in water monitoring in the third term. 	SM	July 2021 – Current agreement expires July 2021	High

Tactic	Responsibility	Timeline	Priority
<p>Maintain active participation in capacity building workshops, conferences, webinars and forums through membership with Columbia Basin Watershed Network, Kootenay Conservation Program, Canadian Freshwater Alliance, Living Lakes Canada, BC Lake Stewardship Society, East Kootenay Invasive Species Council (EKISC) and Invasive Mussel Defense crews, Columbia Lake Stewardship Society, Wildsight Invermere, Columbia Wetland Stewardship Partners, Friends of Windermere Creek, Friends of Columbia Lake ,Lake Windermere Rod and Gun Club, Lake Windermere Lions’ Club, Fairmont Lions’ Club, Rotary Club of Invermere and Rotary Club of Radium Hot Springs.</p>	<p>SM</p>	<p>Ongoing</p>	<p>Medium</p>
<p>Continue working with Ministry of Transportation and Infrastructure (MoTI) and Ministry of Forests, Lands, Natural Resource Operations and Rural Development (FLNRORD) to continue restoration and communication efforts related to Public Access Right-Of-Ways around the lake.</p>	<p>SM</p>	<p>Ongoing</p>	<p>Medium</p>

Tactic	Responsibility	Timeline	Priority
<p>Start dialogues with community associations that are near right-of-ways and bring to their attention the plans for restoring these areas for public use.</p> <ul style="list-style-type: none"> Work with MoTI and Regional District of East Kootenay (RDEK) to identify one potential public access site for restoration. Develop grant proposals to support restoration efforts. 	SM	April 2021 – November 2021	Medium
<p>Develop stronger contact and understanding between Akisqnuq and Shuswap councils and LWA board.</p> <ul style="list-style-type: none"> Work with the Akisq’nuq First Nation to have an Akisq’nuq advisor on the LWA Board 	SM	April 2021 – February 2022	Medium
<p>Host a booth at the Shuswap Band Annual Salmon Festival and work with the organizing committee to undertake a greater role as recommended</p>	SM	August 2021 – September 2021	Medium

Goal Four– Improve and Preserve the Health of the Lake

Objective: The Lake Windermere Ambassadors oversee data collection programs and studies that provide scientific data on the health of the lake and the foreshore.

Water Monitoring

Tactic	Responsibility	Timeline	Priority
Continue lake and creek water monitoring as per the 2010 Water Quality Assessment and Objectives for Lake Windermere and 2007-2017 CBWQ guidelines.	SM	Ongoing	High
Continue to add to water quality database <ul style="list-style-type: none"> 💧 Research new Living Lakes data portal to determine if it works for LWA 💧 Connect with Shuswap Indian Band on their Knowledge Hub Process and participate in adding data 	SM	May 2021 – To determine usability of Living Lakes data portal.	High
Continue operation of the Whiteway, with agreements among agencies as required, and provide washrooms, doggy bags and garbage/recycling containers for lake use.	SM	Ongoing	Medium

Studies and Recommendations

Tactic	Responsibility	Timeline	Priority
Study the impacts of boating on lake health	SM	August 2021 – Deadline to determine the nature of the study – boat impact study or boat capacity study. Once determined, begin to apply for grants to support the study for 2022.	High
Obtain compliance with water quality objects and complete three more years of monitoring	SM	April 2021 – September 2023	High
Ensure collection of total phosphorous within two weeks of ice out	SM	April 2021	High
Add collection of total dissolved phosphorous, total organic carbon, dissolved sulphate, total nitrogen, nitrate, nitrite and chloride to annual monitoring	SM	September 2021	High
Establish three (3) “no motorized boating” areas to respect environmentally sensitive areas and swimming areas (Mark south-end of the lake marked with educational buoys and signage suggesting that people keep out of the area during sensitive periods for birds)	SM	September 2021 – Determine an additional area to mark (likely the south end of the lake) and how it will be achieved (I.e. What funding will be accessed and liability concerns.)	Medium
Establish two (2) areas that are “slow-no wake” and maximum speed of 10 km/h, where there is significant boating in congestion causing safety concerns (Same areas designated as “no tow” areas)	SM	September 2021 – Areas identified include Taynton Bay to the mouth of Abel Creek and 60 metres on the east shoreline.	Medium

Tactic	Responsibility	Timeline	Priority
Establish mechanisms in the community to report on foreshore construction projects to ensure that all such projects obtain approval for the work.	SM	March 2021 – February 2022 – Perhaps create an ad hoc committee to begin work on this project.	Medium
Encourage the Province and Department of Fisheries and Oceans (DFO) to enforce their own regulatory requirements on the foreshore, to support East Kootenay Integrated Lake Management Plan (EKILMP) guidelines, Development Permit (DP) guidelines and best management practices for all foreshore works, and to take action on illegal foreshore works that have negative impacts on habitat.	SM	2021 – SM to connect with both government departments in 2021.	Medium
Fish inventory of Lake Windermere completed, in order to determine the abundance and distribution of invasive fish, as well as the impacts that these species may be having on the ecology and wildlife of Lake Windermere, including potential effects felt by indigenous fish populations.	SM	April 2021 – September 2022 – SM to undertake study in 2021 dependent on grants received. (Grants have already been applied for.)	Medium
Conduct side-by-side Secchi readings during sampling season	SM	September 2021	Medium
Approach local ENV office to assist in auditing of field equipment	SM	September 2021	Medium

Tactic	Responsibility	Timeline	Priority
Request ENV to review Water Quality Objectives following three years of compliance monitoring	SM	September 2023	Medium
Explore the opportunity to conduct a non-point source pollution assessment over the entire watershed, with a priority on Windermere Creek	SM	September 2023	Medium
Explore opportunities for public docks at other locations. Some potential locations include: the reinstatement of a public pier/dock at the foot of Government Street in Windermere and a small dock in Taynton Bay for public access onto the water.	SM	March 2021 – April 2023	Low
Pursue opportunities for multiple ramps for small boats (non-motorized or small motor boats not requiring a trailer) distributed around the lake, with parking where possible. Some of these may be suitable only for small car-top non-motorized boats.	SM	March 2021 – August 2022 – Create one (1) location. Potential locations include: James Chabot Provincial Park (re-establish a small launch at the previous site, recognizing that it is seasonal due to water depth), Pete’s Marina, Taynton Bay, Baltac Road, Windermere at the foot of Government Street and Ash Street.	Low