



Cooperative Memorial Society (CMS) Strategic Plan Empowering Individuals and Families through End-of-Life Planning

Introduction

This strategic plan builds on the vision and mission statements CMS Board approved in 2023. It outlines the key priorities, actionable steps, and timelines for CMS to enhance operational efficiency, improve member engagement, and ensure alignment with its mission and cooperative values. Recognizing the need for continual relevance, this plan also includes efforts to review and refresh the vision and mission statements during the strategic period.

Vision

We envision an Alberta where all citizens have access to dignified, person-centred funeral services.

Mission

To reduce the emotional and fiscal stress of funeral planning by providing members:

1. The information, tools, and resources needed for advanced funeral planning.
 2. Access to affordable funeral services that uphold the dignity and personhood of the deceased.
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Strategic Goals and Objectives

1. Governance Excellence

Objective: *Transition to a robust policy governance model and review the vision and mission statements for ongoing alignment with CMS's goals and community needs.*

Key Actions and Timeline:

- Ongoing: Conduct governance training for board members and staff to strengthen oversight.

- Q1 2025: Clearly delineate board, executive director, and membership services coordinator roles to enhance accountability.
- Q4 2025: Finalize the review and potential update of the articles, bylaws, and policies.
- Q4 2025: Initiate a review of the vision and mission statements to ensure they reflect CMS's strategic direction.

KPI: Completion of all governance updates by Q4 2025.

2. Financial Integrity and Practices Improvement

Objective: *Strengthen financial management and bookkeeping to enhance efficiency and accuracy while reducing workload and ensuring compliance.*

Key Actions and Timeline:

- Complete the annual budget in alignment with strategic goals.
 - Set up tools or templates to predict how much money will come in and go out over time, so we can plan ahead and make sure we always have enough cash to cover CMS needs.
 - Optimize reporting using QuickBooks Online and real-time dashboards.
 - Enhance expense tracking with standardized processes and software.
 - Strengthen internal controls and assign clear financial responsibilities.
 - Explore diversification of revenue streams including grants, and sponsorships.
 - Improve cybersecurity and data protection with robust protocols.
 - **Evaluation Metrics:**
 - 100% CRA compliance.
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3. Enhanced Records Management

Objective: *Develop a reliable record management system to ensure transparency, enhance operational efficiency, and meet the records management requirements of the Cooperative Act.*

Key Actions and Timeline:

- Leverage Google Workspace for centralized record storage and collaboration, providing seamless access and secure sharing for authorized users.
- Any documents currently stored on directors' devices will be transferred to the Board Portal to ensure centralized access and proper recordkeeping.
- All digital records will be securely backed up on Canadian servers to meet legal compliance standards.
- Governance-related documents, including those inherited from past societies, will be digitized and organized within the Board Portal.
- If the office is relocated in spring 2025, digitizing any remaining paper records will be prioritized before the move.

KPI: By the end of Q1 2025, essential documents will be securely backed up on Canadian servers to meet compliance requirements. By Q2 2025, the full digitization of

all governance documents will be completed, ensuring they are accessible in the Board Portal.

4. **Membership Growth and Engagement**

Objective: *Expand CMS membership while enhancing member experience and value.*

Key Actions and Timeline:

- Redesign the CMS website for improved user experience.
- Launch outreach campaigns and use Membee Customer Relationship Management (CRM) software to streamline membership management.
- Actively gather member feedback to guide service innovations.

KPIs:

- Achieve 2% membership growth in Year 1 and 5% membership growth in Year 2.
 - Maintain a 50% or greater email open rate for communications sent to members. (According to [Smart Insights](#), "Health and Wellness" and "Nonprofit Services" report average open rates of approximately 37% and 41.8%, respectively.)
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5. **Service Innovation and Partnerships**

Objective: *Strengthen partnerships with funeral homes and expand member services.*

Key Actions and Timeline:

- Organize workshops to highlight pre-planning benefits.
- Regularly evaluate service agreements with funeral homes.
- Develop new partnerships and host collaborative events.

KPIs:

- 2 new partnerships annually.
 - Host 2-3 community events annually.
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6. **Risk Management**

Objective: *Proactively manage operational, financial, and reputational risks.*

Key Actions and Timeline:

- Conduct annual risk assessments and maintain a risk register.
- Review crisis management protocols biannually.
- Address risks such as cybersecurity, operational disruptions, and financial uncertainties.

KPI: 100% implementation of mitigation plans for identified risks.

7. **Access, Belonging and Community Strategy**

Objective: *Foster access, belonging, and community across all interactions and services,*

ensuring equitable opportunities for all members and partners.

Key Actions and Timeline:

- Board Leadership: The Board will integrate principles of access, community, and belonging into governance, strategy, and oversight, ensuring these values guide CMS's direction while fostering accountability and inclusivity.
 - Executive Director's Role: The ED will champion and operationalize this strategy by developing and implementing inclusive outreach initiatives, monitoring progress, and ensuring alignment with CMS's mission, vision, and values.
 - Inclusive Outreach: The ED will develop materials that reflect the diverse cultural, social, and economic backgrounds of the community, emphasizing accessibility and shared values to remove barriers and build understanding.
 - Training and Education: Staff, board and volunteers will receive training to understand diverse perspectives, foster connections, and create respectful, welcoming environments in line with CMS's values.
 - Goal Setting and Evaluation: The Board and ED will set measurable goals to enhance access, strengthen community ties, and promote belonging, reviewing and adjusting strategies annually to meet community needs.
 - **KPI:** Achieve a 5% annual increase in participation from underrepresented groups at CMS events and activities, supported by feedback surveys to assess perceptions of access, community, and belonging.
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8. Advertising and Marketing Strategy

Objective: *Strengthen CMS's public presence and improve member engagement.*

Key Actions and Timeline:

- Launch public awareness and education campaigns through marketing and advertisements, such as newsletters, blogs, and social media.
 - Share member testimonials and success stories.
- KPI:** Publish monthly blogs and grow social media followers by 10% annually.
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Implementation Timeline

Immediate Actions (Q1 & Q2 2025):

- Continue developing governance policies.
- Approve the 2024/2025 budget.
- Review segregation of duties and launch real-time financial dashboards.
- Complete office relocation tasks if applicable.

Short-Term Goals (Q3 2025):

- Identify potential value-added membership services.

- Organize initial workshops for members.
- Strengthen digital approval workflows.
- Review and update vision and mission statements.

Medium-Term Goals (2026–2027):

- Understand the viability of potential revenue streams, if required to implement.
 - Create more service-related partnerships.
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Conclusion

This strategic plan positions CMS to achieve sustainable growth and meaningful community impact by focusing on governance, financial integrity, member engagement, and innovation. By actively leveraging technology, prioritizing member feedback, and fostering partnerships, CMS empowers Albertans to plan ahead with clarity, dignity, and peace of mind.