

Headwater Learning Foundation

STRATEGIC PLAN

2021 – 2025

Stewardship of learning excellence.

MISSION

We nurture philanthropy to provide financial support to initiatives that advance innovation and equity in education.

VISION

To foster and support the advancement of education.

At Headwater Learning Foundation, we believe...

1

we are all learners,
continuously
redefining what is
possible.

2

innovation is
central to positively
impacting the future
of learning and
education.

3

authentic
relationships and
forward-thinking
collaborations
amplify our impact.

4

educational
advancement has
the power to impact
the vitality of
communities.

INTRODUCTION

As the supporting partner of both Calgary Academy and Headwater Learning Solutions, Headwater Learning Foundation provides financial means and assistance to organizations pushing the boundaries of educational change.

The 2021-2025 Strategic Plan is the first collaboratively developed plan for Headwater Learning Foundation. Guided by the community's desires for equity, improved access, and a modernized facility, Headwater Learning Foundation will nurture a culture of philanthropy to better support its partners' needs and priorities.



GREG BASS
President & CEO



GARY PURCELL
Board Chair



OVERVIEW

By 2025, Headwater Learning Foundation will expand its ability to support partner organizations in improving and transforming education.

GOAL ONE

Philanthropic initiatives foster and support partner organizations.

GOAL TWO

Learning spaces are reimagined.

GOAL THREE

Transformative education is advanced and celebrated.

To achieve these three goals, HLF must embed these elements in all that it does:

1. Innovation and creativity
2. Professional learning
3. Leadership
4. Reconciliation
5. Researched, evidence-based action
6. Culture of philanthropy
7. Strong governance



GOAL **ONE**

Philanthropic initiatives foster and support partner organizations.

By strengthening the Headwater Learning Foundation brand and relationship to partner organizations Calgary Academy and Headwater Learning Solutions, clarity and understanding will be improved for staff, supporters, and the external community.

OUTCOME 1

HLF supports partner organizations' financial goals.

STRATEGIES

Year 1 (Complete)	Develop a philanthropic plan that supports the growth of key initiatives.
Year 2 (Complete)	Articulate desired funding buckets and raise funds connected to areas of greatest need.
Year 3 (Draft)	Improve outreach efforts and advocacy to enhance funding for programs and services.
Year 4 (Draft)	Continually refine the philanthropic plan.

OUTCOME 2

Key stakeholders have opportunities to support partner organizations' initiatives.

STRATEGIES

Year 1 (Complete)	Develop meaningful communications to demonstrate philanthropic impact.
Year 2 (Complete)	Continue to provide meaningful communications that demonstrate need and philanthropic impact.
Year 3 (Draft)	Grow support of priority funding and research areas.
Year 4 (Draft)	Enhance relationship-building and solicitation strategies for specific donor segments.



GOAL **TWO**

Learning spaces are reimagined.

As physical space can be the first teacher, modernizing the school facility is a priority. The Calgary Academy school facility will be enhanced in priority areas driven by student and operational needs and philanthropic support.

OUTCOME 1

Campus and facilities inspire and enhance students' learning experiences.

STRATEGIES

Year 1 (Complete)	Develop student-centered philanthropic priorities.
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Year 2 (Complete)	Invest into school facilities' based on student-centered priorities and greatest need.
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Year 3 (Draft)	Complete the southwest addition for Calgary Academy school
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Year 4 (Draft)	Continue modernizing school facilities based on Master Facilities Plan.
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OUTCOME 2

Donors actively participate in the growth and advancement of Calgary Academy.

STRATEGIES

Year 1 (Complete)	Create donor-centered communications that showcase students' success.
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Year 2 (Complete)	Grow donor stewardship initiatives.
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Year 3 (Draft)	Formalize and advance a recognition and stewardship plan.
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Year 4 (Draft)	Grow the diversity of donor engagement efforts.
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GOAL **THREE**

Transformative education is advanced and celebrated.

Headwater Learning Foundation's efforts to support innovation and equity in learning must be rooted in a commitment to reflecting and building internally first, before advocating and advancing initiatives externally. By building an equity, diversity, and inclusion framework that can be applied or referenced by all business functions, HLF will ensure that it is living the change first before advocating and celebrating others.

OUTCOME 1

Partner organizations are recognized as transformative education leaders.

STRATEGIES

Year 1 (Complete)	Engage learning community to build an equity, diversity, and inclusion guiding framework.
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Year 2 (Complete)	Develop an equity, diversity, and inclusion action plan.
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Year 3 (Draft)	Develop mandate document to clarify goals of individualized programming for unique learners.
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Year 4 (Draft)	Develop and publish research projects in partner organizations.
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OUTCOME 2

Diverse community groups are engaged to share knowledge.

STRATEGIES

Year 1 (Complete)	Engage learning community to build a repository of impact stories.
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Year 2 (Complete)	Involve board and community advocates to build strategic philanthropic alliances.
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Year 3 (Draft)	Explore and establish strategic partnerships with a variety of education and community groups.
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Year 4 (Draft)	Begin to establish an external advisory panel to counsel on research and funding initiatives.
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