



Strategic Plan

Approved by Board in Electronic Vote in
November/December 2021



Five Oaks

Acknowledgement

Five Oaks acknowledges that we gather on the traditional territory of the Haudenosaunee and Anishinaabe people and acknowledge their stewardship of this land throughout the ages. We seek a new relationship with the Original Peoples of this land, one based in honour and deep respect.



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Background

As of the writing of this report, COVID-19 has disrupted nearly every aspect of the Canadian economy and way of life. While demand for retreat spaces like Five Oaks has not disappeared, it has transformed and it will continue to transform as economic, regulatory, and social context continues to change long after the pandemic subsides. With longstanding inequities currently being exposed by the pandemic, Five Oaks has been called to take action. This moment represents an opportunity to re-envision the role of Five Oaks as a space for rejuvenation, reflection, and intercultural connection—not only for Five Oaks’ traditional clients and members, but also for those who have long been underserved, excluded, and marginalized by retreat centres.

In September 2020, Five Oaks launched its strategic planning process. Strategic planning is an inclusive and intentional process for setting an organization’s overarching direction, and a process for articulating the organization’s desired impact. The purpose of this process was to revisit Five Oaks’ Vision and Mission, to determine appropriate areas of focus, and to develop a high-level roadmap for how the organization will evolve over the next several years. To inform the development of the strategic plan, a study was conducted including both primary and secondary research. This study uncovered key trends in the market for education and retreat centres, and identified potential opportunities for Five Oaks to deepen its impact, while simultaneously serving new audiences.

An important element of this process was to gather the perspectives of members and non-members alike. The strategic planning process provided the opportunity to engage with both stakeholders who know Five Oaks well—Board, staff, members, partners, and clients—as well as others whom Five Oaks will aim to serve in the future. Five Oaks is grateful to the more than 60 contributors who offered their time, input, and expertise to this project and whose perspectives have been invaluable in shaping the strategic plan that follows. A special acknowledgement goes to the strategic planning steering committee—Rev. Peter Wall, Rev. Pegi Ridout, Ms. Ausma Malik, Mr. Robert Stapleford and Ms. Karen Efron—without whom this initiative would not have been possible.



Key Research Themes

Five Oaks offers a beautiful, sacred space for reflection, connection, and transformation. The land itself is Five Oaks' primary differentiator—creating a sense of renewal, inspiration, and joy, and providing the foundation upon which meaningful personal and group experiences flow. Five Oaks, however, is more than just the land. It offers unique experiences that leverage the facilities, the network of partners, and the expertise and attitude of Five Oaks staff. Five Oaks is an enabler for personal and spiritual transformation and the pursuit of higher ideals. Even those further from Five Oaks recognized Five Oaks to be a place committed to its values, and particularly appreciated its emphasis on social justice.

Five Oaks is committed to cultivating a diverse and inclusive community. Of particular importance to Five Oaks stakeholders was to welcome those audiences who have faced systemic injustice, exclusion, marginalization, and intolerance. Stakeholders see spiritual and cultural groups as particularly well-aligned with Five Oaks' values, and critical to achieving Five Oaks' mission. Dialogue among people from diverse backgrounds and traditions is a core tenet of what Five Oaks seeks to promote. In order to achieve this vision, Five Oaks will attract audiences that share its progressive, humanist and social-justice oriented values, while also promoting pluralism on dimensions of religion, spirituality, race, ethnicity, sexuality and culture.

Some audiences are still hesitant about whether Five Oaks is right for them. To outsiders, Five Oaks is still perceived as a very white and religiously affiliated space, which leads some audiences to question whether Five Oaks' commitment to diversity is genuine. In today's polarized political landscape, even the rural location of Five Oaks evokes a range of associations. For some, rurality is deeply rooted in the natural; for others, rurality has become associated with exclusion and intolerance. Five Oaks will grapple with these constraints when trying to establish itself as a safe space, particularly for urban and BIPOC communities.

Being a welcoming, inviting, and inclusive space will engage both tangible and symbolic action. There is much work to be done to communicate Five Oaks' desire to create a just, diverse, and inclusive community, to build trust, and to position Five Oaks as a safe and welcoming space for all. Each group has different requirements in order to feel truly welcome in a space. Welcoming new communities will involve an ability to listen, adapt and compromise, as well as a willingness to invest in new programming, partnerships, and facilities upgrades. As Five Oaks continues to welcome new audiences, it will make difficult trade-offs.



Strategic Plan at-a-Glance

STRATEGIC PLAN AT-A-GLANCE	<h3>VISION</h3> <p>To cultivate an affirming, vibrant, and inclusive community where people of all backgrounds and traditions can gather on the land to live, work, learn, pray, play, heal, and act for justice.</p> <h3>MISSION</h3> <p>To offer renewing and transformative individual, group and community experiences through meaningful reflection, deep connection, and joyful expression.</p>	
	<h3>VALUES</h3> <ul style="list-style-type: none"> • Radical Hospitality • Diversity • Environmental Stewardship • Right Relations • Social Justice 	<h3>PROMISE</h3> <ul style="list-style-type: none"> • Principled Programming • Sacred Space • Partners for a Better Future
<h3>STRATEGIC OBJECTIVES</h3> <ul style="list-style-type: none"> • Expanding Five Oaks' Community • Extending Radical Hospitality • Curating Transformative Experiences • Revitalizing Key Spaces • Pursuing Peace, Justice, and Equity 		
<h3>KEY SUCCESS FACTORS</h3> <ul style="list-style-type: none"> • Authentic Relationships • Experience-Design Excellence • Compassionate Co-Creation • Inclusive Governance • Inspired Storytelling 		



Vision & Mission

Five Oaks' strategic plan outlines a five-year strategy that will lead to a renewed and vibrant space for reflection, connection, and action. The plan will commence in September 2021 and conclude in September 2026. During the research, stakeholders expressed a desire for succinct and impactful statements that are both differentiated from one another, and complementary, and that speak to *what Five Oaks is* as well as what Five Oaks does. These renewed Vision and Mission statements build upon the rich history of Five Oaks, while also providing a "guiding star" that will carry the organization into the future.

Five Oaks' Vision is:

"To be an affirming, vibrant, and inclusive community where people of all backgrounds and traditions can gather on the land to live, work, learn, pray, play, heal and act for justice."

Five Oaks' Mission is:

"To offer renewing and transformative individual, group, and community experiences through meaningful reflection, deep connection, and joyful expression."

These statements reflect Five Oaks' commitment to building a diverse and welcoming community; to creating safe spaces for reflection, renewal, healing, exploration, and discovery; and to cultivating authentic relationships through meaningful intercultural and interfaith dialogue. Five Oaks aims to create a more cohesive and equitable society, and will do this by inviting those who visit to live Five Oaks values, to promote peace and justice, and to take action for the betterment of their communities and society-at-large.



Values

Five Oaks is committed to deepening its relationships with historical partners, while also building relationships with new communities. In doing so, Five Oaks will exemplify the following five core values:

Radical Hospitality—Five Oaks is committed to ensuring every guest feels welcome, safe, and supported and that every group has a safe space for reflection. Five Oaks welcomes all those seeking to develop personally or spiritually, from whatever tradition.

Embracing Difference—Five Oaks celebrates the rich variety of cultures, personal and spiritual journeys, and paths which together create a stronger society.

Environmental Stewardship—The land is sacred and nature is a gateway to transformation of self, spirit, and relationships. Five Oaks accepts its responsibility to protect creation.

Right Relations—Five Oaks commits to understanding colonialism in all its forms, examining its historical legacy, learning the stories of the land and of displaced and exploited peoples and, from this knowledge, walking paths toward right relationship.

Social Justice—Five Oaks commits to examining ongoing social and racial injustice, to actively seeking opportunities to right historical wrongs, and to being a catalyst for societal transformation.

Five Oaks' values serve as internal guidelines, informing decision-making at all levels of the organization. They also inform which partners Five Oaks will seek to build relationships with in the future. Five Oaks is more than a space—it is a community, united in values and diverse in traditions, cultures, spiritualities, and faiths.



Promise

Principled Programming

Five Oaks is a unique, intercultural centre offering safe space for educational and spiritual retreat. From one-off workshops to week-long residential experiences, Five Oaks programs are built around five core principles:

- Promoting social justice, equity, and respect for human rights
- Caring for the earth—from a deep respect for land, air, water, and all living creatures
- Curating space for personal and spiritual growth, respecting a diversity of experiences
- Enabling meaningful dialogue for change—both within and between people groups
- Society is stronger together as people reflect, work, play, and learn side by side

A Sacred Space

Five Oaks sits at the confluence of two waterways—a sacred place in Indigenous traditions; for others, a ‘thin place’ where the physical and spiritual are closely and deeply experienced. Today, Five Oaks offers transformational experiences at the confluence of renewal and action: ‘come apart’ for restful and reflective retreat; leave with tools and inspiration for life.

The rich, long-standing Carolinian forests on whose land Five Oaks is situated is teeming with life. Forests and land thrive through the symbiotic diversity of their many parts. Today, Five Oaks deliberately celebrates the rich diversity of human experience. All are welcomed to learn and to thrive here—within their own culture and spiritual practices, or by sharing in others’ experiences.

Five Oaks is blessed by refreshing winds and rains that traverse the Great Lakes region. These constantly renewing climate patterns bring life and nourishment to all in their path. Today, the Centre actively promotes a healing climate of change by naming and addressing historical wrongs between peoples and cultures, and by seeking new ways to live and work together for peace.

Partners for a Better Future

Five Oaks Centre is a safe space to rest and renew your spirit, to reignite and nurture your passion for good, and to re-equip and strengthen your capacity to improve your corner of the world. All bring gifts to this place from their own humanity and lived experience. Whether you are offering programs or participating in programs, you are a valued partner at Five Oaks.



Strategic Objectives

Strategic objectives are the core areas of effort and emphasis that will drive Five Oaks toward the advancement of its Mission and the realization of its Vision. Collectively, they provide a roadmap for how Five Oaks will transform over the coming five-year period. Five Oaks' strategic objectives include:

- Strategic Objective #1: Expanding Five Oaks' Community
- Strategic Objective #2: Extending Radical Hospitality
- Strategic Objective #3: Curating Transformative Experiences
- Strategic Objective #4: Revitalizing Key Spaces
- Strategic Objective #5: Pursuing Peace, Justice & Equity

A number of priorities are associated with each strategic objective outlined above. These priorities will provide the starting point for operational and business planning. Priorities themselves are not always discrete, but rather work in tandem to create a whole that is greater than the sum of its parts. While Five Oaks staff will lead the implementation of these strategic objectives and their associated priorities, to fully realize this Vision will involve continuous energy, creativity, experimentation, and commitment—not only from staff and the Board, but also from Five Oaks' entire community.



Strategic Objective #1: Expanding Five Oaks' Community

Five Oaks will expand its reach and welcome a diverse, intercultural community. In doing so, Five Oaks will become a vibrant place for dialogue and deep connection. Five Oaks will take deliberate action to attract groups that align with its values and enrich its community. Key priorities include:

Attracting new audiences

Five Oaks stakeholders recognized the need to attract new audiences—both in order to meaningfully deliver on the Vision and Mission as well as to increase revenues. Five Oaks will invest in improved marketing with the aim of *rebranding* and positioning Five Oaks as an inviting and inclusive place for all those committed to cultivation of self, spirit, and community.

Diversifying membership & clientele

Five Oaks remains a predominantly white and religiously affiliated space. Five Oaks will work to diversify its membership and clientele—prioritizing those from non-dominant traditions, cultures, spiritualities, faiths. In doing so, Five Oaks will create a more pluralistic and understanding community where people of all backgrounds feel a deep sense of comfort, and where members and guests can come together to learn from one another with openness, authenticity, and generosity.

Ensuring Values-alignment

Five Oaks is committed to its values and will endeavor to ensure values-alignment among all those who visit the space or participate in Five Oaks programming. Five Oaks will aim to communicate its values early and often, and will develop a clear and consistent standard for evaluating alignment of potential partners, members, and clients.



Strategic Objective #2: Extending Radical Hospitality

Five Oaks will build upon its reputation for being a welcoming and inviting community, explore new ways to ensure guests feel safe and supported, and empower guests to participate in healing and transformative experiences. Key priorities include:

Reflecting the diversity of the Five Oaks community

As a place for people from diverse backgrounds and traditions, Five Oaks will reflect the diversity of its membership—in name, symbolism, artwork, and imagery—and endeavour to ensure all guests see Five Oaks as a safe and inviting space for their community. This means not only displaying the unique symbols of each community, but also reflecting the imagery that unites its members—including natural imagery that reflects Five Oaks’ commitment to the land and awe at the wonder of creation.

Designing a seamless and inviting end-to-end experience

Five Oaks will consider all aspects of the client experience—from initial outreach to final parting—to ensure that every touchpoint embodies the warmth, genuineness, generosity, and resourcefulness for which Five Oaks is known. Five Oaks will endeavour to see every interaction through the eyes of guests and, with empathy, continue to redesign each experience so that it surprises and delights.

Offering flexible, high-quality, and culturally appropriate culinary options

A variety of stakeholders spoke of the high-quality food offered by Five Oaks, particularly applauding Five Oaks’ efforts over the past few years. Other stakeholders spoke of the importance of having the “right” food options as well as the flexibility to allow groups to prepare their own food, under special circumstances. Five Oaks will ensure varied, high-quality, and culturally appropriate food options and explore opportunities to allow groups to cook safely within its facilities.

Ensuring accessibility of programming, services, and spaces

Accessibility is a critical factor for groups seeking spaces for education, reflection, and retreat. Five Oaks will invest to ensure the accessibility of its programming, services, and spaces. This may mean partnering with other organizations who have expertise in the wide array of accessibility concerns, particularly when it comes to purpose-built programming for those with vision, mobility, and other accessibility challenges.



Strategic Objective #3: Curating Transformative Experiences

Five Oaks will curate meaningful experiences within and among groups. Leveraging its unique connection to the land, Five Oaks will help guests engage in transformative personal, group, and intercultural experiences, aimed at creating a more progressive and cohesive society. Key priorities include:

Leveraging Five Oaks' connection with the land and the diverse ways of knowing within the Five Oaks community

Five Oaks is blessed to be situated at the confluence of two waterways—a beautiful, natural haven that inspires all who visit. Five Oaks is also blessed with the diverse knowledge and shared wisdom of its community—including the oral histories passed down through countless generations of local Indigenous peoples. Five Oaks will leverage the land and the diverse knowledge of the Five Oaks community to design energizing, inspiring and transformative experiences.

Generating meaningful intra- and intergroup interactions

Five Oaks will identify new opportunities to promote organic and intentional dialogue—particularly intercultural and interfaith dialogue. However, Five Oaks will also respect the preferences of those groups seeking space and solitude to deepen relationships within their own communities.

Developing micro-programming to augment self-guided experiences

Five Oaks offers experiences through both programming and hosted groups. Increasingly, however, the line between these two has become blurred with hosted groups expressing interest in Five Oaks programming. Five Oaks will seek opportunities to better understand the programming goals of its clients and members, and to offer timely and accessible micro-programming that complements self-guided experiences.

Expanding Five Oaks' network of experience partners

While Five Oaks offers high-quality programming, the increasing diversity of the Five Oaks community will require an ever-broader set of expertise. In order to meet the needs of clients and members, Five Oaks will build a network of partners that specialize in a wide range of programming. In doing so, Five Oaks will identify new and creative ways to have a profound impact on the lives of visitors.



Strategic Objective #4: Revitalizing Key Spaces

Five Oaks will invest in key infrastructure and facilities in order to elevate the guest experience. Five Oaks' investments will help to create more comfortable, inviting, and flexible spaces that allow for individual renewal, reflection, and exploration as well as dynamic intra- and intergroup interaction. Key priorities include:

Investing in cozy and comfortable personal care spaces

Rustic, minimalist facilities allow visitors to feel close to the land and provide a platform for profound and transformative experiences. Five Oaks will retain this atmosphere, allowing visitors to experience the land to the fullest, while also investing in cozy and comfortable personal care spaces such as updated bathrooms and additional private accommodations.

Offering quiet and calming sites for meditation, reflection, prayer, and connection with nature

Five Oaks is as a sacred space for renewal and healing. Many stakeholders expressed the desire to refresh existing spaces as well as to create new spaces for meditation, reflection, prayer, and connection with nature. This includes creating spaces suitable for both individuals and groups, as well as both indoor and outdoor spaces. Suggestions ranged from an outdoor chapel to individual pods. Five Oaks will identify opportunities to invest in cost-effective facilities that allow visitors to experience the centre as a "thin place."

Developing a vibrant, central gathering space

Participants advised Five Oaks to develop a large, multi-use and modular space that allows for a variety of functions and group sizes. This space will facilitate activity and dialogue, acting as a central gathering point for Five Oaks groups and for the community at large, and may be used for events as varied as workshops, performances, weddings, and more.



Strategic Objective #5: Pursuing Peace, Justice & Equity

Five Oaks will be a place of action in the pursuit of peace, justice, and equity. Five Oaks aims to support organizations who are committed to social justice, decolonization, reconciliation, anti-racism, anti-oppression and 2SLGBTQIA+ rights. Key priorities include:

Grappling with Five Oaks' connection to colonialism, intolerance, and systemic racism

Five Oaks acknowledges historic complicity in social injustice—including the oppression and marginalization of Indigenous, racialized and 2SLGBTQIA+ communities. Five Oaks will work toward reconciliation and foster dialogue to deepen understanding of the ways that historic and systemic injustices continue to manifest today. Doing so will create a more just Five Oaks, a more equitable society, and a more peaceful world.

Supporting values-aligned organizations

Five Oaks recognizes the extraordinary work of the many service-oriented, justice-seeking and purpose-driven organizations in the region and will take steps to ensure the centre remains an accessible haven and gathering place for all those organizations that reflect Five Oaks' values and take action to right historical wrongs. This may include the development of a differential pricing scheme which will allow Five Oaks to fairly and consistently subsidize deserving organizations.

Creating opportunities for intercultural dialogue, allyship, and collective action

Five Oaks' Vision can be achieved only through collaboration in pursuit of a more peaceful, just, and equitable world. Five Oaks will be a forum not only for reflection, connection, and dialogue, but also a place where diverse communities can find new allies. By bringing together a wide range of groups, Five Oaks will nurture new relationships, create a shared sense of community and catalyze commitment to working together for a more cohesive and compassionate society.



Key Success Factors

In order to deliver on the strategic objectives and priorities outlined above, Five Oaks will endeavor to cultivate the following set of abilities, assets, and attributes:

Authentic Relationships—Five Oaks will embody authenticity, warmth, and generosity of spirit. In doing so, Five Oaks will attract new mission-, experience-, supplier- and community-partners, who share its values, strengthen the experience of visitors, and bring joy to its community.

Experience-Design Excellence—Five Oaks will continue to deepen and diversify its programming expertise and become a specialist in designing high-impact and transformative end-to-end experiences.

Compassionate Collaboration—Five Oaks will listen deeply, be clear about its offerings, and always go above and beyond to meet the unspoken needs of guests.

Inclusive Governance—Endeavoring to serve a diverse range of communities, Five Oaks will lead by example and proactively reflect diversity in its Board, membership, and staff.

Inspired Storytelling—Five Oaks will enhance its marketing, branding, and communications expertise in order to invite new audiences into its community and offer exceptional experiences to all.



An Open Invitation

Over the course of the strategic planning process, Five Oaks has learned much about what makes the centre a unique and significant place for all who visit. Five Oaks is a beautiful natural haven that allows for renewal, reflection, healing, curiosity, discovery, exploration, experimentation, dialogue, and action. While Five Oaks is a sacred space—open to all those seeking personal development, cultural authenticity, or spiritual cultivation—it is more than a gathering place. Five Oaks is a community composed of diverse traditions, cultures, spiritualities, and faiths—yet aligned in values. It is these values that provide a foundation for friendship, respect, and mutual understanding.

Now, more than ever, the world needs places like Five Oaks to gather in safety and harmony for renewal, relationship, and reconciliation. With that realization also comes an obligation—to share Five Oaks' beautiful space and, in doing so, to provide opportunities for healing and to help reduce the inequities that have been exposed during the COVID-19 pandemic. This strategic plan lays out a roadmap for doing just that—deepening relationships with existing partners, clients, and members; extending an invitation to those who may not yet see themselves reflected at Five Oaks; and cultivating a vibrant intercultural and interfaith community through reflection, connection, and dialogue. This strategic plan is also a call to action—not only for Five Oaks' Board and staff, but also for all of Five Oaks' members, clients, and supporters. It will require shared action to bring Five Oaks' Vision to life and to create a more peaceful, just, and equitable world.



Five Oaks



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