

**REGINA OPEN DOOR SOCIETY
BOARD PLANNING SESSION
OCTOBER 15, 2022, 9:00 A.M. – 3:00 P.M.**

SESSION SUMMARY

I OUTCOMES

- Analyze the current and future factors impacting RODS using the SCORE Analysis.
- Establish the 10-year bold ambition for RODS.
- Validate the current Vision, Mission, and Values related to the Ambition.
- Identify the strategic priorities for the next 3-years.
- Define success and the intended results for each of the strategic priorities.

II. PARTICIPANT GROUPS

1- Green Team	2 - Red or Pink Team	3 – Blue Team	4 – Yellow Team
Jim Funke Mariya Wendy Getachew	Joe Anna Ricardo Victoria	Anda Keri Keith Tatianna Linda	Bina Roger Laurie Oudalay Saima

III. SCORE ANALYSIS

i. Most Significant Strengths – Green Team

- Relative financial stability and independence.
- Forward thinkers; flexible to changing environments.
- Reputation, community awareness, community relationships
- Diversity and knowledge/expertise of staff, passion and commitment of staff, personalized services provided in diverse languages
- Awareness of client needs. Experienced and knowledgeable staff who can provide support and understand needs of a variety of cultures.
- A variety of programs to meet diverse needs of clients

ii. Most Significant Challenges – Pink Team

- Staff Retention and turnover
- Competition with increasing number of service providers
- Funder relationships
- Internal and external communication systems
- Departmental silos
- Adaptability to changes in the sector
- Community - lack of awareness and tolerance of an increasing diverse population
- Decline in funding

iii. Most Significant Constraints – Pink Team

- Combining expectations of various funders in our internal processes

- Workloads
- Short term contracts affect long term planning
- Service connectivity
- Fear of change
- Inflation and cost of living
- Effective use of digitalization - balanced

iv. Most Significant Opportunities – Blue Team

- Building the brand depth
- Improving internal referral, communication processes – CRM
- Rebuild/revive relationships with provincial and federal funders - having the ability to influence/ inform major decisions
- Actively work on building relationship with community organizations/partners focusing on clients' needs
- Partnering with SODS to analyze the possibility of reversing the zone approach for the next round of CFPs

v. Most Significant Risks (cause uncertainty of achieving our goals) – Yellow Team

- The uncertainty of funding. Two factors: changes in the government plans. Growing competition.
- Recruitment & retention of employees, compensations (benefits, lower wages impacts the whole process of retention).
- Lack of promotion, branding and community reach out. Over a period of time have lost our presence to some extent. Competition from the other competing organizations.
- Unclear priorities and direction to achieve our goals. Focussed on too many things may affect the top priority.
- Limited IT Resources and IT support.
- Lack of staff and resources in critical areas (proposal writing, IT)
- Success: During COVID we worked hard with Sask health for clinic- got media coverage- Sask health reached out with more funding- RODS been granted with funding to run the clinics.

IV. OUR TEN-YEAR BOLD AMBITION

i. Superior Results Achieved

- In 10 years, we'll have stable long-term contract, reduced turnover and retention of key staff with competitive remuneration
- Funders' recognition of superior program delivery, leading to zone free program delivery/removal of zonal restrictions
- Funders' recognition of superior program delivery within the prescribed zones' model as another option.
- In 10 years, RODS will have established, stable and diverse donors and revenue streams
- RODS has established a social enterprise which is revenue generating to offset funding dependency.
- We have an established and coordinated intake-referral and client management data system in place
- RODS is self-sufficient and not dependent on federal and provincial funding.
- Provincial and Federal government consult RODS to make major decisions

ii. Changes if we were 10 x Bolder (the x factor)

- Become a top employer in SK
- Integrated CRM
- Internal IT department
- Become a leading force in the settlement sector - influencing decisions regarding the settlement sector
- Social Enterprise initiatives
- Become a vocal advocate for the needs of newcomers
- Secured public and private funds for a new facility to accommodate all RODS services (language, employment, childcare, settlement, central Admin, reception)
- Seek out a corporate partnership to attract new employees to SK (potash/ag etc)
- Utilize our team experts to be out in the community to promote our business, advocate, communicate. This doesn't just have to be leadership.
- Prioritize - Pick three priorities to move towards.
- Generate new funding - rent out space to groups/organizations, gala nights, different fundraisers
- We have a wider reach that extends beyond Regina and area. Borderless service delivery.
- RODS will provide services province-wide through a main and satellite offices across Saskatchewan.
- RODS has the authority to implement its own program - initiatives beyond the scope of funders' prescription

iii. National Headlines if we succeed

- A National Award goes to RODS as the best settlement agency
- RODS continues to lead the innovation in the settlement sector
- Regina has the highest rate of immigration per capita in the country thanks to RODS
- RODS is the first home for all the newcomers in SK
- RODS is the one and only organization for newcomers.
- RODS - The Welcoming Community Example to follow
- RODS is awarded the National Service Excellence award
- Regina Open Door leads the way in improving the quality of life of Newcomers
- Federal and Provincial government sign an agreement to designate RODS as the organization to manage all settlement services in SK
- The Regina Open Door Society celebrates its Welcoming Community Awards and Gala
- 80% of success of newcomers settlement in SK - credit goes to RODS
- RODS provides pre-arrival services online in 10-15 languages
- Newcomers in Saskatchewan have Canada's strongest settlement outcomes, thanks to RODS

iv. Aggressive Challenging Goals

- HR Challenges: Form a small committee to develop an action plan to address HR challenges. Present action plan to the Board.
- Becoming an equal partner in the funders' decision-making process, (having the ability to say "no" if needed)
- Becoming Financially independent
- Find a building to house all of our services perfectly
- Achieved work-life balance - to retain employees - quality of work-life
- Use of diverse technology that improves connectivity across programs.

- Program Delivery - Continue to collaborate with partners in the community for program delivery (ex. SODS, build relationships with new partners)
- RODS has become the employer of choice in the settlement sector
- RODS - Work more closely with SODS.
- Widespread networking and stakeholder engagement - alumni, donors, stakeholders, etc.
- Additional Funders: Seek opportunities with strategic partners/funders from other sectors.

V. STRATEGIC PRIORITIES

i. Green team

- Increase RODS' retention rate of staff: 1. Perform retention rate analyses. 2. Analyze and set goal. 3. Develop and execute initiatives to address analyses and goals
- Increase retention rate of RODS' volunteers: 1. Increase volunteer recognition programs. 2. Provide meaningful volunteer experience.
- CRM system implementation: 1. Research costs and software. 2. Develop implementation plan. Test in pilot phase.
- Develops stronger relationship with partners and community stakeholders: 1. Develop and execute stakeholder engagement plan. 2. Develop and execute
- Increase community awareness: 1. Examine resources. 2. Increase Communications capacity as needed.

ii. Pink team

- Enhance staff experience - Retention, work life balance, work environment, onboarding, professional development
- Increase and maximize internal capacities - IT, HR, Communications, finance
- Improve internal and external client experience - better data management, streamlined service delivery
- Strengthen sector and funder relationships to influence decision making/change, and our reputation,
- Promote a welcoming community for newcomers - through education, cultural awareness training, indigenous education, and community outreach, communications strategy

iii. Blue team

- Increase brand recognition and understanding within the community as a whole.
- Strengthen our relationship with our funders and other settlement service providers - alignment with SODS; enhancing our relationship with the provincial funder; re-establishing relationships with the Feds
- Increase retention by developing an action plan to address HR challenges - present the action plan to the Board
- Enhancing the client service through introducing an organization-wide CRM system with centralized client profiles and referral systems.
- Enhance/Establish relationship with organizations/communities including cultural, Indigenous, LGBTQ+, etc. groups.

- Enhance/Establish relationships with community partners such employers, community partners (health, social services, housing, education), municipal government, airport authority etc.

i. Yellow team

- Community Involvement
 - New
 - Increase contact with targeted community organizations
 - develop partnership plan
 - Existing
 - enhance current relationships
 - acknowledge the partnership
 - increase trust and partnership with other service agencies
 - increase staff presence on advisory tables
- HR- recruitment and retention
 - solve job security
 - improve non-financial benefits (worklife balance)
 - looking at flexible work arrangements (internally/externally)
- Process Efficiency
 - strengthen client intake/referral process (from department to department)
 - strengthen internal communication
 - enhance on joint collaboration between departments
 - enhance on capacity building for interpreters/translators
- Competition
 - decrease the sense of competition amongst the service providers
 - mediate and negotiate an end to competition and a beginning of collaboration
 - increase the promotion of our programs

VI. STRATEGIC PRIORITY THEMES

i. Enhance employee work experience

- Increase RODS' retention rate of staff: 1. Perform retention rate analyses. 2. Analyze and set goal. 3. Develop and execute initiatives to address analyses and goals
- Enhance staff experience - Retention, work life balance, work environment, onboarding, professional development
- Increase retention by developing an action plan to address HR challenges - present the action plan to the Board
- HR- recruitment and retention
 - solve job security
 - improve non-financial benefits (worklife balance)
 - looking at flexible work arrangements (internally/externally)

ii. Enhance volunteers experience

- Increase retention rate of RODS' volunteers: 1. Increase volunteer recognition programs. 2. Provide meaningful volunteer experience.

- Enhancing the client service through introducing an organization-wide CRM system with centralized client profiles and referral systems.
- improve internal and external client experience - better data management, streamlined service delivery
- CRM system implementation: 1. Research costs and software. 2. Develop implementation plan. Test in pilot phase.

iii. Maximize internal capacities and processes

- Increase and maximize internal capacities - IT, HR, Communications, finance
- Process Efficiency
 - strengthen client intake/referral process (from department to department)
 - strengthen internal communication
 - enhance on joint collaboration between departments
 - enhance on capacity building for interpreters/translators

iv. Strengthen community relationships and Involvement

- Community Involvement
 - New
 - Increase contact with targeted community organizations
 - develop partnership plan
 - Existing
 - enhance current relationships
 - acknowledge the partnership
 - increase trust and partnership with other service agencies
 - increase staff presence on advisory tables
- Enhance/Establish relationship with organizations/communities including cultural, Indigenous, LGBTQ+, etc. groups.
- Enhance/Establish relationships with community partners such employers, community partners (health, social services, housing, education), municipal government, airport authority etc.
- Develops stronger relationship with partners and community stakeholders: 1. Develop and execute stakeholder engagement plan. 2. Develop and execute

v. Increase community awareness and brand recognition

- Promote a welcoming community for newcomers - through education, cultural awareness training, indigenous education, and community outreach, communications strategy
- Increase brand recognition and understanding within the community as a whole.
- Increase community awareness: 1. Examine resources. 2. Increase Communications capacity as needed.

vi. Strengthen funder and sector relationships

- Strengthen sector and funder relationships to influence decision making/change, and our reputation,
- Strengthen our relationship with our funders and other settlement service providers - alignment with SODS; enhancing our relationship with the provincial funder; re-establishing relationships with the Feds
- Reduce Competition

- decrease the sense of competition amongst the service providers
- mediate and negotiate an end to competition and a beginning of collaboration
- increase the promotion of our programs

VII. INTENDED RESULTS

i. HR Recruitment and Retention

- job security
- Streamlined onboarding and training across dept.
- Automated HR processes - portal - Smart Hire
- Worklife Balance
- Flexibility in work environment - hybrid model
- Better compensation & other benefits
- Reduced turnover - more than 6 mos.
- Increase PD opportunities

ii. Improve client experience thru CRM

- Department integrated system
- Centralized Customer relationship Management
- Centralized intake, referral, data, export reports, analytics
- Employees don't re-enter data
- Reduce service time
- More efficiency
- Coordination services
- Using HR better - client time
- Work-life balance
- Real time - better programing
- Effective client management - faster better service
- Confidential information management
- Ease life of leadership
- HRIS - Human resource information system

iii. Funding relationships/partners

- Improved relationship with funders in having a say - influence decision.
- Increase in funding - more stability, know what to expect
- Diversify funding sources
- Grant management finding opportunities, research
- Fundraising opportunities
- Centralized relationship Management - partner relations
- Acknowledgement of partner contributions

iv. Strengthen key partnerships and community relationships

- Involved in the sector table discussions
- SODS - zone model
- More collaboration with other settlement service providers - better understanding of services
- Attending, participating in different workshops that different service providers offer

- Lead relationship building in the sector - e.g. open house, hosting, - each functional areas need to think about their key touch points, - partnership relationship day, gala?, recognition event?
- Centralized place where keep information of partnerships accessible to staff.

VII. NEXT STEPS

1. Complete the session summary and circulate to participants.
2. Ensure the key ideas arising from the planning session have captured and reflect the data derived from the SCORE analysis.
3. Affirm the Vision, Mission, and Values as still valid and relevant reflecting on the discussion of the planning session.
4. Update the Strategic Framework reflective of the outcomes of the planning day.
5. Present the new Strategic Framework to Board for approval.
6. Create an operational plan for the next 4-years with measures for each of the strategic priority areas.