REGINA OPEN DOOR SOCIETY – 2023/24 OPERATIONAL PLAN

Strategic Objective: C.1. Improve the client experience through the implementation of a customer relationship management system (CRM) **Definition:** *We will research and secure the funding for a CRM system. Once the system is selected, we will implement the system throughout the organization.*				
Performance Indicators: • % improved client experience (by program) • Reduced client wait times (pre and post implementation measures) • % staff reporting improved reporting tools and data access				
2023/24 Deliverables	**Resource Implications**	**Lead**	**Strategies/Actions**	**Quarterly Status Updates**
1. Suitable CRM platform identified that provides the balance of utility and cost effectiveness.	Term contract for analysis, research and vendor screening– applications made for external funding to hire a dedicated staff resource.	CRM Working Group The Working Group is made up of essential representatives from each Department.	• Hiring qualified person on term contract to conduct internal identification of needs – requirement – needs analysis. • Conduct market/user search for suitable options for a CRM. Shortlist and request quotes. • Bring recommendations (3 possible options if possible) to the CRM Working Group, recommendations then made to Management	• Feb 1, 2023 Application made to the Community Services Recovery Fund. Waiting for results. • Sept 2023 internal need assessment complete and vendor search underway. • Recommendation made on suitable vendor to Management. December 2023
2. Funding secured for the CRM buildout and implementation from RODS Board and/or external funders.	RODS may be required to invest funds for the initial buildout and implementation (capital). External funders will need to agree to monthly user licenses and operating expenses. This will be potentially integrated into the final year of the current 5 year CFP and	CRM Working Group	• Present system and submit proposal to the RODS Board with chosen CRM provider. • Propose and negotiate with external funders for operating costs within contracts. • Once approved – implement plan development	• December 2023/January 2024 Proposal for funding made to RODS Board as well as negotiations with external funders.

	also within the proposed 5 year operating budget in the next CFP.			
2024/25 Deliverables	**Resource Implications**	**Lead**	**Strategies/actions**	**Quarterly Status Updates**
1. CRM customization, testing and implementation complete. New workflow processes have been developed and implemented, change management and staff training has been completed	Funded by initial RODS buildout and implementation investment (capital) and external funder support for monthly user licenses and other operating costs.	CRM Working Group	• Manage roll out, actively monitor staff adaptability to the cultural changes associated with new system and associated workflows. • Identify training champions throughout the organization, provide initial and ongoing peer lead staff training on the CRM	• Early build out May 2024 • Champions identified & trained March 2024 • Staff training May 2024 • Estimated CRM staged implementation September 2024

Strategic Objective: C.2. Establish a welcoming community for newcomers **Definition:** *We will enhance our visibility and brand within the community to create awareness of our program and the presence of newcomers within the community. We will support organizations to embrace newcomers through education and outreach programs.*				
Performance Indicators: • Number of targeted strategic events with RODS presence. • Partner evaluations reflect increased knowledge and awareness of Newcomers and RODS				
2023 Deliverables	**Resource Implications**	**Lead**	**Strategies/Actions**	**Quarterly Status Updates**
1. Clearly developed plan for visibility and participation in community with targeted events specified. Building on existing programs in the community e.g., cultural awareness training, indigenous education, and community outreach, and Newcomer awareness in the community.	Staff time & internal budget resources	Marketing & Communications Establish working group	• Develop a comprehensive marketing and communications plan to promote the Regina Open Door Society (RODS) and its programs to the wider community. • Utilize various channels such as social media, local media, community events, and partnerships to increase awareness of RODS and its initiatives. • Create engaging and informative promotional materials, including toolkits,	• Fall 2023 • Ongoing • Ongoing • Ongoing

			posters, and online content, to highlight the impact of newcomers in the community and the benefits of embracing diversity. • Plan and organize targeted events in the community to raise awareness about newcomers and foster inclusivity. • Leverage existing programs in the community, such as cultural awareness training, Employment connections events, Orientation sessions and indigenous education, to enhance newcomer awareness and inclusivity. • Collaborate with local organizations that have similar goals to amplify the impact of joint initiatives. • Seek funding opportunities, sponsorships, and partnerships to support and expand existing programs and events.	
2024 Deliverables	**Resource Implications**	**Lead**	**Strategies/Actions**	**Quarterly Status Updates**
1. Cultural support programs and awareness for organizations who want to support newcomers 2024/25	External funding. Potential sources include Federal Business Development grants, Sask Culture, SSCF (South Saskatchewan Community Foundation)	To be defined	• Enhance and deliver cultural awareness training programs for local organizations, businesses, and community groups. • Collaborate with local organizations to conduct community outreach initiatives, such as workshops, and information sessions, to educate the community about newcomers, their contributions, and challenges they face.	• September 2023 Confirm external funding source • Ongoing

<table>
<tr><td colspan="5">Strategic Objective: I.1. Maximize internal capacities and process efficiency
Definition: We will improve the effectiveness and efficiencies of our internal process by enhancing internal department communication and collaboration to streamline processes and reduce duplication.</td></tr>
<tr><td colspan="5">Performance Indicators:
• % of staff who say communication and collaboration between department is effective
• Reduced complaints from departments onboarding/off boarding of staff and IT support.
• Reduced client complaints on the intake and of referral process</td></tr>
<tr><td>2023 Deliverables</td><td>Resource Implications</td><td>Lead</td><td>Strategies/Actions</td><td>Quarterly Status Updates</td></tr>
<tr><td>1. Processes in place to enhance communication between the IT/HR/Finance departments IT/HR/Finance – (for staff onboard regarding on/off boarding employees. ng) This communication requires:
HR Onboarding
1. Receiving proper documentation from managers and candidate.
2. Requesting accounts to be created by IT\
3. Informing payroll of time tracking and confirming wages and salaries.

HR Termination
1. Receiving proper documentation from managers
2. Informing payroll of time balances and reason for termination for ROE
3. Informing IT to deactivate accounts</td><td>Staff time.
HR/IT/Finance Working Group</td><td>HR & Working Group</td><td>• Working group identify required onboarding and off boarding steps.
• Identify key customers, their requirements.
• Establish workflow, timelines and key responsibilities.</td><td>• Initial work done March 2023
• Completed process in place and is successful.
• Follow link for example of the process steps for both onboarding and off boarding.

Onboarding-Exit example</td></tr>
</table>

2. Provide training and implement reception and client intake service standards, workflows and referral processes. Maximize utilization by staff front desk for internal referral	Staff training time. HR led training.	HR, Marketing & Communications ED	• Work with Departments to identify issues and challenges, build consensus on gaps and solutions. • Develop and roll out new service standards and intake procedures. • Customer Service workshop currently developed and will be modified • Specifically for RODS and new service standards, referrals and workflows. • Ongoing training and follow-up • Self-monitoring – how program is being used. • Cross training of support staff – organizational cross training (group meeting to determine the need and the amount of training) – develop plan for the year – modules. • Complete program Catalogue	• Departmental engagement, standards, intake and referral processes established and initial staff training completed by be completed by August 1, 2023. • • Ongoing facilitation to be implemented and provided by HR, Marketing & Communications on an ongoing basis by October 2023.
3. IT response time issue resolution capability is improved. – System improved – reduce reoccurring problems.	Secure funds through reallocation of salary dollars in Admin Fee received from programs contracts.	ED HR and Finance	• Review salary allocation in Central Admin. • Identify and allocate staffing dollars. • Consult with stakeholders/internal customers on areas of need. • Build new RODS Tier 1 desktop support work flow in coordination with external provider. • Complete job description, recruit, hire.	• Position filled by August 1, 2023

Strategic Objective: I.2. Strengthen relationships with partners and community stakeholders

Definition: We will strengthen existing relationships with key partners within the settlement sector to enhance outcomes for newcomers. We will establish new relationships with targeted community groups and agencies as well as Federal and Provincial Funders that will benefit newcomers and the settlement process including cultural, Indigenous, LGBTQ+, etc.

Performance Indicators:

- Joint position statement for Zoning with SODS
- Formal MOUs with key settlement partners

2023 Deliverables	Resource Implications	Lead	Strategies/Actions	Quarterly Status Updates
1. Re-establish relationship with SODS. Develop joint position statement with SODS related to zones and case management prior to CFP.	Travel to Saskatoon, Staff time	ED & Directors	• Meet with SODS leadership, discuss common challenges and threats, develop a common position and strategy regarding zones and case management.	• September 2023 – met with SODS and developed common positioning.
2. Identify key delivery partners - Catholic Family Service, RIWC of SK, IWS. 3. Meet and strategically engage with identified partners. 4. Nominate a RODS staff representative to go on the SAISIA Board 5. Participate in Metropolis, CISSA-ACSEI, CCR and other national level dialogues and conferences.	Staff Time	Management Team	• Conduct a SWOT analysis based on the organizational program needs and the current environment in the settlement sector. • Create a list of potential allies, the relationship opportunities as well as identifying organizations that pose a current and future threat. • Meet with partners well in advance of next CFP formalize the working relationship in a possible MOU pre. CFP • Nominate a RODS staff person at the call for SAISIA Board nominations in May 2023 • Identify the relationship building opportunities (both formal and informal, e.g. PNT Summits, Metropolis, Chamber of Commerce Events, National Provincial and local), and key people to participate in those opportunities based on the level and gravity of the relationship and program needs.	September 2023 – analysis and planning complete, meet with delivery partners and work towards formalized relationship.

Strategic Objective: P.1. Strengthen recruitment and onboarding capability to meet growing demand
Definition: *We will improve the employee recruitment and onboarding experience in all areas of the organization with the intent of hiring the right candidates with the skills required for the job and orientating them to the culture of RODS.*

Performance Indicators:

- % of new hires that successfully pass probation.
- % of new hires that stay 1 year.

2023 Deliverables	Resource Implications	Lead	Strategies/Actions	Quarterly Status Updates
1. Improved orientation process – organization wide and department specific (75% of departments have completed an orientation process).	Staff/Department time	Wendy, Ricardo, Saima, Getachew	• A detailed flow chart is developed to reflect the on-boarding process. • Based on the tool used (e.g. Google classroom), the materials per department need to be created/adjusted according to the job descriptions.	• Language Services has completed the Department Specific Orientation process and is currently using the model. As of April 2023 Insert link here • By September 2023 remaining departments will have specific orientation models.
2. Evaluation of HR capacity to support departments in recruitment, Interviewing and selection practices.	Additional position – consider organizational profitability as a whole. Secure funds through reallocation of salary dollars in Admin Fee received from programs contracts.	Keith, Wendy, Linda	• Review salary allocation in Central Admin. • Secure funds. • Consult with stakeholders/internal customers on areas of need, review Managers/Directors staffing workload and increased HR role. • Establish duties. • Complete job description, recruit, hire.	• Financial review of Admin budget May 2023. • HR is currently conducting market scan contractual/part time HR talent for recruitment, interviewing and selection. April 2023

Strategic Objective: P.2. Improve workplace experience and employee retention
Definition: *We will enhance the work experience of our employees and ultimately long-term retention through supportive leadership practices, a positive healthy work environment and professional development.*

Performance Indicators:

- Stable or improved retention rates compared to sector standards (current 100% Jan thru March, 2023)

2023 Deliverables	Resource Implications	Lead	Strategies/Actions	Quarterly Status Updates
1. Improve skills and knowledge of leadership team.	Staff Time - estimated $3,400 for 13 people (per module) External grant funding	Wendy, Linda, Keith Management team for consult	• Implement supervisor achieve workshops for all team leads • Assess need for additional management training, explore additional modules as required and per budget	• Leadership training was provided by third party professionals on March 21, 2023 • Additional training modules delivered by December 2023
2. Longitudinal analysis of retention and turnover rates (retention rate 100% Jan thru March 2023)	Staff Time	Wendy, Rakan Wendy, Shelly, Rakan Keith, Linda. Wendy	• Establish processes and data management to provide required reporting information. • Review industry standards. • Continue to provide and analyze exit interviews as well as reasons for departure. • Establish other events to celebrate all employees e.g. years of service, completion of special projects etc. • Review funding for third party/part time HR Consultant	• Process in place to calculate retention and turnover rates on a quarterly basis. Completed April 2023 • Ongoing review of industry standards • Build an employee recognition strategy other than yearly event by December 2023. • Enhance hiring practices by selecting candidates that are qualified and share our Mission and Vision.

Strategic Objective: P.3. Increase volunteer experience and retention **Definition:** *We will strengthen our volunteer program(s) through a better understanding of our current practices within each program, adapting effective practices throughout the organization, and creating a centralize standard/process to guide individual programs and establishing a centralized volunteer data base.*				
Performance Indicators: • % increase in volunteer satisfaction/experience survey • % increase in volunteer retention (per program) • % increase in volunteers recruited				
2023 Deliverables	**Resource Implications**	**Lead**	**Strategies/Actions**	**Quarterly Status Updates**
Please note: The Volunteer Engagement Committee requires additional time to finalize a single recruitment and multifaceted volunteer support, tracking and reporting matrix.				

Strategic Objective: S.1. Improve relationships with funders for long term funding
Definition: *We will strengthen our relationship with the provincial funder and re-establishing relationships with our federal funder to improve mutual understanding of expectations and effective coordination (less competition) within the provincial settlement sector (linked with I.2.)*

Performance Indicators:
- Regular meetings with funders.
- Stable funding from provincial and federal sources.

2023 Deliverables	Resource Implications	Lead	Strategies/Actions	Quarterly Status Updates
1. Regularly scheduled meetings /engagement with Provincial and Federal funding partners	Staff Time Travel Costs	ED Management Team	• Request regular meetings with funding partners	Set schedule by September 2023
2. Strategic engagement and active participation on national, provincial, regional and local task groups, committees.	Staff Time Travel Costs Funder support.	ED Management Team	• Initial and ongoing identification opportunities and their strategic/operational value to RODS • Establishment of objectives/engagement strategy for each	September 2023

Strategic Objective: S. 2. Strengthen proposal management and grant acquisition
Definition: *We will be able to access grant funding more successfully through the timely submission of skillfully written grant proposals.*

Performance Indicators:
- % revenues obtained through grants
- % of proposals resulting in grants
- % of continued programs funded through repeated grants

2023 Deliverables	Resource Implications	Lead	Strategies/Actions	Quarterly Status Updates
1. Improved leadership skills and capacity in proposal writing.	Cost of training program Time available to write proposals	ED, Director of LINC/Emp/Daycare	• Needs analysis – determine current skill set of management team. • identify lead writers • Identify the suppliers of proposal writing training • Identify key people for proposal writing training • Create a reservoir of funders' proposal manuals, templates, successful proposals.	October 2023

Strategic Objective: S. 3. Explore non-government sources of funding **Definition:** *We will access additional funding sources from other organizations through our ability to demonstrate superior outcomes in settlement and our positive impact in the community. We will align ourselves with individuals, partners and organizations who share our goals and philosophy for settlement and are interested in investing in our cause.*				
Performance Indicators: • % increased funding from non- -government sources (donors – individual, corporate)				
2023 Deliverables	**Resource Implications**	**Lead**	**Strategies/Actions**	**Quarterly Status Updates**
1. Process to document identified needs not funded/supported/covered by the main funders 2. Process to scan external environment for appropriate grant/donor opportunities.	Staff Time	ED Marketing & Communications Management Team	• Create a list/plan of the program needs; analyze those against the existing funding, prioritize the needs based on the outcomes and overall organizational direction • Conduct ongoing environmental scan to identify potential sources of funding/donations and mutual mission/values alignment.	November 2023
2024 Deliverables			•	
1. Pilot a targeted fundraising campaign	Staff Time Possible request for board funding.	Staff Time Possible request for board funding.	• Review ongoing assessment of organizational needs • Assess feasibility and type of fundraising campaign against identified need and market. • Assess the CTRAD • Run a targeted fundraising campaign	Fall 2024