DECISION ITEM: Reserve Funds to undertake the CRM Project deliverables
BOARD/COMMITTEE: Finance Committee & Board of Directors
MEETING DATE: June 2024
AGENDA ITEM: TBD
SPONSOR: Finance Committee

RECOMMENDATION: That the RODS Board of Directors approve the use of a maximum of up to $100,000.00 from the reserve to undertake the outlined deliverables in the RODS CRM Project, including securing a term position/consultant undertake the needs assessment/requirements exercise, vendor search, engagement, and potentially CRM tool customization and development. Please note that based on the identified CRM solution, a subsequent proposal may come to the Finance Committee and Board to secure possible additional one-time reserve expense for development costs and contract staffing.

SUMMARY OF KEY ISSUES:

Looking forward, the ability to securely manage required information from clients, students, volunteers and the organization itself is at the core of timely, client centred and effective service delivery, program development, data management, reporting, evaluation and performance management.

Currently, RODS is operating with a series of non-integrated databases for funder reporting purposes, manual process or a series of excel spread sheets that can result in multiple client service records across an organization, all failing to provide a single comprehensive record of all services and required information.

This current operating reality and absence of an organizational level CRM limits not only effective service delivery to clients but also the ability of the organization to manage and utilize data, and extend the knowledge base to effectively report to funders and to heighten the organization's ability to use internal knowledge to effectively compete for funding. A CRM with an organizational level intake and referral/ticketing system and client profiles with program specific information fields (with permissions to see data restricted based on need and requirements), allows for a single database providing a complete **360-degree** view of the services that an organization has provided to all clients across all programs

BACKGROUND:

Constituent Relationship Management Systems, or Customer Relationship Management Systems, (CRMs) had their initial origins within the business sales for profit world, and have been adapted and customized for non-profit service provider organizations. These CRMs provide the tools to operate a central data base to capture required information on donors, clients and services received, as well as providing enhanced communication tools, data analysis, fundraising tools as well as other applications.

RODS has been collecting and managing data based on the requirements of both Federal and Provincial funders, using non-integrated stand-alone data bases to gather and upload client information and service activity reports.

The value of a future CRM for the organization has been part of strategic planning discussions for the organization, and forms part of the deliverables within the current plan.

Within the last year, Federal Funders have agreed to consider providing funding for monthly user licenses to support the operation of organizational CRM platforms. In the 2024 CFP from IRCC, an applicant organization's ability to securely collect, manage and utilize data disaggregated by sex and other demographics (i.e., race, age, language, etc.), were emphasized in the provision of effective client centred service delivery and the application of GBA Plus. A CRM solution greatly enhances the organizations' ability to fulfill those funder expectations, as well as those functionalities mentioned above. RODS has included the expenses associated with monthly user licenses in its 2024 CFP submission.

Larger Settlement SPOs have invested significant funds in the customization of marketed CRM systems (Microsoft Dynamic CRM, Salesforce), and others have attempted to build custom solutions. Members of the RODS Management Team have had introductory tours of several systems, but focused effort is required to find a right sized, affordable solution with sustainable ongoing support. The pitfalls of custom solutions need to be heeded.

The required work includes:

- An internal needs assessment/requirements process to identify operational/program needs/requirements for a future CRM. This would incorporate internal staff communication on the project.
- Conducting a vendor search based on identified requirements and affordability factors, funder and organizationally based.
- Interviewing/evaluating potential vendors.
- Recommendation of a vendor solution and affordability/cost analysis with budget to the Finance Committee and Board, and possible request for additional reserve funds to undertake development and implementation.
- Finalize the development and implementation plan.
- Internal communication about CRM solution and workplan.
- Rollout of the workplan, commence development, customization implementation and testing.
- Conduct staff training including the identification of Departmental Champions and utilization of the a 'train the trainer model'.
- Soft launch and roll out.

ALTERNATIVES:

Continue to use non-integrated stand-alone databases to provide one dimensional reporting to meet funder requirements, using manual processes to frame a picture of the continuum of service clients receive.

Continue to function without an organizational level intake and referral system, living with the disconnect in client's pathway to service.

Continue to utilize the very rudimentary and limited email forwarding/referral system *Fresh Desk* to provide minimal processes solely for email intake and email referral.

ADVANCED CONSULTATION:

The Settlement Sector has begun to see the development and implementation of settlement service specific CRM platforms, building on existing sustainable platforms. RODS has had the opportunity to have brief presentations on such platforms. The challenge is affordability and a right sized solution for RODS, with licensing costs based on per user per month.

RODS Executive Director has prior knowledge and experience with the needs assessments, requirements processes, market assessment, development and rollout of a CRM project. He was the Project Champion for the development of a Salesforce CRM solution for the Canadian Cancer Society in Saskatchewan, with that Salesforce CRM solution now in use across Canada for the organization.

COMMUNICATION STRATEGY:

An internal communication strategy will follow as a part of the needs assessment and requirements exercise with staff and volunteers.
The Board of Directors will receive updates on the project at each meeting of the Board.

REQUIRED APPROVALS

With the support of the Finance Committee, the Board of Directors is required to approve funding from the reserve to complete the outlined deliverables in the RODS CRM project, including securing a term position/consultant undertake the needs assessment/requirements exercise, vendor search, engagement, tool customization and development.

STRATEGIC ALIGNMENT:

A CRM solution forms part of the current Strategic Plan**:**

1. Successful newcomer settlement and community integration

C.1. Improve the client experience through customer relationship management (CRM)
- Enhancing the client service though introducing an organization-wide CRM

system with centralized client profiles and referral systems.
- Strengthen client intake/referral process (from department to department)

TIMEFRAME/CONSEQUENCES OF DEFERRING DECISION:

Approval of funding from the RODS Board of Directors in June 2024 will allow the work outlined above to begin in coordination with the results of the IRCC CFP process, and anticipated IRCC funding for operating costs.

Deferral of a decision to support the term staff/consultant position will delay a possible roll out of a solution into the 2nd year of a possible new 5-year agreement with IRCC.