

# Kamloops Cariboo Regional Immigrants Society

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## Strategic Plan 2016 - 2019



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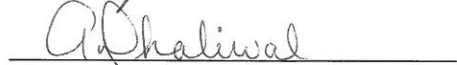

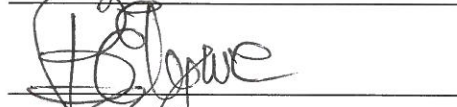



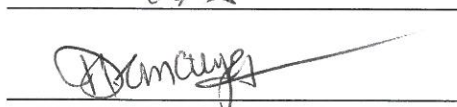
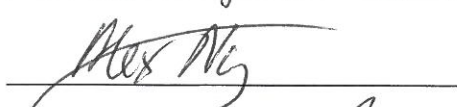
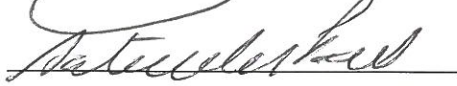
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## Authorization

The Board of Directors of the Kamloops Cariboo Regional Immigrants Society approve and authorize this Strategic Plan for the years 2016 through 2019

Ben Chitsaz:		Date: <u>March 14<sup>th</sup>/16</u>
David Cruz, Past President:		Date: <u>March 14/16</u>
Ambo Dhaliwal:		Date: <u>March 14/16</u>
Sonja Hot, Alt Treasurer:		Date: <u>Mar. 14, 2016</u>
Bernard Igwe, Secretary:		Date: <u>May 2, 2016</u>
Wally Kloubek, Vice President:		Date: <u>March 14<sup>th</sup>/16</u>
Rod McLeod, President:		Date: <u>March 14/16</u>
Nelaine Mora-Diez:		Date: <u>March 14/16</u>
Dilip Kumar Muarya:		Date: <u>March 14<sup>th</sup>/16</u>
Alex Ng, Treasurer:		Date: <u>March 14/16</u>
Satwinder Paul:		Date: <u>March 14/16</u>

### Kamloops Cariboo Regional Immigrants Society

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## Executive Summary

The Kamloops Cariboo Regional Immigrants Society operating the agency Kamloops Immigrant Services is dedicated to providing assistance to immigrants, new Canadians, refugees, and visible minorities. Through a variety of settlement and support services, the Society functions as an integral part of the community of Kamloops and region.

In the fall of 2015, the Board of Directors initiated a strategic planning process to develop clear and ambitious goals and strategies that would guide the society through 2019. This Plan is meant to provide a consistent and deliberate framework for decision-making and governance. The Society has established four primary goals for the years 2016 through 2019. Each goal will be achieved through the implementation of several key strategies:

Goal	Strategies
<b>Become a city of choice for newcomers and immigrants in BC</b>	<ol style="list-style-type: none"><li>1. Respond to emerging needs and new clients with new services</li><li>2. Collaborate throughout the community</li><li>3. Educate the public and conduct community outreach</li><li>4. Become a champion of change for newcomers through advocacy</li><li>5. Continue to provide excellent services</li></ol>
<b>Provide stable leadership</b>	<ol style="list-style-type: none"><li>1. Plan effectively for ED succession</li><li>2. Plan effectively for Board turnover</li></ol>
<b>Move toward a financially independent business model</b>	<ol style="list-style-type: none"><li>1. Establish fee for service</li><li>2. Explore social enterprise</li><li>3. Diversify funding sources</li><li>4. Develop real estate portfolio</li></ol>
<b>Sustain excellence in facilities and staffing</b>	<ol style="list-style-type: none"><li>1. Invest in new space</li><li>2. Provide staff opportunities and incentives for professional growth</li><li>3. Celebrate and acknowledge staff and their successes</li></ol>

# Mission, Purpose, and Values

## Mission Statement

Kamloops Cariboo Regional Immigrants Society is a not-for-profit society dedicated to the provision of a variety of services that assist immigrants, New Canadians and visible minorities to become full, equal participants in Canadian society.

## Purpose

Kamloops Cariboo Regional Immigrants Society serves several key purposes in our community:

- To deliver a broad range of programs which are sensitive to the needs of the culturally diverse community.
- To deliver programs and activities designed to facilitate immigrants, visible minorities, first generation Canadians and their families in becoming full and equal members of Canadian society.
- To inform and sensitize the region on immigration, settlement, integration and multicultural issues.
- To promote the elimination of racism and to facilitate organizational and institutional change.
- To provide assistance necessary for immigrants, visible minorities and first generation Canadians and their families to become full and equal members of Canadian society.
- To facilitate organizational and institutional change to meet the needs of a culturally diverse society.
- To inform and sensitize the region on multicultural, anti-racism, immigrant settlement and integration issues.

## Values

Kamloops Cariboo Regional Immigrants Society operates according to the following core values:

- Excellence in service delivery
- Mutual respect
- Inclusiveness
- Collaboration
- Harmony
- Diversity
- Honesty
- Integrity
- Equity



## Organizational Description

The Kamloops Cariboo Regional Immigrants Society is a non-profit agency dedicated to welcoming and settling newcomers to Kamloops and surrounding areas. Our welcoming, safe, and inclusive agency – Kamloops Immigrant Services – provides free and confidential programs that help immigrants, new Canadians, refugees, and visible minorities integrate and thrive in Canadian society and the Kamloops community.

Our Society's origins date back to 1980, when the Kamloops Chinese Cultural Association opened the Vietnamese and Immigrants' Community Centre in response to an influx of Southeast Asian refugees in need of settlement assistance. During the fulfillment of its two-year mandate, the Centre identified a need for services for a broader diversity of immigrants. Thus, in 1982 Kamloops Cariboo Regional Immigrants Society was incorporated as a non-profit society. The Society opened the Immigrants' Community Centre, whose name changed in 1985 to the current Kamloops Immigrant Services.

Over the past 33 years, Kamloops Immigrant Services has grown into a mature agency with a strong Board of Directors and a dedicated staff of fifteen. We currently offer a range of programs and services, including:

*Settlement & Integration:* Guidance, support, community referrals, service linking, life skills, education, and employment support.

*Language Instruction for Newcomers to Canada (LINC):* Help with English language training and practical communication needs.

*English Language Tutoring and Conversation Groups:* English language and cultural support on a one-to-one basis.

*Childminding Services:* In support of clients attending Language and/or Settlement services.

*Translation & Interpretation Services:* Fee-based interpretation and translation services in a wide variety of languages.

*Community Connections & Mentoring:* Matching community residents as mentors with new immigrants to support healthy integration and social engagement.

*Diversity Awareness Outreach Program:* Providing diversity awareness workshops to community organizations (public and private), schools, and employers about multiculturalism as well as to help newcomers to become familiar with the Canadian culture.

Kamloops Immigrant Services is proud to serve an essential role in the Kamloops area and enjoys constructive partnerships with a variety of other community-based agencies.

# Goals and Objectives

The Kamloops Cariboo Regional Immigrants Society has established four strategic goals for the years 2016 through 2019:

1. Become a city of choice for newcomers and immigrants to BC
2. Provide stable leadership
3. Move toward a financially independent business model
4. Sustain excellence in facilities and staffing

To achieve these four strategic goals, the Society has laid out several key strategies, each of which includes several objectives:

<b>1</b>	<b>Become a city of choice for newcomers and immigrants in BC</b>		
<b>1.1</b>	<b>Respond to emerging needs and new clients with new services</b> <i>Key outcomes: needs assessment and new programs and services</i>		
1.1.a	Conduct a needs assessment	ED, Board, Team leaders	Year 1, A
1.1.b	Establish appropriate responses to emerging needs	ED, Board, Team leads	Year 1, A
1.1.c	Implement new programs and services	ED and team leads	Year 1, B
1.1.d	Evaluate new programs and services	ED and team leads	Year 1, B
<b>1.2</b>	<b>Collaborate throughout the community</b> <i>Key outcomes: partnership agreements / MOUs with community partners</i>		
1.2.a	Identify key community stakeholders	Board & ED	Year 1, A
1.2.b	Reach out to stakeholders and explore partnership opportunities	Board & ED	Year 1, A
1.2.c	Develop and define partnership agreements / MOUs for service delivery	ED	Year 1, B
1.2.d	Implement new services in partnership	ED & staff	Year 1, B
<b>1.3</b>	<b>Educate the public and conduct community outreach</b> <i>Key outcomes: educational plan of action</i>		
1.3.a	Develop an educational plan of action, events, and activities (diversity plan)	Board, ED, & staff	Year 1, A
1.3.b	Establish who will target which segments of the public	ED & staff	Year 1, A
1.3.c	Develop delivery methods for public education (e.g. website, events, presentations)	ED & staff	Ongoing
1.3.d	Implement plan of action	ED & staff	Ongoing
1.3.e	Evaluate plan of action and measure effectiveness	Staff	Ongoing



<b>1.4</b>	<b>Become a champion of change for newcomers through advocacy</b> <i>Key outcomes: clear advocacy strategy</i>		
1.4.a	Establish needs and position KCRIS will take as a change agent and advocate	Board, ED & Community	Immediately & ongoing
1.4.b	Develop an advocacy strategy (communications, media, events)	Board & ED	Year 1, B
1.4.c	Implement the advocacy strategy	Board & ED	Year 1, A & ongoing
<b>1.5</b>	<b>Continue to provide excellent services</b> <i>Key outcomes: clear measures of success for programs and services</i>		
1.5.a	Evaluate services to see if they are meeting needs	ED & Board	Year 1, A
1.5.b	Evaluate gaps in services and shortcomings	ED & Board	Year 1, B
1.5.c	Determine clear measures of success in programs and services	ED	Year 1, B
<b>2</b>	<b>Provide stable leadership</b>		
<b>2.1</b>	<b>Plan effectively for ED succession</b> <i>Key outcomes: ED job description and successful hire</i>		
2.1.a	Review and revise ED job description	ED & Board	Year 1, B
2.1.b	Outsource personnel placement	ED & Personnel committee	Year 1, B
2.1.c	Search for and hire ED	Board & Personnel committee	Year 2, A
<b>2.2</b>	<b>Plan effectively for Board turnover</b> <i>Key outcomes: Board assessment and Board membership criteria</i>		
2.2.a	Identify particular needs on Board of Directors	Board	Ongoing
2.2.b	Conduct Board skills and interests assessment	Board	
2.2.c	Establish criteria for Board membership	Board	
<b>3</b>	<b>Move toward a financially independent business model</b>		
<b>3.1</b>	<b>Establish fee for service</b> <i>Key outcomes: groundwork and viable fee for service</i>		
3.1.a	Identify best possible services to offer for fee (how many, criteria, business case)	ED & staff	Year 1, A
3.1.b	Establish pricing, contracting, liability, insurance, policies, and risk management for fee for service	ED & staff	Year 1, A
3.1.c	Set up and manage books / accounting for new services	Suzanne	Year 1, A
3.1.d	Promote and advertise services	ED	Year 1, B



<b>3.2</b>	<b>Explore social enterprise</b> <i>Key outcomes: groundwork, business case, and viable social enterprise</i>		
3.2.a	Establish a Board working committee to explore possible social enterprises (purpose, mission, funding)	Board	Year 2, A
3.2.b	Prepare a business case and plan on feasibility and value	Board	Year 2, A
3.2.c	Present strategy and implementation (issue: buy existing building or brand new location)	Working committee	Year 2, A
3.2.d	Secure required financing / funding for social enterprise	ED or designate	Year 2, B
3.2.e	Establish operational, infrastructure, administrative, and staffing needs	ED or designate	Year 2, B
<b>3.3</b>	<b>Diversify funding sources</b> <i>Key outcomes: additional funding sources</i>		
3.3.a	Explore income-earning from other revenue arms, from new or expanded services and ventures	ED	Now / ongoing
3.3.b	Explore funding from other sources, including corporate, foundations, individuals, and associations	Staff	Year 1, B
3.3.c	Establish or join fundraising events focused on diversity and multiculturalism	Staff	Now / ongoing
<b>3.4</b>	<b>Develop real estate portfolio</b> <i>Key outcomes: additional real estate and rental housing for immigrants</i>		
3.4.a	Commence negotiations on financing (e.g. through BC Housing) for affordable rental housing for immigrants	ED	Year 1, B
3.4.b	Explore senior housing options and collaborate with willing government bodies	ED	Year 3, A
3.4.c	Acquire additional real estate for social housing	ED or designate	Year 3, A
<b>4</b>	<b>Sustain excellence in facilities and staffing</b>		
<b>4.1</b>	<b>Invest in new space</b> <i>Key outcomes: new space for agency</i>		
4.1.a	Survey staff for suggestions	Staff	Year 2, B
4.1.b	Bring ideas to board for prioritization and budget	Board	Year 2, B
4.1.c	Implement changes to space with assistance of designer	ED	Year 2, B
<b>4.2</b>	<b>Provide staff opportunities and incentives for professional growth</b> <i>Key outcomes: effective opportunities and incentives for staff</i>		
4.2.a	Identify requirements, needs, and wishes	ED & Personnel committee	Year 2, A
4.2.b	Establish funding and budget	ED & personnel committee	Year 2, A
<b>4.3</b>	<b>Celebrate and acknowledge staff and their successes</b> <i>Key outcomes: staff celebration and acknowledgment</i>		
4.3.a	Recognize staff length of service	ED & Admin assistant	Ongoing
4.3.b	Acknowledge and celebrate employees who achieve outside recognition	ED & Admin assistant	Ongoing

## Monitoring & Success

Ensuring the success of the Society's Strategic Plan requires effective monitoring and regular assessment of success.

Elements of the Society's Monitoring Plan shall include, but not be limited to:

1. Reports from Executive Director to Board regarding progress on the Plan's Goals and Objectives at Board Meetings.
2. Executive Director to flag important issues to Board as they arise.
3. Annual formal Plan Review session, to assess if progress appears satisfactory and address any challenges



## Appendix A: Objectives by Year

	Year 1 – A	Year 1 – B	Year 2 – A	Year 2 – B	Year 3 – A	Year 3 – B
ED	<ul style="list-style-type: none"> <li>• Conduct a needs assessment</li> <li>• Establish appropriate responses to emerging needs</li> <li>• Identify key community stakeholders</li> <li>• Reach out to stakeholders and explore partnership opportunities</li> <li>• Develop an educational plan of action, events, and activities (diversity plan)</li> <li>• Establish who will target which segments of the public</li> <li>• Evaluate services to see if they are meeting needs</li> <li>• Identify best possible services to offer for fee (how many, criteria, business case)</li> <li>• Establish pricing, contracting, liability, insurance, policies, and risk management for fee for service</li> </ul>	<ul style="list-style-type: none"> <li>• Implement new programs and services</li> <li>• Evaluate new programs and services</li> <li>• Develop and define partnership agreements / MOUs for service delivery</li> <li>• Implement new services in partnership</li> <li>• Develop an advocacy strategy (communications, media, events)</li> <li>• Evaluate gaps in services and shortcomings</li> <li>• Determine clear measures of success in programs and services</li> <li>• Review and revise ED job description</li> <li>• Outsource personnel placement</li> <li>• Promote and advertise services</li> <li>• Commence negotiations on financing (e.g. through BC Housing) for affordable rental housing for immigrants</li> </ul>	<ul style="list-style-type: none"> <li>• Implement the advocacy strategy</li> <li>• Identify requirements, needs, and wishes for staff incentives and PD</li> <li>• Establish funding and budget for staff incentives and PD</li> </ul>	<ul style="list-style-type: none"> <li>• Implement changes to space with assistance of designer</li> </ul>	<ul style="list-style-type: none"> <li>• Explore senior housing options and collaborate with willing government bodies</li> <li>• Acquire additional real estate for social housing</li> </ul>	

<b>Board</b>	<ul style="list-style-type: none"> <li>• Conduct a needs assessment</li> <li>• Establish appropriate responses to emerging needs</li> <li>• Identify key community stakeholders</li> <li>• Reach out to stakeholders and explore partnership opportunities</li> <li>• Develop an educational plan of action, events, and activities (diversity plan)</li> <li>• Evaluate services to see if they are meeting needs</li> </ul>	<ul style="list-style-type: none"> <li>• Develop an advocacy strategy (communications, media, events)</li> <li>• Evaluate gaps in services and shortcomings</li> <li>• Review and revise ED job description</li> <li>• Outsource personnel placement</li> </ul>	<ul style="list-style-type: none"> <li>• Implement the advocacy strategy</li> <li>• Search for and hire ED</li> <li>• Establish a Board working committee to explore possible social enterprises (purpose, mission, funding)</li> <li>• Prepare a business case and plan on feasibility and value</li> <li>• Present strategy and implementation (issue: buy existing building or brand new location)</li> <li>• Identify requirements, needs, and wishes for staff incentives and PD</li> <li>• Establish funding and budget for staff incentives and PD</li> </ul>	<ul style="list-style-type: none"> <li>• Secure required financing / funding for social enterprise</li> <li>• Establish operational, infrastructure, administrative, and staffing needs for social enterprise</li> <li>• Bring ideas for new space to board for prioritization and budget</li> </ul>		
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<b>Staff</b>	<ul style="list-style-type: none"> <li>• Conduct a needs assessment</li> <li>• Establish appropriate responses to emerging needs</li> <li>• Develop an educational plan of action, events, and activities (diversity plan)</li> <li>• Establish who will target which segments of the public</li> <li>• Identify best possible services to offer for fee (how many, criteria, business case)</li> <li>• Establish pricing, contracting, liability, insurance, policies, and risk management for fee for service</li> <li>• Set up and manage books / accounting for new services (Suzanne)</li> </ul>	<ul style="list-style-type: none"> <li>• Implement new programs and services</li> <li>• Evaluate new programs and services</li> <li>• Implement new services in partnership</li> <li>• Explore funding from other sources, including corporate, foundations, individuals, and associations</li> </ul>		<ul style="list-style-type: none"> <li>• Survey staff for suggestions on new space</li> </ul>	
<b>Ongoing</b>	<ul style="list-style-type: none"> <li>• Develop delivery methods for public education (e.g. website, events, presentations) (ED &amp; Staff)</li> <li>• Implement plan of action (ED &amp; Staff)</li> <li>• Evaluate plan of action and measure effectiveness (Staff)</li> <li>• Establish needs and position KCRIS will take as a change agent and advocate (Board &amp; ED)</li> <li>• Implement the advocacy strategy (Board &amp; ED)</li> <li>• Identify particular needs on Board of Directors</li> <li>• Explore income-earning from other revenue arms, from new or expanded services and ventures (ED)</li> <li>• Establish or join fundraising events focused on diversity and multiculturalism (staff)</li> <li>• Recognize staff length of service (ED &amp; Admin assistant)</li> <li>• Acknowledge and celebrate employees who achieve outside recognition (ED &amp; Admin assistant)</li> </ul>				

## Appendix B: The Planning Process

The Kamloops Cariboo Regional Immigrant Society successfully implemented a three-year strategic plan ending in December 2015. In the fall of 2015, the Board of Directors decided to begin a new strategic planning process to develop a plan that would guide the society from 2016 through 2019.

The planning began with the hiring of a facilitator and writer to guide the process and write the new Strategic Plan. In the first stage of planning, the facilitator launched online surveys for both Board of Directors and Staff, seeking input on the strengths and weaknesses of the organization, as well as the opportunities and threats which it faced.

The results of these online surveys were collated and distributed at a full-day strategic planning session, which took place on January 16<sup>th</sup>, 2016 at Bedford Manor in Kamloops. In attendance were the Board of Directors and Executive Director, led by the facilitator. This planning group undertook the following:

- a review of the Society's mission, vision, and values
- a review of stakeholders
- a review of the SWOT analyses from both Board and Staff
- establishment of key themes and organizational priorities
- review of four core domains: Programs / Services, Business Model, Leadership, and Operational Capacity
- discussion of ways to increase impact
- establishment of goals and strategies
- development of objectives within each strategy

The Board of Directors and Executive Director emerged from the full-day session with a clear sense of purpose and strategies that will help them fulfill the society's purposes. Following the planning session, the facilitator prepared a draft of the Strategic Plan and distributed it to the Board of Directors and Executive Director for feedback.

The final version of the Plan was completed on February 12<sup>th</sup>, 2016 and formally adopted on February 22<sup>nd</sup>, 2016.