Rising Together

Our Culture Map and Strategic Plan

Rise Calgary

Land Acknowledgment

In the spirit of respect, reconcilliation and truth, we honour and acknowledge Moh'kinsstis, and the traditional Treaty 7 territory and oral practices of the Blackfoot confederacy: Siksika, Kainai, Piikani, as well as the Îyâxe Nakoda and Tsuut'ina nations. We acknowledge that this territory is home to the Métis Nation of Alberta, Region 3 within the historical Northwest Métis homeland. Finally, we acknowledge all Nations – Indigenous and non – who live, work and play on this land, and who honour and celebrate this territory.

Leadership Welcome

I am excited to share Rising Together, our new Culture Map and Strategic Plan with you, and welcome you into our plans for our future. Our board and staff team, alongside the team at Habitus Collective, have worked diligently to create a plan that is both ambitious and achievable. The cultural directions within Rising Together articulate the passion and dedication alive within all the people who belong to Rise Calgary. The strategic directions focus our work on strengthening our foundations in compassionate and trans-formative basic needs service delivery, and in impact-driven empowerment programming. Through strengthening our foundations and with this new road map, we are building new capacities in knowledge generation to inform innovation, public policy and systems change. I am excited about the new ways in which we will honour each other and play together as we build a stronger culture as an organization. I am excited to uncover and learn from our own impact data and hone this knowledge into a stronger voice on designing solutions that move people out of poverty.

Here is a quick quide to the Rising Together roadmap.

For an overview of our approach – see page 3.

For an outline of our Theory of Change – see page 13.

For an exploration of our Strategic Goals, see page 21.

For a snapshot of the year ahead, see page 33.

Rising Together is the end result of months of board, staff and partner engagements. I would like to deeply thank all our colleagues whose insights, ideas and feedback helped us set these directions and create clarity around the next five years at Rise Calgary. At Rise, we are always happy to meet new volunteers, new potential partners, and community members so if you see yourself in any of our directions, please get in-touch!

Salimah Kassam

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01 Purpose

This culture map and strategic plan ('The Plan') has been created for the purpose of guiding Rise's strategic decision making into the next five years, cognizant of the strengths and challenges for the organization, and always focused on building the organization as a leader in Calgary's poverty reduction and elimination movements. The foundations of this plan have been built upon a review of key organizational documents, numerous conversations with organizational leadership, three co-development sessions with leadership, board, and staff, baseline survey with staff, partner interviews, and critical review of the findings and co-analysis. With the understanding that at some point in the future The South East Community Resource Centre (SECRC) may complete their merger with Rise, input from the staff and leadership of Rise and SECRC has been taken into consideration throughout.

This Plan aims to develop a deeper understanding of Rise's identity through their organizational story, find out what key strategic goals the organization needs to set before itself, devise impact focused actions and outcomes (i.e. what success looks like), set reasonable milestones, and, critically, articulate a cultural framework (including Rise's identity, values, and principles). Because the vision and mission of the organization are meant to be a reflection of the change Rise wishes to be part of and work towards, it too undergoes a review and refresh, connecting it more deeply to the challenges expressed, the capacity to meet those challenges, and the organizational niche. Much of the discovery of this strategic planning process is captured by the Theory of Change (ToC) - below. The ToC is an organized version of what Rise is aiming to achieve, the strategies it uses to get there, and the impact it will have. This ToC is a starting point for this strategic plan and intended to be dynamic. As Rise learns and grows, implements actions towards its strategic goals, and prioritized outcomes, this theory may change, which is evidence of its strength[1].

02 Introduction

Background and Context

Rise Calgary ("Rise") was established in May 2022 through a merger between BowWest Community Resource Centre, South East Community Resource Centre (SECRC), and Sunrise Community Link.[2] While the organization is new, its involvement in the community spans over 20 years of impact through the work of BowWest Community Resource Centre, established in 1999, and Sunrise Community Link, established in 2000.

Today, Rise has resource centers located in the communities of Bowness, Ranchlands, and Greater Forest Lawn and continues to deeply partner on all programming with the SECRC. Through these resource centers, Rise provides services and support to all of Calgary while occupying a unique position within the social services sector; they strive to meet the basic needs of Calgary's most marginalized, while also simultaneously building economic, social, and wellness resiliency for customers. Rise sees service delivery not just reactively aimed at helping people meet their basic needs, but proactively aimed at increasing long term resiliency and capacity, and economic mobility, thereby reducing the need for basic needs services. In this sense, Rise has a transformational goal to their work that aims to create deeper, more long lasting changes within the lives of Calgarians.

The way Rise aims to achieve better outcomes for low-income Calgarians is by streamlining services, being more adaptive to funding demands, and helping customers create pathways out of poverty (e.g. through employment support, education, asset development, and goal setting). Data from 2022 shows that these outcomes are materializing for Rise. Rise Calgary connects with approximately 5,065 unique Calgarians a year, providing approximatley 12,026 touch-points or interactions with people seeking support meeting their basic needs. In terms of basic needs support, they distributed 1347 food boxes to Calgarians facing food insecurity and approved 372 individuals to the Basic Needs Fund, supported 872 families with items for kids, and they provided mental health support for 128 individuals. They have also created improvements within economic, wellness and social domains of the people's lives through the Mobility Coaching Program, Financial Coaching, Matched Savings Program, Talking Taxes, Parenting and Healthy Family Development Programming (through SECRC). Through Mobility Coaching specifically, many participants have followed through on goals such as getting into housing and paying down bills and had other attitudinal and behavioural shifts such as increased confidence, better understanding of resources, managing daily challenges, and making positive decisions.

Impact Strategies and Supports

Rise employs three organizational strategies (meeting basic needs, identifying pathways out of poverty, and engaging in advocacy) within various areas of support for customers (basic needs, life skills, money management, mental health, targeted support for children, economic mobility, and community well-being), as shown in Table 1. These strategies and supports clearly influence and intersect with each other to create a larger impact picture of Rise's work. For example, while identifying pathways out of poverty focuses on empowerment work and economic mobility support, it also relies on the fact that customers are receiving basic needs support or are having their basic needs stabilized. Depending on the emergent needs of customers, Rise staff utilize strategies and supports in the combination that makes most sense for each customer.

What has emerged clearly through discussions with staff and leadership is that Rise aspires to do a lot more; they want their work to have greater impact in the areas of long-term empowerment and sustainability of its customers in order to exit the cycle of poverty. The way they conceive of the problem is through the Scarcity to Strength framework. This framework argues that people stuck in the scarcity loop, which produces many negatives outcomes such as fear, anxiety, and stress, can be moved into the strength loop, and experience positive outcomes including, among other things, gratitude, peace, and a present mind.

Moving from one loop to another can be supported through intentional work - using insights drawn from behavioral economics (these include strategies to decrease cognitive load, increase accountability, and reframing, using motivational interviewing and strengths-based counseling).

FROM SCARCITY TO STRENGTH
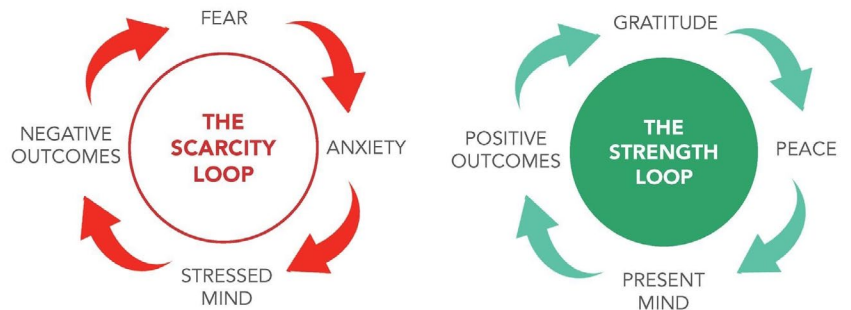
How Rise envisions this happening for customers is by connecting the impact of its work in meeting basic needs and financial empowerment (in the scarcity loop) with longer term transformation (into the strengths loop).

The stages of transformation, as articulated by staff and leadership, are:

1. **Stabilization:** With customers in a state of scarcity, the journey starts with stabilization. Individuals in low-income households may not have the cognitive ability to be able to think about long term plans, due to the urgent nature of budgetary and financial concerns (e.g. when bills need to be paid, costs of living and food). At this stage, customers are working through various crises, both personal and economic. Support for these concerns can free up cognitive resources to be able to focus on longer term goals and strategies.

2. **Mobility:** Utilizing coaching and brain science, customers start to gain greater control of their decisions and build strategies to deal with the challenges of moving out of poverty. The journey of mobility results not only in the reduction or elimination of over-reliance on emergency supports, but also longer-term food and housing security, personal connections, and greater overall wellness.

3. **Empowerment:** This stage is when customers have increased ability to make decisions in their lives and deal with challenges. They have access to the information they need and have solidified various skills and strategies that will enable them to be self-sufficient in the long term.

Stabilization Stage
Working through crisis and constant scarcity, both personal and economic.

Mobility Stage
Utilizing coaching to build future orientations.

Empowerment Stage
Co-creating new confidences and assets.

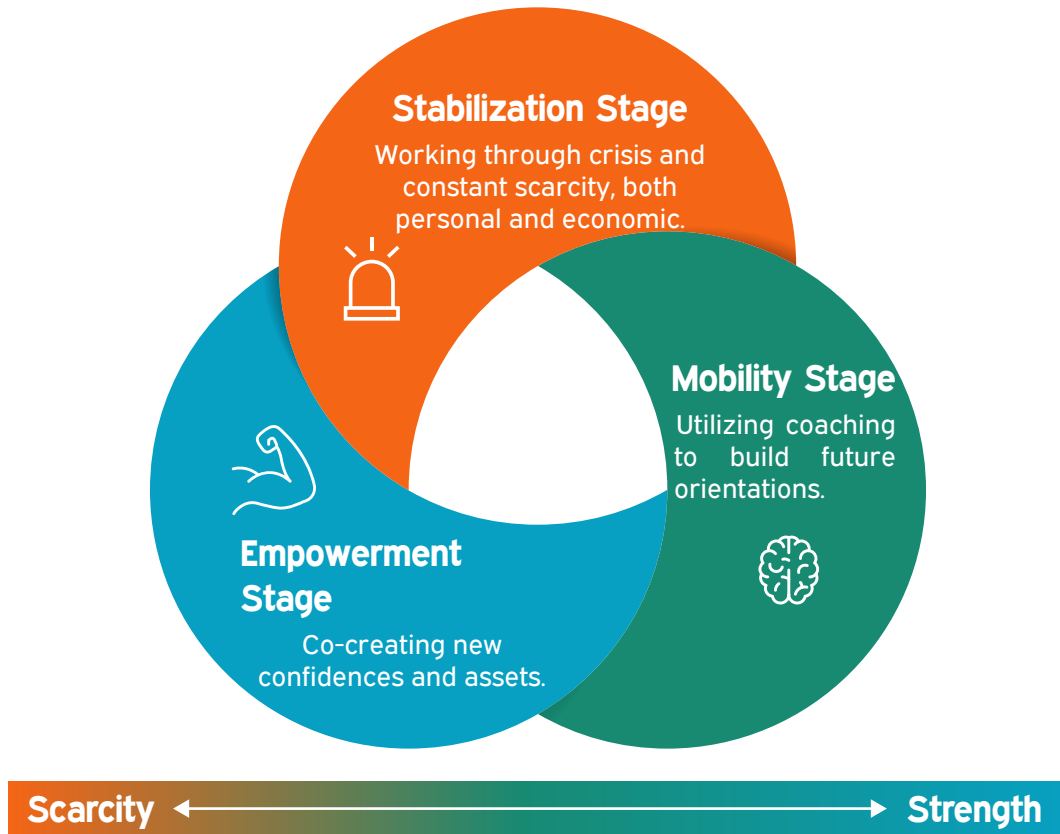Scarcity ⟵——————————⟶ Strength

Figure 1: Pathways out of Poverty

Operationalizing the stages of transformation as their core strategy is critical - this means articulating what transformation means for customers, how folks move within a transformative environment, what impact looks like for both little and big changes, and how to achieve full programming integration within the transformative strategy.

In building out this refreshed organizational strategy and culture plan, mapping current organizational strategies and areas of programming informed where and how to grow the organization and strategic goals. This preliminary mapping of the existing strategies and supportive activities can now be used to compare where the organization aims to grow and identify critical areas of strengthening[3].

Table 1: Organizational Strategies and Areas of Support

Organizational Strategy	Area(s) of Support
1. **Meeting basic needs:** This strategy aims to fill gaps in the social services system for Calgarians who have no other options for assistance. • Similar to most social service organizations in Calgary, Rise has centered its work around this strategy. Most of Rise's services and support focus on providing basic needs to stabilize customers. • This strategy has significant challenges because of the high number of people in Calgary struggling to meet their needs, the limited number of service providers to meet these needs, and the time intensive nature of the support.	**Basic needs support:** This type of support includes services aimed at meeting the basic needs of Calgarians, including the provision of food, clothing, and referrals to other community resources. • The Basic Needs Fund, which provides emergency financial assistance, and the Good Food Box Program, which provides affordable fresh fruit and vegetables, are two important basic needs supports. **Life skills support:** This type of support focuses on free income tax support for low income Calgarians (e.g. support for filing federal and provincial taxes, and benefits programming/tax credits) and employment services (e.g. support for finding and sustaining long term employment). • Culturally appropriate tax services are an important aspect of this support, which is provided to Indigenous and First Nations peoples in Calgary and surrounding areas. **Money management support:** This type of support includes financial coaching, aimed at helping customers save, provide education for themselves or their family, and own property. • The Earn and Learn program is an important money management support, through which customers first learn how to save over a 6 month period, and then Rise matches this savings at a ratio of 3:1. This allows customers to leave the program with increased financial literacy but also quadruple their money. **Mental health support:** This support includes informal mental health support (e.g. informal discussions with Mobility Coaches or Community Advocates) and formal mental health support (e.g. formal counselling and therapy). All services are either free or low-cost, and provided virtually or in-person. **Targeted support for children:** This type of support provides extra assistance for customers that have children with developmental needs.

Organizational Strategy	Area(s) of Support

2. Working with customers to identify pathways out of poverty: This strategy is empowerment work done through supportive relationships that creates a culture of problem solving, trust, compassion and respect, while connecting people with each other and their community. It is deeply rooted in Rise's experiences and evidence informed belief that setting goals, and personalized coaching can result in better outcomes for customers living on low incomes. It aims to increase long term resiliency and economic mobility within customers' lives so they grow from a place of scarcity to strength, reduce their reliance on basic needs services, and become economically sustainable.

- This strategy is a transformational element of Rise's current work, operationalized through the Mobility Coaching Pilot Program, and is lacking within Calgary's social services sector.

- Rise aspires to utilize this strategy more within its work.

Economic mobility support: This support aims to create resiliency and permanent, lasting change in the lives of Calgarians living on low incomes.

- Economic mobility support is provided through the transformational pilot program called Mobility Coaching. This program utilizes a behavioural economic approach (e.g. nudge theory and default effects) to poverty reduction that includes goal-setting and coaching within three domains of life (i.e. economic, social and wellness). It creates concrete steps for coachees to move from intention to goal setting to achieving goals through regular reflective meetings with their coach (a trained Rise Calgary Community Advocate).

Community wellbeing support: The type of support provides funding for residents living in communities with Rise resource centers who want to improve their community. It also includes Rise's growing volunteer program, aimed at increasing community engagement.

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3. Engaging in policy and systems level advocacy: This strategy aims to change the systemic inequities that perpetuate poverty and scarcity (e.g. advocating for basic needs and the development of a basic needs impact framework that may be shared with the sector).

This strategy is aspirational at this time. Rise recognizes that engaging in policy and systems level advocacy takes internal agreement on the nature of problem the are aiming to address, well thought-out strategies to move forward to address that problem, and strengthening thinking around outcomes and evidence of impact.[4]

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Organizational Strengths and Challenges

Organizational Strengths

1. **Staffing and connection to practice area:** Rise is filled with enthusiastic, innovative, and collaborative people who are highly committed to supporting customers through their challenges, meeting them where they are at whatever their challenges, and offering high levels of service. When tapped into properly, the strengths and knowledge of individuals within the organization, with diverse career and lived experience, creates strong outcomes with customers. There is a culture of problem solving, trust, compassion and respect among staff and customers, providing a sense of belonging and combating feelings of loneliness. They also have strong connections to partners, which facilitates referrals to other community supports. Rise staff are interested to learn more and improve their practice and want to find ways to better support customers.

    - Key roles that were highlighted included financial coaching and tax clinic supports, and critically Community Advocates.

    - The Leader of the organization was also singled out for her ability to engage with and speak to evidence and research, ideas, and policies.

2. **Assets:** Other organizational strengths include assets, such as Rise's new data management system, which has enabled them to gather 2+ years of client data (a big success). The way the organization has grown, through the incorporation of sites, has kept its connections within community spaces.   While Rise serves all of Calgary, their resource centers are embedded into the communities of Bowness, Ranchlands, and Forest Lawn, increasing the accessibility of their centers for thousands of Calgarians most in need of support outside of the downtown core. Also, the main office site at 17th Avenue SE has potential as a hub for connection and activities - though in need of work to make warmer and more inviting. Some of the key programs that people spoke highly of include the Basic Needs Fund, Mobility Coaching, Tax Clinics, Matched-Savings and other smaller ad hoc community initiatives such as the food and clothing closets. Through this programming, Rise is fostering empowerment, self direction, and future orientation. There is great potential for the provision of stabilization and empowerment of customers simultaneously though this work.

3. **Partnerships:** Rise also has strong community partnerships, which enable referrals and program development, including the Women's Centre, CUPS, Distress Centre, 211, Aspire Calgary, and Momentum. Rise also partners with post-secondary institutions Bow Valley College, Mount Royal University, and the University of Calgary (for practicum students). We also have a community of practice where we lead under the Aspire network, which includes 14 partner agency's (the Women's Centre, Centre for Newcomers, Kerby Centre, The Immigrant Education Society, Immigrant Services Calgary, Calgary Immigrant Women's Association, Calgary Chinese Elderly Citizen's Association, ASAP, Bow Valley College, Calgary Vietnamese Women's Association, Carya, Connections for Families, Trellis, SORCe).

Challenges

A number of internal challenges have also arisen, which pose different barriers.

1. **Internal challenges:** Rise completing its merger, maintaining avenues of sustainable and ongoing funding, articulating a common vision and impact framework were all discussed.

   - **Staff burnout:** Scarcity is also a challenge for staff in terms of time and demands on their work. Rise needs to address staff needs and burnout.

   - **Staff roles and load:** Filling critical skills gaps in the organization needs to be addressed.

2. **Deepening impact:** When examining Rise's current strategies, feedback from staff indicates that while basic needs support is much needed, it mostly has shallow, short-term impacts on customers with large investments of time needed from Rise staff. This time requirement can be challenging as it creates a push and pull between needing to support customers in immediate crisis and needing to focus on customers' empowerment and mobility. Rise struggles to cope with the demand for basic needs support, which exceeds Rise's capacity. For staff, not being able to give enough time to one area or the other creates mental and emotional exhaustion. While long term impact data is unavailable, this signals the need for greater reflection regarding how to operationalise these strategies within Rise's work. Staff struggle to articulate how the work helps people move along from scarcity to strengths and how the stages of transformation connect.

3. **Addressing customer needs:** Sometimes there is a lack of clarity around who Rise needs to target and how staff manage their time working through basic needs, the specific problems they aim to remediate, and how customers move from crisis mode to stabilization to empowerment, as well as what counts as evidence of this growth and change. Many of Rise's customers consistently struggle to meet their immediate needs and translate short term assistance into long term change. Staff struggle with how to successfully transition those most at risk into empowerment work and meeting the scale of demand from those most at need.

All this speaks to the need to develop further the building blocks of empowerment and stages of transformation within the organization, so that staff are on-boarded to this critical approach of scarcity to strength and understand how it guides decision making pertaining to customer management. Externally, Rise also needs to speak with a common language of empowerment in its approach, communications, and vision.

03 Mission and Vision

Vision: Everyone moves forward.

The aim of the vision statement is to reflect the long term aspirations of the organization - summarizing the organizational values and future goals.

Summary of feedback

During this engagement process with the staff, board, and leadership of Rise, feedback on the Vision of the organization was mixed. Most appreciated that it was equity focused and seemed to impart an understanding that meeting people where they were at was critical. The language was inclusive but failed to acknowledge that this vision was not always possible for every customer. Transformation seemed more aligned to the actual work of the organization. It implied less assumptions about the direction that change happened and was inclusive of customers setting their own direction and having autonomy.

Reflective questions to consider

- Does this vision statement reflect the change Rise is hoping to achieve?
- Does the vision statement stay true to the approach of meeting people where they are at?

Original	Potential Modifications	
Everyone moves forward	• Transformation for everyone • Transformation through empowerment	• Transformation through stabilization, mobility, and empowerment • Growth and change are always possible

Mission (current): Ending poverty through economic and social mobility.

The aim of the mission statement is to reflect more of the present state of the organization - stating why it exists and what it stands for.

Summary of feedback

Most felt the mission statement needed stronger alignment to the current work of the organization and what it is reasonably poised to take on. While appreciating that the mission statement for the organization was assertive and connected to programming strengths, it needed bolstering through connection to the needs and demands of customers. This seemed important given feedback on the Vision of meeting people where they are at. However, where the organization spends the majority of its resources presently is not where the organization aspires to stay. While the current mission statement implies high commitment, in depth programming, immediate crisis alleviation, and case management demands much staff capacity today. Economic and social mobility remains elusive to many customers. Concern was articulated that the actual impact of Rise's work is at the level of resolving crisis and stabilization, but longer term work towards mobility and empowerment is not possible. For example, Basic Needs support was critical to achieving stabilization, but connection with longer term stabilization (beyond the immediate crisis), mobility, and empowerment was elusive.

This left most to ponder two ideas; scale back the aspirations of the mission statement or get better at telling the impact story of Rise's work. Feedback seemed to suggest the mission statement should be revised to better reflect organizational work along the stages of transformation.

Reflective questions to consider

- Does the mission statement get across why we exist?
- Does the mission statement help us tell the story of the actual work we do?

Original	Potential Modifications	
Ending poverty through economic and social mobility	• Reducing poverty through economic and social mobility	• Transformation through stability and empowerment • Transformation comes through stabilization, mobility, and empowerment

04 Theory of Change

A theory of change is both a conceptual model and a concrete product that reflects the model[5]. A fundamental component of any large-scale social change effort, a theory of change can help teams strengthen strategies and maximize results by charting out the work ahead, what success looks like, and how to get there.

Developing a theory of change model involves making explicit collective assumptions about how a change will unfold. This work can help funders and leaders of a social change effort clearly articulate their objectives, discuss equity considerations, define roles of decision-making authority, and enable useful measurement and learning.

Why We Exist

At Rise, we believe:
- All Calgarians, especially those most vulnerable, are deserving of care, support, and someone to listen.
- Growth and change are always possible, no matter what the circumstances.
- Systems fail to care for those most vulnerable, they need to be challenged to do better, and it is us who will shine a light where the problems are.

The Problem

From years of work in the community, we continue to note scarcity is an underlying problem that impacts the people of Calgary. Scarcity is when factors such as time, money, mental wellbeing, education, and opportunity impact the way people approach their lives and make decisions. For many, it impacts relationships (e.g. causing isolation from friends and family, and stigma), and makes long term planning and decision making difficult (e.g. the cognitive load of many financial decisions). Scarcity results from systems lacking care for those most vulnerable (e.g. governments not providing adequate affordable housing), and disproportionately affects some people more than others (e.g. Indigenous peoples compared to other population groups). It causes people to struggle with poverty, mental health, substance use, and housing, and is becoming more of a problem as an increasing number of people are trapped in a scarcity loop, where negative outcomes (e.g. fear and stress) results in further difficulties (e.g. making long term plans, identifying ways out of poverty) and further negative outcomes. Ultimately, scarcity harms an individual's social, economic, and health outcomes in the present and the future.[6]

Who We Serve

Rise has a customer group with diverse and challenging needs, ranging from immediate basic needs support to actively working their way out of poverty (e.g. setting financial goals). Many are experiencing poor mental health (e.g. stress, feeling overwhelmed, unresolved trauma) and physical health, have suffered unexpected tragedy or loss, have experienced systemic issues (e.g. racism), or are in a transgenerational scarcity loop (e.g. challenges and crisis form again and again, and moving beyond that loop has been difficult).[7]

Others are experiencing success and finding pathways out of poverty. The customer group with the greatest success are people who have been able to open space for better decision making, build connections with one another, and take steps to secure their financial future.

Program Focus

Rise programs are addressing scarcity through a caring and compassionate, individualized approach, as we have found that connection, hope, and belonging can help change scarcity. Concretely, Rise provides various supports for low-income individuals and families (e.g. basic needs support, life skills, money management, mental health support, targeted support for children, economic mobility, and community well-being). However, the focus we wish to grow is *the transformation of people out of poverty by focusing on the stages of transformation*.

> "It is collaborative, not transactional"
> - Jennifer Caswell (board member)

> **"Empowerment refers broadly to the expansion of freedom of choice and action to shape one's life"**
> - World Bank, 2002

> **"We also work to empower individuals and families."**
> - Employee Survey

We see our programs building transformative bridges for our customers, and ways to work on their own growth. We recognize those that come to Rise may be anywhere on their journey - but growth and change is always possible. Ultimately, the two paths we walk are simultaneously between depth and breadth; that we serve the high rates of demands from people in our communities, but that we have the time and resources to engage in transformative change with our customers. This is the Rise version of wraparound support; meeting urgent demands and taking people along the stages of transformation. Finessing this approach will put the organization in a great place to speak to the glaring gaps in the system, which we wish to tackle as our programming is settled in a good place.

The Journey: While pathways out of poverty look different for everyone, we know the journey generally takes people through the stages of transformation. With many customers in a state of scarcity, the journey often starts with **stabilization**. Individuals in low-income households may not have the cognitive ability to be able to think about long term plans, due to the urgent nature of budgetary and financial concerns (e.g. when bills need to be paid, with costs of living high and food expenses). Support for these concerns can free up cognitive resources to be able to focus on the longer term. **Empowerment** of customers in this phase enables greater control over decisions and gaining information about how to work towards moving out of poverty. This, in turn, results in **mobility;** the ability of individuals to work towards moving out of poverty, reducing or eliminating food and housing insecurity. It is important to note that these steps are not exactly linear. Individuals can move back and forth, between these stages, and can skip between stages. Rise Calgary works to support customers throughout these stages of transformation.

Our thinking behind the stages of transformation draws on both literature and experience. Poverty can cause individuals to be unable to plan for the long term, due to the constant stressors requiring immediate attention, and the need to allocate cognitive resources towards solving urgent problems. It has been found that this scarcity can bring the IQ of individuals down by nearly 13 points (Mani et al., 2013). Additionally, going without basic needs products resulted in increased stress, and potential

embarrassment when having to ask others for assistance (Fiese et al., 2014). Factors such as insecurity in food and housing, lack of access to basic needs, access to technology, and showers, commonly occupy cognitive bandwidth, resulting in this decrease in IQ, and limited ability to plan for the long term. Alleviation of these stressors, then, can have long term and widespread benefits for individuals aiming to go through the stages of transformation. This is where stabilization programming comes into play. Stabilization programming seeks to act as crisis intervention, providing needs such as affordable food, housing, provision of basic needs, access to technology such as computers and phones, and access to hot showers. From a state of stability, empowerment can help make individuals feel more in control, and can help with decision making to reach a state of mobility out of poverty.

By applying this thinking, Rise Calgary aims to bring individuals to a place where they can begin to work on long term goals, rather than manage immediate and urgent concerns.[8] Individuals living on a low-income can face feelings of powerlessness, as their options and freedoms are restricted to what they can afford. Empowering individuals as they work towards pathways out of poverty can result in more positive outcomes. Empowerment can be categorized into two types: personal empowerment and social empowerment (Kao et al., 2014). Personal empowerment describes giving power back to individuals, by providing assistance for customers to make decisions and to regain control. Social empowerment refers to improvement in social situations. Mobility coaches at Rise Calgary work within both of these realms, working to help individuals have better outcomes in economic domains, but also wellness and social domains in tandem, in addition to providing nudges and incentives to keep going. This not only requires emotional assistance, and inclusion, but also monetary and needs-based supports, be they through basic needs funding, food and income assistance, or through referral to related resources. Empowerment is important, and it must involve providing customers with relevant information and awareness of resources available to them (World Bank, 2022), a task typically undertaken by community advocates at Rise. Community advocates at also provide referrals to other resources as needed, so customers are able to receive various needs such as food, as needed.

Assumptions

1. Pathways to empowerment have logical stops where people are first stabilized and then work to become economically and socially mobilized

2. Strategies for stabilization include income and housing access, natural supports development, financial support, and access to networks of support.

3. The pathway from stabilization to empowerment can be supported through goal-oriented coaching.

4. There are levers within systems, when activated can have positive impacts on people living in scarcity.

5. To activate these levers means demonstrating leadership, using evidence to inform decision making, and mobilizing knowledge in ways that get more attention.

Customers

- One-time support: Those who need help staying afloat - temporarily. They move on quickly and we don't typically see them again

- More intensive support: In order to shift people up into sustainability, there is intensive support needed (e.g. stabilizing then move into empowerment programing)

- More complex needs: People who need sustained assistance and may cycle numerous times between stabilization and empowerment

Strategies

1. Meeting urgent basic needs for those with critical income, housing and financial concerns (stabilization).

2. Working with those to identify pathways out of poverty (mobility).

3. Long term empowerment and sustainability - working on long term strategies to exit cycle of poverty/scarcity through asset-building(empowerment).

4. Policy and systems advocacy to change the systemic conditions that perpetuate poverty/scarcity.

Activities

1. Provision of basic needs support.

2. Community advocate support and referral.

3. Goal oriented coaching.

4. Asset-building opportunities

5. Evidence informed policy, systems and programming recommendations

Outcome/Outputs

Customers have:

- Access to financial and other supports to meet basic needs
- Support identifying pathways to stabilize their lives
- A partner in setting intentions and executing strategies to reach their long-term goals

End-goal (impact)

People living with scarcity are able to meet their needs and work towards moving out of scarcity for good.

05 Culture

Peter Druker is known for the line "culture eats strategy for breakfast". To be fair, he didn't mean strategy is unimportant. Rather, his point was when culture and strategy are aligned, the organization can evolve in powerful ways. Often, leaders focus on strategy and believe culture will take care of itself. In those organizations, leaders are not harnessing and leveraging the assets that exist across the team to fulfill its goals. This creates a risk that the culture may not evolve in lockstep with the strategy, leaving organizations wondering why they couldn't meet the objectives.

We evaluated Rise's current state culture to identify growth opportunities to position the organization to fully step into its strategic goals. From there, we also created a culture framework that leverages the strong aspects of Rise's existing culture, while also framing parts of the framework as aspirational where growth is required.

When considering culture, there are two dimensions to be evaluated.

People's interactions fall on a spectrum from highly independent to highly interdependent. Cultures that lean towards the former place greater value on autonomy, individual action, and competition. Those that lean towards the latter, emphasize integration, managing relationships, and coordinating group effort.
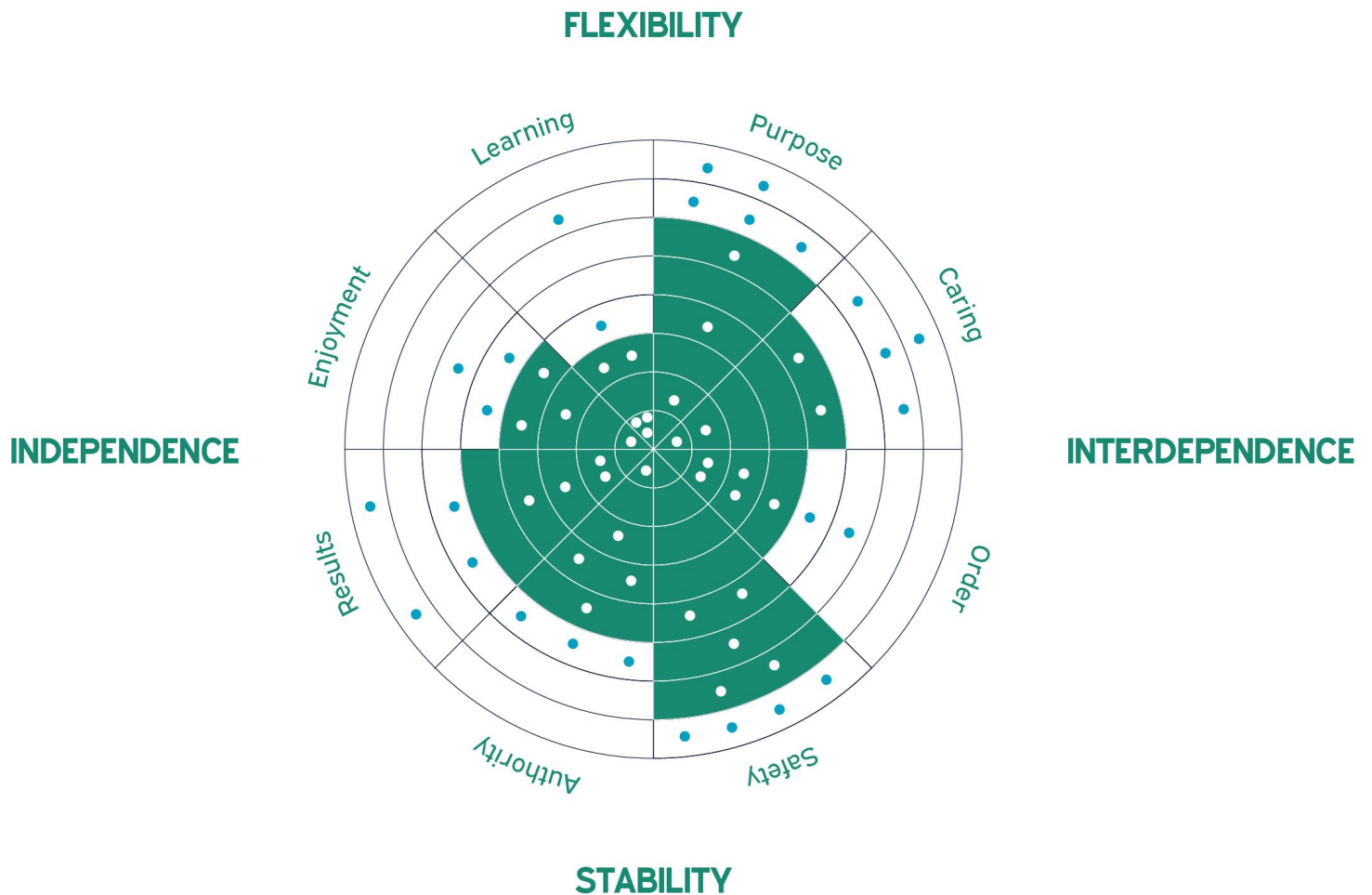
Response to change falls on a spectrum between highly stable structures and highly flexible structures. In cultures that favour stability, those organizations tend to follow the rules, use control structures, and strive for efficiency. In cultures that favour flexibility, those organizations tend to prioritize innovation, openness, diversity, and long term outcomes.

At Rise, we strive for a balance across both dimensions. We want employees to feel a sense of ownership and autonomy in their work, while also pulling in the same direction to accomplish the goals of the organization. We want to be responsive and adaptable, while also having clearly defined systems and processes.

Within those two dimensions, exist eight distinct culture elements guide our thinking:
1. **Purpose:** idealism, altruism, compassion, shared values, the greater good.
2. **Caring:** relationships, mutual trust, collaborative, loyalty, sincerity, teamwork.
3. **Order:** respect, structure, shared norms, methodical, cooperative, customs, procedural.
4. **Safety:** planning, risk conscious, protection, anticipating change, realism, pragmatism.
5. **Authority:** strength, decisiveness, boldness, confidence, dominance.
6. **Results:** achievement, outcomes, high performance, high capability, goal-oriented.
7. **Enjoyment:** fun, excitement, lighthearted, spontaneous, playful.
8. **Learning:** exploration, creativity, innovation, curiosity, knowledge seeking, adventure.

Staff at Rise evaluated their culture on these dimensions. Below is a snapshot of the results.

FLEXIBILITY

Learning · Purpose · Caring · Order · Safety · Authority · Results · Enjoyment

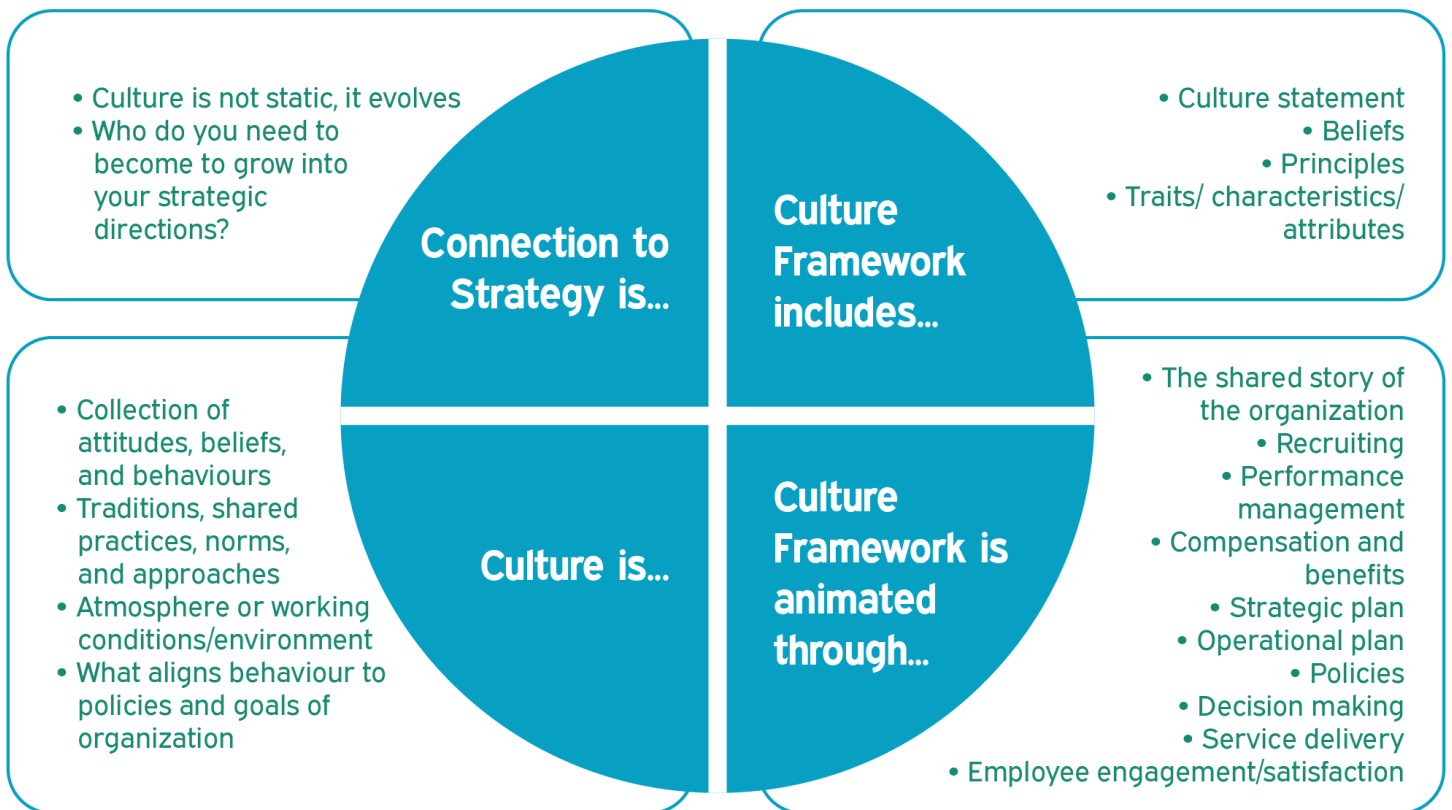**INDEPENDENCE**

INTERDEPENDENCE

STABILITY

What we can see within the results is a culture that favours interdependence and is relatively balanced between being flexible and stable.

The top culture elements are safety, purpose, and caring. The culture areas lagging are learning, enjoyment, and order.

What we can infer from the results, and have validated with staff, is that staff are exhausted, their time is stretched thin, and there is a sense of 'chaos' occurring. Culturally, this is concerning, as morale is heavily impacted.

Establishing a culture framework achieves two things. First, it leverages the existing strengths within Rise. Second, it paints a clear picture of who you aspire to become. Especially in relationship with your strategic directions, as they will require your culture to evolve in order to realize your desired success in accomplishing those goals.

Below is how we think about a Culture Framework.

Connection to Strategy is...
- Culture is not static, it evolves
- Who do you need to become to grow into your strategic directions?

Culture Framework includes...
- Culture statement
- Beliefs
- Principles
- Traits/ characteristics/ attributes

Culture is...
- Collection of attitudes, beliefs, and behaviours
- Traditions, shared practices, norms, and approaches
- Atmosphere or working conditions/environment
- What aligns behaviour to policies and goals of organization

Culture Framework is animated through...
- The shared story of the organization
- Recruiting
- Performance management
- Compensation and benefits
- Strategic plan
- Operational plan
- Policies
- Decision making
- Service delivery
- Employee engagement/satisfaction

Rise Culture Statement

We aspire to help everyone rise up and move forward, including our own team. This is how we get there:

We've got each others' backs.

- Our sum is greater than the parts. Our strength resides in the collective, not with any individual team member.
- We're there for each other. If you need to step away, someone will step in. If you need help, we're there.
- We listen to and learn from one another.
- Everyone belongs, their unique gifts are leveraged, and their contributions are celebrated.
- We trust in one another and hold each other accountable.

> **Which parts feel aspirational and how do we live into this aspect of our culture statement?**
>
> - Workload is currently too high to step in for one another.
> - Consider intentional succession planning or cross training to create redundancies.
> - Not to be confused with 'we are a family' which can create unhealthy dynamics.
> - We are inconsistent in how we support one another.
> - We might not be fully capitalizing on unique knowledge or skills some team member posses.
> - Trust needs to be nurtured.
> - Team building should be an ongoing activity.
> - Celebrating successes, big and small, should be part of our culture.

We create brave and safe spaces.

- We protect our well-being.
- We promote psychological safety in our workplace.
- We bring awareness to our biases, assumptions, and judgements.
- We hold a space of trust and confidentiality.
- We hold brave space for courageous conversations.
- We challenge ideas, not people.
- We allow for discomfort to lead our growth.

> **Which parts feel aspirational and how do we live into this aspect of our culture statement?**
>
> - Not all staff feel valued.
> - There is a perception of 'favourites'.
> - Not all staff feel it is safe to say the hard things. Not everyone feels heard, understood, or that their perspectives are respected.
> - There is a disconnect between our compensation and levels of responsibility and workloads. This creates stress and makes it challenging to maintain our own wellbeing.

We invest in our growth and development.

- This work is complex, requiring us to invest in ourselves to cultivate leading edge skills.
- We are open to new ideas, ways of thinking, and feedback.
- We are committed to building the social systems leaders of tomorrow.

> **Which parts feel aspirational and how do we live into this aspect of our culture statement?**
>
> - There aren't professional development budgets allocated for each team member.
> - There isn't enough time in our day to be able to prioritize our learning.

We are data informed and results driven.

- We use our data to advocate for systems change.
- Our strategies produce evidence-based transformations.
- Well established systems and processes allow us to focus on what matters.

> **Which parts feel aspirational and how do we live into this aspect of our culture statement?**
>
> - We need to consider data security.
> - We need a records management (retention/disposition) strategy or policy.
> - We need to build a shared understanding and commitment around our practice.
> - We need to invest in capacity building to make better or full use of Apricot.
> - Team members can prepare draft reports. This will facilitate understanding of the use and importance of data integrity, while also developing analytical and continuous quality improvement skills.

We are innovative.

- We are intentional about what we do.
- We practice adaptive leadership.
- We let go of what doesn't produce meaningful transformations to embrace what does.
- We evolve and go where the need takes us.
- We are curious and ask a lot of 'how might we' questions to inform our human centred design approaches.
- We focus on growing hope.

> **Which parts feel aspirational and how do we live into this aspect of our culture statement?**
>
> - We aren't good at letting go of services that aren't advancing our mission and desired impacts.
> - We should map our services along the stages of transformation (or similar) to ensure we have activity that ensures progression.
> - We would then require success measures for each service offering to know when someone is ready to move from one stage to the next.
> - Using this data will up our game in understanding which services contribute to progression and transformation and which do not.

We know our role in the ecosystem.

- We fill the gaps in the ecosystem.
- We use our data to highlight the gaps within the system and advocate for systems level change.
- We partner and collaborate to deepen our impacts, grow our reach, create efficiencies, meet demands and complexities, and reach scale.

> **Which parts feel aspirational and how do we live into this aspect of our culture statement?**
>
> - Perhaps we don't actually know how to articulate our role well enough so it is understood by other actors in the ecosystem.
> - We need to improve our data capture and evaluation in order to advocate.

Rise Design Principles

Design principles help frame the way we design programs and make decisions by offering guidance on core concepts or ideas. Design principles that are critical to Rise and under-pin its culture are outlined here:

Nudge	Small, indirect suggestions and other forms of positive reinforcement that can be used to shift behaviour. Nudges are meant to alter someone's behaviour in a predictable way without significantly foreclosing any options. The idea is to steer people in the right direction while keeping their freedom of choice.
Default Success	People tend to choose the easiest option to avoid complex decisions. Defaults provide a cognitive shortcut and signal what people are supposed to do. Advocates and Coaches celebrate all wins, big and small.
Easy, Simple, Barrier Free	Simple, straightforward approaches, that are flexible and responsive to the needs of the customers. Services are free. Services can be provided in person, on the phone, or online. As much as possible, the aim is to reduce barriers to accessing services.
Connect Social Influence	People want to be like everyone else and are heavily influenced by what they perceive everyone else is doing. When possible, peer to peer networks are moblized where customers can share experiences, celebrate together, and grow their social capital.
Create Slack	By freeing up space in people's budgets and creating time to reflect on their intentions and goals, slack (the loosening of constraints) is created. We believe this is critical to addressing stress and may aid in better decision making.
Reframe and Empower	Through active coaching techniques, the goal is to reframe people's thoughts into more positive frames, highlight positive channels and opportunities, and empower individuals to identify areas for growth.

Rise Core Competencies

Core competencies are intellectual, personal, and professional proficiencies that we all bring to our work at Rise. These too under-pin our culture because we actively seek these competencies out and foster strength and excellence in all these areas, which ultimately helps build our organizational story of who we are. While our Rise staff reflect many more areas of competency than those outlined below, these outlined are critical to how we will build our culture and work towards our strategic goals.

- Knowledge of scarcity and systems of poverty
- Transformational coaching skills
- Compassionate advocate and ally-ship for equity-seeking community members
- Social innovation mindset
- Ability to collect, analyze, and evaluate program data
- Ability to evolve programmatic responses based on evidence and results

06 Emerging Strategic Goals

The foundation for our Strategy is set in these key strategic goals:

Strategic Goal 1: Targeted Service Delivery and Impact

We have deeper alignment of the current service model with the stages of transformation, increase program impact, build organizational data and knowledge, and identify early barriers to access so that we have specialized programming focused on long-term sustainability, and can communicate impact with conviction.

1. Align service model with stages of transformation (internal focused)
2. Increase program impact (program focused)
3. Organizational data and knowledge building
4. Early identification of program barriers to ensure ease of access

Already some ideas have been developed to strengthen existing programming and validated through conversations with leadership, board, and staff. These have been integrated into the strategic priorities below but mainly revolve around internal and program alignment with the mission of the organization; keeping work focused on moving customers through the stages of transformation.

Strategic Goal 2: Strengthen foundations: Leadership, Workforce, and Culture, Operations, and Governance.

We identify critical areas for organizational planning and support (including the culture framework) and implement a revised operation structure leading to organizational excellence, build our team and expand our capacities, strengthen understanding of design principles and core concepts, have a strong foundation of our operational costs, and have strong planning and prioritization framework in place to make progress against strategic goals so that we have improved governance, well run and effective programs, and are built on strong foundations of fiscal sustainability.

1. Identify critical areas for organizational planning and support
2. Develop and implement revised operational structure to ensure organizational excellence
3. Build team and expand capacity
4. Strengthening understanding of design principles and core concepts
5. Build a strong understanding of operational costs and required budget to meet strategic goals and objectives
6. Organization has a strong planning and prioritizing framework

Many ideas were developed through feedback from staff and leadership, addressing critical gaps identified through the culture scan. These can be validated further by developing practical next steps and having open dialogue and reflection about effectiveness.

Strategic Goal 3:
Data Informed Decision Making

We become skilled at using the information at hand to make decisions, are curious and active learners seeking out knowledge and tools to develop our practice, and identify systems levers so that we can improve outcomes for customers and consistently improve practice.

1. Decision making is informed by data, information, and evidence
2. We become active learners, foster curiosity, able to identify questions, take opportunities to learn and share learnings
3. Seek out new information and knowledge and use it to inform our practices
4. Identify systems levers to activate based on best understanding of customer needs

Data informed decision making has some of the greatest potential to transform the operations of the organization, but also requires great amounts of training, resources, and time. Potential for transformation is high, with staff, leadership, and board embarking on a journey of learning that also translates into customers using evidence to inform their own decision making.

O7 Implementing the Strategic Plan

Rise's draft strategic plan has three main goals, with specific objectives and priorities across two time points (1-3 years and 3-5 years). Immediate priorities are highlighted as especially time sensitive and urgent. The table below details each of these in greater depths and includes potential measures of what success can look like.

Strategic Goal 1: Targeted Service Delivery and Impact

Specific Objectives	Specific Priorities 1-3 years
1. **Align service model with stages of transformation (Internal focused).**	a. Develop an organizational program logic model with stages of transformation and behavioral design as the organizing principles and integrate culture statements. b. Review database and map out movement between programs as a proxy for the trajectory of transformation stages as well as key indicators, customer profiles, and case studies. c. Conduct an audit of programs with stages of transformation and design principles clearly articulated and laid out - identifying areas of strengthening and opportunities to deepen practice: • Explore alignment with funding goals • Explore alignment with key strategic funder strategies. d. Engage staff to assist with auditing stages of transformation. e. Re-configure and/or re-design Apricot data management system to monitor and measure client's pathways through the stages of transformation f. Regular case-management meetings: • Guiding reflective questions. • Identify opportunities for learnings. • Use data to support guidance. • Review design principles and develop shared understandings. g. Strengthen communications • Develop key messages for organizational vision and mission, role definition. • Build avenues and audiences for Increased communication between board, leadership, and external partners to ensure there is alignment to mission and vision. **What will success look like?** • A clear articulation of the stages of transformation, and connection to programming and impact. • Among staff, leadership, board, and broader community, a clearer understanding of Rise sites, how they connect or reinforce one another, and their role in the community. • Audit document to guide decision making around programming and outcomes. • % Audited case notes • # Best practices identified • Staff understand, become experts, and use design principles effectively • All staff, leaderships, and board are able to articulate the story of Rise and importance of the stages of transformation • Staff can articulate how design principles inform their practice

- Staff develop greater capacity and are able to participate actively in the 'ecosystem' of services.
- Identify a longer term theory of change (ToC) that includes systems and policy change.
- Staff trained and effectively use data management programs to enhance service delivery and track clients against the stages of transformation.

What will success look like?

- Staff take on leadership roles and communicate effectively organizing and design principles.
- All staff, board, and leadership are able to articulate the organizational goals in terms of stages of transformation.
- Organizational Theory of Change begins to include systems and policy change.

Specific Objectives	Specific Priorities 1-3 years

2. Increase program impact (program focused)

a. Revise program indicators and outcomes for impact measurement.
b. Finalize organizational impact framework, including all program areas, services, and sites.
c. Share/codevelop program indicators with staff.
d. Implement program changes to increase impact.
e. Train staff in the use of customer/data management systems.
f. Hone in on customer groups (who we serve).
g. Identify critical partnerships for customer impact.
h. Conduct ongoing organization wide evaluation with impact focus.
i. Annually or every two years, review service delivery plans and conduct environmental scans to review changes in context.

What will success look like?

- Refreshed organizational logic model and revised program logic models
- Quantifiable performance and impact measures are set with clear directions to staff and leadership.
- Programs are impactful and results oriented.
- Staff are empowered to lead and innovate their programs and are clear about impact.
- Programs are demand-driven and relevant for end-users.
  - Staff can identify target groups.
  - Partners seek out Rise and give positive feedback on the impact of partnership.

Specific Priorities 3-5 years

- Develop even more specialized programming based on renewed impact priorities.
- Use impact lessons to improve programming.
- Staff take leadership on program evaluation and strategically guide program development using evidence of impact.
- Develop sustainable avenues for program funding based on evidence and strategic planning.

What will success look like?

- Decisions are guided by evidence (qualitative and quantitative).
- Staff use data and evaluation to guide strategic decision making.
- Sustainable funding for impactful programs.

Specific Objectives	Specific Priorities 1–3 years

3. Organizational data and knowledge building (case management, input, and data manipulation)

a. Develop regular client journey/pathways data briefings.
b. Co-develop with staff and leadership indicators and tools for reporting.
c. Increase investment in staff training and resources to use data systems.
d. Develop culture of staff case/client management process.

What will success look like?

- All staff actively participate in creation of knowledge and collection of data.
- Staff, leadership, and board shape deas using deeper understandings of our customers and their pathways out of poverty
- Launch of Learning Management System (job specific volunteer and student on-line training, on-boarding, and skills development).
- Organizational decisions are made based on internal knowledge and data

Specific Priorities 3–5 years

Permanent and sustainable funding for maintenance and activation of data systems. **What will success look like?**

Ongoing investment in data generation leads to new activities in policy and systems change.

Specific Objectives	Specific Priorities 1–3 years

4. Early identification of program barriers to ensure ease of access

a. Develop early and regular customer and community feedback systems to identify emerging barriers and challenges.
b. Identify 'continuum' or other appropriate model for customer movement through the stages of transformation.
c. Create natural linkages within programs to ensure continual growth or movement within stages of transformation.
d. Develop strong partnerships to better connect with people in communities.
e. Creating a 'one door approach' to access the BNF.
f. Create opportunities for culturally appropriate and inclusive programming

What will success look like?

- Customer and partnership feedback surveys implemented regularly (yearly).
- Data used to identify changing programming needs, identify best and emerging practices, and adapt outcomes.
- Partnerships that help drive programs and respond to barriers.

Specific Priorities 3–5 years

Use customer profiles to identify and predict or forecast emerging barriers to service or critical next steps.

What will success look like?

- Collect data on movement within the stages of transformation.
- Responsive customer case management conversations using forecasting.

Strategic Goal 2: Strengthen Foundations (Leadership, Workforce, and Culture), Operations, and Governance

Specific Objectives	Specific Priorities 1-3 years
1. Identify critical areas for organizational planning and support.	a. Develop and operationalize the culture framework, clearly outlining how to build culture across all sites, within all job categories, and how it leads to actions. b. Identify causes of staff burnout and use reflective questions to determine where and how staff will be impacted throughout the strategic implementation process to address burnout. c. Implement an annual staff feedback tool to assess engagement with the organization, satisfaction with roles, and other culture elements. d. Develop and/or revise skills/competencies matrix for all positions e. Identify internal gaps which can realistically be addressed through volunteers and develop a volunteer strategy. f. Strengthen governance with board and leadership by accessing training supports in governance, change management, fiscal planning, scaling, etc. g. Validate clear operating procedures (program manual, policy manual) and identify annual processes to modify and adapt processes.

What will success look like?

- Organization has clarity in roles with adequate oversight.
- Leadership has annual data on employee morale, engagement, and satisfaction and uses that data to make decisions.
- Culture of the organization is strengthened and socialized well.
- Current and future staff are stabilized and remain in positions for longer.
- Job architecture with clear job levels, including benchmarking of compensation and benefits.
- Volunteer strategy launched and running.
- Strong and efficient on-boarding/ off-boarding procedures.
- Integrated celebration processes.
- Yearly review of staff handbook (program manual and policy manual)
- Federal charitable sector accreditation.

Specific Priorities 3-5 years
- Continue to strengthen governance mechanisms through board governance committee and regular yearly audits. - Identify career pathways and long term professional development for staff. - Offer staff yearly professional development dollars (budget).

What will success look like?

- Organizational sustainability through good governance and efficient operations.
- Staffing stability including buy-in on stages of transformation, data/knowledge generation, continuous learning and mentor-ship of students and volunteers.

2. Develop and implement revised operational structure to ensure organizational excellence.

a. Clarify expectations around staff/ student roles and responsibilities and sites using a framework model (e.g. organizational chart, job architecture, practicum placement learning goals).
   - Host co-development sessions with staff and board.
   - Identify where and how to create internal slack for employees.
   - Validate framework.
   - Revise role architecture.
   - Develop organizational work-plan.

b. Update and revise program roles, accounting for all inputs including staff, students, volunteers and leadership, and based on the critical planning areas identified above.
   - Co-develop and validate with staff.
   - Reflect on levels of responsibility and workloads in relation to compensation.

c. Develop an implementation plan for emerging roles, programming changes and action it.

d. Raise the profile of the organization to ensure fundraising and donations increase.

What will success look like?

- Leadership engages with staff in ways that are empowering and foster leadership.
- Advocates, coaches, and volunteers have clear role parameters, role clarity, comfort and improved morale.
- Evidence informed volunteer strategy developed and implemented.
- Social work practicum successes - students are exposed to philosophies/practices that may influence their careers.
- # of people participating in the volunteer framework
- High retention of leadership/management staff and volunteers.
- Staff reflect values of the organization and mission.
- Employees experience wellbeing and psychological safety.
- Sustainable funding.
- Programs ensure inclusivity and are culturally appropriate.

Specific Priorities 3-5 years

- Have shared organizational goals clearly articulated to all staff, students, volunteers.
- Board leadership and staff are collaborating to strengthen the organization.
- Board recruitment is streamlined and attracting appropriate candiates.

What will success look like?
- Board, leadership and staff are co-developing ideas and delivering on mission-based objectives.
- Rise is known for its stages of transformation work.
- Rise is known as a place to learn about and experience excellence in front-line service delivery.

3. Build the team and expand capacity (skills and competencies development).

a. Develop strong staff recruitment and volunteer recruitment strategy
b. Increase the number of skilled staff occupying critical roles across the organization.
c. Use the culture strategy to identify potential culture elements that need to be strengthened (e.g. purpose, caring, order, safety, authority, results, enjoyment, celebrating successes, trust, consistency with support, processes for giving feedback, favourtisim, and learning).
d. Develop and conduct trainings to ensure comfort and effectiveness in roles, understanding of design principles, applied capacity to do the work, and knowledge regarding how to let go of programs/services that don't align with our vision.
e. Support staff through supervision and mentorship.
f. Support staff growth and prevent burnout through ongoing team building and self care.
g. Support staff with intentional succession planning or cross training.
h. Inventory the unique knowledge or skills of team members, in order to ensure they are being utilized.

What will success look like?

- Strong recruitment practices bring in the right people to thrive.
- Skilled staff working to identify critical supports to customers and moving them into more in-depth programming.
- Staff are able to communicate the stages of transformation and connect it to real programming activities/.
- Regular (monthly) performance management/employee engagement meetings
- Regular training opportunities for staff at vaurous stages of career growth
- Increased retention at the management and leadership level, front-line staff teams feel respected and supported.
- Increased number of staff

Specific Priorities 3-5 years

- Ensure staff are well resourced.
- Strengthened capacity and skills.
- Innovation and staff feedback strengthens the organization.

What will success look like?

- Programs are well run, effective, and customers are well served.
- Staff are empowered, have increased skills.
- Staff provide regular feedback on organizational growth and sustainability.

Specific Objectives	Specific Priorities 1-3 years

4. Strengthening understanding of design principles and core concepts.

a. All staff, board, volunteers, and leadership have understanding of core concepts - including scarcity to strength and stages of transformation and financial empowerment and can apply thinking to their work with Rise.

What will success look like?

- Launch of Learning Management System and corresponding volunteer feedback surveys, volunteers and students report receiving excellent new learning and knowledge.
- All staff, practicum students, and volunteers complete the learning platform program.
- Board, leadership, and staff are actively engaged

	Specific Priorities 3-5 years

- Organization wide practice for effective use of staff, volunteer, and student human resources.
- High retention of volunteers

Specific Objectives	Specific Priorities 1-3 years

5. Build a strong understanding of operational costs per program and required budget to meet strategic goals and objectives within each program.

a. Identify alternative forms of funding and investments.
b. Scan for potential donors/investors and alignment with mission, vision, and strategic priorities.
c. Board training to enhance support with fund development.

What will success look like?

- Strong accounting system used to make better operational, logistics, programming, staffing, and overall planning decisions.
- Launch of Rise Champions strategy, utilizing volunteers to engage potential donors and corporations in giving.

Specific Objectives	Specific Priorities 1-3 years

6. Organization has a strong planning and prioritizing framework.

a. Organization institutes planning and decision making against strategic goals and objectives, e.g.:
  - Strengthen frameworks for service planning and delivery (Planning).
  - Increase infrastructure and resources needed to meet organizational goals and needs. (Infrastructure).

	Specific Priorities 3-5 years

- Annual planning and reflections
- Effective execution of vision and mission
- Board can make decisions using data

Strategic Goal 3: Data Informed Decision Making

Specific Objectives	Specific Priorities 1–3 years
1. **Decision making is informed by data, information, and evidence.**	a. Ensure Rise has access to technologies, and strengthen secure data practices, data capture, evaluation, and records management (retention/disposition). b. Develop a centralized intake and data collection system for providers of the Basic Needs Fund. c. Develop an end to end view of our customers' journeys. d. Regular staff training in all data management systems, especially Apricot. e. Co-development of impact framework with staff and board. f. Create a customer data dashboard and orientate staff so they can begin using it to guide customers' journeys.

What will success look like?

- All staff participate actively in the collection and analysis of date.
- Customers use data to inform their goals.
- Data compliments and is reflective of customers' journeys.
- Impact measurement framework aligns to and supports research related to the Enough for All Strategy and The City of Calgary's FCSS strategy other poverty reduction policy levers.
- Customers can see and measure their goal progress.

Specific Priorities 3–5 years

- Customer journey is guided through data and staff use data to inform their programming approach.
- Rise is recognized for strong evidence informed practice.
- Rise can effectively communicate the impact it has.

Specific Objectives	Specific Priorities 1–3 years
2. **We become active learners, foster curiosity, able to identify questions, take opportunities to learn and share learnings.**	a. Regular staff meetings focused on identifying and capturing learning. b. Hiring processes reflect skills and capacities necessary for ongoing learning. c. Secure funding to support ongoing staff, leadership and board learning. d. Find opportunities to share what we learn with customers: report and interpret data so they can use this to inform their decision making. e. Customers actively participate in the learning journey, setting goals for economic and social wellness. f. Develop robust mechanisms to tell impact stories (e.g. two-sided marketplace). g. Actively generate research 'from the ground'.

What will success look like?

- All staff are encouraged to participate in learning opportunities.
- Yearly staff, volunteer, board retreat to share and learn and develop strong practices.
- Customers use information about themselves and services to make impact focused decisions.
- Customers engage in reflective questions and dialogue indicating they are on a learning journey
- Strengthened impact of programming on customers.
- Rise is an effective story-teller, sharing the impact of its work for its customers, customers' journey through life on low incomes into healthier socio-economic realities.
- Participating in city-wide systems and policy initiatives.
- Strategy and The City of Calgary's FCSS strategy other poverty reduction policy levers.
- Customers can see and measure their goal progress.

- Rise hones in on strengths of customer management through data informed decision making.
- Rise programs consistently use evidence to strengthen their practice.
- Rise is an active participant in knowledge generation and mobilization initiatives (e.g. academic partnerships, forums, events).
- Rise customers progress further in their journeys from scarcity to strength.
- Rise ambassadors / spokespeople are trained and ready to share effectively the message of transformation.

What will success look like?

- Rise is recognized as a leader in customer management.
- Participating in provincial and national dialogues and policy initiatives.

Specific Objectives	Specific Priorities 1-3 years

3. Seek out new information and knowledge and use it to inform our practices.

a. Strengthen research capacity internally.
b. Develop research and learning partnerships.
c. Add knowledge mobilization to role definitions and expectations.
d. Have staff participate in regular learning opportunities and free up time to do so (e.g. team members can prepare draft reports to increase their understanding of data integrity, while also developing analytical and continuous quality improvement skills).
e. Have staff work together to pilot new ideas and refine.

What will success look like?

- Volunteers are able to create slack so that staff can take up learning and mentorship opportunities.
- Standing agenda items aimed at sharing learning and strong practices.
- Upskilled staff indicate strong capacity in this area.
- Multiple opportunities for all levels of staff and leadership to participate in learning.
- Open work environment where learning and testing ideas is encouraged.
- Learning platform development.
- All staff, practicum students, and volunteers complete the learning platform program.
- Board, leadership, and staff are actively engages and aware around innovation, services, and strategy.

Specific Priorities 3-5 years

- Rise cycles intentionally through the impact cycle: Plan, Do, Assess, Revise (pilots and tests new ideas and assesses impact).

What will success look like?

- Rise is recognized as an innovative organization.

4. Identify systems levers to activate based on best understanding of customer needs.

a. Have leadership build stronger foundations for systems work (developing relationships and contacts, sharing learning, and identifying strategic levers to improve customer outcomes).
b. Use data and information collected through enhanced data management systems to identify systems components impacting our work.

What will success look like?

- Stronger partnerships with key systems actors.
- Regular scan of policies and systems impacting our work.
- Annual SWOT analysis.
- Discussions with staff, leadership and board to identify realistic strategies for activating levers.
- Create the foundations for engaging fully with systems work in 2025 (e.g. strategic goals for systems change).
- KPI's developed for Leadership to focus on this work.
- Recognition of our role in this space/sector.
- Board, leadership, and staff are actively engages and aware around innovation, services, and strategy.

Specific Priorities 3-5 years

- Rise develops strong vision of systems change (or theory of change) and frames out a plan of action.
- Rise has identified which systems are in need of influencing and what changes are necessary.
- Rise's story and voice clearly articulates the types of systems changes necessary to improve the lives of their customers.

08 Priorities

Priorities emerging from this strategic plan can be mapped along a continuum, identifying critical priorities over the short term from immediate to the next year.

This table is a starting point for leadership and the board to beginning identifying those steps and setting possible indicators to ensure accountability.

Goal	Tactic	Next 6 Months	Next Year	Deliverable or output or accountability measure
Targeted Service Delivery and Impact	Data Initiative	Configuration and training	Launched and tested Staff assist with auditing stages of transformation	Service model aligned with stages of transformation: % Audited case notes, # Best practices identified
Data Informed Decision Making	Data Initiative	Configuration and training	Reporting capacity meets sector and policy asks	Identify systems levers to activate based on best understanding of customer needs
Strengthen Foundations	Resourceful Humans Strategy	Content and software development	Launch of Learning Management System	Volunteers and students report receiving an excellent experience including new learning and new perspectives.

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Endnotes

1   For example, should Rise measure its outcomes and fall short of what it was intended to achieve, it may choose to refocus and pursue a greater focus in a different area. Their strategies and activities may change, as well as the outcomes. As a reflective tool, a ToC can make clear these changes, identify where organizational or program drift may be happening, and course-correct.

2   BowWest Community Resource Centre and Sunrise Community Link no longer exist after the merger, however the South East Community Resource Centre (SECRC) remains a project of the Ogden Community Association. Rise and the SECRC have a common purpose and shared goals for customers, but with different service specializations, community focus, and oversight.

3   While outside the scope of the current Plan, a reasonable next step would be to map out current programming and impacts and determine alignment with strategic direction and recommendations outlined in this plan. Table 1 could be expanded to include outcomes mapping, reflective questions for alignment with the strategic plan (once approved) and suggestions for modification.

4   Through conversations it was clear that while this strategy could be supported by the Leader of Rise, it had been downgraded significantly due to competing demands on resources. While universally feedback indicated this could be a potential strength of the organization, foundational work needed to happen to move Rise into this space.

5   Annie E. Casey Foundation, https://www.aecf.org/resources/theory-of-change

6   Rise Calgary Overview, https://docs.google.com/presentation/d/1yvxsD1FGZR-q5KbxHHPSfYXVf2YHmzEm/edit#slide=id.p1

7   Staff survey, https://docs.google.com/presentation/d/1yvxsD1FGZR-q5KbxHHPSfYXVf2YHmzEm/edit#slide=id.p1

8   https://docs.google.com/presentation/d/1_tjTItJ8kj95fW-CKe6ZT84QDj2AGPg5/edit#slide=id.p1

Appendix A: SWOT

Strengths

Clients:
- Connections to our customers and each other
- Employee connections to customers - ability to connect, listen, and meeting them where they are at, lived experience

Staff and board:
- Staff - dedication to serving customer needs, support for each other, and understanding of each others' strengths and weaknesses
- Collegial connections - working with one another
- Strong knowledge and skill-set of the board and senior leadership (especially in partnerships and grant-writing)

Resources:
- Database - ability to track customer contacts, assessments, referrals, capacity to track impact
- Safety culture is very strong and of high importance with management.
- Organizational and sector memory - long understanding of the history of this work
- Merger and rebranding

Funding:
- Donor funds - enabling the current level of work

Community connections:
- Sense of community - in the work being done, unsure if this is out to the surrounding community

Principled work:
- Equity focused work - appreciation of participating in work that is focused on equity

Holistic, multidimensional work
- "What RISE is trying to do is to really look at things holistically and put the person and their strengths at the center of their journey to get out of poverty. What I can see is that it's not just about the transaction, it's really about using skills people have to work together to create a journey for them." (partner 3)
- "They seem to push for deeper impact and help people get off the path that they're on, which can sometimes have big fences along the edges.I really appreciate what I've seen with their recent trajectory. And I'd love to see that continue." (partner 4)
- "RISE a resource center, and it's like one stop shopping. Clients will tell their story, and then support workers will be able to figure out what they need. They're like angels, the customers just say what their issues are, and then they work with that. Bringing in RISE we could address a variety of concerns on different levels." (partner 4)

Weaknesses	**Internal:**

Internal:
- Demand is growing and resources are not commensurate
- All areas were identified in need of strengthening (staffing skills and role fulfillment, volunteer strategy, volunteer management, information management, funding streams) - though staffing (role fulfillment) was a clear priority.
- Work has been identified and is ongoing to address these internal concerns along the following priority areas:
- Boundaries - with each other and with customers
- Internal capacity to pursue connections to pursue connections with community

Priority #1 - Staffing - role fulfillment and skills development:
- Staffing - role fulfillment and skills development, boundaries setting
- Leadership development

Priority #2 - effectively managing demand and capacity
- Time for in depth support for customers
- Volunteer strategy
- No benchmarking/impact metrics across the organization

Priority #3 - morale and job satisfaction
- internal transparency and communication at all levels, including
- Equity focus
- Psychological safety

External
- Structural, including supply of affordable housing, LICO cut offs - and using LICO as a metric for access to programs
- Economic, including inflation and rising costs
- Profile, including low organizational awareness beyond our usual stakeholders, relations with government at all levels, no branding and marketing strategy
- Restrictions, including limited sector advocacy, funding supply
- Referrals into Rise outpace our capacity

Innovation
- Potential to innovate approach - for example, better collaborations with funders and partner organizations (to position themselves as sector leaders, establish reliable funding streams, create and align with others innovating successfully, reduce duplication of services, and find complementarity in services).
- Enhance visibility of the organization and find places to lead important conversations.
- "With RISE, there is a disconnect with knowing who works at which locations." (partner 2)
- Taking on sector leadership in basic needs impact measurement in 2023

Partnerships
- Develop 1-3 key sector partnerships that align with programming streams

Impact practice:
- Create evaluation processes that help us better understand what works, why, and scaling/ replicating
- Community engagement - volunteers to engage, tell the story of Rise - not at the service delivery level, targeted community 'work" based on what we know, what impact we can have
- Community ambassadors
- Creating more centers and hubs (to better reach the needs of Calgarians) and resourcing all hubs. This has the potential for increased family/ individual/ seniors services

Strengthen practice:
- Mental health / coaching support
- Policy and systems advocacy
- Develop a culture of continual growth and learning. This could be through research and learning sector leaders
- Create more organizational efficiencies through data systems, use data to benchmark and demonstrate impact, integrate into funding proposal, government policy/advocacy work.

Increase resources:
- Resourcing through more staff/students/volunteers (to assist with workload and activate community members)
- Establishing stable core funding streams (to enable expansion, decrease organizational pressure on income generation, focus more on what they do well)

- Staff burnout
- Dealing with variety of customers and their needs
- Funding inconsistency and scarcity
- Over-abundance of BNF/Stabilization Customers