

Findhelp Information Services
Strategic Plan
2009 to 2011

SHIFTING GEARS



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EXECUTIVE SUMMARY

Established in 1971, Findhelp Information Services is a charitable, nonprofit organization, and a leader in information and referral (I&R) in North America. Findhelp works closely with related professional associations and agencies including InformCanada, Inform-Ontario, Alliance of Information & Referral Systems (AIRS), Community Information Online Consortium (CIOC), United Way, 211 providers, and data partners throughout Ontario.

Recognized throughout North America for dedication to professional standards and best practices in information and referral, data collection and standards, publishing, and information technology, Findhelp has demonstrated a long-standing organizational commitment to collaborating and sharing knowledge and experience with others who share the mission of helping people find the community, social, health and related government services they need, and supporting the work of human services professionals in meeting client needs.

Findhelp's Board of Directors and employees are active in information and referral activities across North America, and have demonstrated leadership through excellence in service provision, development of best practices, and dedication to publicly representing and promoting 211 in Canada.

The Strategic Plan has been developed to guide the Agency's direction from January 2009 to December 2011.

Five Goals have been identified that will broaden Findhelp's mission, its capacity, and position the agency as a leader within the not-for-profit sector.

GOAL 1	Increase Awareness of Findhelp's Brand
GOAL 2	Create Stable, Diversified Revenue Streams
GOAL 3	Grow Its Productive Enterprise Revenue
GOAL 4	Partner to Expand the 211 System
GOAL 5	Organizational Development

During the plan's timeframe, Findhelp will be engaged in partnering with Ontario 211 Services Corporation and 211 providers across the province to launch 211 to all Ontarians.

The recently released provincial Budget proposes over \$13 million over four years, in cooperation with United Way of Ontario and other partners, to make Ontario's 211 system province-wide beginning in 2008-09. This expansion would constitute a major reform in the way Ontarians receive information about community-based services. Core to the success of Findhelp and 211 is working closely with multiple partners and establishing a framework for long-term partnerships with other 211 providers, data partners, CIOC, InformOntario, InformCanada, and the United Ways. Findhelp is positioned to provide IT services and support, ensure provincial data reflects established standards, and contribute to the development of the province-wide 211 system.

Diversified Funding Stream

There is a need to stabilize the agency through stable funding and revenue streams. The goal is focused on working with the three levels of government, and in identifying champions who have influence within government.

Branding Findhelp

As part of the five-year strategic plan "Broadening Our Mission", completed in 2003, the agency's name was changed from Community Information Toronto to Findhelp Information Services. The change represented the provincial scope of the agency's activities, and the agency's position as a lead I&R organization in North America.

Findhelp re-branded itself in 2004. Since that time, marketing efforts to ensure brand awareness among funders and service users were insufficient to gain brand recognition. Without a strong profile Findhelp will struggle to find sufficient work and funds to keep the organization viable.

As part of the re-branding, Findhelp engaged in marketing efforts to ensure brand awareness among funders and clients. Findhelp has since been a relatively invisible service provider, known more for the individual services it provides rather than in its own right.

Anecdotally, Findhelp has taken a different approach to bringing in business over the past 4 or 5 years. There has been a move away from doing outreach (counsellors educating social service agencies on what Findhelp does) and a move towards writing funding proposals.

The strategic plan when fully executed will raise the profile of Findhelp among the public, governments, funders and social service agencies. The work that Findhelp is most competent at doing will be identified and will be the focus of business development activities.

Products and Services

Findhelp's products and services are known for quality among partner agencies and associations, and funders including all levels of government. Findhelp will evaluate its current product lines and explore new products and services that can generate revenue. Our products and Services range from publishing the Blue Book, providing I&R Training, to the creation and maintenance of several WEB portals.

Organizational Effectiveness

Findhelp must ensure it has the capacity and capability to deliver on the strategic plan's goals. It must ensure that the necessary organization structure, policies, practices, staff skills, and IT systems are in place to ensure successful implementation.

Core Competencies

Findhelp's activities include human services inquiry lines provided 24 hours a day, 365 days a year. Together with partners in Simcoe County, Halton Region, Niagara Region, Thunder Bay, Peel Region, Windsor-Essex and Ottawa (particularly in providing after-hours and weekend coverage), Findhelp provides 211 service for over 50% of Ontarians. Findhelp also provides the province-wide Victim Support Line (a service of the Ministry of the Attorney General), Central Access (a detox and addiction line) and Street Helpline.

Findhelp will respond to over 500,000 calls in 2008, and over 1.5 million people will visit Findhelp's websites representing about 20 million online inquiries made by the public, front line workers and other professionals. Public sector programs and private and voluntary sector organizations rely on Findhelp's information services, including data provision, directory development, web and portal development, and application design and hosting.

Making a Difference to ... Job Seekers

Suzanne became a subscriber to Possibilities when she was changing jobs. She was immediately impressed by the range of valuable information available. She reviewed the resume, cover letter and career interview tips, the great calendar of job search related events, and asked the job expert for guidance and advice. She found her job through one of the listed job boards and now makes a point of telling anyone looking for a job about www.poss.ca.

*Making a Difference ...
Connecting People to
the Services They
Need*

Over a thousand times a day, we see the difference it makes when someone with a need is connected to a service that can address that need.

Take for example Kato, who called 211 when it was snowing and asked if there was anywhere he could get a pair of shoes, as his had holes in them. After a number of calls on his behalf, 211 staff found shoes in the appropriate size at the Scott Mission, where Kato could get warm clothing, a hot meal and other support services.

Through data sharing partnerships with I&R providers across the province, Findhelp coordinates several provincial community resource databases including 211Ontario.ca. The online information system and database alignment represented by projects such as 211Ontario.ca began as the Human Services Information System project, which ran from 1998 to 2002 and ended with the launch of 211Toronto.ca. Findhelp provided the leadership and capacity to expand the project provincially, launching the Provincial Consolidated System in May 2008.

Findhelp's work supports the vision of an integrated online database system, alignment of data standards, and development of best practices in information and referral in North America.

Other provincial resource initiatives developed or supported by Findhelp Information Services include Possibilities/Possibilités, an online Employment Resource Centre at www.Poss.ca, Access to Professions and Trades for Foreign Trained Professionals, Directory of Youth Justice Services and Resources in Ontario, Ontario Aboriginal Calendar and Services Directory, and the Employment Ontario project funded by Service Canada and the Ministry of Training, Colleges and Universities.

Through enhanced access to human services information, the web-enabled database projects led by Findhelp support informed selection of services by many different users, individuals, service providers, employers, and governments. These province-wide data and I&R partnerships offer an exemplary story of collaborative partnership, and of building the capacity of the human services sector through the joint work of governments, NGOs and the private sector.

Findhelp is accredited by the Alliance of Information and Referral Systems (AIRS). AIRS accreditation recognizes organizational ability and identifies members who aspire to, and achieve the highest quality of service. The AIRS accreditation process tests every component of the organization's programming, services, and management. When measured against I&R organizations on an international scale, the AIRS accreditation team found Findhelp's service "leading edge" and its operations "outstanding".

Findhelp's commitment to quality assurance dictates that information resource editors are AIRS Certified Resource Specialists and inquiry services counsellors are AIRS Certified Information and Referral Specialists. Findhelp also operates an I&R training division which provides comprehensive training as well as preparation for the I&R Specialist exam.

Findhelp has successfully administrated information management projects funded by the public sector in the range of \$500,000 to \$3 million.

Achievements

Findhelp has "set the bar" for information and referral in Canada, and led many successful initiatives over the past years.

Findhelp launched the provincial consolidated system for 211Ontario.ca, the provincial website that connects Ontarians with over 56,000 French and English services.

Findhelp has contributed to successful and sustainable province-wide human services data projects, including the development of the Canadian Taxonomy of Human Services in both French and English, and the InformOntario Style Guide for shared English and French listings. Leading and facilitating the alignment of data standards and enhancing best practices in I&R data management across Canada, these projects have contributed to improved standards, organizational stability, and mission fulfilment.

Findhelp has developed a technology solution that optimizes web searches performed on the I&R human services database, enables data sharing across Ontario, and supports the vision of an integrated online database system. Findhelp plays a pivotal role in training I&R specialists. In 2007, 67 Professional Training Workshops were provided to 763 participants, 392 outreach visits were made including many in priority neighbourhoods, and staff exhibited at 47 conferences and gave 70 presentations relating to the benefits of 211.

Making a Difference ... to a Family in Need

Esther, a single mother of two young boys was very distressed when she called 211. Esther had expected to get a new job quickly after being laid off. Now, with only three weeks before her employment insurance ran out, Esther was at her wits' end worrying about how she was going to manage.

The 211 specialist provided Esther with contact information for the local Ontario Works office where Esther could apply for financial assistance. She also provided information on how to stretch a limited budget, including food banks in the neighbourhood.



VISION

Findhelp's vision is to ensure that all people, especially those who face barriers to service, have easy access to accurate and appropriate human services information.

Findhelp is dedicated to achieving this vision through a collaborative network of information and referral providers, and a shared resource that can be effectively used by individuals and the human services sector.

MISSION

Findhelp helps people find the community, social, health and related government services they need, and supports the work of human services professionals in meeting client needs.

VALUES

Findhelp's Core Values define what we stand for and how we operate, helping us to work together in the most fulfilling ways.

We are passionate about providing **Service to Others** and through our actions demonstrate empathy, honesty and integrity. We are accountable to our clients constantly striving to uphold the highest professional standards.

We value **leadership** acting in ways that exemplifies what we expect of each other and of our clients. We work together bringing out the best in each other and creating strong working relationships.

We value **diversity** and respect people, abilities, skills, ethnicities, and perspectives. We create an inclusive workplace that celebrates individual differences.

We **respect** people for who they are and for their knowledge, skills, and experience as individuals and team members. We treat clients with respect and fairness and expect the same in return.

Strategic Directions

The 2004–2006 strategic plan, “Broadening Our Mission”, provided the following directions:

- the organization as an expert in 211
- community database consolidation, and
- excellence in service delivery.

During this time, Findhelp built on the strengths of the former Community Information Toronto. By 2006, more than 50% of the agency’s resources supported Ontario-wide projects, programs and services. Today, Findhelp is recognized in the broader human services sector for dedication to professional standards and best practices in information and referral, and Findhelp employees are actively engaged in I&R activities throughout North America.

The current strategic plan will guide agency directions from January 2009 to December 2011. During the plan’s timeframe, Findhelp will be engaged in a major Ontario initiative to launch sustained provincial collaboration to build the province-wide 211 system. Developing the 211 system involves working closely with multiple partners and establishing a framework for long-term inter-organizational partnerships.

Findhelp's provincial leadership role in 211 began in 2003 with the launch of phase 2 of the 211 Ontario project, “211: Advancing the Provincial Consolidated System”. The visionary support of the Ontario Trillium Foundation and Citizenship and Immigration Canada during this phase facilitated the sharing of expertise with community partners, and the building of community through sustained communications and documentation. Findhelp will continue to develop 211Ontario.ca as a robust interface for the 211 system.

Findhelp will continue to provide leadership for the many community organizations and government offices across Ontario who use Findhelp services or contract with Findhelp to develop products that enable delivery of human and social services for the communities we all serve.

GOAL 1: INCREASE AWARENESS OF FINDHELP'S BRAND

This strategic goal has been crafted to increase Findhelp's visibility as an agency, and to gain recognition for the Findhelp brand. Findhelp is not sufficiently well-known for the work that it does, even by the entities that fund our work.

Objectives:

- Findhelp is described as an I&R agency, not a 211 agency, by funders and champions (2011)
- Findhelp will focus its marketing on government's as a primary source of revenue for the agency (2009-2011)
- Findhelp's business increases as a result of targeted marketing and brand awareness (2009, 2010)

Tactics

- Prepare a Marketing and Communications Plan
 - Identify the key messages that will form the core of Findhelp's marketing strategy
 - Determine how these should be communicated and to whom
 - Identify what is the Findhelp brand
 - Ensure Findhelp logo is visible on all products and projects
 - Identify primary targets for the marketing and communication strategy (governments, funders, social service agencies, community information partners)
 - As a primary target group, incorporate a specific government marketing strategy
 - Focus on the work Findhelp wants
 - Identify champions that can communicate the Findhelp message
 - Engage the Board of Directors in making connections with champions

- Market to a variety of social service agencies, community information partners and government bodies using a variety of vehicles
 - Formal presentations
 - Distribution of marketing materials to target groups
 - Create an outreach strategy to reach community groups and agencies
 - Informal meetings with potential funders and champions

- Conduct a work analysis of the existing programs and services that Findhelp is providing and has provided over the past three years
 - What work has Findhelp done
 - What has been most profitable
 - What fits best with the capabilities of the organization
 - Ensure that Findhelp is doing the kind of work that fits its mission, vision and values
 - Create a profile of 'ideal' work
 - Examine all existing work and drop work that is not funded

GOAL 2: CREATE STABLE, DIVERSIFIED REVENUE STREAMS

There needs to be specific efforts made at bringing in sustainable revenue, and short-term efforts to stabilize the organization. By diversifying its funding sources, Findhelp lessens its reliance on a single source of funds.

Objectives

- Increase the number of projects, programs and services in the agency's portfolio, and realize significant gains in cost-efficient delivery of services, consolidation of efforts and concentration on productivity (2010)
- Revenue stream from each of the three levels of government, municipal, provincial and federal (2009-2011)
- 5% funding from non-governmental sources (2011)

Tactics

- Findhelp to respond to stated government priorities by aligning Findhelp's capabilities with these priorities
 - Identify current levels of funding from governments and a description of each relationship
 - Identify potential short and long-term project funding that responds to government priorities
 - Meet with government representatives and educate them on Findhelp and its capabilities
 - Work with them to develop new projects
- Identify additional funding sources and partners
 - Identify and approach potential partners who can work and fund Findhelp to deliver community services
 - Create a profile of potential funders and where the greatest community need is
 - Work from marketing messages to identify the 'pitch' to each organization
 - Organize and implement an outreach campaign to influence these partnerships

GOAL 3: GROW ITS PRODUCTIVE ENTERPRISE REVENUE

Productive enterprise revenues are profitable, yet there has not been a sustained focus on identifying, developing, or selling them. This is a supporting strategy to create a stable revenue stream directly related to the products and services of Findhelp that have a sales potential.

Objectives

- Establish Findhelp as North America's premier provider of I&R training, and focus on developing employee competency and capacity as trainers (2011)
- Increase revenue from data, services and training by 25%, from 2007-8 levels (2010)
- Create a sales and marketing strategy to reach target markets (2009)

Tactics

- Identify what we currently sell and to whom
 - Products currently sold including the Blue Book, data spreadsheets, labels
 - Services currently sold include training and portal development
 - Identify who currently purchases these products, and the profit margins
 - Investigate repackaging products to make them more attractive to the marketplace
 - Look at cost-effective methods for production, delivery and storage
 - Develop a sales strategy for existing and new clients

- Identify products that could be developed or promoted
 - Evaluate the viability of existing productive enterprise activities
 - Develop on-line learning programs
 - Develop curriculum that goes beyond the current offerings. Potential product development to include I&R training manual for service providers, Taxonomy development for broader sector, commercial advertising in publications, electronic version of Bluebook (211Pro), the use of data for social planning, increasing after-hours phone service or adding helplines, creating an information liaison with social agencies to assist in agencies understanding the scope of services available in the province
 - Evaluate all potential new products against specific criteria including fit with the Findhelp mission
 - Evaluate potential profitability
 - Reasonable fit with existing capabilities to deliver product

GOAL 4: PARTNER TO EXPAND THE 211 SYSTEM

Findhelp will participate in 211 planning and explore areas for innovation and collaboration. Community interactions and participation in 211 initiatives, with committees, organizations, and associations are viewed as critical activities to support effective local, provincial, national and North American partnerships.

Objectives

- Seek productive partnerships and alliances that fulfill Findhelp's commitment to 211 stakeholders, promotes service delivery standards amongst multiple stakeholders, develops resources, and increases sustainability for 211 services (2009-2011)
- Leverage Findhelp's capabilities and talents in helping to build the 211 Provincial system. The role of Findhelp is a Provincial one, delivering services in partnership with the Ontario 211 Services Corporation, to 211 service providers, data partners, governments and other stakeholders (2009-2011)

Tactics

- Partner with Ontario 211 Services Corporation on developing the provincial 211 system
 - Nominate an existing or former Board member to the provincial and national boards
 - Findhelp to expand to York and Durham regions. Develop the business case for expansion to York and Durham regions, establish steering committees, political alliances
 - Develop a partnership agreement with the 211 Corporation which will detail the province-wide services Findhelp will deliver, remuneration for these services, and how some existing Findhelp work can be integrated into the provincial system
 - Work with 211 to leverage current government relationships to benefit 211 and Findhelp
 - Work with 211 to leverage funding from the provincial government for 211

- Solidify the partnership with Ontario 211 Services Corporation by defining Findhelp's role in relation to province-wide services in data, systems and I&R
 - Continue to develop the **211Ontario.ca** product in a three-way partnership with 211, CIOC and Findhelp
 - Identify partnerships and projects Findhelp can develop and deliver for the 211 provincial system
 - Work with the 211 operators group to build a unified 211 provincial system
 - Collaborate with 211 on work plan development over the four year project

GOAL5: ORGANIZATIONAL DEVELOPMENT

Findhelp will maintain its reputation as a centre of excellence by focusing on the internal environment. Employees will receive the information, support and encouragement required to meet the demands of providing continuity of services to the public, and seek opportunities for innovation and continuous improvement.

Objectives

- Findhelp will have the necessary organizational structure, policies and practices, skills, and systems to successfully implement the strategic plan (2009)
- Enhance the culture within the agency to promote the professionalism, positive attitudes and sensitivity to colleagues that are hallmarks of a centre of excellence (2009-2011)
- Emphasize our most valuable asset – employees, who are committed to the success of the organization and achieving its mission and vision (2009-2011)
- Develop excellence in Governance (2009-2010)

Tactics

Ensure the growth and sustainability of Findhelp's core services

- Develop agency reporting metrics, monitor metrics for variance and to ensure high productivity
- Align with metrics developed by the 211 Operators including metrics such as call answer rates, call length, call volume per I&R specialists, and abandon rates
- Evaluate productivity against AIRS and other approved international standards applicable to the I&R sector.

- Ensure that the culture at Findhelp is positive and supports the mission, vision, and values
 - Benchmark the agency, identifying gaps
 - Work with the staff to identify core work values
 - Make every possible effort to adhere to 'green' practices
 - Develop a bilingual strategy for Findhelp (promotional materials, hiring, communications)

- Create Development opportunities that build strong leadership
 - Increase involvement of staff and managers in Findhelp development through committees and working groups
 - Develop clear job expectations and competencies
 - Create a staff / management skills inventory
 - Create staff learning opportunities and leadership development for staff and managers
 - Develop a performance management system

- Findhelp must have the organizational structure, capacity, and capability to deliver on the strategic plan
 - Review the organizational structure and identify the skills needed to implement the strategic plan, and any gaps
 - Review current IT systems, and develop a refresh plan based on the agency's needs and vision
 - Review current policies, practices and procedures and create policies and procedures that provide clarity to Findhelp operations

- Work with the Board of Directors to build excellence in governance
 - Create a Board of Directors handbook
 - Develop a tool to measure Board effectiveness