



HR PLUS Final Report

For The Government of Alberta
The Calgary HR Initiative
The Calgary Foundation
Family and Community Support Services-
Calgary
The United Way

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Preface

CentrePoint is pleased to present the HR PLUS Final Report. The program involved an Advisory Committee of funders and 30 organizations over a 3 year period. The process was delivered by CentrePoint staff, human resource consultants and instructors from CentrePoint Non-Profit Management.

Acknowledgements

We would like to thank the clients, consultants and instructors who participated in this project. We would also like to thank the Government of Alberta, The Calgary HR Initiative, The Calgary Foundation, Family and Community Support Services-Calgary and The United Way for its financial contribution, support and guidance in Human Resource capacity building for the Calgary non-profit sector.

We wish those participating organizations future success in their Human Resource and organizational sustainability.

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CentrePoint Mission:

CentrePoint Non-Profit Management is a registered charity (#89426 8242 RR0001) dedicated to creating the future for a stronger non-profit sector through consulting, mentoring, training and knowledge sharing.

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Executive Summary

The Human Resources PLUS program was created by a consortium of funders in response to the dire effects of the 2006-2008 boom on the non profit sector. The sector experienced a shortage of skilled employees and leaders as the private and public sectors competed for talent with deeper financial resources. Turnover rates became very high and some organizations were unable to adequately deliver their services.

The Calgary Foundation, The City of Calgary FCSS, the United Way of Calgary and Area, the Government of Canada and the Government of Alberta in partnership with The Calgary HR Initiative of the Calgary Chamber of Voluntary Organizations contracted with CentrePoint to design, develop and deliver a program for charities to develop their Human Resource Capabilities. CentrePoint designed a blended learning program incorporating formal training, coaching, consulting, online resources and peer learning to help organizations improve their HR knowledge, practices, policies and leadership. The HR PLUS program was a significant investment in HR capacity building in the Calgary non profit sector by funders, participants and CentrePoint. The hypothesis was that if 10 charities per year participated in a blended learning program which included training, peer round tables and coaching, as well as worked with an HR consultant, they would improve their HR knowledge, policies and practices and achieve lower turnover, higher retention, greater leadership capacity and greater sustainability to meet their missions.

The program had funding for 3 years (2009, 2010 and 2011) for ten agencies to participate each year for a total of 30 agencies. As part of the program, CentrePoint conducted quarterly feedback with participating agencies and their assigned consultants.. Additionally, the United Way funded an external evaluation to assess the effectiveness of the program in meeting the intended program outcomes. The result of the evaluation and feedback indicated the program needed to be revised. Consequently, the training moved from classroom to online, the coaching was dropped, the peer learning sessions revised, the consulting hours were reduced and the program fee was substantially reduced. These changes were intended to make the program more flexible to client program and organizational needs as well as make it more accessible.

The 2009 cohort entered the program in its pilot year at the beginning of the recession. This cohort indicated that their HR effectiveness, leadership capacity and sustainability significantly improved over the long term, despite experiencing the ups and downs of a new program. The 2010 cohort obtained great benefit from the program in the short term but experienced some slippage in results over the long term, though they indicated that their current HR practices and leadership capacity improved. The 2011 cohort (and 5 will be completed by x-mas) is on track for achieving good results in their level of HR knowledge, the extent their culture supports organizational effectiveness, leadership capacity and overall sustainability. The reporting and anecdotal comments clearly indicate that the participants now have more effective HR policies and procedures creating stronger HR foundations. The 30 participating agencies will have a stronger HR infrastructure to withstand the upcoming talent and leadership shortages with a recovering economy.

As the economy recovers and baby boomers begin to retire, we can expect to see a return of the conditions creating the significant HR challenges previously faced by the non profit sector. Capacity building efforts within Alberta over the last few years have very much focussed on building non profit HR skills and knowledge in a variety of ways,

as well as encouraging innovation and creativity in organizational design. Capacity builders should leverage these approaches and provide further access to HR consulting expertise.

Background

The origins of the HR PLUS Program lie in the labour market crisis of the 2007-2008 boom, research regarding an impending leadership crisis, capacity building work funded by the Muttart Foundation and a funders partnership.

Calgary's experience of the economic boom during the years 2007-2008 greatly stressed organizations, especially those within the non-profit sector. As the labour market heated up and the Alberta economy started experiencing shortages of employees for all types of jobs, private and public sector organizations responded by increasing both salary and benefits in order to attract and retain staff. Consequently, non profits had great difficulty recruiting staff, providing competitive compensation and retaining their current employees. Our sector experienced extremely high turnover rates, especially in the human services sectors, and in some cases were strained to the point of being unable to deliver services adequately, compromising their missions.

Research involving non-profit leaders in North America, pointed to steady erosion in the strength and numbers of leaders that would be available to the charitable non-profit sector in future years. In a nutshell, research reinforced predictions of *high turnover at the leader level* with 82% of leader respondents reporting departure plans by 2010 and an *absence of succession plans*. CentrePoint's research also indicated a *'lonely at the top' syndrome* amongst leaders that was contributing to their departure plans. Many leaders did not have a second tier of management to share their leadership and management workload resulting in *work/life imbalance*.

Human Resources was becoming a very high priority for non profits as they struggled to establish a basic HR framework, provide more competitive compensation and benefits, and ensure they had the staffing to deliver their services and meet their missions. As well, many organizations had grown rapidly during the boom and experienced growth in service delivery but did not have sufficient administrative (HR, IT, Finance, etc) knowledge, policies, practices and personnel in place to support their organizations.

During this time frame, various foundations and advocacy groups were addressing these issues. The Muttart Foundation was experimenting with funding the provision of HR consulting services to a small group of non profit organizations in both Edmonton and Calgary. Eldon Emerson was the Edmonton HR consultant and Janet Mathieson was the Calgary HR consultant. The intent was to assist these agencies in developing greater HR capacity by building their knowledge, systems and practices. This program helped shape the HR PLUS program. Imagine Canada was working on creating accountability standards for non profits which would eventually include Human Resources. And the HR Council for the Voluntary and Non Profit sector and CCVO were both active in non profit labour force issues providing research, HR standards, education and tools to increase non profit knowledge in Human Resources, as well as awareness within and beyond our sector.

From 2007-2009 funding and grant making agencies in Calgary engaged organizations to better understand their workforce needs and develop appropriate supports. Addressing these complex issues required collaborative effort from all stakeholders – agencies, governments, funders and capacity builders. HR PLUS was supported and jointly funded by a consortium including The Calgary Foundation, The City of Calgary FCSS, the United Way of Calgary and Area, the Government of Canada and the Government of Alberta in partnership with The Calgary HR Initiative of the Calgary Chamber of Voluntary Organizations.

This program was designed to enhance the capacity of each agency to operate in a sustainable manner through the following outcomes:

- Increase organizational sustainability through improved capacity to attract and retain qualified personnel
- Improve performance management systems leading to greater leadership development within the sector
- Increase awareness and understanding of human resource practices within the workplace
- Improve service or program delivery.
- Increased quality and / or quantity of services or programs
- Reduced deterioration of services or programs quality

And more specifically:

- Enable agencies to be more strategically focused; integrating HR strategy with larger organizational planning
- Cultivate a culture within participating agencies that supports and promotes organizational effectiveness
- Develop the Board's understanding of their role within each agency (as it pertains to Human Resources management)
- Improve the level of knowledge and understanding of Organizational Effectiveness/Human Resource issues
- Build the leadership capacity within each organization

The HR PLUS program was developed in the last six months of 2008 and was ready to launch by January 2009. Of course by that point, Calgary was entering the recession and the intense need for solutions to attraction and retentions problems had diminished. However, non profits now faced other Human Resource issues: organizational restructuring; an increased demand for services that would be met with diminished resources; a myriad of performance management issues due to hiring a variety of staff during the boom years who were not always the best fit or fully qualified; a leadership and management deficit as under qualified staff had been promoted into management roles; compensation issues resulting from reduced or frozen funding; and a lack of adequate policies, systems and practices to form a sustainable Human Resource framework. Ironically, as Calgary's economy recovers, we can expect to see a muted return of the very issues which drove the creation of this program: a permanent shortage of leadership due to retiring baby boomer and smaller labour pools; higher turnover rates; and retention issues due to more competitive compensation and benefit packages found in other sectors.

Program Design

Blended Approach

The HR PLUS program was designed using a “blended” learning model involving different avenues of formal and informal learning for both organizations and individuals. The program incorporated formal training, consulting, coaching and peer learning. The learning model was based on an existing successful program, Fund Development Plus.

The PLUS model, which CentrePoint has used for Fund Development, Leadership and Human Resources, is a ‘blended’ approach to addressing capacity building needs. It works by selecting a peer group of agencies, through a competitive application process, who are all looking to address similar issues within their organization. This peer group is led through a broadly defined curriculum within a defined topic area with the assistance of an assigned subject matter expert in a set period of time. Incorporated into the curriculum are specific training seminars that provide a foundation for the theories and best practices of the subject as well as opportunities for the peer group to network and discuss issues within a facilitated learning environment. It is the role of the Consultant to support and counsel the agency as it endeavours to apply the theory and best practices of the subject into their own specific set of circumstances.

CentrePoint used the PLUS model with the subject of Human Resources and added an additional coaching element to specifically build leadership competency within the selected organizations.

Program Elements

CentrePoint’s program selected 10 agencies to participate in the program annually for the years of 2009, 2010 and 2011. The selected agencies needed to demonstrate charitable status, financial stability and strategic focus to be considered and then chosen to participate. Each agency was provided 100 hours with a professional Organizational Design/ Human Resource consultant who would provide guidance and subject matter expertise. CentrePoint organized a series of 6 training workshops specifically designed for this program which fit into overall program curricula. In addition, CentrePoint coordinated a series of peer learning events to provide an opportunity for each group to come together and discuss issues of common interest. The final element of the proposed program was to offer the Executive Director or a Senior Leader of each participating agency an executive leadership coach to provide additional support and leadership guidance for 6 hours.

CentrePoint’s proposed program was composed of the following elements:

A Recruitment & Selection Phase

- Marketed and promoted the program to the non-profit community of Calgary
- Established an application procedure to determine applicant readiness
- Selected most appropriate agencies for participation

An Evaluation Phase

- Worked through an assessment tool to highlight current practices and knowledge within each individual applicant organization

- The Agency and Consultant analyzed and interpreted results of the initial assessment within the framework of the agency's Strategic Plan
- Determined priority areas and developed a work plan for the duration of the program for both strategic and transactional elements

Implementation Phase

- Consultant and agencies worked together to develop a Human Resources plan for the organization while also resolving immediate Organizational Design and Human Resource issues
- Agencies attended a series of training and peer learning sessions specific to individual components of Organizational Design/ Human Resources
- Completed elements of the work plan developed during the Evaluation Phase including an HR strategic plan

Support Phase

- Review and finalize Human Resource planning
- Consultant ensures agency has necessary confidence, tools and knowledge to move forward without their assistance
- Introduction of Executive Leadership Coach to provide leadership guidance to Executive Director or designated senior manager within each organization

DELIVERABLES

Professional Development

CentrePoint offered 6 three hour training sessions based on curriculum to program participants at key intervals through the course of the program. Agencies were able to bring 3 board and/or staff members to each session and the consultants were invited to attend as well. The training sessions offered a theoretical grounding for the consulting engagement. The training topics included:

- Strategic Human Resources (HR 101)
- Recruitment & Selection
- Performance Management
- Compensation & Benefits
- Separation and Termination
- Legislative Compliance

It was an overarching goal of this program to develop a deep organizational knowledge around human resource management. To achieve this it was required that participating organizations establish a small team of individuals to engage within the overall process.

Peer Learning

Peer or shared learning was an important feature within all of CentrePoint's capacity building efforts and was one of the primary reasons why CentrePoint's proposal was based upon a 'class' concept (where all agencies regardless of size move through the program together). By establishing a class base we could then establish a peer group among the participants who could support each other post-program. CentrePoint offered up to three opportunities for the peer group to come together in a facilitated fashion to discuss common issues, discover key themes within this subject area and to provide feedback as to how the program was progressing. These sessions would typically be

about an hour and half in duration and be open to three members of each participating agency.

Consulting

Typically in Organizational Design / Human Resource projects the complexity of the problem and level of support required generally correlated to the number of staff, budget size and number of programs within each agency. Each agency received 100 hours of consulting support. The consultant was expected to conduct an HR assessment of their assigned organization, to create a project plan for the use of the 100 hours and to facilitate an HR strategic plan with their client.

Coaching

Research,¹ involving non-profit leaders in North America, pointed to steady erosion in the strength and numbers of leaders that would be available to the charitable non-profit sector in future years. In a nutshell, research reinforced predictions of high turnover at the leader level with 82% of leader respondents reporting departure plans by 2010 and an absence of succession plans. CentrePoint's research also indicated a 'lonely at the top' syndrome amongst leaders that was contributing to their departure plans. Many leaders did not have a second tier of management to share their leadership and management workload resulting in work/life imbalance.

Additional research² suggested that where the coaching process was used, an excellent Return on Investment was being achieved. Other research pointed to rejuvenated leaders, creativity and clarity of thought, goals and new confidence all leading to greater levels of individual and organizational energy and results. Examples in the research indicate reduced turnover (retention), enhanced attraction of talent (less disruption to service and team), more engaged employees, better team and individual productivity and a positive impact on clients.

CentrePoint introduced the concept of coaching as a support mechanism for the Executive Directors or senior managers of the agencies participating with this program. Through executive coaching support, the senior leader could improve the probability that obstacles would be addressed and that self-generated plans would be implemented to achieve extraordinary results. In addition, the plans and pieces generated within the consulting portion of the program would be reinforced and the senior managers of the participating organizations would have the confidence and support needed to ensure that they got implemented. It was proposed that CentrePoint would provide each organization with the opportunity to utilize six sessions with a Certified Executive Coach from CentrePoint's LEAP Program. Coaching would be directed at the Executive Director level or a member of an agency's senior management team if that individual was accountable for effective human resource strategy and management within the organization.

Resources

During the course of this program resources and materials would be developed for the specific use of its participants. However, there was already a significant source of quality Human Resources material available from the Human Resources Council for the

¹ See Addressing the Leadership Challenge (2005 CentrePoint). Dare to Lead (2006 Compass Point)

² Sherpa and PWC LLP

Voluntary and Non-Profit Sector (www.hrcouncil.ca). Instead of trying to recreate what was already freely available CentrePoint used the tools, templates and material available through the HR Council.

Project Feedback and Evaluation

CentrePoint solicited feedback from both clients and consultants at the beginning, at the middle and at the end of the involvement. On-line surveys were sent to these groups to establish a pre-program baseline for comparison against expected outcomes, to ask for input as to what was working or could be changed within the program and to establish a post-program baseline against outcomes. Additionally, a long term follow-up online survey was completed by the agencies 6 months after completing the program to determine their performance against outcomes and to solicit suggestions for further support. Completion of these surveys was very high with well over 80% consistently submitting their reports. Reporting was a contractual term and condition for both consultants and client agencies. The reports echoed the findings of the external program evaluation described below.

As well, the HR PLUS program had the luxury of an external evaluation conducted by Irene Hoffart of Synergy Research Group in the Fall of 2009, courtesy of the United Way. The purpose of the evaluation was to determine the alignment of the actual program with its goals and to understand the impact of the HR PLUS work on the participating organizations. Three consultants and 9/10 participating 2009 agencies were interviewed.

The Synergy report found that agencies applied for the program as they recognized the critical function of human resource management and that their agency lacked human resource capacity. Participating agencies were hoping to strengthen HR skills and integrate HR practices into their organizations.

Participants emphasized the importance of senior and/or board level involvement in the program to ensure the necessary support. The evaluation found that while the training sessions were considered valuable and informative, they could also be not basic enough or not advanced enough for the participants. There was consistent feedback that the training sessions were too short and that more time was required to integrate discussion and ask questions. For the peer learning sessions some found them valuable while others questioned their value due to the varying knowledge levels of the participants, the inconsistent participation, and a discomfort with sharing possibly confidential information with the group. The most valuable component to the program was their consultant's knowledge, availability and response to the unique needs of each organization. Particularly, the consultants were able to help their agencies integrate HR practices and elevate HR as a priority for senior management.

The Synergy report made these comments about program impact:

The impact of HR Plus varied substantially, depending on organizational size, culture, capacity and nature of service provided, and included:

- Increased confidence and validation of the HR staff;

- Access to needed HR tools and resources;
- Developing HR documentation and policies;
- Developing a strategic HR plan and integrating HR practices into the organizational strategic planning process;
- Improvements in staff commitment, communication, performance growth and cohesion; and,
- Producing a lasting impact on program leadership including supervisors, senior management and Board and creating momentum for future HR work in the organization.

The report also made these specific recommendations:

Program Structure

1. Individual consulting should be designed as the core service of HR Plus. The action plans developed by the organization with the consultant's assistance should guide organizational participation in other HR Plus offerings.
2. Training and peer sessions should be redesigned to ensure that there is sufficient time to accommodate the amount of information provided and that there is an opportunity for discussion that allows all participants to effectively integrate the information.
3. Ensure that the program participants continue to have access to information and resources that are immediately available and that address emerging organizational needs.

Follow-up and Future Program Considerations

1. HR Plus provides a valuable contribution to the work of building HR capacity in Calgary's not-for-profit sector and its services should continue, albeit with some fine-tuning.
2. HR Plus should provide an opportunity to previous HR participants to receive additional HR Plus services, in the form of individual consulting, mentoring or peer support.
3. HR Plus should implement a follow-up process to determine whether HR Plus work has had a long-term impact and to identify any new issues or needs that may arise for the participating organizations in the future.

Revisions

Additionally, when the marketing, application and selection process was launched in the fall of 2009 for the 2010 cycle, only 4 organizations applied. CentrePoint solicited further feedback from interested organizations who had attended the 2008 and 2009 Information sessions to find out why they did not apply. CentrePoint found out that for some the program was too large and long of an investment, that it was not practical or flexible enough and that many organizations lacked the capacity (time, money and staff)

to handle this type of capacity building during a recession when organizations were struggling with funding cuts, staff cuts and increased demand for services. As a consequence of the lack of demand for the program, participant feedback and the Synergy evaluation, many revisions were made to the program and it was relaunched in April 2010.

The training piece was immediately changed to respond to our clients varying knowledge levels and to make it more flexible and available on demand so clients would have access when and where they needed it. CentrePoint partnered with CCVO to provide on-line learning from Harvard Manage Mentor in both human resources and general management. CentrePoint also created two on-line learning models on Strategic Human Resource Management and Recruitment and Selection. CentrePoint selected these two modules as critical based on the program goals and was able to develop them from the in-class course content offered in 2009.

The peer learning sessions were divided into an Executive Director stream to elevate the level of conversation to strategic human resource issues and to ensure confidentiality and an HR Manager stream to provide a forum where tools, templates and issues could be shared based on their experience. Additionally, the design of the sessions moved from structured content discussion to participant directed agendas and conversations. In 2011, the peer learning sessions were offered to past and current participants of HR PLUS.

The coaching component was dropped as there had been a very limited uptake on this available service. This may have been due to the mentoring role played by the HR consultant for many of the agencies.

The consulting component was reduced to 75 hours to make it easier to invest staff time. The first round of the program had used 3 consultants who worked with multiple clients, mimicking a “cluster” concept. The intention was to develop synergies and insights as the consultants had several clients from a particular subsector such as the immigrant serving agencies, health, arts, etc. There was also a shortage of available consultants due to the 2008 boom. With the recession of 2009 we were able to hire more consultants, approximately 8 so that most consultants had only one client and a few had two. Additionally, we tightened the expectations to 4 clear deliverables written into their contracts to ensure greater consistency of experience across all clients: conduct an assessment of client HR practices and systems; create a project plan with the client outlining how the 75 hours would be used; create an HR strategic plan with the client; provide 75 hours HR consultation covering these deliverables and HR project work.

Lastly, instead of providing the program on a fixed calendar basis (i.e., starting in January and ending in December), the program was made available on a flexible start basis to enable clients to align the program with their own calendar year and organizational priorities. This change combined with a shorter timeframe of 8 months, fewer consulting hours and a self-directed learning approach made the HR PLUS program more flexible and accessible. When the program re-launched in 2010, it had a full class of 10 qualified participants.

Project Description of Aggregate Agency Results

2009 Participating Agencies

1. Amyotrophic Lateral Sclerosis Society
2. Alberta Theatre Projects
3. Centre for Newcomers
4. Child and Youth Friendly Calgary
5. Deaf & Hard of Hearing Society
6. Immigrant Services Calgary
7. Momentum
8. One Yellow Rabbit
9. Pembina Foundation
10. Prospect

The agencies were asked to report quarterly on their experience within the program. The first report provided a baseline for comparison at the end of the program (also referred to as Q3 or Q4) and six months post-program (also referred to as the long term follow-up survey.) The numbers are based on a 1 to 5 scale where one is none, 3 are some and 5 is a lot. The number is an average of the participants' responses. A positive spread indicates an improvement and a negative spread the opposite. A negative spread may be explained by the participants increased knowledge in the topic, indicating a greater awareness of what they do not know about the topic.

Competencies Achieved the 2009 Cohort:

Q1 & Q4 Comparisons for 2009	Q1 average response	Q4 average response	Q1 to Q4 difference	Long Term follow up Responses
Questions:				
How would you rate the potential for this organization to improve their HR abilities?	4.2	4.4	0.2	
To what extent do you expect this program to benefit your organization? (Participant Response)	4.2	4.0	-0.2	
What level of HR knowledge do you feel currently exists within this organization?	3.5	3.8	0.3	3.88
To what extent does this agency's culture support and promote organizational effectiveness?	4.2	3.9	-0.3	4
To what extent does this Board understand its HR role within the agency?	3.9	4.2	0.3	4.25
How would you rate the effectiveness of current HR activities within this organization?	3.2	3.8	0.6	4.13
How effectively is their HR strategy integrated into overall organizational strategy	3.2	3.4	0.2	3.5

Q1 & Q4 Comparisons for 2009	Q1 average response	Q4 average response	Q1 to Q4 difference	Long Term follow up Responses
and planning?				
How effectively do their current HR practices build the leadership capacity within this agency?	3.1	3.4	0.3	4
How effectively do their current HR practices enable them to operate in a sustainable manner, meeting their mission?	3.4	3.7	0.3	3.88
To what extent did the program increase your ability to attract and retain qualified staff?	Not asked	Not asked		3
To what extent did the program improve your performance management systems?	Not asked	Not asked		3.25

While the pre and post program baselines show that the participants' HR Activities were more effective, they show some minor improvement in their HR knowledge, their understanding of the board role in HR and their integration of HR strategy into their organizational strategy.

CentrePoint conducted a long-term follow-up survey in July, 2010 with the 2009 HR PLUS participants and 7/10 responded. The results indicate that the program worked for some and was not a good fit for others. The survey indicated that generally HR knowledge, practices and organizational effectiveness remained the same as at the end of the program in December, 2009.

In two areas there was a noticeable improvement. Overall, the effectiveness of current HR activities improved from a 3.8 to 4.13 out of 5. As well, the effectiveness of current HR activities in building the leadership capacity within the agency improved from a 3.4 to 4.0 out of 5.

When asked if they would recommend the program, half enthusiastically would and half of the respondents would recommend it on a qualified basis (e.g. if they did not have HR staff, or if they needed basic HR support, etc.)

Lastly, the 2009 participants cited a few resources needed to sustain their HR capacity building such as a senior level staff resource to manage HR, access to a consultant, further progress in developing a business strategy and more wages, capital equipment and training dollars. There was not a consistent response

Anecdotal Successes:

On November 24, 2009, CentrePoint conducted a wrap-up session for the program participants. Participants were asked to reflect on their achievements and learnings within the program. Here are a few comments indicating a greater knowledge about the subject of HR, a shift to the more strategic practice of HR and a strengthening of HR practices to improve staff retention:

1. A smaller organization spoke about how they redeveloped all their HR policies and procedures to capture their organizational culture and values, how HR has become a key initiative within their strategic plan and that they now have an HR plan.
2. One ED spoke about how they decided to conduct a staff survey, learned things they knew about and things that were hard to hear. They pursued a restructuring with their consultant which they found scary, high risk but essential as they would have lost people if they had not done it. Their HR PLUS consultant advised them to see this restructuring as a “transitioning model” to allow them some flexibility and to take the pressure off getting it totally right. This organization has a better defined compensation plan including every 3rd Friday off for staff, which has been hugely popular. The ED stated that their HR has shifted from what staff or individuals want to what the organization needs. The consultant observed that the leaders of this organization really “stepped up”.
3. An HR Manager spoke about having a high turnover rate. Within the program they’ve focused on creating and developing an HR role for the agency, as well as developing an HR plan. They have shifted from operational HR roles to strategic HR roles.

2010 Participating Agencies

- The Alex Community Health Centre
- Awo Taan Healing Lodge Society
- Boys and Girls Clubs of Calgary
- Cause Canada
- Closer to Home Community Services
- Family Services of Central Alberta
- Inn from the Cold Society
- Lead Foundation
- MCF Housing for Seniors
- McMan Youth, Family and Community Services

Competencies Achieved by the 2010 Cohort

Q1 & Q3 Comparisons for 2010	Q1 average response	Q3 average response	Q1 to Q3 difference	Long Term follow up Responses
Potential to improve HR abilities?	4.75	4.5	-0.25	
How much do you expect this program to benefit your agency?	4.75	4.75	0	4.5
What current level of HR knowledge exists in your agency?	3.5	4.25	0.75	3.89

Q1 & Q3 Comparisons for 2010	Q1 average response	Q3 average response	Q1 to Q3 difference	Long Term follow up Responses
To what extent your agency culture supports organizational effectiveness	4	4.75	0.75	4.11
Board understanding of their HR role?	4.25	4.75	0.5	4.33
Effectiveness of current hr activities?	3.5	3.75	0.25	4.11
Integration of hr strategy with agency strategy?	4	4.25	0.25	3.56
How effectively do current HR practices build agency leadership capacity?	3.5	4.25	0.75	4.0
How effectively do current HR practices enable sustainable operations, meeting your mission?	3.75	4.5	0.75	3.89
To what extent did the program increase your ability to attract and retain qualified staff?	Not asked	Not asked		3.22
To what extent did the program improve your performance management systems?	Not asked	Not asked		3.44

The 2010 program cohort completed their program reports by Dec.31, 2010 and 9/10 participants submitted their final report. The participants reported a significant increase in the following areas:

- Agency culture supports and promotes organizational effectiveness
- Board understanding of their HR role within the agency
- Effective integration of the HR strategy into overall organizational strategy and planning
- HR practices effectively build leadership capacity

CentrePoint conducted the 2010 HR PLUS Edge long term follow-up survey In July of 2011. 70% of participants responded. They rated the benefit of the program to their organization as a 4.4. /5 and were highly likely to recommend the program (4.6/5 rating). They showed a solid improvement in the extent their agency culture supports

organizational effectiveness, their current HR practices and their ability to be sustainable.

Anecdotal Successes

In the final report, when asked to report on their accomplishments to date, participants made the following comments:

- We have accomplished the establishment of a foundation for our HR work over the next 5 years. This work is in alignment with our agency strategic plan and will help us move forward in a directed and effective manner.
- Engaged staff and board to a higher level of understanding of HR and what it means to our agency. Developed our HR Promise and communication tool to staff...
- Many accomplishments have been made, especially in identifying the HR Manager role within the agency, distributing the HR Manager transactional duties to Admin and accounting staff to free up time to deal with strategic role.
- Undertaking a large transformation process to our HR required the close work of a consultant, who brought industry expertise and knowledge.
- Working with our consultant has been fantastic. The work that she has done with our agency has to a great extent improved the overall culture of the agency.

Participants were also asked in the final report if they would recommend this program and all 9 enthusiastically said yes. A few had these comments:

- Yes, this program is an excellent opportunity for organizations wishing to strengthen their HR capacity. In addition to the theoretical knowledge that is offered, it is also very task-focused, which in our case, helped us to bring HR to the forefront of what we are so busy doing and to spend some time putting some values and action into place to guide us in the future.
- Absolutely. The quality of work that was produced was excellent. We appreciated her ability to remain on target and the expertise that she brought to the table (i.e. their consultant.) We would not have been able to afford this type of work if it was not for this program. Many, many thanks
- Yes, most definitely. Having a mentor to guide us in our HR development process has been invaluable to us. Our development in the HR area has been greatly accelerated due to having a dedicated mentor for our agency. Our agency's unique needs and goals have been accommodated and developed in a way that would not have been possible without the HR Edge program. We have created a clear, purposeful and effective HR program and plan which will serve us far into the future.

2011 Participating Agencies

- Developmental Disabilities Resource Centre of Calgary
- Horizon Housing
- Resourceful Futures Community Support
- Servants Anonymous
- Children's Cottage Society
- Churchill Park Family Care Society
- SPEC
- Catholic Family Services
- Discovery House
- Trinity Place Foundation

For those organizations completing the program in the fall of 2010, they showed a solid improvement in their current HR knowledge, the extent their agency culture supported organizational effectiveness, their current HR practices and their ability to be sustainable.

Competencies Achieved by the 2011 Cohort

Questions	Q1 2011 average response	Q3 2011 average response	Difference
Potential to improve HR abilities?	4.75	4.5	-0.25
How much do you expect this program to benefit your agency?	4.75	4.75	0
What current level of HR knowledge exists in your agency?	3.5	4.25	0.75
To what extent your agency culture supports organizational effectiveness	4	4.75	0.75
Board understanding of their HR role?	4.25	4.75	0.5
Effectiveness of current hr activities?	3.5	3.75	0.25
Integration of hr strategy with agency strategy?	4	4.25	0.25
How effectively do current HR practices build agency leadership capacity?	3.5	4.25	0.75

Questions	Q1 2011 average response	Q3 2011 average response	Difference
How effectively do current HR practices enable sustainable operations, meeting your mission?	3.75	4.5	0.75

Anecdotal Successes

When asked if they would recommend the program, participants commented:

- Absolutely. The program is designed to make you look at your current process and determine if you have any areas for improvement. You can utilize your consultant to help improve the identified areas and link to your HR Strategic plan.
- Absolutely! We are an organization that did not have an HR department, so what this program offered us & would be very beneficial to other 'grass roots' organizations like ours, would be to develop a strong foundation to build on. To develop employees to their strongest potential. With doing that, any organization will be able to flourish in the future.

Recommendations

Program Outcomes

The HR PLUS program was a significant investment in HR capacity building in the Calgary non profit sector by funders, participants and CentrePoint. The hypothesis was that if 10 charities participated in a blended learning program which included training, peer round tables and coaching, as well as worked with an HR consultant, they would improve their HR knowledge, policies and practices and achieve lower turnover, higher retention, greater leadership capacity and greater sustainability to meet their missions. How well did this program deliver these outcomes?

The 2009 cohort entered the program in its pilot year at the beginning of the recession. This cohort indicated that their HR effectiveness, leadership capacity and sustainability significantly improved over the long term, despite experiencing the ups and downs of a new program. The majority of these participants came from small or medium sized organizations who did not have dedicated HR support.

The 2010 cohort obtained great benefit from the program in the short term but experienced some slippage in results over the long term, though they indicated that their current HR practices and leadership capacity improved. 70% of these organizations were medium to large size non profits (in terms of budget and staffing) who had or created a dedicated HR role within their organizational structure. It is quite interesting that they were not able to maintain their early gains within the program given permanent HR staff.

The 2011 cohort (and 5 will be completed by x-mas) is on track for achieving good results in their level of HR knowledge, the extent their culture supports organizational effectiveness, leadership capacity and overall sustainability. This cohort is comprised of primarily small or large organizations.

There were many factors which impacted the overall achievement of outcomes. Certainly, the recession immediately removed the pressure of attracting and retaining qualified staff so participants did not focus on this outcome as much. However, they very much focussed on improving their performance management processes and selected terminations, possibly as a response to hiring a variety of under skilled staff during the boom. In several cases, turnover within the ED or HR role negatively impacted their HR knowledge level, their focus on the program and achievement of results. The consulting component was customized to each organization's needs which may not have always directly linked to the program's specific outcomes.

However, the reporting and anecdotal comments clearly indicate that the participants now have more effective HR policies and procedures creating stronger HR foundations. Additionally the larger participating non profits often focussed on taking their HR infrastructure to the next level. They became more strategic in their HR and addressed organizational design, leadership development, succession planning, top employer practices etc. The participating agencies will have a stronger HR infrastructure to withstand the upcoming talent and leadership shortages with a recovering economy.

Program Design

Was the design of the HR PLUS program effective in delivering the outcomes? Best practice literature for capacity building indicates blended learning is an valuable approach .Training and consulting are considered traditional interventions, while peer to peer learning is thought to be highly successful and coaching is promising for leadership development.

Readiness for change is an important component to undertaking a capacity building intervention. CentrePoint's application, selection and orientation process ensured participating agencies were financially and operationally stable, had strategic direction and were open to changing how they operated and led their HR function. Many of the medium to larger sized organizations had experienced significant growth in funding, staffing and service expansion during the boom and needed to more fully develop their HR capacity as a result.

Informal and formal evaluation of the education component indicated that a set curriculum was not useful in responding to participants' different knowledge levels and resulting educational needs. While the shift to on-line learning resources made HR education more flexible and available on demand, it did not increase the knowledge level of the participants in the second and third cohorts in comparison to the first cohort. However, half of the participants in the 2010 cohort were relatively new to their role and needed to learn about Human Resources. While, participants in the second and third cohorts did indicate that the online learning was good quality and useful for them, there was higher usage in the second cohort than in the third cohort. Furthermore, the trend to professionalization within HR roles is occurring within our sector so staff with HR

accountabilities are often taking HR certificate courses from local institutions and/or participating in the CHRP accreditation process.

The program also provided on-line tools and support through the promotion of the HR Council and the use of Google Groups. The HR Council is a good source of free Canadian HR non profit content and was highly effective in combination with a consultant's practical experience and the on-line generic Harvard Management Mentor modules. The Google Groups were intended to help the participants connect between training and round table sessions in order to share their ideas, tools and templates. It was not a preferred tool for sharing and connecting, due to technical problems and issues of confidentiality. The use of Google Groups was discontinued in the second year.

While Coaching is a highly effective development tool, participants within this program more probably saw their consultant as an HR mentor or coach, undermining the need for this type of intervention. Leadership studies do suggest that this is a preferred professional development practice for Generation Y which may be important for future capacity building approaches.

The peer to peer roundtables were more successful when the participants drove the agenda and when they were segmented into Executive and Managerial groups. They need to be supported by sufficient opportunities to interact and develop trust with their cohort to fully explore HR issues in a confidential manner. The third group of participants entered on a staggered basis, lacked a defined sense of their cohort and so did not participate as greatly. Participants were certainly less available to attend these sessions. The second and third cohorts were also able to attend brown bag lunches with CCVO for select Harvard Manage Mentor topics.

Certainly the consultants were the strongest component of this program. Participants were actively looking to strengthen their existing HR policies and improve or develop new HR processes. The consultants were critical in helping shape the participants' understanding of their HR strengths and weaknesses, in focusing their time together on key priorities and in being more strategic in how they developed their HR infrastructure. In several instances, the participants conducted post-program HR consultations with their HR Plus consultant through CentrePoint to continue their HR development. CentrePoint was very effective in the client-consultant matching process.

While the program's original prescribed, intense and long term design was intended to enhance impact, it did not meet the needs of the clients. The multifaceted approach to organizational learning (formal, informal and applied) did enable participants to connect opportunities for individual and organizational improvement with a variety of resources and to design their own learning and improvement.

From a design perspective several features worked very well. The application process ensured the program had participants who were ready to learn and change. The online learning and tools provided instant HR content for many participants who needed to deepen or broaden their knowledge base while acknowledging that not all participants were looking for this learning. The consultants helped HR PLUS clients who were ready to apply their knowledge and learning to create stronger HR practices, procedures and strategies. Certainly the design of this program evolved to meet the needs of the clients.

Future HR Trends and Capacity Building Recommendations.

By 2013, if not earlier, the non-profit sector will be facing a shortage of developed and effective leaders at all levels (front-line, emerging leaders, CEOs and possibly Board leaders) due to a variety of factors. The first wave of baby boomers will begin retiring in 2011 and continue for the next 18 years creating a shortage of senior leaders. This trend will be compounded by Alberta's economic recovery which will create labour shortages. Additionally, the non-profit sector will be competing for talented leaders with the better resourced private and public sectors. There will be an acute shortage of emerging leaders who will not be prepared for Executive Director roles. The challenge is to provide the organizational support and professional development for boards and organizations to develop a pipeline of effective leaders and employees for their own agencies and the non-profit sector in general. Organizations which have more effective leaders experience superior organizational performance and employee engagement.

Non-profit organizations in Calgary and Alberta have emerged from the recession facing continued difficulties in Fund Development while facing increased demands for services. This impacts a non profit's ability to fund administrative roles, such as HR. Additionally, the re-emergence of significant HR issues and permanent labour shortages will make it highly difficult to attract and retain qualified employees, endangering non-profits' ability to meet their mission.

From an HR perspective, non profits will need to address a variety of challenges. Perhaps the most important challenge is dealing with permanent and smaller pools of available talent. Certainly, an acute analysis of process and service efficiency and organizational design will be required to enable non profits "to do more with less" staff. Additionally, previously discussed options such as shared administrative services, collaborations or mergers may become a viable way to achieve missions with fewer staff. It will be important to have a very solid total compensation base ensuring they can be competitive within and beyond the sector. Perhaps if organizations can streamline their staffing requirements, and not at the expense of administrative competency, they will be able to better compensate existing staff. Recruitment practices will need to be creative and resourceful in how and where they source potential employees to compensate for smaller talent pools. They may want to more fully consider diverse groups such as immigrants, the physically challenged, part-time retiring baby boomers, etc. Perhaps an integrated HR approach to meet organizational needs would help capitalize on the retiring baby boomer demographic, as well as engage future employees. On boarding, performance management and professional development will be vitally important to getting new and existing employees up to speed, aligned to the strategic direction, and contributing value.

The design implications for capacity building will be most definitely on applied learning and organizational development, and less on acquiring theoretical knowledge. Training on any topic has become highly competitive and for HR knowledge building there are several available options: HR certificates through universities, on-line courses, accreditation through HRIA, individual courses, etc. If formal education were to be pursued than a clear needs analysis indicating content, knowledge level and format is strongly advised based on this program's experience.

What will be the best format for this type of capacity building? Certainly organizations want rapid access to knowledge, experience or answers. And individuals expect a variety of options to suit their learning and work requirements: from formal classroom training and on line learning, to coaching, to targeted project work and on the job learning. As well, an ability to connect to consultants, on line communities of practice such as the HR Council for the Non Profit Sector, face to face communities of practice as offered by the HRIA or CCVO, The HR Council toolkit and on-line learning will be vital. Social media will be a useful connective tool.

Non profits will need to be able to do HR assessments to prioritize and tackle the above mentioned challenges and then pursue the appropriate development and strategic work. Access to experienced consultants with non profit experience will be important for this work, and especially for smaller organizations who traditionally can not afford or do not know where to access this expertise.

As overall capacity building funding is constrained, collaborations with other capacity builders are encouraged to ensure we are not “reinventing the wheel” and that we are getting full value for our investments. For example, Volunteer Alberta offers “Knowledge Connector” for non profit learning, The HR Council offers an HR assessment, online content and HR webinars, CCVO offers a variety of communities of practice and LEAN processes and HRIA could potentially provide a source of volunteer HR consultants.

So in conclusion, future HR capacity building for the Calgary non profit sector should be evolutionary and build on current initiatives as well as be flexible, client driven, and multi-platform. A bursary program for consulting expertise designed to address HR and organizational development in retention, performance management, compensation and organizational design may be desirable. The medium and larger sized non profits will have more connections, resources and funding for HR development then will smaller organizations that will require significant help. Feedback from the smaller organizations within the HR PLUS program indicated that they would appreciate follow-up HR support to protect and leverage their investment. Lastly, ongoing communication regarding success stories, the variety of available options and funding opportunities would enable non profits to be more knowledgeable about avenues for growth.

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