

Looking to Nova Scotia:

Three projects funded by Nova Scotia's Voluntary Sector Professional Capacity Trust



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Overview and context

The Community Development Fund (CDF) was a federal initiative created in 2008 to provide funds to the provinces and territories for the purpose of enhancing sustainable prosperity in four strategic areas: economic and trade diversification; improved productivity, innovation, and training; community transition plans; and adjustment challenges for workers. In Nova Scotia, the Department of Economic and Rural Development and Tourism administered \$34.9 million in CDF monies over a three-year period beginning in April 2008 and ending in March 2011.

In April 2011, the Nova Scotia Department of Labour and Advanced Education applied for and was granted \$800,000 of remaining CDF funds to create the Voluntary Sector Professional Capacity Trust in order to address the challenges of developing and managing human resources within the non-profit and voluntary sector.

In Nova Scotia, this sector employs more than 36,000 people in organizations with staff that range in size from one person to dozens of people; most organizations, however, have 10 or fewer paid staff. The educational level of the Nova Scotia workforce in the non-profit sector is high compared to the national picture, but the salary levels are markedly lower.

The human resources (HR) challenges within Nova Scotia non-profit organizations are myriad: recruitment and retention difficulties are extensive; HR policies and practices tend to lack clarity and are often implemented inconsistently; and HR management duties are frequently assigned to a staff member (for example, an executive director) whose primary function lies elsewhere and who often has not had specialized HR training. The formation of the Voluntary Sector Professional Capacity Trust represented an opportunity to tackle these issues.

The story

The Voluntary Sector Professional Capacity Trust was managed by a seven-member board of trustees drawn from across the province. The board was responsible for all decisions related to the administration of the Trust. It disseminated a call for Expressions of Interest, seeking projects in three areas of interest: analysis of training and learning needs, training in human resource management policy, and development of sector capacity. The board prepared guidelines based on the Trust's operating principles and including applicant eligibility, selection criteria, and timelines. Trustees reviewed 106 submitted applications and approved 43 projects with grants that ranged from \$2,500 to \$77,000, for a total of approximately \$785,000. The remaining \$15,000 was used to cover the audit and related expenses.

Three projects that had been awarded grants from the Voluntary Sector Professional Capacity Trust were selected for inclusion in this case study. These three projects, led by YMCAs of Nova Scotia, Prior Learning Centre, and Avalon Centre, are described in the pages below.

Lessons learned

The life-span of the Voluntary Sector Professional Capacity Trust, from April 2011 to April 2012, was short; and the timeline for projects funded by the Trust was tight.

The deadline for submitting an Expression of Interest was May 31, 2011; the approval process was finalized by July 8, 2011; and the projects had an anticipated completion date of March 31, 2012. The trustees undertook a careful review of the applications and provided feedback to applicants, sometimes with follow-up questions and requests for additional information. This step helped to fine-tune the projects. Nevertheless, the trustees felt that more lead time would have been useful to promote the Trust, identify potential projects, and develop innovative ideas and partnerships. Applicants were enthusiastic about the opportunity for partnerships, but the tight schedule did not allow for time to develop new partnerships. The projects were not ethnically diverse.

Applicants to the Trust were informed that submissions should be succinct and brief (a maximum of two pages). Busy administrators of non-profit organizations who are invariably juggling multiple demands appreciated this; they felt that it reflected the Trust's awareness of the constraints and time pressures faced by non-profit organizations.

Two of the three projects described in this case study required short extensions. The flexibility that was demonstrated by the Trust in approving these extensions was appreciated and was seen, once again, as reflecting the Trust's "real-world" perspective on non-profit organizations.

Emerging themes and insights

The value of professional development and capacity-building to non-profit organizations was reinforced as a result of the Trust initiative. The purpose of the Trust was to allow non-profit organizations to build on their organizational structures and to share their capacities with other partners in order to advance capacity across the province. While the trustees were pleased with the results, they recognized that the need continues to be immense.

Impacts for the community and sub-sector

A learning summit was held on May 14, 2012, which was attended by more than 100 individuals representing a wide range of non-profit and voluntary organizations from across the province. Participants included representatives from organizations that had received Trust funds as well as from those that had not. The event provided an opportunity to discuss the challenges of HR management within the sector and helped to expand and maximize the impact of the Trust.

The Voluntary Sector Professional Capacity Trust stipulated that all learning materials, curricula, and methodologies developed through the 43 projects funded by the Trust will remain in the public domain. This policy, like the learning summit, is designed to expand and maximize the Trust's impact.

Project 1: YMCAs of Nova Scotia

The story

Six independent YMCAs in Nova Scotia partnered on a project that received funding from the Voluntary Sector Professional Capacity Trust. The project was designed to improve the recruitment, training, and retention of skilled and committed employees of all six organizations. The YMCAs are located in Cape Breton, Cumberland County, Greater Halifax-Dartmouth, Lunenburg County, Pictou County, and Yarmouth. The goal of the project was to develop, with the assistance of a human resources specialist, a single, standardized personnel policy that reflected current best practices and trends and was in accordance with legal requirements, and a single, standardized performance management tool and implementation model that could be used with all staff members.

The participants used peer leadership and consensus decision-making to carry out the project. The steps they undertook were as follows:

- Create a project overview to assist with the search for a suitable HR specialist
- Select an HR specialist
- Work with the HR specialist to research existing policies and protocols both within and outside the YMCAs, identify human resource trends in all sectors, and examine relevant labour legislation
- Develop and implement a plan for moving forward when the HR specialist unexpectedly resigned as a result of a serious health problem
- Work with the original HR specialist (and the subsequent replacement specialist) to draft and finalize a standardized personnel policy and performance management tools and to coordinate the orientation and training of the YMCAs' senior managers
- Facilitate a phased implementation of the resulting policy and tools with individual boards of directors

The six YMCAs developed the capacity to work together on a concrete project that benefited all equally and that would have been cost-prohibitive for each one individually. The project provided the YMCAs with the opportunity to develop working arrangements that were collaborative, respectful, and focused. Each senior manager took on different leadership roles, as needed. The project's capacity to draw on vast collective experiences, knowledge, and perspectives resulted in an end product that was high-calibre. Despite differences in opinion in some key areas, everyone involved in the project supported the end product.

Lessons learned

When the project was approximately 60% finished, the HR specialist resigned because of serious and insurmountable health issues. This posed a major set-back that threatened to disrupt the project. With hindsight, the project's partners recognized that it might have been useful to have prepared a contingency plan in the event that a single-person HR firm encountered an unanticipated emergency.

However, the partners were able to develop an alternative plan. They requested assistance from YMCA colleagues in Quebec, who agreed to make their senior HR VP available to help with completing the work. The over-all result was that it was necessary for the Nova Scotia partners to assume greater responsibility for the project. While not ideal, this solution overcame the crisis, and the experience provided further evidence of the importance of partnerships, networking, and innovative problem-solving.

Emerging themes and insights

The joint personnel policy successfully combined the best components of the existing separate policies and trends from other non-profit and private-sector organizations. Flexibility was built into the policy, when possible. For example, it was agreed that each local YMCA would independently determine a timetable for implementing "best-practice" employee benefits, based on affordability and the time required within each organization.

As the project approached its completion date, it became apparent that additional time was necessary to finalize the policy and tools, present the materials to the individual boards of directors, and develop an analysis of the financial implications. The roll-out of the approved personnel policy for all six YMCAs is expected to be completed by September 1, 2012.

Impacts for the community and sub-sector

Both the process and product of this project created a sense of excitement, optimism, and cohesion. While the senior leaders had previously worked together to share resources and provide peer support, they had not engaged in collaborative decision-making or joint policy development prior to the project. The use of a standardized personnel policy and performance management tools will support shared expectations, reinforce the YMCAs' branding strategy, and provide a more seamless framework for sharing staff resources.

Improvements to employee benefits introduced through this initiative will help to offset the sector's salaries, which tend to be lower compared to the private sector, and to ensure that the YMCAs of Nova Scotia are viewed as an employer of choice. This may help to provide a model for other non-profit and voluntary organizations.

Project #2: Prior learning centre

The story

The Prior Learning Centre (PLC) is a nationally recognized centre of excellence that provides services and programs designed to identify existing competencies among individuals and organizations, and to build on those assets by developing effective and individualized learning pathways. Based in Halifax, the PLC has operated since 1996 as a collaborative, community-based non-profit organization.

The project funded by the Voluntary Sector Professional Capacity Trust used a systems-based approach to develop professional development plans for selected non-profit organizations. A systems-based approach focuses on identifying the knowledge, skills, and learning of employees both

individually and collectively, in order to align their competencies - within the organization as well as the sector - with professional development plans. It also helps the organizations to identify internal competency gaps and to create opportunities for professional development that are central to their own strategic plans.

The PLC worked with three other non-profit organizations: Women's Employment Outreach, which provides services to women seeking employment; Metro Non-profit Housing Association, which seeks to develop housing options for the homeless, people at risk to becoming homeless, and people living in inadequate housing; and Halifax Refugee Clinic, which provides legal assistance to newcomers to Canada seeking refugee status.

The project was designed to develop and implement a process for these three organizations to reflect on their values, interests, and goals; to identify existing skills, knowledge, and abilities both within individual employees and within each organization as a collective entity; and to develop learning plans for each organization to expand its capacity to meet its mission.

The process consisted of:

- individual interviews focused on self-reflection and identification of skills, abilities, and attributes
- group discussions focused on collective reflection and identification of each organization's skills, abilities, knowledge, values, and philosophy
- review of the organization's mission within the context of each employees' role, responsibilities, and capacities
- preparation of next-step goals and action items to address gaps and build on strengths

The PLC deliberately chose organizations with diverse missions and clientele to ensure that the resulting model would ultimately be useful to a wide range of groups. Other selection criteria set by PLC were that each of the partner organizations be located within the Halifax Regional Municipality in order to minimize travel costs; that each have a staff size of 10 employees or fewer in order to match

the profile of the majority of Nova Scotia non-profit organizations; and, finally, that each have a strategic plan that could be used as a tool in helping the organization prepare a systems-based organizational human resources development plan.

Lessons learned

The PLC had itself previously undergone a systems-based analysis of organizational competencies and gaps and so fully understood its potential value to a non-profit organization. This experience proved to be invaluable in working with other organizations.

The recruitment process and logistical arrangements took longer than anticipated. The first partner, Women's Employment Outreach, with a four-woman staff, was identified before the project proposal was approved; when the project was funded, roll-out plans were put in place very quickly. The second partner, Metro Non-profit Housing Association, with a staff of 10, joined the project when the work with Women's Employment Outreach was beginning. While Metro Non-profit Housing Association focuses primarily on housing issues, additional areas of interest include helping those with housing challenges to develop innovative strategies for coping with related issues, such as inadequate income and health problems. The third partner, Halifax Refugee Clinic, an organization with a very small staff that relies on volunteers from the legal community, was recruited as the project neared its completion date. As a result, it needed an extension to complete the project.

The diversity of the partner organizations' missions, challenges, and circumstances was seen to be an asset for this project because it helped PLC to develop a robust process that had been designed and tested in a range of settings.

Emerging themes and insights

While there was diversity among the partners, there was also considerable commonality. For example, all three organizations function in a continual state of crisis, which invariably disrupts their capacity for long-term planning, group reflection, and extensive professional development, both as a collective and as individuals. This creates challenges to the

organizations' ability to implement their strategic plans.

In all three organizations, there is also a close alignment between the employees' deeply held personal values and their organization's cause. Employees are extremely committed to helping their organization make a difference. It is clear that the sector is values-driven.

Finally, all three organizations demonstrated a profound interest in, and a pressing need for, ongoing professional development opportunities. Through the process of working with these organizations, PLC staff members discovered that the stories of the front-line workers and the clients they serve are compelling, and could be effectively used to demonstrate the issues and to attract more support.

Impacts for the community and sub-sector

The project reinforced the partners' already existing HR plans and simultaneously developed additional systems-based organizational professional development plans that are fully aligned to their missions. In addition, the process revealed that the partners have the potential to use their own internal human resources, as well as human resources available within the sector, to fill their individual organizational competency and training gaps. This offers a practical, viable option to offer professional development opportunities.

Project #3: HR shared service pilot project (administered by the Avalon Centre)

The story

The Avalon Centre, a feminist organization working to change the current socio-political culture that fosters sexism, social injustice, and other forms of oppression, was the designated organizational applicant and administrator for the HR Shared Service Pilot Project. The project was a partnership involving six other organizations with related missions: Adsum for Women and Children, Avalon Sexual Assault Centre, Elizabeth Fry Society, Family

SOS, Home of the Guardian/ Chebucto Family Centre, Supportive Housing for Young Mothers, and YWCA Halifax.

The partners had begun to discuss the possibility of collaboration prior to the creation of the Voluntary Sector Professional Capacity Trust.

The seven organizations collaborated to respond to their shared challenges in human resources management. Assisted by funding from the Voluntary Sector Professional Capacity Trust, the project had two objectives: to develop, pilot, and evaluate an HR services framework that would allow the partners to collaborate without compromising their confidentiality or integrity; and to develop, implement, and evaluate capacity-building and training activities, with the assistance of an HR consultant, in order to increase the groups' abilities to manage their human resources.

The services of an HR consultant were engaged to conduct separate interviews with each of the organizations to assess their capacity-building and training needs, and to provide training in the following five areas, identified as key in the interviews:

- salary and job evaluation
- recruitment, selection, and behavioural competencies to advance strategic planning
- performance management and employee development and retention strategies
- N.S. employment standards, and health and safety at the workplace
- HR policies, succession planning, and employee and board recognition

The seven organizations had a total of 127 employees working in diverse employment conditions, reflecting a wide spectrum of circumstances (for example, unionized, full-time, and contracted arrangements). Each partner provided between one and three employees to participate in each of the five training activities. The employees found the training to be informative, beneficial, and relevant.

Lessons learned

The partners were very pleased with the selected consultant, who displayed extensive knowledge of the HR field and considerable skill in both needs assessment and training delivery. She generously

provided each organization with individual time in addition to the group training sessions. She helped to assess position descriptions to ascertain desired qualifications and appropriate salary levels. She encouraged the partners to jointly purchase employment surveys, which provided information such as the market ranges of salaries and benefits for employees of non-profit organizations. This has proved to be an invaluable tool.

The partners felt that the consultant greatly contributed to the project's success. This is especially noteworthy because the project initially encountered difficulty recruiting a satisfactory candidate. The search required two rounds of position posting, application review, and candidate interviews. The concerted effort was clearly worth it.

The partners also felt that the project would have benefited from additional time, i.e., more days and a longer duration, noting that HR capacity and partnerships require time to build, particularly when they involve seven separate organizations, each with its own structure, personnel, and schedule.

In addition, there were some frustrations about the administrative workload. Despite the partners' initial efforts to ensure that the work would be minimal and fairly distributed among the project partners, the demands of the project were greater than anticipated. The partners, all perennially over-worked and under-supported non-profit organizations, found it difficult to find the time to undertake the action items necessary for the project's success, such as participating in meetings, resolving problems, overcoming scheduling conflicts, attending the training sessions, and preparing the final report. In retrospect, this problem, which was the biggest challenge, might have been alleviated if the proposal had built in funds to cover the costs of administering the project.

Emerging themes and insights

The partners learned from each others' experiences. As small non-profit organizations that normally function without dedicated HR support, it was very useful to become exposed to a wide a range of HR management strategies and to learn from the experiences of others. The workshops provided specific

As small non-profit organizations that normally function without dedicated HR support, it was very useful to become exposed to a wide a range of HR management strategies and to learn from the experiences of others. The workshops provided specific information about best practices, market standards, and legal requirements. Some of the partners learned, for example, that the practice of providing non-statutory holidays to employees, while it may be desirable, is not obligatory. They also learned that this practice can be usefully highlighted as an attractive benefit.

The project reinforced the importance of professional development and capacity-building for non-profit organizations. There tends to be a misperception among government (and even within some boards) that non-profits are able to rely on volunteers without professional training. For this reason, it is important to maintain an ongoing dialogue around the significance of professional standards. The Trust project was tremendously encouraging to non-profits, because it demonstrated that the Nova Scotia government recognized the value and significance of professional development.

Time constraints invariably impede capacity-building initiatives. While the value of networking was strongly reinforced with this project, it was pointed out that future collaboration would require organizational and fiscal support.

Impacts for the Community and Sub-Sector
The project successfully propelled high-calibre HR practices in the seven participating organizations. The training greatly benefited the employees who attended the sessions, and they were able to share the information with colleagues. The HR consultant provided the project partners with digital copies of the five workshops, which significantly extended the usefulness and potential impact of the workshops.

The partners felt that the immediate outputs were extremely useful and that the benefits of the project were even greater. Valuable links were forged that may lead to opportunities for further collaborative projects, for example, in the joint purchase of health care benefits packages, pension plans, insurance plans, and other bulk buying opportunities. However, the partners noted that collaborations take time and organizational support, and any joint projects could require fiscal support.

About the author

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HR Council for the Nonprofit Sector

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