

Better Together

A Shared HR Services Framework for Non-profit Organizations

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HR Council for the Voluntary & Non-profit Sector

The HR Council for the Voluntary & Non-profit Sector (HR Council) works with organizations, educators, labour and government to identify and address issues related to paid employment in the voluntary and non-profit sector.

Our priorities are to:

- Build and share knowledge
- Promote good HR practices
- Foster training and learning opportunities
- Provide leadership on HR issues
- Engage voluntary and non-profit organizations in our work

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The logo for the Government of Canada, featuring the word "Canada" in a serif font with a stylized crown above the letter 'a'.

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Better Together

A Shared HR Services Framework for Non-profit Organizations

Executive Summary

This framework provides both leaders and their boards with some background information on the shared-service concept. It outlines the benefits and challenges associated with sharing a senior level HR expert.

Many Board of Directors in the non-profit sector are seeking ways to support their Executive Directors in being able to accomplish the vision and the mission of the organization while building their individual and professional capacity for managing HR issues. The HR Council for the Voluntary & Non-profit Sector (HR Council) determined that there was a need to provide a comprehensive framework for community based individuals and organizations that are interested in pooling their resources to engage and share an HR professional. This framework provides both leaders and their boards with some background information on the shared-service concept. Based on experience with the Muttart Cluster Pilot Project and a current shared-service practice, this framework provides an outline of the benefits and challenges associated with sharing a senior level HR expert.

The premise is that leaders, who choose to come together and explore the development of a shared-service strategy, will have a common goal to increase their capacity to deal with HR issues and therefore will be ready to commit their time and resources to learn from the HR expert and from their peers. For the purpose of this framework, the group of organizations working together will be called an *ensemble* and that ensemble will operate from a relationship-based platform. By sharing the services of an expert, Executive Directors:

- Will be able to develop and access sustainable solutions for HR processes, practices, tools and resources without compromising the confidentiality or integrity of their individual organizations
- Who alone could not afford the services of a senior level HR professional, will now have access to the skills and experience they need at a much reduced cost

This framework has been developed on the premise that it is the Executive Director as a person who is integral to the formation of the ensemble, versus the organization they represent. If the Executive Director's capacity and expertise is built, then any organization that they lead will benefit from their increased skill and knowledge. It is recommended that participants commit to a minimum of one year and ideally to a three-year period and that they receive the support of their Board before joining an ensemble. Typically an ensemble is a group of six or seven Executive Directors with like experience, maturity

and the ability to be open and able to embrace the changes required to increase organizational effectiveness. Through this common purpose and the commitment of time, Executive Directors can gain different perspectives on their leadership style, their organizational practices and challenges, and their comfort with managing change while leading their organization through challenging economic and political times.

The HR issues facing the sector are significant, sobering and stressing Executive Directors to the point where individual programs and services are being impacted. Some key HR issues facing leaders today are:

- A lack of organizational effectiveness; position and role alignment
- Unsuccessful recruitment and retention practices
- Lack of, or out-dated HR policies and procedures
- Confusing and ineffective performance management systems
- Problems with legal compliance including costly terminations
- A lack of concentrated HR capacity building in both the ED and their leaders
- Increased challenges in the area of salary and benefit administration; a need to understand competitive compensation systems and benefit programs
- Confusion over succession planning and employee recognition strategies

The sustainability of organizations in the sector is a concern that has been identified by participants as well as governments and funding groups. However, an issue greater than organizational sustainability is the retention of Executive Directors.

Although Return on Investment or ROI is historically a financial term, its meaning can be translated for our purposes. The feedback received from many members of shared-service models indicated that there was a direct correlation between the time

and resources they invested and the skill and knowledge they received. Leaders were able to access a senior level resource for less than half the cost of an entry level position. The gain was both personal and organizational and was greater than the sum cost of their investment.

It was found that organizations which experienced increased stability, effectiveness and growth as a result of participating in an ensemble model, were able to directly measure the effectiveness of their Executive Director's increased capability and strategic view against time previously spent following ineffective methods. The successful participants invested the proportionate amount of time and energy into the ensemble initiative as they had spent trying to fix their ineffective and broken processes.

For some, the sharing of a senior HR expert and working with a group of strong leaders will be an ideal solution for building their capacity to address the staff and volunteer challenges they face. However, others they may find the commitment of their time and energy to move their organization forward not appropriate for them at this time.

By reading the Shared HR Services Framework, you will learn more about the ensemble concept. You will learn what assumptions have been made, what questions must be answered, what financial commitment is required, and finally how this model can help to build capacity and knowledge in our sector's most valuable resource – the Executive Director. You will discover that this is a guide to help you to personalize, to create and even to design your own ensemble!

1 Introduction

Our premise is that leaders, who choose to come together and explore the development of a shared-service strategy, will have a common goal to increase their capacity to deal with HR issues and therefore will be ready to commit their time and resources to learn from the HR professional and their peers.

Why has this framework been developed?

The HR Council for the Voluntary & Non-profit Sector (HR Council) has developed this framework in response to requests for information and guidance from community-based individuals and organizations that were interested in combining their resources to engage and share an HR professional.

This framework was developed based on the learnings from shared HR specialist models already existing in several locations across Canada, most notably in Edmonton and Calgary (Muttart Foundation) and in Toronto (HIV/AIDS network). In seeking a person to develop this framework, the HR Council chose to work with Janet Mathieson because of her experience as a senior level HR professional in a shared service model. Janet was the manager of the Calgary cluster as part of the Muttart Foundation's pilot project. There were seven organizations of varied sizes and complexity that formed this cluster: Big Brothers and Big Sisters of Calgary and Area, Calgary Counselling Agency, Children's Cottage Society, The Kerby Agency, Calgary Meals on Wheels, Volunteer Calgary and the YWCA of Calgary.

Over the course of the three years that the group met, three of the agencies experienced a change in their Executive Directors, and one agency's leader became somewhat detached. Cluster participation had been determined by the agency, not by the leader; therefore those leaders who changed roles were no longer eligible to participate in the cluster. With each new addition (and deletion) of members, the dynamics of the cluster were dramatically impacted. At the time the cluster was formed, most of the leaders had similar experience in their role as Executive Director and in their desire to move their organization to the next level. They had created norms for how they would work together, how information and resources would be shared and how to leverage their collective learning to enhance staff training and to benefit the broader sector. The addition of new team members required an in-depth orientation into the history of the cluster as a group, into the work already accomplished, and into what was planned next. Some of the new members were also new to the Executive Director role and required more mentoring than peer support. For many, going through this process three different times caused them to lose energy and engagement. Although they still worked closely with the consultant and with one or two other members, they became reluctant to participate in cluster activities.

Following the completion of the Muttart pilot project, Janet transitioned into managing her own consulting business, focused primarily on the non-profit sector. Although the model of shared-service used with some clients is different than the Muttart Foundation's, the concept of a group of leaders sharing a skilled resource is still a key component. Some of her clients today are those that she worked with in the cluster and others are leaders who had seen the benefits of the Muttart project and wanted to have the opportunity to experience it for themselves.

Our premise is that leaders, who choose to come together and explore the development of a shared-service strategy, will have a common goal to increase their capacity to deal with HR issues and therefore will be ready to commit their time and resources, to learn from the HR professional and from their peers. For the purpose of this framework, the group of organizations working together will be called an *ensemble* and that ensemble will operate from a relationship-based platform.

Who is the HR Council?

The HR Council for the Voluntary & Non-profit Sector was incorporated in 2005 having evolved from a joint initiative of the Community Foundations of Canada and the United Way of Canada. Working with organizations, educators, labour and government, the HR Council identifies and addresses issues related to paid employment in the sector on a national level.

What is a shared-service model?

There are a number of models that organizations have employed to reduce costs and increase efficiency.

Large Public/Private Organizational Model

In large organizations, centralizing functions into one department which then serves the rest of their organization creates consistent practice and efficient delivery of service; an example would be centralizing all their human resource, finance, or IT functions into one team or department. The other type

of shared service that is often seen, either internally in the organization or through an outsourced relationship, is the call-centre format. Employees and customers contact the call-centre and any one of a number of people can respond to the question or inquiry.

Consulting Model

In a consulting environment, one consultant will work with a number of different clients, as a form of shared service. Typically the consultant is hired to complete a certain project during which they will clarify the client's expectations, suggest strategies and then complete the task as directed. Once the task is complete, they move on. Because of their exposure to and relationships with numerous organizations, consultants are also said to be aware of industry "best practices" although the transferability of such practices from one organization to another is not typically recognized or encouraged.

Ensemble Model

The type of shared service outlined in this guide is slightly different. It is based on the consulting model with some key enhancements. In this model, rather than the consultant seeking out a number of diverse clients, a group of Executive Directors or Chief Executive Officers will come together and hire an HR professional to work with them. (*For the purpose of this framework, all Executive Directors and CEOs will be referenced as Executive Directors*).

What is an Ensemble?

It is recommended that six to seven (6-7) Executive Directors form an *ensemble*, then recruit and select an HR professional to work directly with them and their organizations, usually for a period of two to four years.

During this time the HR professional will not only work with each Executive Director and the organizations as a consultant, they will work with the group collectively as an ensemble. This will accomplish three things:

1. The ensemble members will form a relationship-based network with peers who are facing

common HR challenges in their organizations. This is accomplished by having established monthly or quarterly meetings with the expectation that all members and the HR professional attend.

2. By sharing the services of the Expert, ensemble members will be able to develop and access sustainable solutions for HR processes, practices, tools and resources without compromising the confidentiality or integrity of individual organizations.
3. Executive Directors, who alone could not afford the services of a senior level HR professional, will now have access to the skills and experience they need at a much reduced cost.

What assumptions have been made?

It has been assumed that if you are reading this framework it is because you are interested in the idea of sharing the services of a senior level HR professional with a group of other Executive Directors. This framework has been developed on the premise that it is you the person who is integral to the formation of the group, versus the organization you represent. Although organizational form, size, and structure has been included as consideration, the focus of this guide is the Executive Director.

An assumption has also been made that you would be able to find a group of six to seven Executive Directors with whom an ensemble could be formed, as defined earlier. Factors such as each member's experience as an Executive Director and the size and complexity of each organization, are to be taken into consideration when determining the appropriate number to form an ensemble.

We also assume that an ensemble will be formed for three years, although it is recognized that some may find that length of commitment difficult.

It is also assumed that the ensemble will be self-managed. As a group, you will recruit the expert resource, establish team norms and determine how the ensemble functions.

An assumption has been made that a senior level HR professional would be engaged as the Expert.

You as a group could determine that someone of slightly less skill and/or experience could be appropriate and would help to reduce overall costs. It is important that the skill level of the HR professional and your needs as participants is comparable and aligned in order for you to feel the shared-service experience is successful.

And finally, it has been assumed that each of you who takes part in the ensemble would assume a financial responsibility for your participation.

What challenges can an HR ensemble address?

The HR issues facing the sector are significant, sobering and stressing Executive Directors to the point where individual programs and services are being impacted. Some key HR issues facing leaders today are:

- A lack of organizational effectiveness; position and role alignment
- Unsuccessful recruitment and retention practices
- Lack of, or out-dated HR policies and procedures
- Confusing and ineffective performance management systems
- Problems with legal compliance including costly terminations
- A lack of concentrated HR capacity building in both the ED and their leaders
- Increased challenges in the area of salary and benefit administration; a need to understand competitive compensation systems and benefit programs
- Confusion over succession planning and employee recognition strategies

Another challenge facing Executive Directors today is the sense of isolation. Although many participate on various committees, projects, and even networks, studies have indicated that they do not have sufficient support systems. Those previously

involved in an ensemble, shared that the ensemble concept allowed them to be vulnerable in identifying HR issues, both personally and professionally, that they struggled within their organization. To learn that other leaders were wrestling with similar issues was validating, and together sharing strategies, challenges and successes formed a synergy that allowed for creative and strategic ideas to be developed.

2 Making the case for an ensemble

Working with other ensemble members and the Expert, you will be able to set realistic expectations for what you want to receive from the ensemble experience. Your ability to receive from the ensemble experience will be in direct proportion to the energy and commitment you put into it.

The purpose of an ensemble is to provide an opportunity for a group of Executive Directors to come together and share the expertise and financial cost of an HR Expert. It is also to create a safe environment in which these leaders can give and receive support on managing the HR issues they face. Through this common purpose and the commitment of your time, you can gain different perspectives on your leadership style, your organizational practices and challenges, and your comfort with managing change and strategies for leading your organization through challenging economic and political times.

Critical success factors

The ensemble concept must be implemented in a manner that considers growth and/or increased sustainability of your organization by ensuring that the following critical factors are in place.

Financial

You must ensure that you are able to budget the required funds to participate in this shared resource, for a minimum of one year; ideally you want to be able to allocate funds for a three year period. In the section on financial considerations you will find additional information on strategies and costs, however, by sharing the services of an expert resource among six to seven organizations you will:

- Gain access to a professional normally outside of your ability to recruit or hire
- Leverage the skill of a senior resource at approximately 50% of the cost of an entry-level role

Although not a direct financial cost, the ability to create time in your schedule to work with the Expert and the other ensemble members is crucial to considering success. The old saying “time is money” is true. If you want to realize significant cost reduction through increased effectiveness and efficiency in your HR initiatives, then time must be factored in as a cost of this project.

Finally, it is important that you spend time researching grants and funding opportunities that are directed to capacity building initiatives. Many funders are willing to support initiatives that not only increase the effectiveness of one organization, but by collaborating with others, increased sustainability of all involved, which could ultimately lead to the strengthening and longevity of the sector.

Your future

The sustainability of organizations in the non-profit sector is a concern that has been identified by participants as well as governments and funding groups. However, an issue greater than organizational sustainability is the retention of Executive Directors.

Many Executive Directors have found themselves trying to balance a divergent set of responsibilities: overseeing program/direct service development and management, finance, fund development, communications, Board management/relations, community involvement and/or advocacy, organizational design and sustainability, and of course human resources.

Because HR issues are often directly related to individuals and emotions, resolving issues are not simple because people are not simple. Many leaders find it extremely time-consuming and draining to ensure that issues are identified, managed and resolved in a manner that maintains the integrity of the organization and respects the individual or individuals involved. By increasing leadership capacity to understand and proactively resolve HR issues and to create effective and strategic systems, you are more able to achieve an appropriate work-life balance. A balanced work life often leads to a higher level of retention as well as increased potential for succession from within the organization.

Client satisfaction

Most non-profit organizations fall under one of the following areas of activity: sports and recreation, health and social services, development and housing, or religion.

Within each of these areas of activity, client satisfaction is part of most organizational mission statements. It is usually referenced either by ensuring

that people have access to services in a way that empowers and respects them or that barriers are removed from the client's ability to access services.

By participating in an ensemble, you as Executive Director are able gain insight into the most effective structure for your organization including the correct alignment of role and responsibilities which then leads to increased organizational effectiveness and ultimately increased client satisfaction:

- When staff are unclear of their roles, responsibilities, accountability and autonomy, then client service can be hindered
- As direct service demands change or are altered, organizational structure and role alignment must also be re-examined to ensure that they are still effective in meeting the changed emphasis of the organization
- When individual performance plans and goals or objectives are clearly linked to the vision, mission and strategic plan, employees are better able to understand how achieving their targets is critical to the overall success of the organization

Product or service development

In this success factor, understanding what is happening not only in the sector, but also provincially and nationally is important to help you keep your organization both current and proactive in the products or services you offer.

As a leader today, you also have to consider if your organization should stand alone or merge with another. Many are considering this as an option in order to ensure continued funding and support. Merging can help to offer a broader spectrum of products or services but only if it is with the appropriate partner. Understanding how your peers are viewing this challenge can help you as Executive Directors consider all the salient points of the issue.

Intellectual capital

Much information is distributed through studies and reports that references the aging workforce and the shortage of qualified workers. Knowing this to be true, you must be consciously developing HR systems and strategies that will support your ability

to either retain key leaders and staff or to facilitate their succession in a phased approach.

Having a well defined succession plan will help you to ensure that those with the history and knowledge of your organization are able to mentor and transition their knowledge to those you have identified as having strong skills and great potential. Letting people know that you have identified them to be part of your organization's succession plan has been proven to aid in their retention.

Strategic relationships

Participating in a shared-service model is a critical success factor for developing strategic relationships. By sharing with and learning from the other ensemble members, you can gain new ideas on how best to approach potential partners or funders and in the process perhaps discover new strategies and opportunities you had not previously considered.

Employee attraction and retention

This is the greatest challenge most leaders face today. How do you ensure that you are able to attract the critical skills you need and how do you retain them once you have them in your organization?

Having access to the knowledge of the Expert and the support of your peers, you will develop the skills and abilities to evaluate the structure of your organization; to determine if there are opportunities for staff to grow and develop, if roles are properly aligned, what levels of autonomy and responsibility you have associated with different roles, and finally how effective your systems and processes are.

Each of these components can either attract or repel prospective employees. Aside from salary, one of the top draws for new hires is the provision of training and developmental opportunities. It's also important to consider the fact that not providing people with the appropriate balance of responsibility and authority can drive them from your organization.

By creating skilled interviewing and selection practices, you can not only avoid making a bad hire, you can influence candidates; when they observe your level of preparation and professionalism they

may choose your offer over others they receive.

Learning how to develop performance management processes that align individual roles to the strategic direction of the organization, recognize excellent performance and manage poor performance, will give your employees a sense of confidence that they are on the right career path.

Sustainability

With the demographics of our society rapidly changing, you must consider diversity issues relating to cultures and generations in the services/products your offer as well as in the HR systems, processes and strategies you implement. Failing to address these key issues in your policy manuals and your organizational culture can not only prevent the forward movement of your organization, it can impact its ability to exist.

“It is important to understand the distinction between critical success factors and key performance indicators. Critical success factors are elements that are vital for a strategy to be successful. Key performance indicators are measures that quantify management objectives and enable the measurement of strategic performance. Example: Performance indicator would be the number of new customers and the success factor would be the creation of a call centre for providing quotations.” - Wikipedia

Identifying potential barriers

Internal barriers

Internal barriers include the thoughts you have about your ability to commit and to be accountable to others because:

- You have so little time right now and so many competing priorities that adding more could be too much
- You are concerned that others will discover that you are not as capable in managing HR issues as you have portrayed
- You are not sure that you have the energy to try again; you feel discouraged and do not know if you want to commit to more change but at the same time you are worried that if you do not do something different, you will ultimately not be successful

Those who have participated in an ensemble model said the time they set aside to participate in ensemble meetings and to work with the Expert actually was returned to them ten-fold a year or so later. Through increased effectiveness in structure, systems, processes and tools, they were able to focus on the core elements of their role. They were more confident in empowering their leaders and/or front-line staff in managing the day-to-day issues of the organization. Some of the relationships they developed during the tenure of the ensemble were based on mutual need and vulnerability and the trust that developed ensured the relationship continued even when the ensemble was over.

External barriers

External barriers include money, time, other people's reactions, resources, and results. We are not in direct control of them, but we can affect how they work and we can still plan around them.

Budget

Looking at how you could budget your portion of the costs for the ensemble against budget restraints, increased compensation/benefit costs, and a reduction in funding or grant portfolios, can seem

daunting at first glance. Consider the time you currently spend in a year on managing HR issues like recruitment, performance management, training, role and responsibility clarification to name a few. You might be surprised to learn that you actually spend more on recruitment and training of new staff than you would on the cost of participating in an ensemble.

Getting support from your board

Most board members are aware of the challenges you face as an Executive Director. More so than ever before, board members are able to recognize the multiple demands you face in moving the organization forward at the same time as managing staff and satisfying the demands of funders.

- Participating in an ensemble of peers will provide the Executive Director with both personal and professional development opportunities.
- Participating in an ensemble can also provide the Executive Director with access to tools and resources that will enable them to better manage their heavy workload.
- Involving a board member in the investigation and development of an ensemble relationship can be rewarding and affirming for both you and for them

If you are able to involve a board member in the ensemble process, you may find that one day you may need to make some significant change or adjustment to the structure or the management of the organization. That board member will not only understand why, but be able to support you with the rest of the board.

Achieving results

Working with other ensemble members and the Expert, you will be able to set realistic expectations for what you want to receive from the ensemble experience. Your ability to receive from the ensemble experience will be in direct proportion to the energy and commitment you put into it. We can always build our capacity if we are open to learning and changing as necessary.

3 Identifying who should participate

Participants embracing a shared-service model are ones who understand the complexity of the issues facing their organizations, are concerned about their ability to successfully understand or resolve transactional and strategic HR issues, and are willing to lead their organization through transformational change.

Each person reading this framework will need to decide for themselves if the idea of a shared-service model, especially the ensemble concept, resonates as the right fit for them. Participants embracing a shared-service model are ones who understand the depth and complexity of the issues facing their organization, are concerned about their ability to successfully understand or resolve transactional and strategic HR issues, and are willing to lead their organization through transformational change.

Characteristics of ensemble participants

Participants:

- Must be willing to take risks and to grow and expand beyond their comfort zones
- Should have achieved some success in implementing innovative and creative strategies and have demonstrated ability to implement some level of change management process
- Must be open and able to embrace the changes required to increase organizational effectiveness
- Must demonstrate the ability to respond quickly and effectively when presented with challenges; see that some challenges are opportunities
- Should have a reputation of integrity and credibility; have previous experience in working in some form of collaborative relationship
- Should be able to appropriately determine the level of importance participating in this type of shared-service is for themselves personally and for their organization. This includes scheduling time to work with the Expert to affect change; remaining committed to involvement in ensemble meetings and activities; and ensuring their board understands their needs and gain their full support, including the allocation of resources to this commitment.

Characteristics of the HR Expert

The HR Expert needs to have a broad expertise in HR coupled with a strong knowledge of organizational design. His or her ability to understand and meet the transactional needs of the ensemble members yet retain the ability to move through those issues to affect transformational change is critical to the success of the shared-service concept.

The Expert must:

- Understand the issues most important to each member of the ensemble and then strategize with them on how best to meet them
- Be skilled in managing multiple and potentially conflicting priorities
- Have knowledge of a variety of processes, procedures, systems, and strategies; yet possess the ability to modify them in a way that would be consistent with the needs of individual organizations
- Be able to establish with each participant your expectations, boundaries, and commitment to work with them
- Negotiate the time and effort they will spend on transactional work versus transformational priorities
- Not be easily intimidated or unduly influenced by others
- Know when to employ consultation, coaching or mentoring language to support you and other ensemble members
- Demonstrate integrity, honesty and reliability in the work they do and the way in which they conduct themselves
- Be able to participate closely with leaders and their staff, yet remain removed enough to maintain their strategic perspective

4 The key elements of an ensemble

Participating in an ensemble should facilitate change and development in your organization on many levels, therefore it is imperative that you have strategic vision and purpose, the ability to make key decisions and have the full support of your board.

As seen throughout this framework, the key elements of the ensemble are the participation and commitment of a group of Executive Directors and a senior level HR professional. It is the way in which they operate together that causes the ensemble model to be successful.

The role of Executive Directors

It is critical that an ensemble be formed with members who are in the Executive Director role. Participating in an ensemble should facilitate change and development in your organization on many levels, therefore it is imperative that you have strategic vision and purpose, the ability to make key decisions, and have the full support of your board. There must also be a clear understanding of your needs and issues both personally and for your organization as well as a willingness to engage in a relationship-based model.

Commitment to the ensemble

It is imperative that you are able to make a commitment for a minimum of one year with a goal to participating for three years. Ensemble meetings with all the members present should be held either monthly or quarterly. You and the group of leaders forming your ensemble will need to determine a schedule that works for your group - one that everyone can commit to.

The commitment to the ensemble also speaks to your commitment to adequately implement new systems, strategies, processes and practices. It is important that changes are made carefully and in a timely manner. Making changes without first ensuring the readiness of both you and your organization will not yield the desired results, and these changes will not occur overnight.

In the case that a member should be unable to continue to meet with the rest of the ensemble, it is recommended that the remaining members continue without adding a new member. Considering options that could support all the initial members will only enrich your experience. If even one member is not committed to the ensemble, overall attendance and willingness to trust or risk, can be reduced in all members. It has been found that those who work well with the Expert but avoid the benefits of the group tend not to leverage all the experience that the ensemble could offer.

Similar knowledge and experience

Those of you who have similar experience and who face similar issues and challenges although in different types of organizations, tend to be more open and willing to share with and learn from each other. The greater the difference in experience or knowledge each brings, the less authentic the sharing will be and the less energy and commitment members will have. Participants who have significantly less experience or less organizational knowledge tend to cause the group to focus on more mentoring than sharing. *Examples of some different formations of ensembles are provided in Appendix 3.*

The ensemble is to be self-managed

As a group, you will need to establish team norms. These norms will cover topics such as how often to meet, what constitutes quorum, are meetings dependant on quorum. *See Appendix 4 for an outline of developing team norms.*

As a group you will have to determine how the ensemble functions. A few issues that you will have to manage are:

- How to recruit and select the Expert
- How to work as an ensemble with the Expert
- How to determine boundaries for confidentiality as an ensemble
- What happens if a member wants to leave before their commitment is up

See Appendix 1 for a more comprehensive list of related questions.

Financial considerations

Participation requires financial commitment on the part of each Executive Director. Therefore, you need to understand the costs associated with hiring a senior level HR professional and determine how to manage those costs among the ensemble members. *Please reference Section 5 for a more comprehensive list of related financial questions and scenarios.*

5 Understanding and justifying the cost

Executive Directors, who previously felt overwhelmed and unable to manage the complexity of the HR issues they faced, found themselves with new competencies, skills and abilities. This confidence enabled them to identify the core issues and apply the correct strategy to resolve them.

A selling feature of the shared-service concept is the potential for accessing greater levels of service at reduced costs. The ensemble concept is no different, however there are many questions to be answered and situations to be considered from a financial lens, in forming an ensemble.

Some initial questions to consider

1. Will the Expert be hired on a full-time or part-time basis? If it is on a part-time basis, what percentage of time is being purchased?
2. Is the Expert being hired as an employee or a contractor?

If as an employee:

- Who is the “employer” and what relationships do the other ensemble members have to the “employer”?
- Is the employer one of you or do you need to consider someone/some organization functioning as an independent coordinator or convener?
- Does the Expert receive benefits? What other costs are covered?
- How will the participating members of the ensemble pay their portion of the costs?

If as a contractor:

- Who will receive the Expert’s invoice?
- If only one organization receives the invoice, how will the participating members of the ensemble pay their portion of the costs?
- If each organization receives an invoice, how are the charges to be split? Is it equal access or actual service or some other measure?

3. What costs are covered?

- Does the Expert receive a salary or a retainer on a regular (monthly) basis?

- Who determines the salary or amount of retainer the Expert receives?
- Does the Expert receive compensation for “other” costs, such as mileage, parking, supplies, materials, computer, internet, phone
- If the Expert is a contractor, then what tools will the ensemble pay for: e.g. BlackBerry, laptop, wireless stick?

Ensemble scenarios

The following ensemble scenarios have been developed to help you consider how the ensemble might be formed and address some of the questions listed above. To provide some diversity, one scenario is based out of Halifax, Nova Scotia and the other is in Red Deer, Alberta.

Scenario one: Halifax, Nova Scotia

In this scenario we will assume that the Expert is being hired in Halifax, Nova Scotia on a full-time basis to support ensemble members.

Independent contractor

The Expert is being hired as an independent contractor. This means that they would invoice each participant separately, dividing the total cost per month by the number of participating agencies. Each invoice would include GST but no deductions for EI, CPP and Income Tax would be required. As they are being hired as an independent contractor, they will work from a home office when they are not attending meetings at one of the ensemble organizations.

Salary and costs

The salary and costs for the Expert were negotiated at the time of hire with all costs combined into one monthly fee because independent contractors are assumed to use their own tools and cover incidental costs in the performance of their contracted work. In this case an annual total cost of \$81,120 (+GST) was negotiated.

In 2009, the wages generally paid for an experienced HR professional in Halifax and surrounding areas is \$32 per hour. Throughout most of Nova Scotia, wages range from \$25 to \$40 per hour depending on experience and availability. Contractors will often add about 30% to that wage to compensate for lack of benefits and eligible coverage.

So, in order to receive the support of an expert HR resource, each member would be required to pay:

- If there were six participating members, then each Executive Director would be responsible for \$13,520 annually or \$1,127 per month
- If there were seven participating members, then each Executive Director would be responsible for \$11,589 annually or \$966 per month

The Expert's time

Although similar calculations could be done in dividing the Expert's time among the ensemble members, experience has proven that the most efficient and effective manner in which to operate an ensemble model is to empower the Expert with the scheduling. The Expert would initially complete a needs assessment with each Executive Director to determine the key initiatives to address. From there they would look for synergies among other ensemble members. This has a number of benefits including:

- The potential to lead to ensemble-wide training initiatives
- When a tool or process has been developed for one member, it could then be shared, modified or implemented for another organization
- The Expert has the ability to see from a holistic view where opportunities to share resources or processes lie
- Determining some type of reporting or accounting of time by the Expert to the ensemble members can help to evaluate and monitor member participation and the Expert's activities

There will be some months when one member may have little time to devote to working with the Expert and then the following month they want to launch a new initiative requiring a significant amount of time.

When considering the time a leader would have with the Expert, it is important to remember that you are not only scheduling the time you need face to face, but also the time it takes the Expert to work on the process from their office.

It has been found that projects being worked on have natural ebbs and flows. This can be due to restrictions on your time as an Executive Director, competing priorities, or other challenges. Creating flexibility in this area can allow the Expert to determine the best use of time to meet the needs of all the members. Part of relationship building is developing trust. By trusting that the Expert is able to manage the demands placed on them, actually enables you to be at rest when you appear to be dominating the Expert's time. As an ensemble, it will be important that you develop team norms at the very beginning that will outline preferred methods for sharing the Expert and for providing feedback when concerns arise.

Scenario two: Red Deer, Alberta

Again we will assume that the Expert is hired on a full-time basis only this time as an employee in the smaller urban area of Red Deer, Alberta.

Expert as employee

One of the Executive Directors in the ensemble offered to hire the Expert through their organization and provide them with benefits, but wanted the total cost split between all the ensemble members.

Some ensemble members were concerned that having the Expert employed as a member of one of the organizations, would give that organization some type of advantage. Their concern was increased by the fact that the Expert would also receive office space at the host organization. To resolve such critical concerns, the ensemble members agreed to work with the one organization acting in the role of employer, however they were able to reach a compromise on the office space by having

the expert work from home, with each participant providing equipment, supplies or resources for the home office.

Salary and costs

Again a calculation was done for the cost of receiving the support of an expert HR resource. The salary agreed on was \$71,175 per year, with benefits, vacation, and equipment costs, the total came to \$90,392.

In 2009, the wages generally paid for an experienced HR professional in Red Deer and surrounding areas is \$36.50 per hour. Throughout most of Alberta, wages range from \$32 to \$56 per hour depending on experience and availability. The addition of payroll costs, benefits and other perquisites can range from 25 – 30%. In this example we added 27%.

From this CPP, EI and Income tax would need to be deducted. The employer-member agreed to carry some of those costs, leaving the group to divide a total of \$90,392. That meant that each member would be required to pay:

- If there were six participating members, then each Executive Director would be responsible for \$15,065 annually or \$1,255 per month
- If there were seven participating members, then each Executive Director would be responsible for \$12,913 annually or \$1,076 per month

Although the cost difference is minimal, the perception of one member having an advantage by employing the Expert can hinder the ensemble's ability to move forward. This type of scenario would need to be managed at the onset of the project to avoid conflict later. Investigating who might act as a chair or centralized resource to facilitate the employment of an Expert is a worthwhile venture.

From the two scenarios you can see that the cost will depend on whether you are in a large or small urban area, in a province that attracts high numbers of skilled people or where recruitment may be more difficult, or whether you create your ensemble with five or six other leaders. Checking with organizations in your region that have senior

HR professionals, whether they are for-profit or not, can help you to understand what you might need to consider as a competitive wage for your consultant. From there you need to determine if it is to your advantage to hire them as an independent consultant or as an employee. As described in the above scenario, although the initial cost of the consultant's contract may be higher, ultimately it can cost you less when all the other compensation and benefit issues are factored in.

The return on investment

Although Return on Investment or ROI is historically a financial term, its meaning can be translated for our purposes.

Financial definition

Return on investment (ROI) is simply a measure to help decide whether an investment is worthwhile. It considers the costs, the benefits and the time value of money. To calculate ROI, the benefit (return) of an investment is divided by the cost of the investment; the result is expressed as a percentage or a ratio. Return on investment is a very popular metric because of its versatility and simplicity. That is, if an investment does not have a positive ROI, or if there are other opportunities with a higher ROI, then the investment should not be undertaken.

Social definition

Within most non-profit organizations there is an increasing demand from management and funders for ways of demonstrating social impact. From the point of view of the organization, this information is not only invaluable in illustrating the effectiveness with which they achieve their goals but also in helping to improve the performance of the organization by tracking and measuring outcomes and impacts.

The ROI for ensemble participants

The feedback received from many members of shared-service models indicated that there was a direct correlation between the time and resources they invested and the skill and knowledge they received.

The gain was both personal and organizational, and was greater than the sum cost of their investment.

Transitioning the shared-service model from the styles adopted in large organizations into the ensemble model, allowed for greater support in building HR management capacity and knowledge transfer for participating members. By building the capacity of the Executive Director, their individual organizations, their network, peer groups; eventually leads to the sector being strengthened.

It was found that organizations that experienced increased stability, effectiveness and growth as a result of participating in an ensemble model were able to directly measure the effectiveness of their Executive Director's increased capability and strategic view against time previously spent following ineffective methods. The successful participants invested the proportionate amount of time and energy into the ensemble initiative as they had spent trying to fix their ineffective and broken processes. From the point of view of the organization, this information not only illustrates the effectiveness with which they achieved their goals but also in helping to improve the performance of the organization by tracking and measuring outcomes and impacts.

Ensemble members participating in networks, peer learning groups, or as part of a national organization, found themselves given opportunities to share publically the strategies and resources they had learned, developed and implemented.

The value ensemble members put on their relationship with the Expert as well as with their peers, was directly aligned to their evaluation of the project being a success or not. For almost all, it was the access to a coach, mentor, confidant and consultant rolled into one, that gave them the greatest sense of support and confidence. For some, their ability to transition the knowledge and tools they gained throughout their organization, was a key factor in evaluating success.

Executive Directors, who previously felt overwhelmed and unable to manage the complexity of the HR issues they faced, found themselves with new competencies, skills and abilities. This confidence enabled them to identify the core issues and apply the correct strategy to resolve them. Some

who previously felt they were unable to take a holiday, found with the correct organizational structure and alignment of skills and roles, they could take holidays without fear or interruption.

Ensemble participants who allocated minimal time to work with the Expert or attend ensemble meetings did not see the same return on their investment as those who made the ensemble opportunity a priority.

Executive Directors indicated that having a consistent and accessible resource that was familiar with their organization, their staff and associated issues; actually reduced the time it took to resolve the issue. They indicated this knowledge actually ensured that staff or processes were not negatively impacted by actions taken and that resolutions, insights and directions the Executive Director received were not delayed while the Expert was briefed on the organization and the people involved.

Final thoughts

Embarking on a shared-services initiative is a tremendous undertaking. Careful consideration and thought must go into the process to ensure that the decision is the right one for you and your organization.

In developing this framework, our intent was not to provide step-by-step instructions, but rather promote the benefits of shared HR services by presenting the learnings and experiences of some existing shared HR services models. The premise

is that leaders, who wanted to get together and explore the development of a shared-service model, could use this framework as a starting point for the development of their own shared HR service model.

The HR Council is keen to connect with individuals and organizations that are interested in moving forward with the development of their own shared HR services models. We hope to follow the development of such models in communities across the country with the goal of documenting the experiences of participants for a follow-up case study series that would be made available in the Resource Centre on our website.

For more information about this framework or to express your interest in sharing your own experience in developing a shared HR service model please contact us by one of the following means:

Post

HR Council for the Voluntary & Non-profit Sector
201-291 Dalhousie Street
Ottawa, Ontario K1N 7E5

Toll free telephone

1.866.594.8332

E-mail

info@hrcouncil.ca

Web

www.hrcouncil.ca

Appendix 1 - What questions need answers?

1. Do I have a full group of committed members to form an ensemble with?
2. Do we each understand the commitment level?
 - Is there a contract/agreement that needs to be signed by each of us attesting to our commitment?
3. Do we have similar experience, skill level or knowledge that we will be comfortable to share with and learn from each other?
4. Have we done sufficient research to understand what we are getting into?
5. Have we been able to answer all the financial questions and considerations?
6. Have each of us personally been able to commit to the minimum of one year?
 - Do we agree that a one year commitment is appropriate?
7. How many will try to budget for the recommended three year term?
8. Are we comfortable in managing the costs if one member were to drop out?
 - If yes – how?
 - If no – what do we need to do to be comfortable?
 - Does this impact our initial number of participants?
9. Do I have my Board's support in moving forward on this ensemble concept?
 - If I do, am I comfortable with how they expect this to impact me?
 - Why do I not have their support? Am I still going forward?
10. Have we determined the skill level of the consultant that we need?
11. What do we think our success in finding an appropriate consultant will be?
12. How do we start the recruitment process?
13. How can the HR Council be a support during this process?
14. How often will we meet as an ensemble?
 - How will our meetings be structured?
 - Will someone act as a chair? Will it rotate? Be a shared leadership?
 - Where will we hold our ensemble meetings? How long should they last?
15. Do we establish a relationship with the Expert as an ensemble or independently?
- 16.. Am I comfortable with our decisions on where the Expert will work?

17. What are the confidentiality boundaries?

- By participants?
- By the Expert?
- What is the ensemble comfortable in being shared amongst the members, and what is restricted?
- If there is group training/development, what type of examples or processes can be used and what should be avoided?

18. How will feedback be provided to the Expert?

19. Am I really open to make changes both personally and within my organization?

20. Do we as an ensemble assign work collectively or does the Expert manage it individually?

- How do joint workshops/training sessions get established?
- Who is responsible for arranging all the details?
- Does each member of the ensemble develop their own service level agreement with the Expert, or does the ensemble as a whole create one agreement with holistic guidelines?

21. Do we need to have some type of formal evaluation?

- Do we start with goals and expectations and measure against it?
- How often does the evaluation process occur?

22. What will I do if I develop a conflict with one of the other ensemble members?

23. What will I do if I develop a conflict with the Expert?

24. What is my greatest fear? Can it be resolved?

Appendix 2 - Expert profile

Title

Ensemble HR Expert

Role Summary

Senior level HR and management expert, CHRP designation, providing support to seven non-profit organizations; building capacity through the collaborative design and implementation of strategic processes.

Key Responsibility Areas

1. Coach/Expert

- Develops solid relationships at the Executive Director level, the management levels and staff levels (as appropriate) with ensemble agencies
- Ability to develop and foster relationships within sector, community and personal network
- Has the discipline to remain composed in times of ambiguity
- Taps diverse points of view in planning. Is adaptive to realities and flexible in choice of tactics
- Uses feedback to inform, enlighten, and suggest improvements
- Applies project management principles and practices effectively to manage commitments
- Patient, with a good sense of timing

2. Organizational Design & Development

- Demonstrated understanding of organizational design and effectiveness principles; ability to tailor process to agency uniqueness

- Ability to understand how each role within an agency functions; how it functions with other roles in the agency, with community organizations and with external stakeholders.
- Ability to align roles/processes with an agency's strategic plan, business plan and culture

3. Human Resources Expertise - A broad range of HR knowledge and experience including:

- Organizational design and effectiveness
- HR planning
- Leadership development and succession planning; performance management
- Strategic program design (i.e. compensation, staffing, training, orientation, reward & recognition)
- Change management; conflict resolution
- Policy development, interpretation and implementation
- Payroll systems and benefits; compensation management
- Legal compliance

4. Facilitation & Capacity Building

- Explains complex HR concepts and processes in understandable, non-technical terms
- Remains detached from influencing content when facilitating
- Captivates attention when presenting new concepts/training materials to individuals or groups
- Ability to develop and facilitate team building and workshops

Competencies

- Mature individual who can call upon years of leadership experience in HR to lead, collaborate with and support agency leaders.
- Must possess strong interpersonal/relationship building skills
- Demonstrated ability to remain calm in the midst of ambiguity and confusion; Highly developed organizational skills; Strong influencing and coaching skills
- Creative and innovative critical thinking and problem solving skills
- Flexibility in utilizing both high level consulting and practical transactional skills
- Possess expertise in understanding and analysing organizational systems and structures; providing recommendations and redesign strategies
- Skilled in interpreting and developing compensation systems and principles
- Strategic view of recruitment and retention programs; interview protocols
- Excellent written and verbal communication skills; Highly developed facilitation skills
- Experience in strategic and business planning
- Relates well to people at all levels of the organization, both internally and externally; builds appropriate rapport; listens; builds constructive and effective relationships; uses diplomacy and tact; truly values people; can diffuse high-tension situations comfortably

Appendix 3 - Different ensemble formations

There are differing opinions on whether an ensemble can be successful if participants come from like-organizations or if they are from diverse ones. What has been shared consistently is that it is the experience, knowledge, skill and maturity of the leader that has the most impact on the success of the peer learning component of the ensemble model.

The following ensemble formations are meant to serve as examples of what a potential ensemble could look like. Other factors or considerations such as a common funding partner, geographic proximity, organizational mandate or existing personal relationships may also inform the identification of potential ensemble participants.

Formations based on years of experience

Create an ensemble for those who have worked as Executive Directors for:

- Less than three years
- More than three years and less than six
- More than six years

Formations based on organization size

Create an ensemble for those who are Executive Directors in organizations with:

- Less than 5 staff
- More than 5 staff but less than 25
- More than 25 staff but less than 100
- More than 100 staff

Allocations could also be based on organizations with:

- Less than 25 staff
- More than 25 staff but less than 100
- More than 100 staff

Note: Whenever considering an ensemble formation by the size of organization the Executive Director leads, you need to also consider the number of volunteers or students involved. Sometimes the staff number is low but the complexity of the programs or services are more complex than staff numbers will indicate.

Formations based on complexity of organizations

Create an ensemble for executive directors in organizations that are:

- Small and stable
 - i. Small and stable alone
 - ii. Small and vulnerable alone
 - iii. Small and stable with small and vulnerable
- Large and stable
 - i. Large and stable alone
 - ii. Large and vulnerable alone
 - iii. Large and stable with small and stable
 - iv. Large and stable with large and vulnerable

Appendix 4 - Setting norms for the ensemble

Norms outline the way a group of individuals, with a common purpose, will work together thoughtfully and productively. Norms are usually categorized as either interpersonal or procedural and once they are established, everyone in the group is to take responsibility to ensure the established norms are followed. Norms can be personalized to meet the needs of a particular group and as they mature, their norms may change.

Ensemble norms

Logistics

Meeting time, place, duration and frequency

Timeliness

Start time, finish time, lateness and attendance (quorum)

Courtesy

Listening, interruptions, equal participation, dealing with disagreements, respect, empathy

Decision-making process

How will we make decision? Reach agreements? How will we show agreement?

Confidentiality

What are the boundaries? What can be shared within the ensemble? Outside the ensemble?

Setting priorities

How will resolve issues or conflicts for competing priorities? How do we discharge responsibility for on-time completion and equal distribution?

Enforcement of norms

How will we make sure the norms are followed?

Appendix 5 - Service agreement template

Professional Services Agreement dated March 2009

Between
Expert's Company Name
(herein referred to as the Expert)
and
Non-profit Organization or Ensemble
(herein referred to as the Ensemble)

The Expert and the Ensemble agree as follows:

1.0 Purpose of Agreement

The purpose of this agreement is to outline the services of the Expert to the Ensemble in the provision of Human Resources Consulting.

2.0 Term

The term of this Agreement shall commence Month/Year and end Month/Year, unless extended by mutual written agreement of the parties.

3.0 Contract Amount and Conditions of Payment

In consideration for the performance of the services and work provided by the Expert by this Agreement, the Ensemble shall pay to the Expert those amounts as set out below:

Fee for services

A fee of \$XX plus GST is agreed as the rate for the all the projects and terms agreed to. It is either so many hours per month, or on a project basis. Projects and/or time in excess of this must be pre-approved. Payment is to be made upon receipt of consultant's invoice and according to the following schedule:

- *Insert proposed schedule of payments.*

Expenses

Expenses are not anticipated at this time. Should expenses reimbursement be required, pre-approval of the Ensemble is required. Payment will be made as reimbursement upon delivery of proper receipts, subject to application for an advance payment where necessary. Any travel required on behalf of the Ensemble will be fully reimbursed by the Ensemble based on pre-approved guidelines.

4.0 Services and Work

The Expert shall during the term of the Agreement perform and complete their Services and Work as defined in the Scope of Professional Services with care, skill, diligence and efficiency.

Scope of Professional Services

- *Restate terms in a point form*
- *Capture the key points of the term or the project*

5.0 Warranty by Officer

The Expert warrants that they are competent to perform the services and work required under the Agreement and that the Expert has the necessary qualifications, experience, skills and resources to perform the work.

6.0 Assignment and Delegation

This Agreement is for the services of the named Expert and the services and work, specific to the Ensemble, may not be assigned or delegated in whole or in part except with the prior written approval of the Ensemble.

7.0 Confidentiality

Both the Expert and the Ensemble will not, throughout the duration of this Agreement, during the period of any renewals of this Agreement and following the termination of this Agreement, except with the prior written consent, divulge any information, knowledge or data which they receive during the course of this work, except as required in the performance of this Agreement.

8.0 Release and Indemnification

The Expert will indemnify the Ensemble and its officers and employees from any and all damages or injuries to persons or property, or claims, actions, obligations, liabilities, costs, expenses and fees if caused by reason of any negligent, illegal or dishonest act on their part.

The Ensemble will, except in the case of willful act or omission or gross negligence on the part of the Expert, indemnify the Expert from any and all claims and damages arising out of or in any way connected with the work under this Agreement.

9.0 Termination

Either party may terminate this Agreement without cause or reason on 10 days written notice to the other party.

Upon termination of the Agreement for any reason the Expert will immediately deliver to the Ensemble any finished and unfinished work and all property belonging to the Ensemble. Likewise the Ensemble will return any finished and unfinished work and property belonging to the Expert.

Upon termination of the Agreement for any reason the amount of compensation due to the Expert will be prorated to the date of termination. Claims for reimbursable expenses will be limited to those incurred prior to notice and supported by proper receipts delivered within 14 days of termination.

10.0 Ownership of Property Including Copyright

Title, Ownership, Copyright, Trademark and all other rights to all work, documentation, and information produced or contributed to by the Expert, specific to the Ensemble in the performance of the work under the Agreement shall vest in and remain the property of the Ensemble.

Title, Ownership, Copyright, Trademark and all other rights to all work, documentation, and information produced by the Expert in the performance of the work under the Agreement, not specific to the Ensemble, shall vest in and remain the property of the Expert.

11.0 Relationship of Parties

This is a contract for the performance of service, and the Expert is engaged under the Agreement as an independent contractor for the sole purpose of providing such services. The Expert agrees to be solely responsible for any and all payments and/or deductions required by law including those required for Canada Pension Plans, Employment Insurance, Worker’s Compensation or Income Tax.

The Expert is not entitled to any benefits owing or accruing to employees of the Ensemble or its partner organizations. The Ensemble will not withhold any taxes or other source deductions from payments due to the Expert under this Agreement, which would be required in the case of an employee, and the Expert will indemnify the Ensemble for any liability, charges or expenses incurred by the Ensemble in this regard.

The Expert is responsible for payment of all expenses in connection with their business operations including payment of all license fees, charges, taxes and assessments imposed by any authority.

The parties acknowledge and agree that the Ensemble has engaged the Expert as an independent company, solely for the purpose of performing and providing the services to the Ensemble specified in this Agreement. Neither the Expert nor any present or future employees, consultants, agents, contractors or subcontractors shall be deemed to be an employee, servant or agent of the Ensemble or its partner organizations for any purposes whatsoever. In providing services pursuant to the terms of this Agreement, the Expert shall have reasonable discretion as to the manner of providing services and shall render such services with the highest professional standards.

12.0 General

If any provision of this Agreement is determined to be invalid or unenforceable in whole or in part, such invalidity shall attach only to such provision or part thereof and the remaining part of such provision and all other provisions hereof shall continue in full force and effect.

This Agreement shall be governed by and construed in accordance with the laws of the Province of XX.

This Agreement constitutes the entire understanding, contract and agreement between the parties hereto and supersedes all prior oral or written understandings, agreements or contracts, formal or informal, between the parties or their representatives with respect to the subject matter of this Agreement.

Expert

Ensemble

Name/Signature

Name/Signature

Date_____

Date_____

HR Council_{for the}
Voluntary & Non-profit Sector