

Developing a Non-profit Workforce Strategy

The Alberta Story

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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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Canada

Contents

Executive Summary	1
Introduction	2
The Alberta Context	4
Project Evolution	6
Success Factors	8
Challenges	11
Essential Components for Success	15
Appendices	18

Executive Summary

This report is intended to assist other provinces or territories that are embarking on the development of their own non-profit workforce strategies.

This report is a case study that captures and reflects on the process and outcomes of *A Workforce Strategy for Alberta's Non-Profit and Voluntary Sector* (April 2008), based on interviews with 15 people who were instrumental in the document's creation. The report is intended to assist other provinces or territories that are embarking on the development of their own non-profit workforce strategies. The evolution of the workforce strategy development process was documented and assessed, resulting in articulation of components viewed as essential to a successful outcome.

There was uniform concurrence that the strategy's creation and publication was a notable achievement, one largely credited in particular to the leadership shown by the Calgary Chamber of Voluntary Organizations and the Edmonton Chamber of Voluntary Organizations, as well as an initiative enabled by the "happy confluence" of the opportunity, the people and the timing that all came together in Alberta. Other contributing factors to the success in Alberta included: the provincial government's commitment to workforce action, including a very supportive ministry in Alberta Employment & Immigration; the existence of a pre-existing joint government-sector table (Alberta Nonprofit/Voluntary Sector Initiative, or ANVSI); a non-profit workforce crisis which was a motivating force; and the strength, commitment and wherewithal of the sector itself.

All who were interviewed spoke about issues or elements of the workforce strategy process and document that were not ideal and which other jurisdictions should be aware of before embarking on a similar venture. Issues included the downside of the need for congruence with the provincial Building and Educating Tomorrow's Workforce initiative (e.g. putting "a square peg in a round hole"); the lack of foundational work done, including provincial workforce data for the sector and an absence of desired outcomes within the document; a somewhat unsatisfactory engagement process, partly based on a lack of time and funding to do this work; a transition from the ANVSI table to the CCVO and ECVO, along with existence of other HR-related initiatives, that caused some confusion and frustration; and finally, no apparent follow-through on actions, or clarity about who is responsible for follow-through, close to a year later.

Six elements considered as critical to achieving a successful outcome were identified: start the work now; align with a broader initiative if you have the opportunity, but know what you are getting into; be clear upfront about the purpose of the workforce strategy; build the necessary foundations, preferably at the beginning; engage with purpose, communicate and help connect the dots; and, finally, start with implementation in mind.

1 Introduction

This report documents the evolution of the workforce strategy development process and identifies what worked well, what could have been done differently and highlights essential components of a successful outcome.

Project sponsor and context

In 2008, the HR Council for the Voluntary & Non-profit Sector (HR Council) undertook a project to provide non-profit organizations across the country with tools and knowledge to begin to develop and implement workforce strategies that are responsive to priority human resources (HR) issues and challenges identified in their provinces or territories. Concurrently, the Alberta Government began to work with a number of industry sectors, including the non-profit sector, to formally explore workforce issues and address them through the development of sector-specific strategies. As this work was already underway, the HR Council believed that documenting the Alberta experience would be useful for sector groups in other provinces or territories that are considering the development of sector-specific workforce strategies.

Project overview

This report captures and reflects on the process and outcomes of *A Workforce Strategy for Alberta's Non-Profit and Voluntary Sector*. It documents the evolution of the workforce strategy development process and identifies what worked well, what could have been done differently and highlights essential components of a successful outcome.

Case study methodology was used to document the experience in Alberta. The intent was to assist other provinces and territories that are embarking on their own non-profit workforce strategies rather than to provide a retrospective evaluation of the Alberta strategy. Information contained in the report was generated primarily through interviews with 15 key sector and government stakeholders who participated in and/or were otherwise instrumental in developing *A Workforce Strategy for Alberta's Non-Profit and Voluntary Sector* (Appendices 1 & 2).

The HR Council commissioned Pat Rice and Beth Taylor to complete the case study and prepare this report. It is important to note that the experiences, perspectives and opinions expressed herein do not necessarily reflect the opinions of the HR Council or its funders.

Glossary

ALBERTA NONPROFIT/VOLUNTARY SECTOR INITIATIVE (ANVSI) & HR PROJECT TEAM

The Government of Alberta and the non-profit and voluntary sector have created a collaborative partnership in which both parties have come together to increase their collective abilities to build healthy, active and sustainable communities. The HR Project Team evolved as a joint government-sector committee of ANVSI to address specific priority actions of the NPVS workforce strategy which require government involvement.

BUILDING AND EDUCATING TOMORROW'S WORKFORCE (BETW)

Alberta's 10-year labour force development strategy addressing labour force issues across several industry sectors and identifying 17 government-led priority actions to ensure Alberta has more workers, better-trained people and innovative workplaces.

CAPACITY BUILDING ORGANIZATION

Typically refers to those organizations whose mandates encompass actions that improve/strengthen the effectiveness of the non-profit sector; in Alberta, CCVO, ECVO and Volunteer Alberta are examples.

INTEGRATED HUMAN RESOURCES PLANNING

An integrated human resource strategy is a strategically planned approach to identifying the work functions that need to be accomplished in organizations and involving people, whether paid or unpaid, to perform the work needed to achieve the organization's mission. An integrated human resource strategy assumes that "high skilled" or "professionally skilled" individuals can be engaged in organizations by offering their skills and knowledge in both a paid and volunteer capacity.¹

LABOUR MARKET PARTNERSHIPS PROGRAM

This program is designed to develop and support projects with groups, organizations, industry sectors, and communities with common labour market needs; some funds were available to support the sectors' development of their own strategies.

NETWORK ASSOCIATIONS

These associations provide a voice for the sub-sector organizations, e.g., the Alberta Council of Disability Services, Alberta Association of Services for Children and Families etc.

VOLUNTARY AND NON-PROFIT SECTOR

Defined as self-governing organizations that exist to serve the public benefit, generate social capital but do not distribute private profit to members, depend to a meaningful degree on volunteers, involve participation on a voluntary basis, and are independent or institutionally distinct from the formal structures of government and the profit sector.² Note: The term "non-profit" is used in place of "voluntary and non-profit" throughout this document for brevity.

SECTOR COUNCIL

Sector councils are permanent organizations that bring together representatives with different perspectives from key stakeholder groups that share a commitment to identify and act on the issues and skills needs that are most important to a given sector.³ They are primarily federally-funded and have developed over the past two decades to become the primary, remaining federal vehicle to consider national labour force issues.

SUB-SECTOR

In the context of this document, sub-sector refers to specific service areas within the non-profit sector, typically represented by network associations, e.g., organizations primarily serving people with disabilities, or children and families.

SUB-STRATEGY AND SECTOR-SPECIFIC STRATEGIES

In the context of this document, these terms assume that Alberta's *Building and Educating Tomorrow's Workforce* is the overall strategy, with sub and sector-specific strategies dealing with labour force development needs in specific industries/areas such as mining, construction, retail trade and the non-profit sector.

1 From High Skills Volunteer Research Pilot Project study commissioned by Volunteer Calgary in 2007

2 An Accord Between the Government of Canada and the Voluntary Sector, Voluntary Sector Forum, 2001

3 National HR Council for the Voluntary & Non-profit Sector

2 The Alberta Context

Alberta experienced significant economic growth during the first half of this decade. While this created tremendous opportunities for Albertans, it also produced serious and unique challenges.

Mandate for labour force development

In 1996, the federal government began devolving responsibility to the provinces and territories for delivering active labour market measures. Shortly afterward, most provinces and territories entered into Labour Market Development Agreements with the federal government, although the details of these agreements varied considerably from one province to another.⁴ Alberta was among the first jurisdictions to take formal action on its new labour market mandate.

National sector councils, including the HR Council for the Voluntary & Non-profit Sector, also play a role in human resource development. Sector councils are organized around a defined area of economic activity that is led by a partnership of representatives from business, labour, education, other professional groups and government. They are funded primarily through the Government of Canada's Sector Council Program and have developed over the past two decades to become the principle federal vehicles to consider national labour force issues.

Alberta's economic scene

Alberta experienced significant economic growth during the first half of this decade. While this created tremendous opportunities for Albertans, it also produced serious and unique challenges. By 2005, labour and skill shortages had become apparent across all industry sectors. The unemployment rate dropped to just 3.9 percent in 2005, the lowest rate in Canada.

There was growing belief that if Alberta's intensifying labour force pressures were not addressed, labour and skill shortages would constrain future growth as well as impact current economic and community well-being. Industry leaders began approaching the provincial government with concerns about increasing skill shortages and requested assistance in addressing this problem. It became

⁴ Shifting Roles: Active Labour Market Policy in Canada Under the Labour Market Development Agreement, 2002 Canadian Policy Research Networks inc.

apparent that all sectors were experiencing similar pressures and efforts to take action must be coordinated and broad-based.

Building and Educating Tomorrow's Workforce

The provincial government responded to its labour force pressures by developing *Building and Educating Tomorrow's Workforce: Alberta's 10-Year Strategy*, (BETW) to guide government investment in people and the labour market from 2006 to 2016.⁵ BETW was co-sponsored by two ministries (Alberta Education & Industry and Advanced Education & Technology) and was a significant cross-government undertaking of 17 different ministries. It involved the formation of an Industry Deputy Minister Advisory Committee and an Assistant Deputy Minister Committee with membership from 14 ministries impacted by workforce issues, and established processes and structures to support ongoing stewardship and accountability.

The strategy also recognized the inherent partnership that existed between government and industry in addressing workforce issues. Government had a role to facilitate and set the stage for addressing labour force issues and industry had a role and responsibility to lead strategy development and implementation for their respective sectors. The strategy focused on four themes or pillars:

- *Inform* Albertans about education and labour market issues, initiatives and opportunities
- *Attract* people to Alberta
- *Develop* the knowledge and skills of Albertans as well as high performance work environments
- *Retain* people in Alberta's workforce

HR issues in Alberta's non-profit sector

Alberta's non-profit sector had been experiencing serious workforce challenges. These include stressful working conditions, low job security and high

turnover in entry-level positions, lack of staff training opportunities and an aging workforce at senior and middle management levels.

Sub-sector surveys and anecdotal information conveyed growing HR-related concerns including annual turnover rates of 40 per cent or more in some areas, along with their impact on service provision. Wages were increasing generally in Alberta. The competition for qualified labour was fierce, with those sectors capable of offering better compensation recruiting additional workers with softer competencies from lower-paying sectors, including the non-profit sector.

Non-profit and government initiatives

Over the past several years various organizations, joint government-sector tables and other initiatives have been created to address HR issues in the sector, all which helped set the foundation for the development of a workforce strategy:

- Calgary and Edmonton each have a collective voice for the sector in the Calgary Chamber of Voluntary Organizations (CCVO) and the Edmonton Chamber of Voluntary Organizations (ECVO).
- The Government of Alberta and the sector have created a collaborative partnership known as the Alberta Nonprofit/Voluntary Sector Initiative (ANVSI). Both parties have come together to increase their collective abilities to build healthy, active and sustainable communities.
- The HR Project Team evolved as a joint government-sector committee of ANVSI to address specific priority actions of the sector's workforce strategy that require government involvement.
- Sub-sectors have developed network associations. These associations provide a voice for the sub-sector and some are also undertaking workforce initiatives. For example in 2004, the Alberta Council of Disability Services embarked on Workforce 2010 as a long-term strategy to address workforce issues in the disability sub-sector.

⁵ Building and Educating Tomorrow's Workforce: Alberta's 10 Year Strategy, 2006, Government of Alberta

3 Project Evolution

Representatives from the non-profit sector contacted key government officials, highlighting the size of the sector and its serious workforce issues that warranted inclusion in the first group of industries to create sector-specific strategies.

Initiation

The Alberta Government released its *Building and Educating Tomorrow's Workforce Strategy* in 2006 and began engaging industry sectors to develop sector-specific workforce strategies. The non-profit sector was not among the initial sectors targeted by the government. Representatives from the non-profit sector became aware of this process and contacted key government officials, highlighting the size of the sector and its serious workforce issues that warranted inclusion in the first group of industries to create sector-specific strategies. CCVO and ECVO took an active role on behalf of the sector and the government agreed to include the sector in the first round. Quasi-governmental organizations such as hospitals, universities and colleges, while non-profit, were not included in the scope of the strategy.

Process and engagement

In January 2007, CCVO and ECVO contracted a writer with financial support from Alberta Employment & Immigration. The writer prepared a discussion paper as a forerunner to the eventual strategy document incorporating existing sector information. CCVO and ECVO held stakeholder consultation sessions in early 2007 in each of their two cities with a further consultation session held in Red Deer in the spring. Ongoing and informal dialogue also took place with individual sector representatives. As various drafts of the strategy document were prepared, CCVO and ECVO sought feedback from key provincial sector groups as well as from the HR Council. A final draft was completed by fall 2007 and distributed to stakeholders for feedback. Symposia were held in Calgary (November 2007) and Edmonton (December 2007) to present the report to community stakeholders and solicit organizations to sign up as contributors for one or more actions.

The provincial government assisted by facilitating the overall process, reviewing report drafts and providing advice on how to achieve compatibility with the government's framework for the reports. Alberta Employment & Immigration's Labour Market Partnerships Program had an easily accessible pool of funds set aside to support the sectors in the development of their own strategies. This provided funding for the writing contract although no funds were available for strategy development or stakeholder engagement, other than for meeting costs.

Product

A Workforce Strategy for Alberta's Non-Profit and Voluntary Sector

The report followed the standard provincial framework for all sector strategies and had several actions grouped under the four strategy pillars of Inform, Attract, Develop and Retain. The

provincial government assumed responsibility for publishing and printing the report (5 000 copies) and for organizing its public launch. The strategy was released on April 28, 2008 at the Calgary Zoo. Government officials attended and spoke along with key sector representatives.

Implementation

An implementation process and organizational structure is presently under consideration. A February 2009 CCVO communiqué provided an update to the sector about forming a provincial non-profit workforce council and indicated that three-year funding has been provided by the provincial and federal governments for its development and operations. The proposed workforce council would act as a collaborative platform and a facilitator for further sector engagement and connection among the various regional and sub-sector initiatives that are taking place across the province.

4 Success Factors

The key measure of the non-profit sector's success in Alberta seems to have been the strategy document itself.

What success looked like in Alberta

The key measure of the non-profit sector's success in Alberta seems to have been the strategy document itself; the finalization and distribution of *A Workforce Strategy for Alberta's Non-Profit and Voluntary Sector*. Although there were many comments about how the process or document could have been improved, there was uniform concurrence that its creation and publication was a notable achievement, one largely credited in particular to the leadership shown by both the CCVO and ECVO.

All those interviewed agreed that the importance of striking while the iron was hot and benefiting from the alignment of forces that would contribute to forward momentum outweighed any gains that may have been realized by delaying creation of the strategy until appropriate preparatory work could be completed.

The fact that the province acted decisively on the federal devolution of labour force responsibility to the provinces and territories was itself viewed as a success. The creation of a provincial workforce strategy, linked to the Building and Educating Tomorrow's Workforce initiative, was viewed as a significant accomplishment and was demonstrative of a stronger relationship between the provincial government and the sector.

Contributing factors

As noted by one of the people interviewed for this project, there was “a happy confluence” of the opportunity, the people and the timing that all came together in Alberta. These contributing factors to the sector's success in Alberta are outlined below.

Non-profit workforce crisis

It was widely believed that the sector was in crisis due to Alberta's economic boom (2005-2008) and the accompanying generalized labour shortages. The sector had been experiencing difficulty in areas such as increased staff turnover rates and challenges in recruiting qualified staff, leading to the alarmingly high number of vacant positions and deteriorating working conditions.

The situation for the sector in Alberta was viewed as both “immediate and

critical.” There was readiness and motivation within the sector as well as within government and the public overall to tackle workforce issues. The perceived severity and impact of the issues had reached a critical mass that brought these issues closer to the top of government and sector agendas.

Provincial government commitment to workforce action

The BETW initiative was of fundamental importance in both setting the stage for action in the sector and then in supporting the initiative once action was underway. Benefits were perceived as both tangible and intangible. The cross-fertilization among industries was viewed as helpful and something that should continue to be pursued. The sector’s link to BETW also meant that its labour force needs had become a government priority. Tangible support included the availability of some data and information, document editing and review, as well as the provision of some early and easily accessible funding through the Labour Market Partnerships Program.

While this existing government initiative was key to the sector’s success, several interviewees identified that Alberta Employment & Immigration, in particular, was engaged, collaborative, supportive, easy to work with and “with us every step of the way.” This is notwithstanding a frequently expressed concern that the provincial format was not always suitable for the needs and realities of the sector. Government representatives who were consulted similarly asserted that the Building and Educating Tomorrow’s Workforce initiative itself had led to a “fairly unique” way of working within the provincial government as indicated by the initiative’s co-sponsorship by two ministries, the creation of cross-ministry and government/industry committees and the establishment of processes and structures to support ongoing stewardship and accountability at a high level.

Pre-existing joint government & non-profit sector table

The Alberta Nonprofit/Voluntary Sector Initiative (ANVSI) was frequently cited as a primary factor in the success of developing the sector’s workforce

strategy. That table served as a strong mechanism that was well positioned for action. ANVSI was seen as having the right combination of people (government and sector representation), experience as a group and existing legitimacy to move the strategy forward. As a group they had already invested in the cultural infrastructure required to develop an atmosphere of trust, openness and good working relationships among members. ANVSI also had previously discussed the sector’s labour force challenges and both sector and government members had a shared understanding about the issues and awareness of related initiatives within sub-sectors.

The existence of the ANVSI, as well as sector wherewithal are attributed as the reasons the sector “got on the [government] radar early”, and was then included in the broader, provincial BETW initiative. It was at an ANVSI meeting, for example, that the Assistant Deputy Minister of Alberta Employment & Immigration was approached to move up the schedule for involving the sector in the industry-specific strategy development process. The sector’s inclusion on the schedule in the first place was, at least in part, due to individual ANVSI members’ provision of information about the scope and economic impact of the sector to government.

Strength and commitment of the sector

A fundamental contributor to the success of the initiative was the strength and commitment of those working within the sector, with the following factors identified as components of the sector’s strength.

Sector wherewithal was a term used by a government representative to indicate that even without much capacity, given some opportunity the sector has competencies and attributes that allow it to move forward and get things done. Some of the challenges provincial staff experienced in working with other sectors, for example, the need for fairly hands-on support in areas such as convening meetings and facilitation, were not ones required by the sector. An e-mailed comment by one government official during the process points to the sector’s strengths: “Your sector must be commended on how it has taken ownership and is moving along on the sub-strategy [industry-specific] work. A role

model for other sectors to follow!”

Various sub-sectors had already done significant work on their own labour force issues. This work was cited as significant input to the creation of a sector strategy overall. Further, the Calgary Chamber of Voluntary Organizations, the Edmonton Chamber of Voluntary Organizations and, and to a lesser extent, Volunteer Alberta, were frequently identified as critical to the creation of the workforce strategy, due in part to their mandates which enabled a focus on this type of work. In addition to these organizations, individual champions, both within government administration and within the sector itself, were acknowledged as essential in first positioning the work for success and then in moving it forward.

Those leading the process initially sought to engage as diverse a group of stakeholders as was possible, from large social service organizations with a primarily paid labour force, to smaller arts and

recreation groups, to faith communities. The symposia and public strategy launch event were viewed as inclusive and useful, with the two sponsoring government ministers also modeling the collaborative spirit by sharing the spotlight.

While each of the above areas were commonly cited as paving the way for sector’s success in completing a non-profit workforce strategy, the significance of the serendipitous timing requires emphasis. As one interviewee pointed out: “We were ready to be lucky.” This speaks to the earlier-noted alignment of forces and perhaps more importantly, the recognition that the timing was right and the decision to seize the opportunity.

Finally, it was pointed out that the HR Council for the Voluntary and Non-profit Sector was instrumental in integrating a national perspective through reviewing strategy drafts and also in lending national credibility to the initiative.

5 Challenges

A common perception among interviewees in the non-profit sector was that the sector was not as well-organized and had a lower profile and perceived level of importance to the province.

All people interviewed spoke about challenges or elements of the workforce strategy development process and the resulting document which were not ideal and which other provinces and territories should be aware of before embarking on a similar venture. The issues noted below are the ones frequently identified by those interviewed, although there often were varying perspectives, which are indicated as appropriate.

A common perception among interviewees in the non-profit sector was that the sector was not as well-organized and had a lower profile and perceived level of importance to the province, than those sectors the government initially targeted to develop workforce strategies. The perception was that other industries were well-organized and resourced, had comprehensive data and a clear sector voice to inform government and industry stakeholders about the state of their industry workforces, and were well positioned to implement their strategies. In reality, interviews with government representatives indicated there was not such a clear dichotomy between the sector and other industries. The Government's perspective was that issues existed in all sectors that developed workforce strategies, including a consistent lack of sector organization, and that the non-profit sector demonstrated sophistication and resourcefulness in dealing with its challenges.

Congruence with provincial initiative

The alignment of the sector's workforce strategy development with the broader provincial strategy was uniformly seen as a benefit. However, there were also some limitations associated with achieving congruence.

All industry workforce strategies were required to have the same general structure and format as the *Building and Educating Tomorrow's Workforce* document and with each other. They needed to be structured around the four pillars of Inform, Attract, Develop and Retain, and all strategies needed to have the same look and feel. Many interviewees noted that the sector has fundamental differences when compared to other industries and that this requirement was like putting a square peg in a round hole. For example, if proposed strategies did not fit any of the four pillars, they may have been deleted rather

than trying to force fit them. As well, some strategies had to be combined and made more general in the interests of keeping the document succinct. Finally, it was necessary to include “contributors” (names of organizations next to each of the priority actions) despite the contention that the structure of the sector (i.e., no single umbrella organization such as the Retail Council of Canada) did not lend itself to naming official cross-sector groups who could assume responsibility for implementation.

Congruence with the provincial initiative also restricted the inclusion of issues which the sector believed required government action, along with sector action, to mitigate. The structure did not allow such issues to be included and nor could the notion of a sector-government implementation partnership be included. As one interviewee noted: “The structure forced us into making statements about what we could do, but with no capability to implement [these actions].”

The sector has a unique feature relative to other industries in that it makes extensive use of volunteers as part of its workforce. While not solely a congruence issue, a clear policy decision was made in concert with provincial officials to limit the scope of the strategy to the paid workforce. It was felt that if volunteers were included in the definition of labour force, it may diminish the critical importance of HR issues in the sector’s paid workforce and its services in the view of the public and politicians, i.e. “it’s nice to have – not necessary to have.” While this decision resulted in a more uniform approach with other sectors and contained the breadth of the strategy, it did not give full attention to the importance of highly skilled volunteers, nor to the growing concept of integrated HR planning.

There was also a sense of urgency to get the report done as quickly as possible in order to align with provincial timeframes. Some felt that this compromised foundational processes such as gathering research data, and affected the quality and usefulness of the resulting strategy document. It also limited the extent of engagement. On the other hand, this was a significant opportunity that had presented itself to the sector and most felt it was critical to put aside ideals and get on the train.

The product itself

Varying feedback was received about the strategy document itself. The range of opinions may have reflected differing views about the purpose of the document. Was it first and foremost a strategic plan that would guide future actions to clear, definitive and measurable results? Or, was it the beginning of a process that focused on engagement, the identification of stakeholders and the creation of networks to stimulate ongoing collective action? These two perspectives, as well as blending of these views, were reflected in much of the feedback about the strategy document.

Some of those who were interviewed expressed the view that the strategy did not incorporate primary sector data on the labour force. Provincial data would have been ideal, although national data would also have been beneficial. The result of this was the view that opinions, based on focus groups, formed the basis for the strategy and further, that some of the strategy’s assumptions are not verifiable.

On the other side of this issue, the sector was included in the first group of industry strategies relatively late in the process. There was a clear sense of urgency to be part of the provincial initiative and let the process unfold. While it would have been better to incorporate good research, if the sector had waited to obtain relevant data it would not have been part of the first group in the provincial process.

Coupled with this issue about the absence of data was a related concern that the final document contained activities that were not outcome-focused. There were no metrics against which the sector could measure its achievements. Other industry strategies also focused on activities rather than outcomes and it is only recently that questions have been raised about the need to incorporate outcomes. As one person commented, if strategies had started with an outcomes perspective, “we probably would still be working on them.”

Other comments suggested that the document could have gone further to incorporate ideas and data from other sub-sector strategies, such as the Alberta Council on Disability Services’ Workforce

2010. This would have made the report stronger and facilitated engagement. In addition, the document is primarily focused on urban issues to the relative exclusion of rural and regional concerns.

The process

Individual efforts and other initiatives set the stage for the sector's inclusion as part of the first group of industry sector strategies. With that decision made by government, towards the end of 2006 the CCVO and ECVO were approached to lead strategy development on behalf of the sector. While there was general concurrence about the appropriateness and benefit of having these capacity-building organizations take on the coordination, there was also some questioning about how the discussions had started at one table (Alberta Nonprofit/Voluntary Sector Initiative) but responsibility for strategy development was given to other organizations and the assertion that there needed to be greater transparency around transitions like this.

The strategy development process was coordinated primarily by the CCVO and ECVO. While that was seen as an efficient and streamlined way of keeping the process moving forward, it was also considered to be somewhat limiting in terms of representation. Some suggested that a formally structured steering committee would have been a more inclusive approach to guiding strategy development and that this type of foundational structure may also have provided a vehicle for implementation.

The process also needed to be iterative, as the necessary foundational work had not been done in areas including relationship building and identifying key players and networks in various regions across the province. In many ways, the sector needed to build and implement the process simultaneously. There was no single umbrella organization that was responsible for leading the strategy development, just as there was no single umbrella organization in Alberta that spoke for the sector. Those interviewed pointed out that this work is not a one shot deal and nor can the product be a static document. It is a learning process and it can be lengthy and expensive work.

A larger issue underpinning some of these process dilemmas is how the sector sets the foundation

for and manages collaborative tables. Issues were raised around what happens when members of a collaborative are wearing different hats and there is the need to determine what is collaborative work and what is [an individual organization's] mission work. The line is not always clear. There are not always processes in place to have discussions about these issues. One interviewee noted that this type of work is "messy", the process rules are not always defined, the opportunity for the discussions is not always available, nor is the path to meaningful change clear.

Engagement

Stakeholders were engaged to inform the strategy document and to help establish networks and contacts for future implementation and coordination. In developing their approach to engagement, CCVO and ECVO wanted to be cautious about how much they asked groups for information about issues and solutions when much of this material was already available in other publications and documents.

The consensus was that engagement was less than ideal. Both sector and government representatives wish they had more extensive engagement and had been more inclusive, especially when considering geographic diversity, people with disabilities, First Nations and ethno-cultural groups. The geographical limitations were primarily due to limited time and lack of funding to develop and support this process. In retrospect, a couple of interviewees noted that the regional network of Alberta Employment & Immigration could possibly have been used to enhance the engagement process.

The perceived HR crisis in the sector was both a driver and possibly a detractor to the engagement process. While acute labour force concerns and the profile of these concerns may have brought front line organizations to the table initially, that same condition prevailed in limiting ongoing and sustained involvement. There were too many serious operational issues to allow many front line organizations to focus on high-level strategy development that may not have direct and immediate benefits for them.

Engagement may also have been impacted by what several people referred to as confusion about “what strategy was what.” There were several different, although related, sector initiatives taking place, and it was often not clear which strategies were addressing what issues or even that they were different initiatives. This lack of clarity likely also impeded the ability of umbrella associations to engage their own constituents in the process.

Implementation

A Workforce Strategy for Alberta’s Non-Profit and Voluntary Sector was finalized in early 2008 and publicly launched in April 2008. Since that time, implementation has been the primary focus for the sector’s workforce strategy and steps have been taken to develop a structure and process to facilitate this through a provincial workforce council for the sector. This process continues to evolve, although there has been mixed feedback about the wisdom and need to establish another structure.

A common refrain during the interview process was: “Now what?” and “Who’s going to actually do all this work?” The sector does not have a single umbrella organization that speaks for and can act on behalf of the sector so there is not an obvious entity that has been able to automatically assume responsibility for implementation. CCVO and ECVO have been providing coordination and leadership for these implementation discussions.

The process and act of attaching names of organizations to the individual strategy actions as required by the provincial government was considered to be ambiguous. It was not clear at the time what it meant and how this would facilitate implementation. Feedback from interviews suggests it still is not clear. Did this signify some level of responsibility for implementation and if so was it reasonable for service providers to be charged with that responsibility? It appears that the official intent of the term contributor was only to indicate interest, support and possibly some current activity around an action.

Some expressed concern that the process had apparently “stalled.” The report was released almost a year ago and there has been little discernable activity or results around implementation. The perceived crisis and public urgency to address labour force issues in the sector may also have diminished with recent economic concerns. Some worry that the sector may have lost the momentum to marshal significant effort by, and on behalf of, the sector. An alternative perspective is that the workforce issues are still present, although perhaps less evident and urgent, and that this is an ideal time to address long term issues and undertake initiatives such as training for the future. In any case, those interviewed frequently noted that more attention should have been paid to implementation from the very outset of the process.

6 Essential Components for Success

A common perception among interviewees in the non-profit sector was that the sector was not as well-organized and had a lower profile and perceived level of importance to the province.

The following section synthesizes the thinking of those most involved in the development of the workforce strategy and highlights six elements considered as critical to achieving a successful outcome. The success factors are dealt with at a fairly high level in that there clearly is no one right way to do this work; there are too many variables for a more prescriptive approach. Each province or territory is likely to have its own unique set of circumstances that impact all areas of non-profit workforce strategy development, from the initial driving impetus, the organizational structure of those leading the way, the design and evolution of the process used and the scope, depth and purpose of the product.

Success factor #1

Start now

Although the entry point for action to deal with labour force issues is likely to differ, perhaps the most important consideration is that with the responsibility of provincial and territorial governments in this area, it is an opportune time for each jurisdiction to move forward in dealing with non-profit human resources issues.

Success factor #2

Align with broader initiatives, but know what you're getting into

Linking to a government-sponsored initiative can be of critical importance. However, it is also vital to carefully consider the benefits and pitfalls of linking a sectoral workforce strategy with a broader, province-wide initiative. Explicitly identify and assess both the opportunities and constraints of being part of a bigger initiative as early on in the process as possible.

In Alberta, the benefits of the link with the *Building and Educating Tomorrow's Workforce* initiative included borrowed credibility, government funding and

assistance, political support and higher-level visibility. Limitations included a somewhat constraining format and content expectations and timelines that were designed to meet government's agenda, rather than that of the sector. Although nobody interviewed felt that the sector should have turned down the opportunity to be connected with BETW, an early, more explicit examination of the offsetting constraints may have better positioned the sector to negotiate concerns with government or otherwise mitigate the limitations.

Success factor #3

Be clear about the purpose of the strategy

Other provinces and territories would benefit from being clear at the outset, as well as the initiative evolves over time, about the purpose and the scope of their workforce strategy. This includes consideration of whether the plan is intended to be a formal one with clear and measurable outcomes, and also clarity about the planned scope of the strategy, including which organizations it is intended to benefit.

Many of the challenges faced by the sector in Alberta as it developed its workforce strategy were rooted in differing assumptions and understandings of the purpose of the document, differences about what the purpose of the strategy should have been, and now that it is finished, how the document should be used as the sector moves towards implementation.

Success factor #4

Build the foundations, preferably at the beginning

An action orientation needs to be balanced with ensuring adequate attention is paid to critical foundational work needed for a solid strategy product and strong process. In Alberta, there continues to be some level of tension between the common sense and rational approach of doing things in order, i.e. the foundational work first; and, alternatively coping with, or even capitalizing on, the inherent

'messiness' of the work. Presumably there are jurisdictions that are in a position to do important foundational work now, with a view to later strategy development. While people understandably want to see action and results, one interviewee also noted that, "we do things with duct tape and haywire; if we backed up and organized ourselves...we could address the issues head-on."

Foundational process considerations include establishing rules of engagement and problem-solving mechanisms, exploring alternative models of leadership and clarifying how transition processes will be handled.

Underlying product considerations include understanding the sector, ensuring the availability of provincial workforce data and first learning from sub-sector initiatives and models used in other provinces and territories.

Finally, the need for leadership and champions, both in the sector and in government, was also frequently stressed in interviews as being an important foundational asset in moving the work forward.

Success factor #5

Engage with purpose, communicate and help connect the dots

Engagement with sector representatives should be purposeful and inclusive based on the objectives of the intended strategy; ongoing communication and deliberate attention to connecting the dots is paramount.

If the intended target of the strategy is primarily larger employers, consultation with primarily volunteer-based organizations either is unnecessary, or should be limited to a very particular area of focus. Engagement also should include rural representation, people with disabilities, First Nations and ethno-specific communities, as appropriate to the purpose of the strategy. Further, as noted earlier in this report, the breadth and 'messiness' of a province-wide workforce strategy results in the need to connect the dots among a variety of evolving, pre-existing and related initiatives.

Success factor #6

Start with the end in mind

Other jurisdictions would benefit by explicitly incorporating implementation considerations at the outset of the initiative.

Obviously, no jurisdiction intends to develop a workforce strategy that results in a completed document that sits on the shelf. In Alberta, many of those interviewed were looking for timely action, the sooner the better, to ameliorate the problems being experienced. It was felt that the sector would have been more successful in making the transition to the implementation phase if implementation had been a focus of planning, and perhaps parallel action, at the outset. Alberta has lost considerable momentum in the implementation of its strategy by having to cycle back (close to a year following the release of the strategy document) and consider questions such as: what sort of implementation organizational entity is appropriate and how can implementation be resourced; should aspects of the

strategy be prioritized and how can this be done; should outcome measures be incorporated; and, how to ensure that the workforce strategy continues to be relevant based on changing conditions.

Note:

Since the commissioning of this document, the Alberta Nonprofit and Voluntary Sector Workforce Council (Alberta Workforce Council) has been established. This new council will connect key networks and organizations in Alberta to address common workforce issues in the non-profit sector. The Alberta Workforce Council will coordinate the implementation of the *Workforce Strategy for Alberta's Non-Profit and Voluntary Sector*.

For more information about the new Alberta Workforce Council, please contact Mike Grogan with the Calgary Chamber of Voluntary Organizations at mgrogan@calgarycvo.org or Mandie Abrams with the Edmonton Chamber of Voluntary Organizations at workforcestrategy@ecvo.ca.

Appendix 1: Stakeholders Interviewed

Rhonda Barraclough
Executive Director
Alberta Association of Services for Children and Families

Val Mayes
Former Executive Director
Edmonton Chamber of Voluntary Organizations

Christine Couture
Assistant Deputy Minister - Strategic Policy Coordination
Alberta Government - Executive Branch

Yvonne Martodam
Manager, Workforce Councils
Alberta Council of Disability Services

Russ Dahms
Executive Director
Edmonton Chamber of Voluntary Organizations

Shari Narine
Contract Writer
Workforce Strategy for the Non-profit and Voluntary Sector

Eldon Emerson
Manager, Human Resources Initiatives
Muttart Foundation

Liz O'Neill
Executive Director
Big Brothers/Big Sisters, Edmonton & Area

Caroline Fairbrother
Regional Director - Calgary Region
Alberta Employment & Immigration

Zarelda Reghelini
Senior Manager - Industry Liaison Coordination
Alberta Employment & Immigration

Mike Grogan
Director, Workforce Development
Calgary Chamber of Voluntary Organizations

Keith Seel
Director
Institute for Nonprofit Studies – Mount Royal College

Jane Hirst
Regional Executive Director
Boys and Girls Clubs of Alberta

Katherine van Kooy
President and CEO
Calgary Chamber of Voluntary Organizations

Karen Lynch
Executive Director
Volunteer Alberta

Appendix 2: Interview Guide

Questions to outline the process/outcomes i.e. "the facts":

1. Project evolution & initial planning:
 - Help us better understand what steps were taken to put together a process and then move it along?
 - What 'pre-cursor' projects/events to the 2007 meetings may have been involved?
 - What was the impetus for the project? (i.e., government policy, sector-driven, combination)
 - Who played key roles in getting it underway? In government? In the community?
2. Stakeholder identification & sector engagement:
 - How was sector identification and engagement done?
 - Who participated?
3. Outcomes & final report:
 - What was the product produced and how has it been used to date?
 - How did the elements in report content get generated, prioritized and finalized?
 - How was implementation anticipated to occur?
4. Implementation:
 - What do you see as the next steps in how the strategy document is used?
 - What progress has been made?

Questions to highlight learnings to share with other jurisdictions:

5. What aspects worked well and should be considered by other jurisdictions?
6. What could be done differently by other jurisdictions? What aspects are likely unique to Alberta's experience and may not be transferable?
7. What elements are essential to be successful? How critical were the following elements: e.g., stakeholder motivation and buy-in, initiative champions, funding, existence of related initiatives, government policy & involvement, sector involvement, harmonious collaboration, representative structures in place, timing?

HR Council for the
Voluntary & Non-profit Sector