COLLABORATIVE SOLUTIONS TO HR CHALLENGES IN OTTAWA'S SOCIAL SERVICES SECTOR

OCF REPORT
ON PROPOSED NEXT STEPS
DECEMBER 2022

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1. INTRO

In June 2022, the Ottawa Community Foundation (OCF) and senior representatives from over twenty local social service organizations initiated the New Leaf Community Challenge on Human Resources (NLCC-HR) via a preliminary discussion about HR challenges and possibilities for local collaboration to address them. On August 25, over 50 participants engaged in an open-invitation Solutions Lab for EDs and heads of HR, to further develop the thinking on local solutions. Please refer to the **Facilitator's Report** and its appendices for details on that session and its outcomes.

REPORT

This document proposes a way forward that builds on the learnings to date. We welcome input from sector leaders not only on specific solutions of interest, but also on continued development of a collaborative process that has sufficient promise of positive impact to warrant the effort we will all need to make. This input will help shape both the current work, and future New Leaf Community Challenges.

If you want to take a leadership or supportive role on an initiative, or if you would just like to be kept in the loop and are not sure you are already on the list, please email raird@ocf-fco.ca. Involvement in next steps is open to any organization in Ottawa's social services sector – not contingent on having participated in the August Solutions Lab.

2. CONTEXT

Broad social, economic and demographic dynamics pose significant HR challenges across all sectors.

Layered on this, additional systemic issues related to wages, benefits and stability of employment confront the not-for-profit sector, and social services specifically. As many have pointed out, these issues in turn relate to inadequate core funding for organizations in the sector.

These long-standing but increasingly debilitating realities do need to be tackled at broad societal levels. But the working assumption of this process – validated by many key players within the sector – is that organizations in Ottawa can collaborate locally to address some dimensions of the HR challenges they face.

The engagement to date highlights great will to collaborate to make the social services sector among the most appealing employment sectors in Ottawa. As participants at the August Solutions Lab noted: *The overall focus should be on attracting and keeping people in the sector, not just*
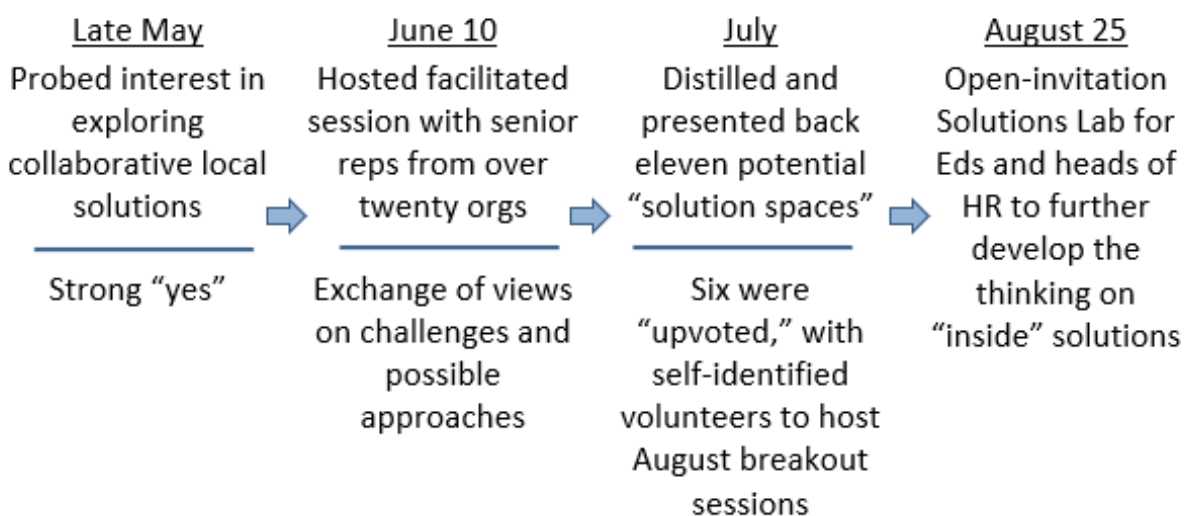
in our organizations. This involves making a strong case for and highlighting the value of working within the social services sector. Of course, beyond promoting the reward of meaningful work, it is well understood that attention is needed to conditions of employment.

We acknowledge the complexity of the issue. A sentiment that threaded through the discussion on August 25th was the need to explore solution spaces more deeply. And perhaps an associated hesitancy around moving forward on specific possibilities in advance of that deeper exploration. At the same time, the issue is pressing and momentum for collaboration is hard to maintain without some tangible opportunities for progress.

So, the proposed next steps include both advancing specific initiatives, <u>and</u> continuing to shape a process for ongoing, deeper progress. These ideas are open to amendment and additions. What ends up being "actioned" will depend on what initiatives are championed by sector players, and which of these the sector discerns to be most productive.

3. WHERE WE'RE AT AND WHAT NEXT

Quick recap on process to date

Late May	June 10	July	August 25
Probed interest in exploring collaborative local solutions	Hosted facilitated session with senior reps from over twenty orgs	Distilled and presented back eleven potential "solution spaces"	Open-invitation Solutions Lab for Eds and heads of HR to further develop the thinking on "inside" solutions
Strong "yes"	Exchange of views on challenges and possible approaches	Six were "upvoted," with self-identified volunteers to host August breakout sessions	

Core assumption

SOCIAL SERVICE ORGANIZATIONS IN OTTAWA CAN COLLABORATE TO MEANINGFULLY IMPROVE THE RECRUITMENT, RETENTION, EFFECTIVE DEPLOYMENT AND SATISFACTION OF STAFF IN THE SECTOR.

Intent

TO IMPLEMENT SOME TANGIBLE ACTIONS IN THE SHORT TERM, WHILE CONTINUING TO BUILD A LONGER-TERM COLLABORATIVE PROCESS

What's Next – OCF's Job

- Support the further development of selected initiatives
- Host/enable potential funding channels including the Community Services Recovery Fund and a NLCC funding forum
- Work with the sector to define a process for <u>ongoing</u> collaboration on further solutions, and determine what OCF can do to support it

What's Next – Sector's Job

- Provide feedback on the process as outlined in this report to shape how we move forward
- Develop selected proposals (see Section 4 and Appendix)
- Engage in the ongoing work -- implementation of selected initiatives plus ongoing collaboration

4. MAKING PROGRESS ON SPECIFIC INITIATIVES

4.1 Getting to Actionable Proposals on Specific Initiatives

The Appendix at the end of this report summarizes some ideas that have emerged from the work so far. It is not meant to be a limiting list. Other ideas are welcome. Also, growing existing collaborative initiatives is as legitimate a focus as starting new ones.

The next step of developing proposals for the implementation of specific initiatives will require:

1. One or more "champions": Someone interested in leading on the development of a proposal and budget.
2. Additional "supporters": Other organizations that see the value in the initiative, and some that are actively interested in contributing to its development and implementation.

If you would consider either a champion or a supporter role on one of the initiatives outlined in the Appendix – or another initiative of interest -- please get in touch at raird@ocf-fco.ca.

Playing a lead does not mean doing all the work to get a proposal developed. OCF can provide some seed funding to enable the lead(s) to engage expertise to help with research, with partnership-building, with strategy and workplan development, and/or with proposal preparation. We could also assist with some convening to engage potential partners/contributors in fleshing out the idea.

Timelines to implementation will vary depending on the nature of the initiative. In some cases, the proposal might be to launch the initiative, or it might be for further research, partnership-building or other preparatory work to get to launch. Notionally, we are looking for proposals that address what needs to happen to make significant progress over a one-year timeframe.

It is evident, given the diversity of organizations (types of issues and clients, organizational size and capacity, funding structure and sources, etc.) that not everything worth doing is going to benefit all or even most organizations, especially not in the short term. But to "rise to the top," an initiative that starts with a small number of organizations should have the potential to scale up or scale out.

4.2 Funding for Implementation

There are currently two possible funding channels for proposed initiatives. The most immediate is the Community Services Recovery Fund. The OCF will receive a portion of this fund for organizations in Ottawa. The application deadline is February 21, 2023.

The second is a New Leaf Community Challenge Funding Forum in late May or early June, once the CSRF funding decisions are known. This forum will differ from previous NLCC events in that what gets funded will be determined by sector interest, and by the funders who participate.

OCF will provide NLCC funding for implementation of promising proposals. The level of engagement of other funders cannot be predicted at this point. But assuming robust proposals emerge, OCF will work to build collaboration on the funder side as well.

We also recognize that proposed initiatives are unlikely to become fully or sustainably operational with a single year of funding. We enter this process with an intention to continue to support initiatives that have achieved lift-off but are still on their way to cruising altitude.

5. AN ONGOING COLLABORATION

There was clear interest expressed at the August Solutions Lab in ongoing exchanges and in exploring further collaborative possibilities. Some preliminary suggestions were floated – e.g., an annual summit, a paid advisor for the sector – but the format and the focus for an ongoing process remains to be determined. We propose reconvening to determine where the interest lies, and to look at options to meet the interests, following the NLCC Funding Forum in the Spring.

APPENDIX: SOME EMERGENT INITIATIVES

Table of Contents for Initiatives

Preamble

The possible solutions included in this appendix are not intended to be a limiting list. If there is something else you'd prefer to work on – or if you want to either combine or pare down any of the initiatives described below -- let us know. If you are part of an existing collaboration that you want to expand, that is also fair game. How we collectively land on which initiatives – if any -- end up moving forward is outlined above in Section 4 of this report.

For initiatives where more detail emerged at the August 25 Solutions Lab than can be summarized here, there are cross-references to the **Facilitator's report and associated appendices.**

A final general note. It was strongly acknowledged at the August Solutions Lab that diverse employees in the sector need to have a voice in solutions intended to address HR challenges in the sector. Appropriate ways of doing this can be built into the development of any initiatives that move forward.

1. A Leadership Community of Practice

The intention to build excellent workplace culture is widely shared among leaders in the sector. Indeed, a sector-wide reputation for excellence in workplace culture could be a deliberately cultivated attribute that, along with purpose-fulfilling work, could at least partially counterbalance the reality that on the whole, the private and public sectors will continue to offer higher pay and employment benefits.

A community of practice for leaders in the sector is one way to support this intention. Enthusiasm for this possibility was expressed at both the June 10 and Aug 25 workshops. In fact, a June 10 participant immediately riffed off the expressed interest, and a few informal ED gatherings have already been held. There might be value in a more structured network and approach to leverage peer learning and to engage mentorship and training.

2. Support for on-boarding and sustaining "non-traditional" staff especially those with lived experience

Many organizations already employ staff with lived experience. These staff may be hired for specific and specialized peer-support programs, as part of a more generalized staffing plan, or just because a lot of folks who work in the sector have lived experience. The benefits are significant. But the challenges are also real. As one participant noted, someone who has been or even still is street-involved or addicted may not fit seamlessly with organizational culture, operational demands and administrative responsibilities.

Some organizations have developed substantial expertise in on-boarding, in on-the-job support, and in adapting employment conditions and systems. So, one scenario might be for an existing

organization with expertise to be supported to develop the capacity to educate/train/support others.

3. Access to collective "self-care" for front-line staff

Professional development and employee benefits are key staff retention issues in the sector and are addressed under some other potential initiatives on this list. But the pandemic elevated the critical need for self-care to avoid burn-out and improve retention, particularly among staff delivering front-line services. Staff with health benefits may have the option to access support on an individual basis. But staff in some organizations do not have paid benefits. Moreover, recent initiatives in Ottawa are proving the case for approaches and activities where peers explore, experience and restore together. Although there is no quick path through to sector-wide, accessible and diverse supports for self-care, it might be possible to improve access to collective experiences to support mental, emotional and spiritual well-being.

4. Staff-sharing between a small number of organizations

There are existing instances where two or more organizations either deliberately share staff to meet managerial or administrative needs, or independently employ a single individual thereby in effect enabling full time employment. There may also be examples of deliberate cross-deployment of program/front-line staff; though it is undoubtedly more common for front-line staff to independently piece together work for different agencies to make ends meet.

Regardless of the model and focus, staff-sharing is of course not a "system-wide" solution. But if there is interest in exploring, implementing and evaluating a few shared staffing opportunities, this could result in an experience-base and perhaps a play-book on when to do it and how to do it well that could be of broader benefit.

In a related vein, some organizations may have capacity or expertise in excess of need on either a predictable/regular or on an occasional basis. For example, a full-time accountant or comptroller with a larger social service organization might have capacity to also cover modest accounting needs for a small organization. If this seems worth investigating, a first step could be a survey to determine whether there its potential. And if so, next steps could involve exploring/developing mechanisms (e.g., a platform) to enable staff-sharing or service offerings. Refer to Topic 5 in the Facilitator's Report and Appendix D for some further thoughts.

5. Shared recruitment activities

Refer to Topic 5 in the Facilitator's Report and Appendix D for more detailed thinking on how to improve the "pipeline" of candidates for organizations in the sector. Various ideas were explored including creating inclusive job exploration events that attract candidates from beyond the typical range (the Ottawa Aboriginal Coalition's Nov 3 job fair was noted as an example), and a platform to enable cross-referral of candidates between organizations. (This latter idea potentially overlaps with the platform for staff/service-sharing function discussed above.) The possibility was also raised of leveraging an existing employment-focused not-for-profit to provide recruitment services.

The Ottawa Disability Support Network/Réseau des services en déficience intellectuelle d'Ottawa (ODSN) is a collaborative of 18 Developmental Services agencies. ODSN already does some training coordination for its member agencies. The ODSN's HR Strategy Working Group is now working on a regional approach to recruit and match the right employees in organizations within the adult developmental service sector and deliver training/coaching and other retention

supports. They plan to hire a collectively funded project coordinator. (See "learning opportunity" note on the next page.)

6. Coordinated Training and Other Professional Development Opportunities

Refer to Topic 3 in the Facilitator's Report and in Appendix D for more detail on this area of opportunity.

Informal/occasional joint training initiatives are not uncommon. The potential benefits of more coordinated training and PD include reduced costs, increased/improved PD opportunities, and the evolution of cross-organizational communities of practice with associated potential for mutual teaching/learning.

Various possible approaches (not mutually exclusive) could be explored, such as:

- Centralized coordination by a dedicated organization: One example is the above-mentioned training coordination by the ODSN. In a different vein, Volunteer Ottawa offers workshops for its members, and "learning path" programs for early career employees.
- A shared platform (app): A range of functions could be accommodated e.g.: posting upcoming training opportunities; enabling sign-up; assessing potential interest in a particular training; sharing reviews of training.
- Leveraging training offered by employers in other sectors: A specific idea was to engage the City of Ottawa to share opportunities for NFP sector employees to participate in relevant training offered to municipal employees.
- Systematizing and elevating secondment opportunities: Secondments are a way to provide opportunities for learning and career advancement to employees, and potentially to enhance

learning/understanding across sectors (e.g., via more flexible and generous exchange programs for experienced public sector employees who wish to gain more experience in the NFP sector).

7. Centralized shared services

Refer to Topic 4 in the Facilitator's Report and in Appendix D for more detail on this area of opportunity.

Beyond the potential to collaborate on HR-related shared services, there is the model of a common service provider that offers a broader suite of "backbone" functions – e.g., financial management, HR recruitment and training, scheduling, procurement, payroll, data management, property management, evaluation.

The Ottawa Shared Services Organization (OSSO) was discussed at the August 25 Solutions Lab. It was recently founded and currently offers in-depth financial and administrative services to its 3 founding member organizations. Thrive Group in Hamilton is another example of an administrative backbone for four member organizations that also offers a suite of back-office services to about a dozen other organizations.

> *Please contact* JessicaMartineau@tceottawa.org *if you are interested in attending a session to learn more about ODSN's HR Strategy Working Group, and OSSO's structure, operation and plans. (This is an open invitation, not contingent on intention to further engage in the current process.)*

There are also numerous examples of other more specifically-focused shared services. The Ottawa Coalition of Community Houses provides some capacity-building, evaluation and advocacy support to its members. The Social Planning Council of Ottawa offers some services -- including data analysis and impact evaluation -- on an as-requested

basis. It also provides administrative and fundraising support to numerous very small organizations that serve specific diverse populations.

There might be value in assessing the willingness and capacity of some existing shared service organizations to serve more organizations; and in exploring how to best service different subsets of organizations. Ability to provide efficient and effective shared services may require a focus on organizations providing similar services, or organizations of a comparable size or with similar funding arrangements.

8. Strengthening Sector Advocacy for Good Work

This was Topic 1 at the Solutions Lab, so considerable detail can be found under that topic in the Facilitator's Report and Appendix D.

Though the concept of "decent work" is multi-dimensional, the expressed intention here is to engage funders of Ottawa services to adapt their funding approaches to better enable organizations to offer decent pay, reasonable stability of employment, and benefits.

The paucity of core funding is a root issue. But other dimensions and opportunities were identified at the Solutions Lab. In addition, though it proved hard to get traction on the idea of shared funding for staffing (Topic 2 at the Lab), there might be options worth considering as part of a broader engagement on funding approaches: For example, a funder-sponsored but sector-managed fund that could be used to bridge salary gaps, or to extend an internship beyond the period covered by the initial funding program.

9. Economies of scale in benefits packages

Funding issues are critical to the ability of organizations in the sector to offer meaningful benefits. But another way to improve that ability could be to negotiate benefits collectively; or join an existing pooled benefits program. For example, the Ontario Nonprofit Network offers an employee benefits program to ONN members. There may be other options.

The need for a robust analysis of benefits packages was a key activity identified under Topic 1 at the Solutions Lab. It was noted in at least a couple of separate discussions at the Solutions Lab that unique, customizable, and flexible benefits are needed to reflect the diversity of needs of staff. Research into what employees need and want would be foundational to pursuing a collective approach to benefits.