Working in the Social Economy Symposium

The Work and Learning Network

Tuesday, 27 April 2010
1:00 pm to 4:00 pm

University of Alberta
Faculty of Extension
Enterprise Square
Edmonton, AB
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Moderator Jorge M. Sousa welcomed the participants, and thanked them for coming out to what is expected to be a very interesting afternoon.

**Stuart Wulff - BALTA**

People come together to co-manage and co-create the research we do. Community and academic leads co-chair a number of committees as we try to bring research closer to the community. It’s not perfect, but it’s a different model, with a steep learning curve. We are now getting to the point where we’re starting to develop a body of research that reflects that co-creation.

**Alison Taylor – the Work and Learning Network**

The Work and Learning Network represents a diversity of partners from the fields of education, government, and the private sector. Issues related to work and learning bring us together. Every year we host series and symposia such as this one. We have a very active advisory board who make suggestions for sessions and speakers.

Recent topics looked at initiatives for supporting settlement and integration of new immigrants and at workforce planning in different areas. In the fall we’ll be looking at temporary foreign workers in Alberta and Manitoba.

I’d like to take this opportunity to thank Jorge Sousa, Mandie Abrams and Julie Salembier, who’ve filled vital roles in the organization of this symposium, and also graduate research assistant, Elizabeth Vergis. Today we can look forward to hearing different perspectives about the social economy.

**Jorge Sousa – the Work and Learning Network, BALTA**

Today’s proceedings are being recorded, and will be available live, on-line, across the country. Following the symposium, the proceedings will be available online. Your questions and responses are being recorded; if you have concerns about that, please let us know after the fact so we can edit you out.

There is often a gap in our understanding as we look at work and learning in the social economy. We forget it is a unique workplace. We’re still looking at people as though they’re working “9 to 5,” but people working in the social economy sector may be working 70 hours a week rather than 40. A research gap has been identified as we try to understand the dynamics of what’s occurring in these organizations.

Today we look forward to hearing from our speakers and also from you, as active participants. Around the tables, we’ll examine the questions so we can begin to understand your experiences, and see what opportunities exist for further research so that we can progress onward, rather than just re-hashing the issues.
I have been working with colleague Lynda Ross, who lives in British Columbia and works in Athabasca. Today we’re presenting preliminary patterns, as we’re in the middle of a portraiture study rather than a significant university analysis.

Our goal was to develop a survey that looks at the scope and scale of the social economy in Alberta and British Columbia. The study will run until the end of this year. Today’s PowerPoint information is preliminary, based on a to-date (low) response rate of 16 percent.

One of the challenges we face is that many organizations don’t recognize themselves as being part of the social economy. We define the social economy as “a realm of economic activity—formal/informal, market/non-market—that supports social justice” and is more like a cooperatives or a credit union—that is, a social enterprise that uses market enterprises to achieve environmental and social objectives.

We contacted a number of umbrella groups, requested their contact lists, and built a master list on which 70 percent of the contacts are from British Columbia and 30 percent from Alberta.

Some generalizations (careful ones) can be made. Geographic clusters exist around Calgary, Edmonton, Vancouver, and Victoria, with sparse representation from the rural regions.

PowerPoint 1

**BC–Alberta Social Economy Portraiture Survey 2008-2010:**

**Some Preliminary Patterns for Working in the Social Economy Conference**

**Slide 1: Opening Slide with title**
BC–Alberta Social Economy Portraiture Survey 2008-2010:
Some Preliminary Patterns for Working in the Social Economy Conference

Mike Gismondi and Lynda Ross, BALTA/ Athabasca University
Table 1: SE Organizations Work Sectors by Province

<table>
<thead>
<tr>
<th>Sector</th>
<th>AB (%)</th>
<th>BC (%)</th>
<th>Total (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agriculture, Forestry, Fishing, Mining</td>
<td>26.1</td>
<td>17.0</td>
<td>20.1</td>
</tr>
<tr>
<td>Recreation/Tourism</td>
<td>20.5</td>
<td>22.8</td>
<td>22.0</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>5.7</td>
<td>5.3</td>
<td>5.4</td>
</tr>
<tr>
<td>Construction</td>
<td>4.5</td>
<td>4.7</td>
<td>4.6</td>
</tr>
<tr>
<td>Retail Sales</td>
<td>18.2</td>
<td>14.6</td>
<td>15.8</td>
</tr>
<tr>
<td>Wholesale Sales</td>
<td>5.7</td>
<td>5.8</td>
<td>5.8</td>
</tr>
<tr>
<td>Transportation/Storage</td>
<td>9.1</td>
<td>3.5</td>
<td>5.4</td>
</tr>
<tr>
<td>Finance and/or Insurance</td>
<td>8.0</td>
<td>11.7</td>
<td>10.4</td>
</tr>
<tr>
<td>Real Estate</td>
<td>2.3</td>
<td>6.4</td>
<td>5.0</td>
</tr>
<tr>
<td>Catering/Hosting</td>
<td>10.2</td>
<td>1.8</td>
<td>4.6</td>
</tr>
<tr>
<td>Health</td>
<td>22.7</td>
<td>15.8</td>
<td>18.1</td>
</tr>
<tr>
<td>Social Services</td>
<td>46.6</td>
<td>39.2</td>
<td>41.7</td>
</tr>
<tr>
<td>Arts and Culture</td>
<td>22.7</td>
<td>36.8</td>
<td>32.0</td>
</tr>
<tr>
<td>Communications</td>
<td>9.1</td>
<td>11.1</td>
<td>10.4</td>
</tr>
<tr>
<td>Professional Services</td>
<td>19.3</td>
<td>17.5</td>
<td>18.1</td>
</tr>
<tr>
<td>Technical/Scientific Services</td>
<td>2.3</td>
<td>8.8</td>
<td>6.6</td>
</tr>
<tr>
<td>Training</td>
<td>34.1</td>
<td>28.1</td>
<td>30.1</td>
</tr>
<tr>
<td>Administrative Services</td>
<td>5.7</td>
<td>7.6</td>
<td>6.9</td>
</tr>
<tr>
<td>Waste Management</td>
<td>5.7</td>
<td>2.3</td>
<td>3.5</td>
</tr>
<tr>
<td>Teaching/Education</td>
<td>43.2</td>
<td>32.2</td>
<td>35.9</td>
</tr>
<tr>
<td>Public Services</td>
<td>19.3</td>
<td>14.0</td>
<td>15.8</td>
</tr>
<tr>
<td>Other</td>
<td>42.0</td>
<td>21.1</td>
<td>28.2</td>
</tr>
</tbody>
</table>
### Table 2: Legal Form of SE Organizations by Province

<table>
<thead>
<tr>
<th>Form</th>
<th>AB (%)</th>
<th>BC (%)</th>
<th>Total (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not-for-profit organization</td>
<td>47.7</td>
<td>49.7</td>
<td>49.0</td>
</tr>
<tr>
<td>Not-for-profit corporation</td>
<td>18.2</td>
<td>15.2</td>
<td>16.2</td>
</tr>
<tr>
<td>Foundation</td>
<td>2.3</td>
<td>5.3</td>
<td>4.2</td>
</tr>
<tr>
<td>Society</td>
<td>33.0</td>
<td>36.3</td>
<td>35.1</td>
</tr>
<tr>
<td>Co-operative</td>
<td>14.8</td>
<td>4.7</td>
<td>8.1</td>
</tr>
<tr>
<td>Association</td>
<td>2.3</td>
<td>2.9</td>
<td>2.7</td>
</tr>
<tr>
<td>For-profit organization/corporation</td>
<td>2.3</td>
<td>5.3</td>
<td>4.2</td>
</tr>
<tr>
<td>Other</td>
<td>4.5</td>
<td>7.6</td>
<td>6.6</td>
</tr>
</tbody>
</table>

### Table 3: Paid and Unpaid Employment (Range, Median) by Province

<table>
<thead>
<tr>
<th>Type of Employment</th>
<th>AB</th>
<th>BC</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full-time (&gt; 30 hours/week)</td>
<td>0-162</td>
<td>0-2700</td>
<td>0-2700</td>
</tr>
<tr>
<td>Part-time (&lt; 30 hours/week)</td>
<td>0-114</td>
<td>0-240</td>
<td>0-240</td>
</tr>
<tr>
<td>Seasonal</td>
<td>0-36</td>
<td>0-90</td>
<td>0-90</td>
</tr>
<tr>
<td>Freelance &amp; Contract workers</td>
<td>0-20</td>
<td>0-292</td>
<td>0-292</td>
</tr>
<tr>
<td>Volunteers</td>
<td>0-2600</td>
<td>0-1580</td>
<td>0-2600</td>
</tr>
</tbody>
</table>
Table 4: Proportions of SE Organizations Providing Support to Other Organizations by Province and Type of Support Offered

<table>
<thead>
<tr>
<th>Type of Support</th>
<th>AB (%)</th>
<th>BC (%)</th>
<th>Total (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technical</td>
<td>20.5</td>
<td>31.0</td>
<td>27.4</td>
</tr>
<tr>
<td>Financial</td>
<td>22.7</td>
<td>24.6</td>
<td>23.9</td>
</tr>
<tr>
<td>Training</td>
<td>39.8</td>
<td>39.8</td>
<td>39.8</td>
</tr>
<tr>
<td>Capacity Building</td>
<td>36.4</td>
<td>49.1</td>
<td>44.8</td>
</tr>
<tr>
<td>Organizational Development</td>
<td>23.9</td>
<td>32.2</td>
<td>29.3</td>
</tr>
<tr>
<td>Research and Education</td>
<td>26.1</td>
<td>26.9</td>
<td>26.6</td>
</tr>
<tr>
<td>Advocacy and Promotion</td>
<td>37.5</td>
<td>39.8</td>
<td>39.0</td>
</tr>
<tr>
<td>Networking</td>
<td>48.9</td>
<td>52.0</td>
<td>51.0</td>
</tr>
<tr>
<td>Development</td>
<td>12.5</td>
<td>19.3</td>
<td>17.0</td>
</tr>
<tr>
<td>Other</td>
<td>12.5</td>
<td>7.6</td>
<td>9.3</td>
</tr>
</tbody>
</table>

Table 5: Revenues (Range, Median) for all SE Organizations

<table>
<thead>
<tr>
<th>Revenue Source</th>
<th>BC and Alberta Combined N</th>
<th>Median ($)</th>
<th>Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>Government Grants</td>
<td>118</td>
<td>200,000</td>
<td>$250 - $8.3 million</td>
</tr>
<tr>
<td>Loans</td>
<td>9</td>
<td>25,000</td>
<td>$5,000 - $400,000</td>
</tr>
<tr>
<td>Service Contracts</td>
<td>77</td>
<td>200,000</td>
<td>$200 - $17 million</td>
</tr>
<tr>
<td>Sales of Goods and Services</td>
<td>124</td>
<td>53,350</td>
<td>$258 - $239 million</td>
</tr>
<tr>
<td>Donations</td>
<td>116</td>
<td>31,650</td>
<td>$20 - $52 million</td>
</tr>
<tr>
<td>Investments</td>
<td>62</td>
<td>20,000</td>
<td>$5 - $8 million</td>
</tr>
<tr>
<td>Endowments</td>
<td>15</td>
<td>12,000</td>
<td>$100 - $600,000</td>
</tr>
<tr>
<td>Membership/Subscriptions</td>
<td>85</td>
<td>6,000</td>
<td>$15 - $3.42 million</td>
</tr>
<tr>
<td>Foundation Grants</td>
<td>64</td>
<td>60,000</td>
<td>$180 - $768,000</td>
</tr>
</tbody>
</table>
Survey respondents identified four main clusters/work areas within the sector (see Table 1):

- Social Services
- Arts and Culture
- Training
- Teaching and Education

Table 2 shows legal forms of social economy organizations by province.

How long have the surveyed organizations been in operation? Over 10 percent have been in operation for over 50 years, with the median operational time being 23.6 years. Most agencies have been in operation for about 19 to 20 years. They have a
membership base of over 3.5 million members, about 1/2 million in the smaller groups. We found it interesting that this many people are thinking about this way of organizing, of putting back into the social economy.

Table 3 shows paid and unpaid employment. More than two-thirds of organizations reported the participation of volunteers:

- 12% reported having no paid employees at all
- 10% relied solely on board members
- 7% relied solely on volunteers
- 13% relied on a combination of volunteers and board members only
- 24% employ people in target groups (such as women, the disabled)

The majority of volunteers work in fields such as teaching, education, and the social services.

Table 4 reports networking, cross-training, and inter-group support. Policy people are always interested in how much money organizations are making. Sixty-six percent indicated they were involved in some form of market-based activity. How much money do these organizations generate annually? In Alberta, about $375 million.

Table 5 shows capital budgets. In British Columbia, the mean annual capital budget is $278 million; in Alberta it’s $42 million a year. Total revenues are $630 million dollars.

The vast majority of profits are put back into the organizations, for growth and the expansion of operations.

We’ve also looked at democracy and gender. How many organizations have women on their boards? 46.6 percent. Over 90 percent have at least one female director. Five percent have boards consisting solely of women. Women play a stronger role in the social economy than they do in the public and private sectors.

Our response rate was 16 percent; we need a 30 percent response rate to convince policy-makers. This summer, in an attempt to get our response rate up, we’ll be working with three summer students and moving from online to telephone surveys. We’ll be working with the faith-based sector and the affordable housing sector, between Hope and Vancouver. One other study will look at financial support for the sector.

**Policy Context**

What does policy look like? Keep in mind that the non-profit sector is only one portion of what we refer to as the social economy. It is, however, a key sector, and many commonalities exist across the sector.
I’d like to begin by setting the context for developing strategy. Back in 2006, when the Alberta economy was charging ahead, with major workforce shortages and a great demand on employers for staff, the government developed a comprehensive labour/workforce strategy, for building and educating tomorrow’s workforce. It set out a framework for various government departments to address workforce issues. Desired outcomes were more workers, a better skilled and innovative workforce, and more innovative work places. The strategy had four major components.

**Inform**
- Ensure employers and industry have proper information to plan for the future, and that individuals have the correct information for planning their career paths.

**Attract**
- We are seeing increased mobility in terms of people coming to Alberta to work. We want to attract from Alberta first, then Canada, then other countries.

**Develop**
- Education and training are required so employers can develop/grow their own workforces.

**Retain**
- Once the workforce is in place, we must ensure attractive, productive workplaces and communities in order to retain those workers.

These four themes overlap. None of them exists in isolation; they need to be integrated. An integrated approach to developing government policy addresses workforce issues.

We identified 17 priority actions. Within these actions we needed a sense of accountability, so we identified which government departments were responsible for addressing which issues.

Global actions, influencing all sectors of economy, were identified. Government is only one of the responsible players. A number of stakeholders also involved—community, educational institutions, labour organizations, and so on.

Stakeholders and industry are equal partners in term of addressing workforce issues. Each sector looked at what they needed to do to meet the unique needs of their workforce and to develop their own strategies and plans. Industry would develop content and be responsible for implementation. Government functioned in more of a support role. The real leadership was in the sector, developing sector-specific strategies.
PowerPoint 2

A Workforce Strategy for Alberta’s Non-Profit & Voluntary Sector

Slide 1:

Slide 2:
Slide 3:

BETW Labour Force Development Goals

- **INFORM**
- **ATTRACT**
- **DEVELOP**
- **RETAINT**

17 GOA Priority Actions

**Ministry Action Plans**

3-5 Year Plans

Government is Lead
Influence More than One Industry/Sector

**Industry/Sector Workforce Strategies**

Industry/Sector is Lead
Sector Specific

Slide 4:

A Workforce Strategy for Alberta’s NON-PROFIT & VOLUNTARY SECTOR

- Released in 2008 to address paid workforce issues in the sector
- Identifies workforce challenges and trends
- 26 priority actions
  - Inform: 7
  - Attract: 5
  - Develop: 12
  - Retain: 4

Slide 5:

Roles in Workforce Strategy Development & Implementation

**Sector-Led**

- Developed content for sector strategy
- Serve as sector/industry contributors
- Implement strategy priority actions through initiatives and projects
- Work with other sector/industry contributors on collaborative projects
- Communicate progress on sector/industry-led action

**Government Support**

- Facilitated process for sector strategy development
- Facilitate and enable sector contributors in their implementation role
  - i.e. Capacity building
- Identify cross-sector/industry collaborative activities
- Communicate progress on government-led action
The Alberta Non-profit/Voluntary Sector Initiative, or ANVSI, is a partnership between the government of Alberta and non-profit organizations, built around areas of mutual interest and collective needs. Ten senior government official and 10 leaders from the non-profit sector work within a framework that guides them. Alberta communities can benefit from projects, whether they are delivered by the non-profit organizations or by government. We work at a common table as a collaboration committee, discussing policy dialogue, capacity building, and issues resolution.
When the collaboration framework was created in 2007, areas of common understanding were identified, as shown in the PowerPoint presentation. Collaboration isn’t easy; tensions always exist. But we come to the table with good intentions and have been able to achieve a lot.

**PowerPoint 3**

*Alberta Non-profit/Voluntary Sector Initiative*

Slide 1:

![Slide 1](image1)

Slide 2:

![Slide 2](image2)
Slide 3:

**Whereas the Government of Alberta and the Nonprofit/Voluntary Sector...**

- Share a common vision for Albertans achieving exception quality of life through healthy active communities
- Share common interests and areas of mutual concern
- Fulfill complementary roles in development and delivery of public policy and services
- Respect each other’s autonomy and ability to act independently
- Recognize that a collaborative partnership is essential to enable working together to improve services to Albertans and build vibrant communities

Slide 4:

**Framework for Collaboration**

*Five Commitments to Action*

1. Better understanding of each other’s values, roles and mandates
2. Work together to build capacity to participate in this collaboration
3. Develop mechanisms to enable the NPVS to have input into public policy dialogues
4. Develop strategies that will enable the NPVS to inform, attract, develop and retain the human resources required
5. Identify and recommend solutions for the administrative, program resource and risk management issues that challenge the current and future sustainability of the NPVS
The Edmonton Chamber of Voluntary Organizations, or ECVO, is a capacity-supporting organization that provides information, resources, research/analysis, and reports, so that organizations have what they need in order to make decisions. We also provide support and opportunities for events such as this. My presentation will build on what Zarelda and Carole spoke to. I’ll talk about the doom and gloom first, then about positive issues. Some are unique to the non-profit sector, others are shared with other sectors of the economy.
The Alberta Non-profit Workforce Council

Slide 1:

Working in the Social Economy Symposium
April 27, 2010

Slide 2:

The Edmonton Chamber of Voluntary Organizations

Edmonton Chamber of Voluntary Organizations works to enhance the nonprofit and voluntary sector’s capacity to deliver programs and services.

- Information and resources
- Researching, analyzing, and communicating information
- Support, linkages, networks and community convening

Slide 3:

HR Challenges in the Nonprofit Sector - The Alberta Context

- Persistent labour shortages
- Changing demands for programs and services
- Funding levels and practices
- Exceptionally competitive labour market
- Aging workforce at the senior and middle management levels
- Lack of understanding of the sector
- Difficulty in coordinating provincial action
Slide 4:

Why is this a crisis?

- Social Impact
  - Nonprofits are critical to healthy, vibrant communities providing a wide range of community-based services — children, seniors, immigrants, health, recreation, arts & culture, literacy, job skills, etc.

- Economic Impact
  - Jobs in the sector; skills development for other sectors; impact on quality of life and ability to attract workforce.

Slide 5:

Alberta NPVS Workforce Strategy

- Released in 2008
- Identifies workforce challenges and trends.
- 28 priority actions under 4 main themes:
  - Inform
  - Attract
  - Develop
  - Retain

Slide 6:

The Alberta Nonprofit Workforce Council

- A cross-sectoral group of nonprofit organizations, networks and stakeholders with reach into all areas of Alberta
- Role is to connect and support a wide variety of workforce initiatives
- Responsible for coordinating activities required to implement the Workforce Strategy
- Will facilitate the continued development of the Workforce Strategy
Slide 7:

[Diagram showing WorkforceConnect with sections for Broad Sector Awareness & Strategic Focus, Workforce Council, Administrative Catalyst – Secretariat, Issue & Action Oriented, and Action Teams]

Slide 8:

**Actions to Date**

- Developed Workforce Council Structure and action model
- Created Communications Plan
- Alberta Workforce Initiatives Inventory
- Beta Testing Website

Slide 9:

**Thank You**

Marie Abrams
Edmonton Chamber of Voluntary Organizations
workforcestrategy@cevo.ca
www.cevo.ca
(780) 421-1660
Recently, a CBC program focused on the exorbitant amounts spent by private sector organizations in fundraising. The non-profit sector needs to be transparent about how it works, how it raises money, and how it uses its funds. The same could be said for workforce retention.

The non-profit sector has not had a provincial-level voice; it has needed a council that could be responsible for moving strategy forward and for looking at how those strategies could be implemented. It’s not just about needing a provincial-level body, but also about allowing work on the sub-sectoral, community, and local levels. The Workforce Council has 13 members and meets four to six times a year.

Action teams address topics that interest them, to whatever degree in which they are interested in them. These teams must fit with individual organizational mandates, and aim to attract action teams as organically as possible. We have many opportunities to seek out and find solutions to the challenges that non-profit organizations are facing.

As the Council enters its second year, the website will be launched in June with a formal launch taking place in the fall. This website has the potential to be a place where we can share resources and ideas, as we keep our eyes open and our ears to the ground.

**Attraction and Retention — Positioning the Sector as a Choice Employer**

*Mark Holmgren*

*Mark Holmgren Consulting*

Presentation has to do with attraction and retention, but perhaps not in a way you’d expect. Non-profit revenues in Canada, at $111.6 billion, are three times government revenues. There is a problem when we speak of the sector in such large numbers because it gives an impression of an entity. When we start looking at things in pieces, one thing becomes clearer: parts of the sector are very small. Fifty-four percent of NPOs do not even have paid staff.

Hospitals, universities, and colleges make up 1% of organizations but employ 40% of all paid staff. Sixty-four percent of staff are employed by 5% of non-profits (excluding hospitals, universities, colleges).

Eight hundred fifty-six NPOs hire 67,200 staff (77% of revenue); 23,100 are employed by 7,000 NPOs (with 23% of revenues split between those above and the 10,300 that have no staff).

When we look at workforce issues related to this population, and look at large organizations versus small ones that have different issues, we see a need for workforce strategies that are not “one size fits all.”
We need to know more about the various sub-sectors. Some sectors have much greater revenues than others.

Is there data? What are the differences between the five NPOs that have most staff and the rest of the non-profits? What are the differences across sub-sectors? What are the challenges for organizations of different sizes, with revenues?

**KEY TRENDS**

By 2031:
- all the boomers will have retired
- seniors will outnumber children (by 2015)
- the number of seniors will be up 110% (2006–2031)
- the number of newborns to 24-year-olds will be down 15% (2006–2031)
- everyone else: up 5%

We do know that immigration will drive population growth. In 2003, one in 10 immigrants spoke English or French (compared to one in three in 1980). By 2017, between 19 and 23% of the population will be a visible minority.

**WORKFORCE ISSUES**
In 1981: For every one senior there were five workers
In 2005: For every one senior there were four workers
In 2031: For every one senior there will be two workers

Tax revenues will decrease unless there are significant new revenues.

We have to ask, “What will fuel the sector?”
- government funding?
- earned income/user fees?
- fundraising?
- consolidations and mergers?
- social innovation?
- social enterprise?
- efficiencies?
- fewer NPOs?

Competition will drive up wages in some professions. Work will become more flexible and employee-focused. Workplaces will be increasingly multicultural. We anticipate shortages in senior managers, human resources managers, and human resources personnel.

Boomers will be in demand to offset workforce shortages, but to what extent? And will education keep pace? Two-thirds of job openings over next 10 years will require post-secondary education.

**Attraction/retention strategies**
Effective attraction and retention strategies include:
- affiliation with a good cause
- status as a community leader
- connections to larger networks
- recognition
- altruism
- optimal salaries and benefits
- flexible work hours and days
- work from home
- access to technology tools
- extra perks
**Leadership crisis?**
Aging of leadership and lack of succession planning might lead to the dissipation of entire networks and the loss of sector knowledge. NPOs need to plan collaboratively, align themselves with educational institutions, and so on. We need to develop targeted, sector-wide strategies. It takes capacity to innovate and change.

**Funding/funders ...**
- results-based funding
- rethinking thin funding
- sector investment
- investing in innovation and change
- core funding is critical
- so is project funding

**Governments ...**
- fund the full cost of contracts
- pay market wages
- increase flexibility
- lighten administrative burdens

**Non-profits ...**
- do more with less
- get organized to address sustainability issues and promote sector value
- share space, share services, share staff
- consider consolidations, mergers, and social innovations (but need to be realistic about just how much will be saved through sharing of resources)

---

**PowerPoint 5**

*Big Change Ahead*

Slide 1:
Slide 2:

About the Sector
Revenue Sources
Key Trends
Implications & Questions
Will there be a labour shortage?
Strategies - Considerations

Overview

Slide 3:

ABOUT THE SECTOR

Slide 4:

$111.6 billion
Non Profit Revenues in Canada

Compare...
Alberta Government 2010
revenues: $34 billion
Slide 5:

**INDUSTRY** | **REVENUES (BILLIONS)**
---|---
Energy Products | $22.5
Agri-foods | $12.7
NonProfit Sector | $10.0
Industrial Machinery | $9.1
ICT | $8.3
Forest Products | $3.4

About the Sector in Alberta

Slide 6:

175,000 employees
19,000 non profit organizations

organizations do not have paid staff

Non Profit Workforce | Alberta

Slide 7:

175,000 employees
8,740 non profit organizations

NOW CONSIDER...

Hospitals, Universities and Colleges make up 1% of Alberta organizations but employ 40% of all paid staff.

Non Profit Workforce | Alberta
Slide 8:

105,000 employees
8,550 non profit organizations

BUT ALSO...

64% of staff are employed
by 5% of non-profits.

Excluding Hospitals, Universities, Colleges

Non Profit Workforce | Alberta

Slide 9:

67,200 staff are
employed by 856
non profits.

77% of the
revenue.

23% of the
revenue split
between those above
and the 10,300 that
have no staff.

23,100 staff are
employed by 7,000
non profits

Non Profit Workforce | Alberta

Slide 10:

<table>
<thead>
<tr>
<th>Primary Activity</th>
<th>Alberta</th>
<th>Canada</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sports and Recreation</td>
<td>26%</td>
<td>21%</td>
</tr>
<tr>
<td>Religion</td>
<td>19%</td>
<td>19%</td>
</tr>
<tr>
<td>Grantmaking, Fundraising &amp; Voluntarism Promotion</td>
<td>11%</td>
<td>10%</td>
</tr>
<tr>
<td>Arts and Culture</td>
<td>10%</td>
<td>9%</td>
</tr>
<tr>
<td>Social Services</td>
<td>9%</td>
<td>12%</td>
</tr>
<tr>
<td>Education and Research</td>
<td>8%</td>
<td>5%</td>
</tr>
<tr>
<td>Development &amp; Housing</td>
<td>5%</td>
<td>8%</td>
</tr>
<tr>
<td>Business, Professional Associations and Unions</td>
<td>3%</td>
<td>5%</td>
</tr>
<tr>
<td>Health</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>Environment</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>Law, Advocacy and Politics</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Hospitals, Universities and Colleges</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>2.4%</td>
<td>3%</td>
</tr>
</tbody>
</table>

We need to know more about the various subsectors
Slide 11:

What are the differences between the 5% that have most the staff and the rest of the non profits?

What are the differences across sub-sectors?

What are the challenges for organizations of different sizes, revenues, geographic locations and missions?

Are the challenges for small non profits more about filling capacity gaps than recruiting staff?

Is there data?

Slide 12:

Revenue Sources

Slide 13:

<table>
<thead>
<tr>
<th>33% of their funding from governments. The national average is 49%.</th>
<th>User Fees/Earned Income is 49%. The national average of 35%.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fundraising and other income make up the remainder of income (18%) in Alberta.</td>
<td></td>
</tr>
</tbody>
</table>

The Sector’s Resource Engine
Slide 14:

- Government funding?
- Earned Income/User Fees?
- Fundraising?
- Consolidations and Mergers?
- Social Innovation?
- Social Enterprise?
- Efficiencies?
- Fewer NPOs?

What will fuel the sector?

Slide 15:

Key Trends

Slide 16:

<table>
<thead>
<tr>
<th>Population</th>
<th>BY 2031</th>
</tr>
</thead>
<tbody>
<tr>
<td>All of the Boomers will have retired</td>
<td></td>
</tr>
<tr>
<td>Seniors out number children by 2015</td>
<td></td>
</tr>
<tr>
<td>Seniors up 110% (2006-2031)</td>
<td></td>
</tr>
<tr>
<td>0-24 year olds down 15% (2006-2031)</td>
<td></td>
</tr>
<tr>
<td>Everyone else: up 5%</td>
<td></td>
</tr>
</tbody>
</table>
Slide 17:

Immigration to drive pop. growth

In 2003, one in ten immigrants spoke English or French (compared to one in three in 1980)

By 2017, 19 to 23% of the population will be a visible minority.

In 2031, 50% of the population in Vancouver and Toronto will be immigrants.

**Immigration**

Slide 18:

**Workforce**

Labour Force

In 20 years the participation rate in the Alberta workforce will fall from 72% to 63%

Slide 19:

1981 One Senior Five Workers

2005 One Senior Four Workers

2031 One Senior Two Workers
Implications and Questions?

Slide 21:

- Tax revenues will decrease unless there are significant new revenues or cost savings found.
- Payments to Seniors will increase.
- Health Spending will increase.
- Payments to children's benefits, child-care allowances and education funding will decrease.

Implications & Questions

Slide 22:

- Competition will drive wages up in some professions.
- Work will become more flexible and employee focused.
- Workplaces will be increasingly multicultural.
- Boomers will be in demand to offset workforce shortages, but to what extent?
- Will education keep pace with talent requirements of employers?

Implications & Questions
Slide 23:

Will there be a shortage or won’t there?

Slide 24:

Past 50 years: Canada’s workforce grew by 200%

Next 50 years: 11 percent

Sounds like there will be

Slide 25:

2/3rds of job openings over the next 10 years will require post-secondary education.

HRSDC projects the labour supply will be adequate to meet the demand.

Or maybe not...
### Slide 26:

<table>
<thead>
<tr>
<th>Senior managers, HR managers, human resource and business services professionals</th>
<th>Managers in health, education, social and community services.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Managers in Public Administration</td>
<td>Health care professionals</td>
</tr>
</tbody>
</table>

**Anticipated Shortages, 10 years**

### Slide 27:

**Challenges and Strategies**

### Slide 28:

**Attraction/Retention Strategies**

- Affiliation with a good cause.
- Status as community leader.
- Connections to larger networks.
- Recognition.
- Altruism.
Slide 29:

Optimal Salaries & Benefits
Flexible Work Hours and Days
Work from Home
Access to Technology Tools
Extra Perks

Attraction/Retention Strategies

Slide 30:

Aging of leadership and
the lack of succession plans, resulting in
the dissipation of entire networks and the loss of
sector knowledge

Leadership Crisis?

Slide 31:

Sector-wide strategies are likely not sufficient.
Specific strategies for specific segments could
make more sense.

Issues are bigger than workforce.

Targeted Strategies Needed
Slide 32:

Results-based funding
Rethinking thin funding

Sector Investment
Investing in innovation and change

Core funding is critical
So is project funding

**Funding/Funders**

Slide 33:

Fund full costs
Pay market wages
Increase flexibility
Lighten admin burdens

**Governments**

Slide 34:

Do more of less

Get organized to address sustainability issues & promote sector value

Shared space, shared services, shared staff, consolidations, mergers, and social innovations ....

**NonProfits**
DISCUSSION

(Moderator: Jorge Sousa)

For the next 10 or 15 minutes, at tables, participants were asked to jot down some notes, then leave them on the table so they could be collected later and included in the report.

Several questions were posed for presenters.

Lorraine Woolard, U of A, asked: “What is a social economy framework?”

Stuart Wulff responded: As was said earlier, the concept of the social economy, which has come out of Europe, is a new thing for Canada. Even those who are researching the concept are now asking whether it is a concept we are going to want to stick with. A number of concepts—civil society, third sector, third economy—are used as ways of attempting to describe the same thing from different perspectives. My own feelings have evolved even over the three-and-a-half years that I’ve had this job. There are competing visions of how to define the social economy, let alone what that means in the context of non-profits. One definition defines the social economy as “socially intended business practices that don’t exist for a primarily business purpose” (for example, when a non-profit sets up a business enterprise or cooperative, whether producer or consumer).

A competing trend says that non-profits ARE the social economy. A third vision is starting to come out which is being called the social solidarity concept. It’s not defined structurally, in terms of a legal definition, but more as an ethos. Each definition can be useful. For dealing with government, use the “big” definition. If you’re looking for better policy regarding venture capital, use the “business” definition. For today’s purposes, don’t get hung up on the definition of social economy except for looking at how it might help you with your workforce issues. How can we be helpful rather than irrelevant?
Martin Garber-Conrad responded: One of the uses of the social economy is to counter the notion that what we’re primarily talking about is the charitable sector (charity being the “frills,” the little “extra things” on the margins). In the public imagination, the non-profit sector is the “volunteer” sector. So the entire notion that there are paid staff at all, and that work force issues even exist, is new in the public imagination.

This is an important industrial sector even though it operates out of the norm of making profit. We need to help people understand that non-profit organizations have been involved in social enterprise for at least a hundred years and particularly that they have been using a highly sophisticated level of business practices all along. We wouldn’t have been able to operate otherwise. The non-profit sector doesn’t need to become “more business-like.”

The literature for the past 30 years has discussed the downside of even using the term “non-profit” (that is, defining the sector by what it isn’t, in the same way one might say, “Lettuce is non-animal.”). It’s a silly and not very helpful way of defining one’s sector. One never knows whether the term “social economy” will be here for the long term, but it does have an advantage if it reminds us that this sector is a significant part of the economy, and could be more significant if funders and governments treated it like the industrial sector that it is rather than as a marginal offshoot run primarily by middle-aged women who don’t work.

Jenny Kain, City of Edmonton, commented: One of the documents I’ve fond most useful is a diagram by Bill Lynak (?) out of Québec. Second, it has been put forward that we should start calling ourselves “the social profit sector.” This might be a move in the right direction.

Jorge: What the term “social economy” offers is the opportunity to establish a common framework. We should try not to get bogged down on one definition. Social economy groups in Québec and Europe have addressed the definition organically, as the sector continues to evolve. We should try to do the same.

Jorge: Will some of the ideas we’re talking about help inform/shape your work?

Yessie Byl, Alberta Civil Liberties Research Centre, commented: What a lot of people from the social economy sector are thinking is that attempts such as this to define the sector are all well and good, but without government commitment to long-term funding they’re all meaningless. Short-term funding prevents organizations from making long-term commitments to employees, vision, planning, and so on. Until government makes long-term commitments, it’s all just a lot of hot air.
DIVERSITY IN THE WORKPLACE IN CANADA

I’m in a remarkable situation here, privileged to be working with multicultural health worker’s cooperative. I’ve been working from Day One with multicultural communities in this city, reaching out to communities across the country. Brokers work within the community to provide bridges between institutions and newcomers. Their model is the idea that they are members of the community. They understand the issues of new community members and speak their language. They work with service providers to help them supply culturally competent services to newcomers. Our population, particularly our workforce, has become incredibly diverse.

People may come as immigrants or as refugees; but the majority come as highly skilled, highly educated people who may not have much opportunity to use those skills once they are here.

The key is to remember that we’re looking at a very diverse situation. This increasing diversity represents unique opportunities and challenges for human service providers.

BACKGROUND

The Nurturing Diversity and Building Inclusive Workplaces Initiative is a one-year pilot project funded by Alberta Employment and Immigration and administered by the Alberta Council of Disability Services in partnership with the Edmonton Workforce Council and the Multicultural Health Brokers (MCHB) Co-operative Ltd.

For the past 20 years we’ve been trying to build capacity. It’s really about social change, and about ensuring that our product – both the earning opportunities and the outcomes – can be distributed throughout the sector. For example, some amazing strategies are coming out of Australia, where they’ve rebuilt from top to bottom in terms of looking at their government structure.

Many of the initiative’s front-line staff are drawn from the newcomer (that is, immigrant and refugee) communities, and are relatively new to their workplaces. Their experiences are widely divergent, including differences in:

- educational and professional backgrounds
- pre- and post-settlement experiences
- ESL competence
- understandings of Canadian workplace norms and expectations

The experience of the MCHB Co-op provided considerable benefit in conducting workforce diversity research. Co-op members are members...
of the ethno-cultural communities they serve. They have significant experience working with communities and individuals who are contending with pre- and post-settlement experiences. They can also draw upon the expertise of an in-house psychologist trained in working with individuals suffering from torture and trauma.

**PowerPoint 6**

**Nurturing Diversity and Building Inclusive Workplaces Initiative**

Slide 1:

Diversity in the Workplace in Canada

- Of the 17,146,100 people in the labour force in 2006, an estimated 3,634,800 were foreign born individuals. They accounted for slightly over one-fifth (21.2%) of Canada’s total labour force in 2006.

- Over half the recent immigrants (who arrived between 2001 and 2006), had a university degree. This was more than twice the proportion of degree holders among the Canadian-born population (28%).

- In 2006, the employment rate for Aboriginal people of core working age (aged 25 to 54 years) was 65.1%, up from 61.2% in 2001. This compared to 81.6% for non-Aboriginal people in 2006, up from 80.3% five years earlier.

- Nearly 2.8 million Canadians reported using more than one language at work in 2006, up from about 2.5 million in 2001.


Slide 2:
Slide 3:

Our increasing diversity represents unique opportunities and challenges for human service providers. The workforce has rapidly diversified, reflecting the communities they serve.

Slide 4:

Background

The Nurturing Diversity and Building Inclusive Workplaces Initiative is a one year pilot project funded by Alberta Employment and Immigration (AE & I) and administered by the Alberta Council of Disability Services (ACDS) in partnership with Edmonton Workforce Council and the Multicultural Health Brokers Co-operative Ltd. (MCHB Co-op).

The initiative brings together three medium/large scale Edmonton area service providers, Chrysalis: An Alberta Society for Citizens with Disabilities, Skills Society & Excel Society, to explore strategies to support inclusive and culturally competent workplaces.

Slide 5:

Diversity Strategies

Diversity strategies ensure that the differences found in a diverse workforce are valued and managed appropriately.

Managing Diversity recognizes that valuing individual differences means employees may require different management styles. The objective here is not creating a diverse workforce but rather creating an environment in which all employees can work to their full potential - an inclusive organization. No employee experiences advantages or disadvantages.
Slide 6:

Developing a Diversity Strategy

- Diversity is a top down commitment and integral to an organization's values.
- Diversity strategies are linked to an organization’s business goals and strategic plans - they are in many ways a strategy for change management with the goal to create an inclusive organization.
- Diversity strategies consists of:
  - Definition
  - Policy statements
  - Demographic data
  - Implementation strategy (cultural audit, diversity training, accountability, rewards and development of minority staff)
  - Evaluation of the diversity strategy
- Throughout, there is extensive and repetitive communication to all employees about the diversity strategy.

Slide 7:

Factors that May Prevent Diversity Initiatives from Being Successful

- Perceived lack of relevance by employees about the importance of diversity initiatives in their workplace.
- Not using data that defines diversity in their organization.
- An Us vs. Them Mentality
- A lack of understanding between management and staff about diversity strategies in the organization
- No clear goals and objectives about what the diversity initiative will achieve and its benefits to workers and the organization.
- Tendency to seek stability and resist change.

Slide 8:

Purpose of the Nurturing Diversity Initiative

- The purpose of the initiative is to build inclusive and culturally competent workplaces to support and retain a diverse workforce.
- Working with the Multicultural Health Brokers Co-operative Ltd. (MCHB Co-op), the Edmonton Regional Workforce Council will design a program to bridge the needs of a diverse workforce with the quality care support needs of vulnerable individuals, building sustainable multicultural work teams.
Slide 9:

Diversity management fits well with the developmental disability service sector's underlying values promoting inclusion for persons with developmental disabilities.

However, the diversity strategy may require a shift in thinking to broaden and deepen organizational understanding of what inclusion, inclusive communities and inclusive organizations can be.

Slide 10:

Project Scope

The Nurturing Diversity Initiative will create specialized training and organizational capacity building that will:

- develop staff cultural competency;
- reduce misunderstanding and miscommunication;
- build staff morale and confidence; and,
- ensure common understanding and adherence to industry standards of care.

Slide 11:

Outcomes

- A tool kit for employers to support diversity in the workplace.
- Train-the-trainer program for supervisory personnel.
- A network of practice within the sector that nurtures a diverse workforce and supports cultural competent workplaces.
- A resource list of good connectors and materials for the sector.

Slide 12:

Guiding Principles & Research Design

The project methodology draws upon the MCHB Co-op's extensive experience conducting participatory action research within the human services and health care sectors.

The MCHB Co-op is committed to process that draws upon the experience within communities and organizations and that generates appropriate solutions to needs, challenges and concerns defined by the people who use the results of the research.
Slide 13:

The Project will:

- be collaborative and participatory, with the goal to share information gathered on an ongoing basis with those involved in the diversity project;
- build collective responsibility for the process and outcomes of the project;
- build on strengths of participants and of organizations as well as identify areas for growth;
- ensure the meaningful involvement of as many of the staff as possible throughout the project; and,
- involve prospective training participants in the planning, design and evaluation of the training.

Slide 14:

Process

- An Advisory Committee drawn from each of the participating organizations was established at the onset of the project (November/December 2009) to provide strategic guidance in the project development, implementation and management.
- Each of the partner agencies was asked to create Initiative Teams. The Teams
  - support awareness of the project goals, input into the content and delivery mode of the Train the Trainer curriculum; and,
  - act as an internal resource in the sustainability of the project past the pilots phase.

Slide 15:

- The agencies were also encouraged to develop a communications strategy to further the following goals:
  - signal buy-in from the top levels of management;
  - create opportunities for dialogue and feedback throughout the development of the project; and,
  - open the door to opportunities for involvement as participants and leads in the implementation of the project goals - leading to greater integration and sustainability of the project goals.
Slide 16:

**Needs Assessment Methodology**

The MCHP Team conducted the research component of the Needs Assessment between December 2009 and March 2010.

As noted, the goal was to include as many of the staff in three participating organizations and to build in opportunities to identify and engage those individuals who are best suited to participate in the Train the Trainer model (potential of 10 individuals per organization).

Slide 17:

The needs assessment adopted a mixed method design that incorporates qualitative and quantitative research methods:

- Review of the relevant literature;
- Group discussion with the initiative teams (micro-environmental scan);
- Focus groups using open ended questions; and,
- A quantitative needs and interest survey with the potential to elicit information from all staff within the organizations.

Slide 18:

**Profile of Participating Agencies**

<table>
<thead>
<tr>
<th>Agency</th>
<th>Total Staff</th>
<th>FTE/PTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chrysalis</td>
<td>83</td>
<td>72 full time, 11 part time</td>
</tr>
<tr>
<td>Excel</td>
<td>373</td>
<td>331 full time, 142 part time</td>
</tr>
<tr>
<td>Skills</td>
<td>515</td>
<td>95 full time, 420 part time</td>
</tr>
</tbody>
</table>

Slide 19:

**Focus group discussions**

Agencies were asked to organize focus group sessions with each of the following groups:

- Senior management and human resources personnel;
- Middle management, e.g., program managers and team leaders; and,
- Front line staff.

Participation was encouraged by senior management, but in nature voluntary (self-selected).

Participants answered a series of six open ended questions that explored attitudes, knowledge, experience, and learning and learning needs to work productively within a diverse workplace.
Slide 20:

Participation in the Focus Group Discussions

<table>
<thead>
<tr>
<th>Agency</th>
<th>Group</th>
<th>No.</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chrysalis</td>
<td>AES</td>
<td>12</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Vocational Services</td>
<td>9</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Management</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>18</td>
<td></td>
</tr>
<tr>
<td>Excel</td>
<td>Grand Manor</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Main Office</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>11</td>
<td></td>
</tr>
<tr>
<td>Skills</td>
<td>Direct Support</td>
<td>11</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Team Leaders</td>
<td>9</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Management</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>30</td>
<td></td>
</tr>
<tr>
<td>TOTAL</td>
<td></td>
<td>69</td>
<td></td>
</tr>
</tbody>
</table>

Slide 21:

Needs and Interests Survey

The survey supported broad participation by staff at each of the participating agencies.

The survey questions were designed to:

- assess the climate of diversity within the organizations; and,
- to identify diversity organizational development, training needs and interests.

The survey was available to all staff online (Survey Monkey) and by hard copy between February 14 and March 8, 2010 using Survey Monkey.

Slide 22:

Participation in the Needs & Interests Survey

<table>
<thead>
<tr>
<th>Agency</th>
<th>Total Staff</th>
<th>Survey Monkey Response</th>
<th>Hard Copy Response</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chrysalis</td>
<td>83</td>
<td>25</td>
<td>18</td>
<td>43 (52%)</td>
</tr>
<tr>
<td>Excel</td>
<td>373</td>
<td>0</td>
<td>50</td>
<td>50 (13%)</td>
</tr>
<tr>
<td>Skills</td>
<td>515</td>
<td>23</td>
<td>22</td>
<td>45 (9%)</td>
</tr>
<tr>
<td>TOTAL</td>
<td>971</td>
<td>48</td>
<td>90</td>
<td>138 (14%)</td>
</tr>
</tbody>
</table>

Slide 23:

Data Collection - Opportunities

The action research design of the project develops certain opportunities for data collection:

- It is flexible and allows room for participatory process that responds to meet emerging issues and organizational requirements.
- It responds to the needs of the participating agencies – and recognizes that the environment in which they work will shape the final process and product.
- The research and data collection methods are designed to build/sustain partnerships and participation.
Slide 24:

Challenges and Limitations in Data Collection

- **External Factors – The Funding Crisis**
  The funding crisis (Alberta Government, Persons with Developmental Disability contract and individual support funding) became a real and immediate factor affecting the ability of the organizations to focus their energies and resources during the early months of the project. Senior managers realistically had to prioritize the stability of the organization and the morale of staff, individuals receiving service, and their supports.

- **Working Solution**
  The project timeline was adjusted to recognize the emerging reality for the participating organizations. This did shorten the timeline available for participation in the needs and interests survey.

Slide 25:

- **Resources**
  The organizations have just come through the widespread labour shortage; however, they are still impacted by budgetary concerns and have varying levels of flexibility available in their staffing models. Limited human resources and decentralized service delivery models therefore presented some barriers to participation in the project.

  1. **Time Constraints**
     This was the most frequently cited reason for postponing or managing participation in the focus groups and survey. Staff is stretched thin to meet service needs. Further, many frontline staff work more than one job (sometimes within the sector).

  2. **Service Delivery Models & Staffing Depth**
     The organizations each have a unique model of service delivery and support clients with differing medical, behavioral, social and cognitive support requirements.

Slide 26:

Staff in two of the agencies is located throughout community, working independently (one on one support) and in small scale teams (residential settings). The third agency has staff within community and in residential and “institutional” settings.

Shift work and difficulties in scheduling coverage impacted the ability of the organizations to easily facilitate staff participation in the focus groups – and perhaps in the surveys.

Staff working shifts, located throughout the city, and working more than one job, were presented with multiple barriers to participation in the focus group discussions – and were realistically reluctant to participate during their free time.

Slide 27:

- **Working Solutions**
  - **Focus groups**
    Each organization developed strategies to manage staffing requirements and to encourage participation (e.g., a “one day blitz” requiring minimal reorganization of staffing schedules, incorporation of the focus group discussion into the monthly staff meetings).

    Management re-organized schedules/shifting to accommodate participation and ensured participation was paid time. Senior management in two organizations “dropped in” at the end to thank their staff for taking the time to participate.

    As participation in the focus groups was by self-selection, the researchers are aware that participants comments did not represent the multiplicity of perspectives within the workplace.
Slide 28:

**Surveys**

Hard copies of the survey were distributed to each organization to facilitate involvement by staff that did not have ready access to computers/Internet during or after work hours.

The hard copy format may have also facilitated participation by those who were uncomfortable using the on-line delivery format or lacked computer literacy skills.

Although pre-tested with ESL speakers, a number of the questions on the survey were not accessible. The questions will be reformatted and re-tested with the help of initiative Team members prior to their incorporation into the tool kit.

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Slide 29:

**Sensitivity of Diversity Issues in the Workplace**

Many of the frontline staff are drawn from the newcomer communities (immigrant and refugee) and are relatively new to their workplace.

They face differing education and professional backgrounds, pre- and post-settlement experience, ESL competence, and understanding of Canadian workplace norms and expectations.

Diversity issues can be sensitive issues. Gathering data in a mixed group format (focus group) requires sensitivity to the differing experiences, perspectives, issues and concerns presented by participants.

The MCHB Co-op are aware that discussion about diversity topics within the workplace can trigger personal discomfort, activate past traumatic experience, and impact on team morale and social cohesion.

The researchers were aware that some issues such as racism in the workplace and community may not have been fully opened up for discussion.

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Slide 30:

**Working Solutions**

The project process, including the development of initiative Teams and open communication about the project goals, may contribute to building trust in the project team's efforts to gather what can be sensitive information. The project members are aware that building trust within the organization and in the project is an ongoing commitment.

It is important that the researchers are interculturally responsive and willing to be open to new learnings, including those that others may be uncomfortable with. The ability of researchers to engender trust and participation from participants who have a history or experience of being marginalized and excluded, is an essential skill in action based research.

The focus groups were kept small (6-12 participants) to allow the researchers to develop trust and to work towards maintaining a safe environment for participation.

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Slide 31:

Further, the combined experience of the MCHB Co-op has considerable benefit in conducting workforce diversity research. Co-op members are members of the ethnocultural communities they serve. They have significant experience working with individuals and communities contending with pre and post settlement experiences. They can also draw upon the expertise of an in-house psychologist trained in working with individuals suffering from torture and trauma.
**PANEL: KEY ISSUES AND STRATEGIES**

**PANELISTS / Areas of Interest**

**Innovations in Non-Profit Services**  
**Martin Garber-Conrad**  
*Executive Director, The Edmonton Community Foundation*

**Outcomes: Community Disability Services Recruitment and Retention Campaign**  
**Brooks Hanewich**  
*The Alberta Council of Disability Services*

**Sector Experiences in Adapting to Reduced Resources**  
**Bill Moore-Kilgannon**  
*Public Interest Alberta*

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**INNOVATIONS IN NON-PROFIT SERVICES**

**Martin Garber-Conrad**

Just a quick observation about the issue of succession planning, which was raised earlier: About 20 years ago I was a relatively new executive director of a small social services charity, 25 years away from retirement. Now I’m a very experienced CEO of a somewhat larger charity, and I’m 24 years away from retirement (thanks to the “Freedom-85” plan I signed up with). I don’t think many of my colleagues are going to be retiring right away.

What has come to be called the shared services project was started in 2009, based on a model of shared hosting that has been implemented elsewhere in Canada and in the United States, to see whether it could fund smaller non-profit groups in Edmonton. There was a strong need — among organizations that actually had a legal identity and also had staff — for shared services. So we struck a committee and began to look at the possibility of sharing services in three areas:

- financial management
- human resources
- coaching and mentoring

(We thought also about the possibility of sharing IT services, but didn’t get as far as implementation in that area).

In July of last year we got funding from Alberta Employment and Immigration to do a study. We had barely begun that study when the City of Edmonton asked us not only to conduct the study in the area of shared services, but also to implement actual sharing of the services. A consultant is going to prepare an evaluation of the first year or two of this initiative.

The human resources shared services cluster model has been well used across Canada, particularly in Edmonton and Calgary. The Muttart Foundation has such a project, drawing on information...
conducted by the Edmonton City Centre Church Corporation (E4C) in 2008 and also on research done by the diversity mentoring table under leadership of Big Brothers and Big Sisters. The plan is to contract with a human resources professional who will provide a range of HR services to six or seven organizations (all small organizations, but with each having at least 10 staff members).

The financial shared services project will provide a number of shared services including accounts payable, accounts receivable, payroll, remitting of deductions, and so on. E4C has purchased the necessary computers and software.

A shared coaching and mentoring project is also underway, focusing on mentoring workers in after-school programs, particularly for immigrant and refugee youth. Only half of the organizations provided any sort of training for their volunteers or program staff. A coordinator has been hired to prepare a comprehensive after-school strategy.

One of the learnings in this early stage was a realization of the need for ongoing support throughout the formation of this group of agencies who were going to hire the human resources consultant. We’ve also realized that participants in this type of shared services model need time to bond and build trust in order to begin working together in real ways.

Learnings from the shared financial services component centred around lack of knowledge and some discomfort with the rigorous financial accountability framework. As well, some agencies were working with computers that weren’t up-to-date enough to run the financial accounting software.

Overall, a learning has been that positive change — even where people really want to change — takes time and resources. Change doesn’t happen automatically. We couldn’t have gotten to this point without the expertise of the existing non-profit organizations, and without collaboration, working directly with experienced organizations.

This project addresses some of the human resources challenges. Having a human resources professional available can improve staff recruitment and retention for small non-profit organizations., and can have significant implications around risk management and accountability.

Charities and non-profit organizations are operating in increasingly complex regulatory, financial and accountability frameworks, and need a higher level of expertise in order to negotiate that optimally. It’s not about saving money. It’s about doing better the tasks that people are already committed to doing.
Outcomes: Community Disability Services Recruitment and Retention Campaign

Brooks Hanewich

I represent about 120 disability service organizations across the province in the areas of accreditation and workforce capacity. Community disability services is a microcosm of what we’ve been talking about today.

A poster that was featured in a recent community disability services promotional campaign read, “It’s more than a profession. It’s a passion.” This philosophy extends to funders, to other community organizations, to many people in this room. And we are making some headway, but it’s not as pronounced as you may think.

PowerPoint 7
Working in the Social Economy

Slide 1:

Slide 2:

- Highly competitive labour market – record low unemployment rates (3.5% April 2005)
- Sector – information data 2004/05 through workforce 2010 project (VRRI: July 2005)
  - 12,700 individuals receiving support - 8,900 adults (PDD) and 3,800 children (FSCD)
  - Demographic predictors indicate higher prevalence of males, individuals over 45 years of age, greater focus on complex support needs
  - Estimates of 15,000 positions funded by PDD/FSCD to support children and adults with disabilities
  - Turnover rates were consistently high – Average provincial rate for PDD services was 40% (VRRI: 2005)
  - Low wage rates
  - Declining enrolment rates in post secondary disability studies programs
  - Over 40% of employees education levels at high school diploma or less
Slide 3:

Compelling vision is still relevant today

The Province of Alberta will have a well-trained and stable Community Disability Services workforce recognized as professionals providing valued service.

Slide 4:

A Networks Approach

Slide 5:

3 Key strategic priorities

Skilled Workforce

HR Infrastructure

Branding & Marketing

Pivotal to attaining the vision of a well-trained and stable workforce
Slide 6:

1st Cornerstone Strategy

Marketing and Branding Campaign

Slide 7:

Branding & Marketing – Strategy 1

- Workforce 2010
  - Work in sector poorly understood
  - Fewer people entering sector
  - Shortage of qualified workers - high turnover rates & lower enrolment in post secondary programs
  - Self-portrayal - focus on low wages, just a “job”, stepping stone to a real career
  - Seen as poorly paid

- HR Strategy
  - Change sector name
  - Build brand recognition for the work
  - Implement a social marketing campaign
  - Raise profile with youth
  - Develop attraction strategies aimed at target markets
  - Instill pride in work through internal communication

Slide 8:

Sector name change & key messages

Community Disability Services
Meaningful Work. Stronger Communities.

- Desire to be clear and “call it what it is”
- Positioning line...reflects our focus and values “communities” integral to the work
Slide 9:

Slide 10:

Workforce 2010 implemented

- Websites created
  - Provincial: www.cdda.ca

- Targeted advertising
  - Transit posters – buses, train stations, etc.
  - Brochures
  - Grocery store displays
  - Magazine, newsletter

- Two videos: Public announcements
  - 10 second clips
  - Intended to raise awareness of the work in this sector and promote enrollment in post-secondary programs.
  - Airing during prime time on Global TV across the province from mid to June

- Career videos:
  - To introduce the work to students in secondary schools
  - Will be posted on the career centre websites for students looking at the various career opportunities

Slide 11:

Ready to find a career in Canada?

www.cdda.ca | 1-877-333-5436
Slide 12:

Ready to come back to work?

Slide 13:

Taking stock & refocusing

- Evaluating impact
- Getting others involved
- Refresh the images
- Enhance direct referrals
- Continue focusing on youth and building momentum

- Audit – assess impact, inform future work
- Provincial committee, book mark campaign
- Photo contest
- Tote bags
- Recruitment team, regional websites, targeted marketing
- Building connections – presentations at high schools/engaging emerging leaders

Slide 14:

2nd Cornerstone Strategy

Human Resources Infrastructure
Slide 15:

Job Classification System

- Recognized Career Path
- Consistent Language
- Consistent Understanding of the work

Slide 16:

3rd Cornerstone Strategy

Skilled Workforce

Slide 17:

Training Expectations

- Team Leader/Specialist
  - Undergraduate degree preferred
  - Progressively responsible experience

- Community Disability Services Practitioner
  - Diploma in a relevant discipline, a disability studies diploma preferred
  - Progressively responsible experience

- Community Disability Services Worker
  - High School
  - Foundations in Community and Disability Studies or other
  - Specialized Training
  - Experience
Slide 18:

**Skilled Workforce**

- Professionalize the sector
  Professional Association was created and is currently looking to establish a structure and gain new membership.
- Nurturing diversity in the workplace
  - Developing a pilot with the Edmonton Workforce Council to strengthen organizational capacity to sustain multicultural teams in the workplace

Slide 19:

**Social Marketing Audit**

- At the beginning of 2010 ACDS hired a communications firm to complete an audit of our marketing strategies.
- Included in the audit was comparative analysis was done with information gathered in 2005.
- The audit included recommendations and next steps

Slide 20:

**What we found**

Incentives for remaining in the Community Disability Services Sector
- Building meaningful relationships.
- The satisfaction gained from watching clients achieve personal goals.
- The satisfaction gained from watching workforce members flourish.
- Evolving career sector.
Slide 21:

**What we found**

Disincentives for remaining in the Community Disability Services sector (job challenges)
- Low wages
- Being able to cope with the emotional and sometimes physical demands of the job
- Continual facing societal stereotypes towards persons with disabilities
- Ability to strike a balance between work and personal life
- Impacts of government and policies cycles
- Ongoing staffing shortages
- Understanding of the broad spectrum of disabilities
- Elimination of Disability Studies Programs at Post-secondary Institutions

Slide 22:

**Current workforce perceptions**

Perceived public perception as held by current workforce
- We are viewed as glorified babysitters and/or caregivers
- Lack of understanding of the whole system required to support persons with disabilities
- We are a special breed of people
- Those that know about us have a great deal of respect and compassion for what we do

Perceived impact of social marketing campaign to date
- Making headway, but a ways to go
- Acknowledge the changing societal behaviour takes time and is a long term strategy
- Have seen more inclusion in the community
- Closer connection amongst the workforce (increased pride)
- Better coordination and collaboration amongst the regions

Slide 23:

**Comparative Analysis**

Albertans (omnibus)
- changed in some areas, and didn’t in other areas.
- when asked “If you heard someone talking about a job or career in community disability services, what kind of work do you think they would be referring to?" top of mind answers were more closely related and more representative to the work that is conducted by the workforce, compared to descriptors from 2005 which were general and generic in nature.
- where in 2005, 23.2% of omnibus respondents said they would be well suited to work in the sector, this increased to 33.1% in 2010.
Slide 24:

Going forward

Social Marketing Strategies
- Develop a school outreach education program (Gr. 9-12) aimed at building awareness of the Community Disability Services sector as a potential career choice.
- Focus on key primary locations of where potential workforce members are located.
- Explore social media applications.
- Build direct relationships with career counselors.
- Continue advocacy and lobbying efforts at the provincial government level.

Overall Strategic Considerations
- Leverage initiatives where and when possible.
- Increase emphasis on profiling the job sector in the community/public.
- Ensure the current workforce is aware of what social marketing efforts are taking place.
- Develop and execute a media relations program.
- Continue using real-life images, but revisit the creative application of these images.
- Explore building national alliances.

Slide 25:

Critical success factors

- Spirit of collaboration and partnership
  - Support of multiple partners – Alberta Ministry of Seniors and Community Supports, PDD Regional Community Boards, Alberta Employment & Immigration, Service Providers, post-secondary.
- Building blocks:
  - Workforce 2010 – solid foundational information
  - HR Strategy for the sector – A call to action
  - Champions - provincial, regional & agency level

Slide 26:

Questions... Comments
This is an exciting opportunity, but we have a limited time to pull things together. An overview needs to consider a number of elements:

- short-term thinking vs. comprehensive planning
- competitive model vs. service delivery model
- outcomes-based service delivery
- de-skilling of the workforce
- impact of the cuts
- advocacy
- toward a comprehensive social policy

**Short-term thinking vs. comprehensive planning**
Political timeframes impact decision-makers as we deal with the fact of a 4-year political cycle. Annual budgets and in-year cuts work against a comprehensive plan that would see long-term investment in quality public services.

**Competitive model vs. service delivery model**
Rather than supporting a service delivery model, the province has moved to a competitive model by which human service agencies have to compete for contracts, year-to-year. This creates competitiveness between the agencies and anxiety about ongoing contracts. In contrast, a service delivery model would result in better relationships between agencies and government, as well as greater collaboration between agencies. In the long term, the service delivery model supports greater stability in both relationships and funding, and enables agencies to focus on providing quality service rather than merely tracking details.

**Outcomes-based service delivery**
How will new contract structures change relationship between:

- government and agencies?
- agencies and staff?
- staff and the people they are working with?

If organizations are to achieve goals and have flexibility and innovation, they must be able to keep resources. Loss of flexibility changes relationships, with long-term implications. Smaller agencies may have to become sub-contractors to larger agencies. What are the implications? For example, private corporations now provide health care to more and more people for less and less money. Quality services cannot be provided in this model.

**De-skilling of the workforce**
This includes recognition of the wage gap, high staff turnover rates, reduced hiring standards, reduction of educational programs, and denial of professional association for child and youth services.
We’ve seen provincial government cuts, leading to funding cuts (for example, Red Deer college cancelled a program that trained people to work with children and adults who have developmental disabilities). There is a disconnect between what we’re trying to do and the availability of resources to make it possible.

**Impact of the cuts**
Program cuts have a cumulative effect. Post-secondary education cuts equal loss of programs. Of a $36 million cut to children’s services, $28 million was taken from child intervention services. Of an $87 million cut to employment and immigration, $15 million was lost from employment programs and tuition. The effect shows in such areas as funding for people with developmental disabilities—when “not a cut” is really a cut. We need to talk about the fact that although the money coming forward is the same, in real terms, this amounts to a cut.

**Advocacy**
It is possible to mount a successful advocacy campaign (for example, the “Who Cares, Alberta?” campaign). We need to engage in reframing and changing the dialogue in Alberta about comprehensive social policy; what do we need in order to have a long-term vision in this province?

We’re cutting public service funding when we should be supporting that sector. We’ve targeted the poorest and most vulnerable people in society. The social economy sector has been trying to stand up, and is willing to speak out about the reality of what they’re experiencing, but far too much of it is rooted in fear, and for a good reason. We are experiencing things in Alberta that would not be tolerated in any other province.

The only way to improve the social economy sector is to transform what the public thinks that sector is all about, and to rebuild this sector of our economy.

**Toward a comprehensive social policy**
When asking whether discussions about these realities have been held with the government of Alberta, it depends on which level you’re speaking about. A number of incredible people care passionately and uniquely about developing their areas. Even Ministers will say they like it that we’re out there speaking and challenging them on these issues, but when they go into cabinet, if nobody is challenging them, they have a hard time getting anything done.

They’re getting no support. Advocacy isn’t about having a good relationship with one Minister; it’s about making sure all Ministers hear about issues from within their constituencies. People at senior levels are fabulous—they’re struggling themselves, they know what needs to be done, and they would like to be more innovative and creative. But they’re being forced to accept the contract manager model, where government doesn’t do things themselves, but sub-contracts out the actual handling of the services.
Working in the Social Economy: Sector experiences in adapting to reduced resources

Bill Moore-Kilgannon
Public Interest Alberta
April 27, 2010

Overview

• Short-term thinking vs. comprehensive plan
• Competitive model vs. Service Delivery
• Outcomes-based service delivery
• Deskilling the workforce
• The impact of the cuts
• Advocacy
• Towards a comprehensive social policy

Short-term thinking vs. Comprehensive Plan

• Political timeframes
• Economic shifts – Eg. Who Cares Alberta
• Annual Budgets and in-year cuts
• Comprehensive plan – Long-term investments in quality public services
Slide 4

Outcomes-based service delivery

- How will new contract structure changes relationship between
  - government and agencies
  - between agencies and staff
  - staff and people they are working with

Slide 5

Deskilling the workforce

- The wage gap
- High staff turn over rates
- Reduced standards for hiring
- Reduction of education programs
- Denial of professional association for child and youth services

Slide 6

The impact of the cuts

- Program cuts have cumulative affect
- Eg - PSE cuts = loss of programs
- $36 (3.1) million from Children’s services - $28 million (6.8%) from child intervention services
- $87 million cut (7.3%) to Employment and Immigration - $15 million in tuition and employment programs
- PDD – When “not a cut” is really a cut
WRAP-UP AND EVALUATIONS

We’ve heard today from three stakeholder groups. We should also acknowledge a group that has been absent from our discussions this afternoon—the clients and recipients of services themselves. It’s a challenge to include that group within a forum such as this. But as the City of Edmonton and the Province of Alberta move forward, I believe the social economy should be recognized as a significant contributor to the economy of the city and province. The social economy is the intersection of the economic and the social. This requires a different mindset, and leads us to ask ourselves some questions:

- Are there research opportunities that can come out of this symposium?
- Can we partner to use limited funds to leverage our effectiveness?
- What is the university’s role in preparing for a new level of partnership?
Those of us engaged in social economy activities are looking for research partners. All stakeholders need to be involved in some way if we’re going to be able to strengthen the social economy. We need to be strategic, and to develop the social economy purposefully.

Thank you and evaluations
Jorge thanked the symposium’s sponsors, BALTA and ECVO. He also thanked Julie Salembier (in charge of technical elements), Alison Taylor, Stewart Wulff, graduate student Elizabeth Vergis, and Mandie Abrams. Registrants were asked to fill out the evaluation forms that were included in their package, and thanked for their attendance and participation.