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Promising Recruitment and Retention Practices for Local Level Staff

Focusing on the Human Resource implications of the Integrated Programming Model (IPM Model)

August 2009

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Executive Summary

The integrated programming model (IPM) is the model for World Vision's next generation of programmes. IPM equips World Vision local level staff to work effectively with partners toward the sustained well-being of children within families and communities – especially the most vulnerable.

Following piloting of IPM in 30 programmes across all regions, wider adoption of IPM by new and existing programmes is beginning in FY10. The most important success factor for this model is staffing: having and keeping the right people in key roles and building their capacity to fulfil their responsibilities. This report was commissioned to help World Vision prepare to address this challenge.

Background and Scope of Report

Local Level Staff are a critical and large part of World Vision's 40,000 people workforce: estimated at 40% of the total. The new **Integrated Programming Model** is based on effective engagement with partners and communities. This requires Local Level Staff that have strong skills in relationship building, facilitation, and local analysis.

This will require an increased level of investment in **Capacity Building** with a priority on soft skills. For the core IPM roles, 'misaligned' recruitment decisions or the departure of a key relationship builder in the community will have a much greater cost in terms of total staff costs and lost programming outcomes than ever before. Any unmanaged attrition (turn-over) is costly and therefore National Offices must examine their local context and take steps to attract and retain the right staff.

This report summarizes promising practices for recruitment and retention of local level staff. These practices were discovered through research with local and national level staff in more than 32 National Offices across all regions. The report recommends practices which have the potential to be replicated across the National Offices and have significant impact on the successful recruitment and retention of the type of field level staff that will be required for successful implementation of IPM. Around 50 such practices have been identified, many of which have already been proven effective but are not yet consistently applied.

Executive Summary

This report has input from interviews with approximately 40 WV Informants from Operations and P&C, 8 peer organizations, 800+ surveys responses from World Vision staff around the world and Accenture' high performance approaches and resources all with insight into recruitment and retention practices. Whilst some of the promising practices need to be reviewed for prioritisation and applicability for each National office, **there are some key opportunities for increasing retention across the Partnership and improving staff loyalty, well-being, and commitment.**

- **Staff engagement** can be increased through new ways of opening up communication channels, soliciting and acting on staff input, and recognizing/valuing staff contributions, suggestions and concerns as part of a more open and facilitative management style
- **Staff capacity building** – high performing staff want to continuously improve, and the IPM promotes an outcome and results orientated organisation. This can be achieved through building a more open and a continuous learning culture, where staff are proactive about their own learning opportunities, are not penalised for mistakes and stop equating 'learning' with classroom based training events
- Support **career growth** at local level by reviewing the number of grades within roles, creating senior roles who have responsibility for coaching new staff, whilst continuing to practice in the field and encouraging horizontal moves

The majority of the practices highlighted throughout the report are not deeply tied to an IPM model would be beneficial to National Offices irrespective of any new or changed programming approach

Executive Summary

Implications and decisions for National Offices

National Offices differ in their current approach to programming and HR policies and practises. However this does not mean that there cannot be standardised people processes. Nor does it mean that promising recruitment and retention practices can't be shared and implemented

It means that it is hard to give prescriptive blanket recommendations. Hence there is a need for each National Office opting into IPM to complete a **Country Self Assessment**. A tool has been develop to enable the National Office to understand the key HR implications of IPM and to plan how to address these implications based on good practice within World Vision and beyond.

Depending on local context and workforce trends each National Office will need to consciously decide, for example, whether to:

- Apply an incarnational approach through having staff live within or near the communities served or in other ways.
- Source staff from the local community or from urban areas with higher education levels
- Provide employment contracts on a fixed-term or permanent basis

These decisions will allow P&C to create much more integrated and planned approach to key aspects of sourcing, contracting, compensation and benefits.

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Executive Summary

Better equipping P&C to support National Offices in the recruitment and retention of the Local Level Staff

Organisations with strong recruitment and retention practices typically have robust processes and systems in place to support HR efficiency, to provide metrics and data for prioritisation, planning and trending which allow senior HR leaders to focus on more strategic issues. In many countries, finding the right people for key roles will require more capacity building than in the past. The impact of World Vision's lack of a Global HR IS and Learning Management System has been strongly highlighted by a recent Hackett report which benchmarked World Vision against peer organisations. Investment in this area would make a number of the promising practices such as Workforce Planning, Succession Planning and Career Planning far easier to implement and sustain, as well as improving efficiency and effectiveness of capacity building. Technology is a significant investment but there are likely to be opportunities for more cost effective process reviews to achieve more consistency at P&C level

IPM as an opportunity to reduce change fatigue and impact of multiple requests on staff

World Vision's Vision, Mission and Values attract many extraordinarily committed individuals However, the large number of simultaneous initiatives competing for staff time and attention can cause 'change fatigue' demonstrated by stress or apathy towards strategic initiatives in the field. To optimize IPM's fresh focus on local solutions, the Partnership should allow Local Level Staff to dedicate their energy to the new model and build proof of success in the community, especially in the first years after the launch. This will mean difficult trade-offs around strategic priorities, which may result in a conscious decision to delay or forgo other promising initiatives in order to minimize the burden on our people and to maximize and correctly align the financial and people support for the project.

This report aims to provide guidance on promising practices that can improve recruitment and retention of Local Level Staff. It is extensive as it provides recommendations on over 50 promising practices. The Self Assessment tool aims to support National Offices in prioritising those most relevant to their context. Guidance is available to those National Offices choosing to use the tool.

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Scope and Background

Employees working in the field at programme and community levels are the key to the success of World Vision's work. These are referred to in this report as Local Level Staff (or staff). The IPM model recognises that these staff must be adequately equipped; this must start with recruiting and retaining the right people.

A consultancy was co-sponsored by People and Culture and the IPM team to produce a report on the **promising practices for the recruitment and retention of Local Level Staff**, bringing perspectives from both within World Vision, and outside of the organization.

This report presents recommendations for action that World Vision can take at multiple levels to improve recruitment and retention. Most of these recommendations will need to be contextualized by National Offices to reflect their needs and local situation. The Country Self-Assessment will help National Offices to consider areas of strength and weakness in their own recruiting and retention practices that can help them to focus on high priority areas when opting into IPM.

Exclusions from Scope[1]

Topics related to supporting the effectiveness of Local Level Staff which are not addressed in this Report are:

- NO Salary Compensation Strategies (country based approach required)
- Approach to Integrated Capacity Building (ICB) and required Staff competencies (addressed in the draft ICB Strategy)
- HR effectiveness (for a full assessment of P&C's current capabilities see the Hackett Report)

1. For further details of where to find documentation related to exclusions from the scope of this report see the Appendix B.

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What is the Integrated Programming Model (IPM) Project

A Partnership-wide project to:

- Review the current programming approaches of ADPs and other WV programmes, as well as best practices in relevant programming of other organisations
- Facilitate the development of an integrated programming model based on the findings of this review, through partnership-wide **co-creation** including piloting in multiple contexts.
- Serve all lines of ministry, sectors, themes, functions, and regions

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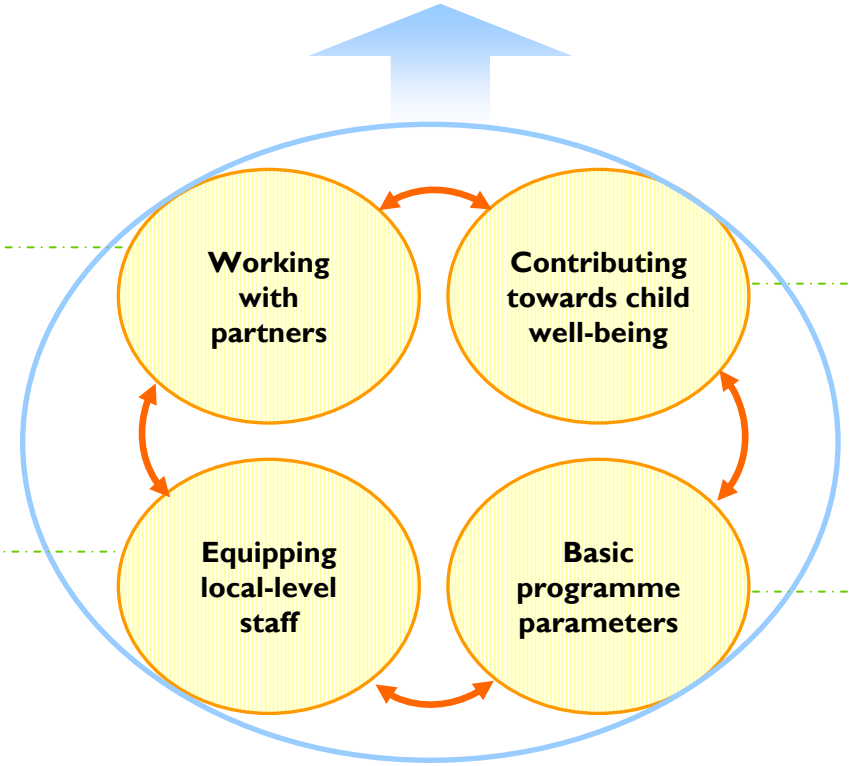
What is the Integrated Programming Model (IPM)

The Integrated Programming Model equips local level staff to work effectively with partners toward the sustained well-being of children within families and communities – especially the most vulnerable

Sustained well-being of children within families and communities – especially the most vulnerable



Includes:
- Understanding of partnering
- Types of partners
- The critical path

Includes:
- Child well-being outcomes
- Child participation
- Project models
- Measurements

Includes:
- Roles of WV local-level staff
- Key competencies
- Management support

Includes:
- Geographic size
- Target populations
- Life span & cycle resourcing
- Governance
- Sponsorship programming (as applicable)

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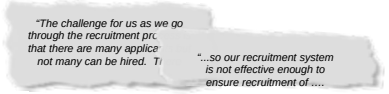
Approach and Methods

Data Gathering

Internal Interviews



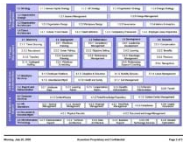
Existing World Vision Reports

Employee Survey

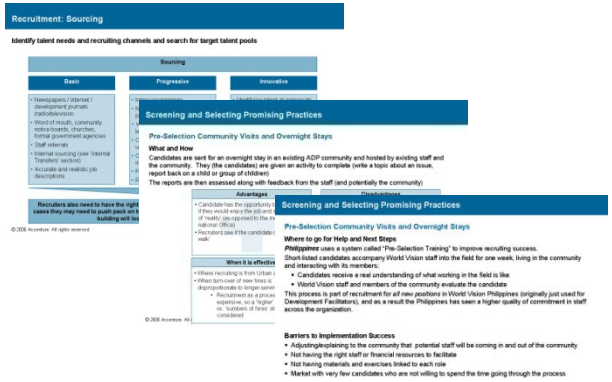
Small stakeholder groups

External Interviews & Research

Accenture thought leadership



Report Produced & Reviewed



The report provides guidance for Global Centre, the Regions and National Offices on leading recruitment and retention practices, and how they may be relevant to WV especially within the context of IPM.

Country Self Assessment

After global and regional review. The next step encourages each National Office to perform a self assessment to determine priority areas for action.

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Breakdown of Main Recruitment and Employee Engagement Sections

Recruitment	
Challenges and Overview	On boarding and Orientation
Workforce Planning	Internal Transfers
Sourcing	Contract Types
Screening and Selecting	

Engagement	
Overview and General Opportunities	Monetary and Non Monetary Rewards: Recognition
Organisational Culture	Performance Management, Individual Development Plans and Coaching
Learning	Succession Planning
Staff Care	Career Pathing
Monetary and Non Monetary Rewards: Salary	Aligning of Support Functions
Monetary and Non Monetary Rewards: Benefits	

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How the Recruitment and Retention Sections are structured

Each section typically contains:
- Existing challenges or perceived future challenges with the area (not necessarily applicable to each NO)

Each subsection typically contains:
- A definition of the topic or sub-process
- 'Practices' broken down into
  - *Basic:* Should be considered the 'minimum' required to run the process
  - *Intermediate:* Strong practice bringing well-documented benefits
  - *Innovative:* Promising practice, but not yet common in the INGO field

Promising progressive & innovative practices
- Those requiring detail:
  - A description of the 'practice' (what & how)
  - The advantages & disadvantages of the practice and when it may and may not be effective
  - National Offices or Organisations that have implemented the practice
  - Barriers to implementation success
- Those which are straightforward:
  - Explanatory text only

Additional information includes:
- Areas requiring organisational or NO debate
- Other points of view
- A link to scripture where relevant
- Integration points with other processes (if not obvious)
- Quotations from interviews and the survey

National Offices are not all recommended to implement promising practices for all topics. Each NO should review what most urgently needs attention using the self assessment tool to do support this.

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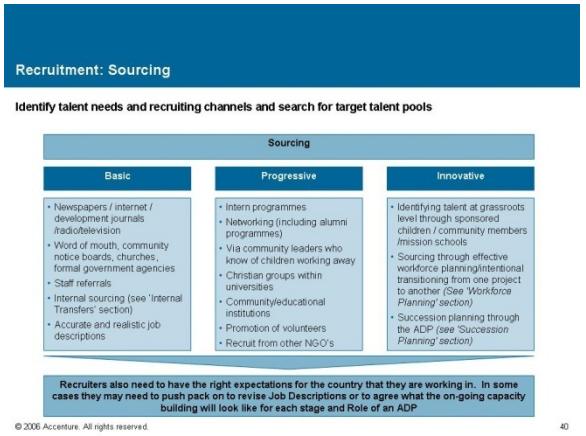
How to read this report

If responsible for a specific function in HR

Specialist for a P&C functional area

- Review the Contents, how the reporting and recruitment section are structured and opening slides
- Jump to relevant recruitment or retention section
  - Review Promising Practices Overview
  - Review detailed slides for any practices that you require more detail on
- Read sections on
  - Roles of National Office HR & Operations and how they can be enabled
  - How the Region can help



Promising Practices Overview

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How to read this report

If responsible for HR generally

Specialist for a P&C functional area

- Review the contents, how the reporting and recruitment section are structured and opening slides
- Consider which processes within your areas require improvement
- Jump to relevant recruitment or retention section
  - Review Promising Practices Overviews as per interest areas
  - Review detailed slides for any practices that you require more detail on
- Read sections on
  - Roles of National Office HR & Operations and how they can be enabled
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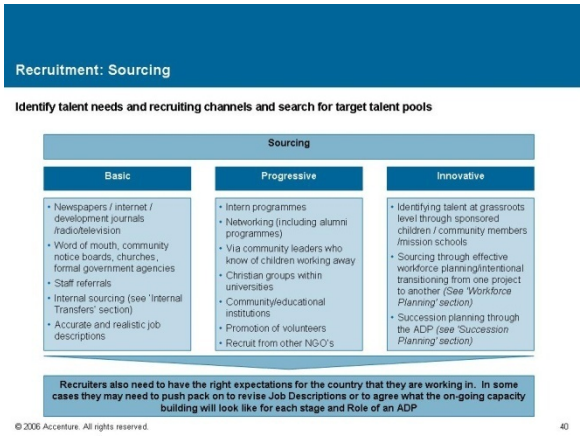

Promising Practices Overview

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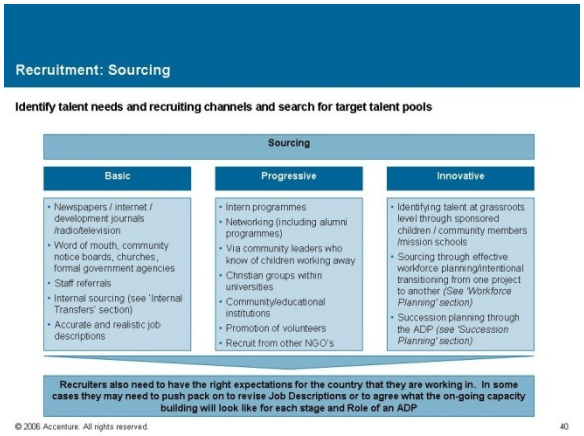
How to read this report

If responsible for Operations

Operations Reviewers

- Review the contents, how the reporting and recruitment section are structured and opening slides
- Review the 'Logical Operating Model Framework for discussions' in order to start to think about the breadth and complexity of HR
  - Consider which processes within your areas require improvement/you would like P&C (HR) to do more
- Jump to relevant recruitment or retention sections and review:
  - Promising Practices Overviews as per interest areas
  - Detailed slides on practices for which you require more detail
  - The sections on 'Culture' & 'Alignment of Support Functions' in Retention
- Read sections on
  - Roles of National Office HR & Operations & how they can be enabled
  - Think about how your function can better work with P&C (HR) colleagues



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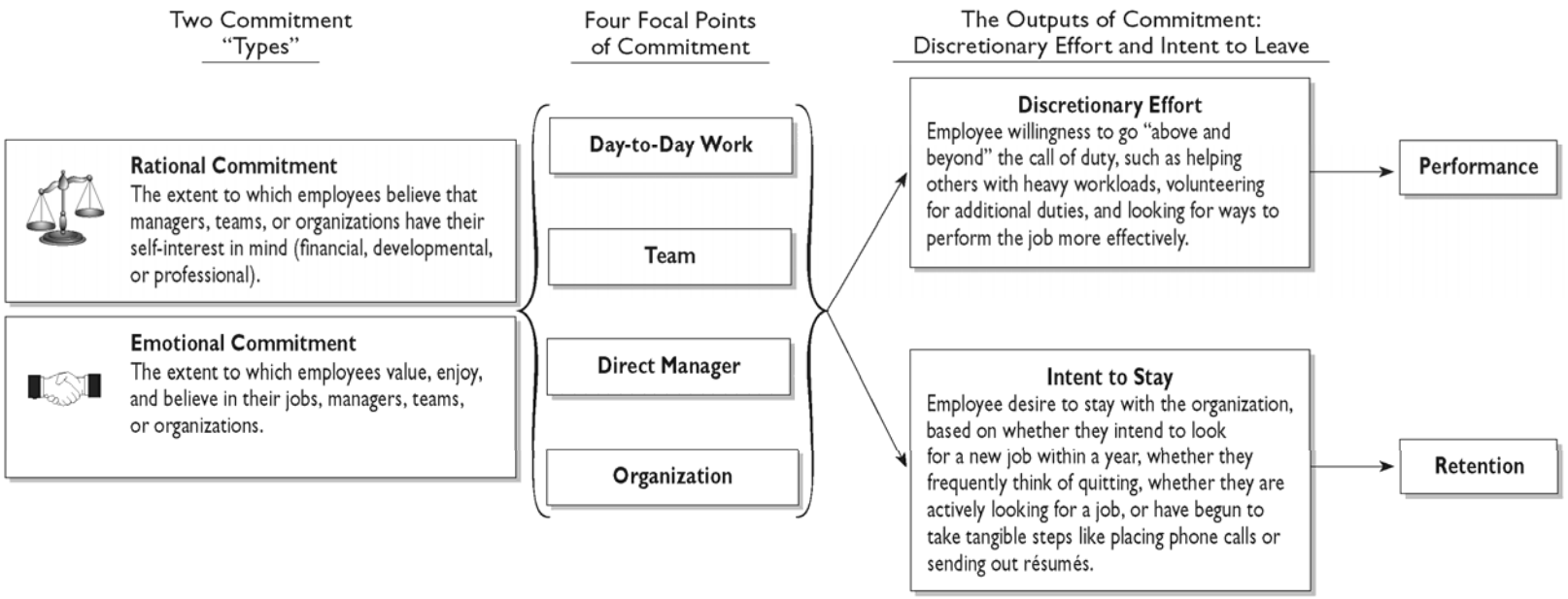
About Employee Engagement and Retention

What does 'Employee Engagement' mean?

Engagement is the extent to which employees commit to something or someone in their organization and how hard they work and long they stay as a result of that commitment.



About Employee Engagement and Retention

What does ‘Retention’ mean

Retention’ refers to keeping or retaining individuals in an organisation. Time and money is spent on hiring (recruitment) and on building the capacity of an employee (training, coaching) so effort should be made to retain that employee whilst there is still meaningful work for them to do.

Retention is the opposite of ‘turnover’ or ‘attrition’. When good strong performers leave an organisation, it is considered ‘unmanaged’ turnover.

How Recruitment links to Engagement and Retention

There is a strong link between recruitment, engagement and retention – organisations need to understand how to keep employees motivated and committed, which employees they want to retain and understand how to recruit similar types of people. This process needs to link to their overall workforce and talent management strategies.

For example, is it better to:

A Recruit amazing staff, who understand what is required of them quickly and require only two weeks of internal training - but on average leave after 1.5 years?

B Recruit staff who take longer to perform at the ‘expected’ level, require six-weeks worth of training and then on-the-job coaching for a year but stay with the organisation for an average of six-years.

This isn’t a trick question[1], it is an illustration of the dynamics that organisations needs to consider and answer. The answer will be largely based on cost and results. Additionally, understanding why people leave and why people stay also helps understand how to find the right people in the first place.

1. A purely personal view is that were I running in a call centre, I would chose option A. If I were running a development programme and recruiting community based facilitators, I would chose option B

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About Employee Engagement and Retention

Why there are so many topics related to Employee Engagement

The following topics have all been related to Employee Engagement and Retention in this report

Organisational Culture	Monetary & Non Monetary Rewards: Recognition
Learning	Performance Management, Individual Development Plans & Coaching
Staff Care	Succession Planning
Monetary & Non Monetary Rewards: Salary	Career Pathing
Monetary & Non Monetary Rewards: Benefits	Aligning of Support Functions

The following slides aim to explain why and show the ideal integration between these topic.

Retention is a multi-faceted topic it could be thought of simply as removing the reasons that people leave, some of these topics link into the next stage of increased employee engagement – ensuring that not only do employees want to stay, they want to give their best and do well. In many ways World Vision's Mission and Values place them in a relatively unique position of giving people a real reason to stay and strive

Please also read the opening sections of the Engagement and Retention section for further details

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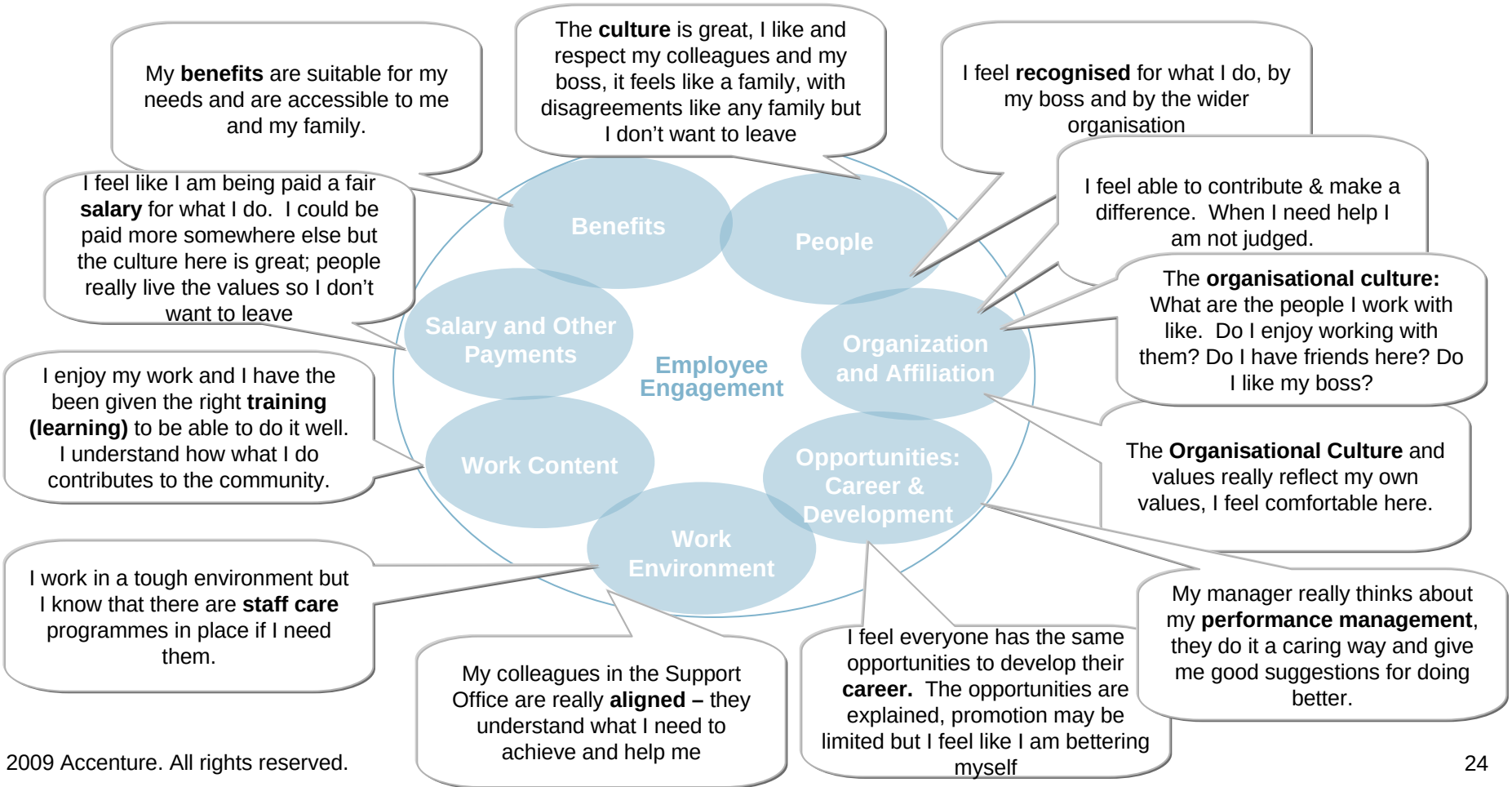
About Employee Engagement and Retention

Linking Engagement to Employee Satisfaction

To illustrate why these topics are important, these slides show how a satisfaction can be increased or reduced in each of the following areas. This example shows comments a satisfied employee might make.



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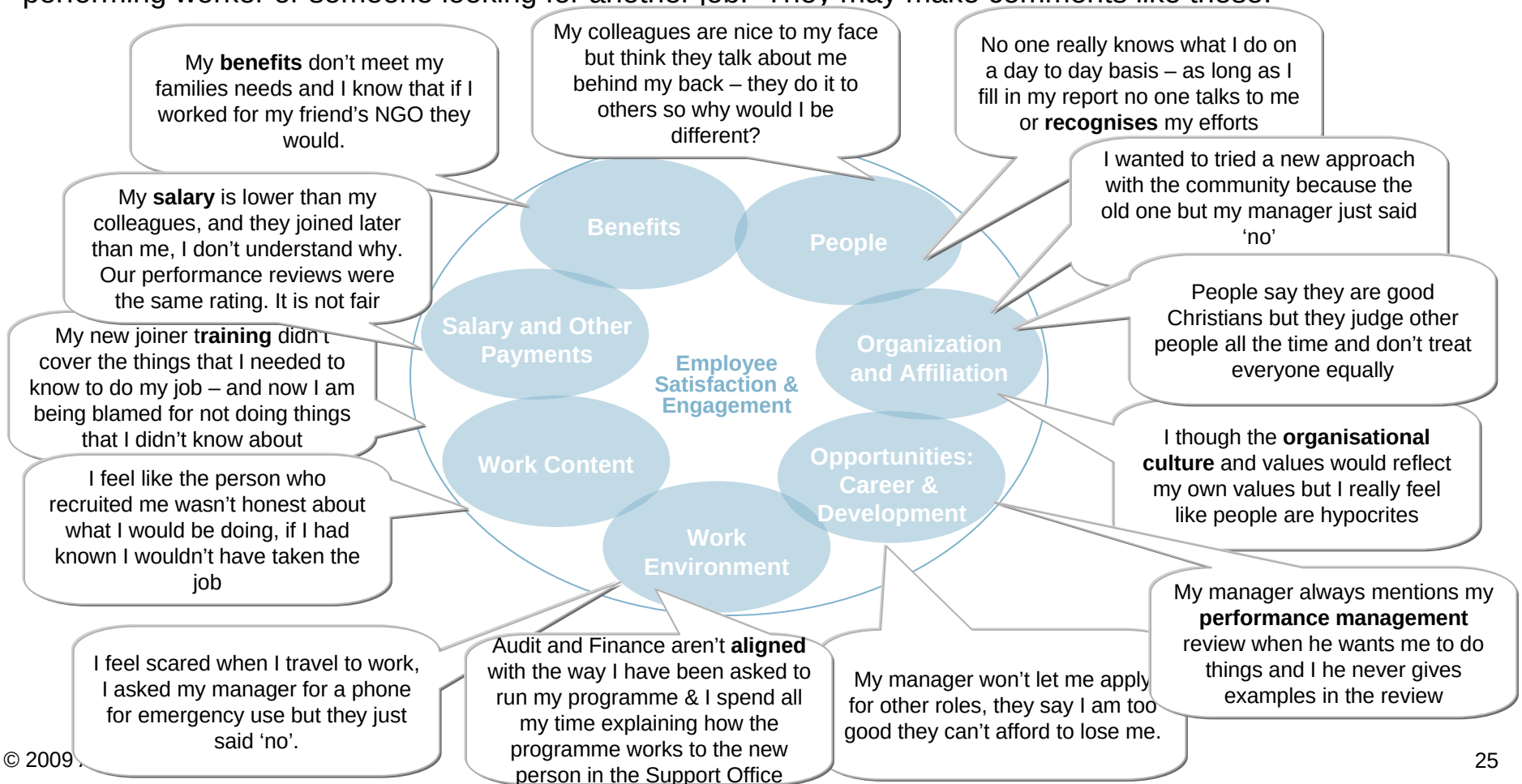
About Employee Engagement and Retention

Linking Retention to Employee Satisfaction

Conversely employees who aren't satisfied, become less engaged and every area cumulates to an under performing worker or someone looking for another job. They may make comments like these:



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About Employee Engagement and Retention

Why Learning is an Engagement Topic

A big theme for IPM is an **increased focus on capacity building** which will required a substantial **investment**. Some people might question the wisdom of this and feel uncomfortable with diverting funds in this area.

Even in the private sector, this is a concern to some. Rather than guaranteeing employment security, many firms now claim to provide opportunities for employees to accumulate skills and experiences that both improve company performance and enhance employees' employability in the labour market. This "employability approach" encourages and often expects individuals to take greater personal responsibility for their careers.

Since many believe that the employability approach allows, and even invites, the loss of talent, organizations are often hesitant to invest to make their employees more marketable. According to this argument, any investments in employees' general skills and marketable competencies will increase people's value in the external labour market and presumably their likelihood of leaving.

In a global study of managers and executives[1], they found that organizations can strengthen their executives' intentions to stay by equipping them to leave. Their counterintuitive conclusion: **the best way to ensure that critical talent doesn't leave is by providing experiences and opportunities that truly enhance their value and employability in the external labour market.**

1. Accenture research paper 2008. It is *inevitable* that some employees will leave as a result of increased investment in them – this only makes it more important to focus on employing those who core values are aligned with those of World Vision.

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Linking Retention to Employee Engagement

Introducing the Engagement Survey

World Vision is currently piloting an engagement survey[1]. This measures the engagement levels of employees. Engagement is the extent to which employees commit to something or someone in their organisation, and how hard they work, and how long they intend to stay as result of the commitment.

As an outcome to Engagement Survey, there will be data on levels of employees emotional and rational commitments and as a result Intent to stay with World Vision and employee's Discretionary effort.

In other words Employee Engagement describes the extend to which employees enjoy and believe in what they do, and feel valued for doing it, and actively seek to achieve the organizations goals and objectives.

The data will be benchmarked against other organisations operating in different industries and contexts throughout the world.

1. World Vision is working with the Corporate Executive Board to roll-this out. National Offices will be able to use employee engagement results to understand how better to control their retention levels.

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What are the HR implications of the Integrated Programming Model (IPM)?

IPM will have different HR implications for each National Office

Depends on country context

IPM is a collection of best practices from around the Partnership and from other NGOs and therefore it should not be surprising that there is no one answer. National Offices needs to ask

- How do the current skill profiles of existing local level staff differ from those in the IPM job profiles?
- Do the skills and capacities required exist in the external market at the right price?
- If we believe that moving to the IPM model is right for their office, what aspects of this will be the hardest to implement?
- if existing staff don't have the right profile, are we prepared to make and implement tough decisions?
- How successful are we currently at recruiting and retaining local level staff? If we examine the reasons why people left, do we expect it to get better or worse with the introduction of IPM?
- How closely do HR understand the organisation's needs and do we have the processes and systems in place to enable them to support those needs? Do HR have the right capacity? If not, how will it be built

The questions above illustrate the need for each NO to complete a NO self assessment. The answers are not necessarily linear, choices made about IPM opt-in, the timing of IPM implementation and phasing approaches to IPM will all have an impact on the HR Implications. Phasing approaches might be

- Convert to IPM in one go vs. a phased approach
- Apply only new ADPs & those up to a particular stage in the lifecycle or to all ADPs

Whilst each National Office will have a different priority for promising practice improvements, four key areas can be applied consistently across the partnership. These are outlined in section x.

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What are the HR implications of the Integrated Programming Model (IPM)?

Being a little more specific

One clear message

The move away from, in many National Offices, a service delivery based model, to a community empowerment based and child centred development approach involves less spending on physical resources and more investment in people to make project successful. This really emphasises the need for:

'the right staff in the right place at the right time'

How can this report help HR and Leadership to work more successfully together to achieve this?

1. Outlines and defines promising practices within and outside of the organisation
2. Provides a way in which countries can review these and assess the changes that they should consider in staffing more effectively (National Office Self Assessment Tool)
3. Emphasises the difficulty in making HR more efficient and effective without investing in the right underlying processes and technology[1].

1. For further details on the challenges the HR organisation faces, benchmarked against peer organisations, see the Hackett Report. Referenced in Appendix B

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Essential Capacities for IPM

The capacities required for IPM to be successful are[1]:

- Understanding of the implications of child well-being in programme design
- Capacity to shift from a service delivery focus to a partner facilitation focus. This requires a deep understanding of local culture and context.
- Appreciative Inquiry skills as staff work with potential partners and key stakeholders.
- Facilitation skills for:
  - meetings with stakeholders, particularly where there are mixed levels of power
  - working with children
  - using both formal and informal interactions to move the process forward
  - building the facilitation skills of local level partners and community members
- Communication skills to:
  - Help the team clearly articulate expectations to the potential partners.
  - Help share good practices and lessons learned with stakeholders at the local level and within WV as well.

- Capacity to deal with traumatic issues that children may report to them.
- Time management skills, particularly as staff are required to work on multiple tasks simultaneously.
- Programme skills in
  - Understanding the relationship between IPM and LEAP
  - Local planning
  - Monitoring
  - Process documentation
  - Resource mobilisation
  - Conflict management
  - Use of qualitative and quantitative data
- Capacity to work effectively with local churches and FBOs.
- Capacity to host exposure visits.
- Capacity building approaches for team leads to quickly and efficiently bring new staff up to speed on IPM and progress to date.

1. Taken from *Summary of Learning from IPM Pilot Programmes - 7-09.doc* referenced in Appendix B

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Incarnational Living

National Offices Approaches to Incarnational Living

What does this mean?

'Incarnation' simply means to embody or personify something, so in this example, incarnational living is to live with the community like the community to be better able to share and help and to demonstrate good living.

- IPM states that the best approach is to have community based staff living in and with the local communities but recognises that this may not be an option in some NOs

Is it optional?

- The key intent behind the approach is a focus on relationship building.
- The National Office must make the decision what will work best for them including in that the feasibility of recruiting and retaining people to do live within the community. Factors that will determine this and the implementation success are:
  - How the approach is communicated and how staff understand the reasoning & benefits behind it
  - The strategy of any transition approach
  - Where people are sourced and staff staffed from
  - Any additional HR practices/benefits/allowances and policies
  - The likely reaction of the community to the approach (experimental approaches may be required)
  - How can staffs' families be supported (especially with regards to education of children) and work opportunities for spouses.

"As the Father has sent me, I am sending you." John 20:21-22

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Incarnational Living

National Offices Approaches to Incarnational Living

India

All Development Facilitators to live within the community the work inclusive of their immediate family. This is non-negotiable and is part of the job description.

- This appears to work reasonably well and challenges lie with newer staff members
- Some geographic areas within the region are more challenging than others
- The HR, Operations and Staff Care have had to implement a number of initiatives focusing on security, living arrangements etc.
  - The top issues remaining are children's education (with some feeling like they are sacrificing their children's future for their communities) and spouses' ability to find work

Cambodia

Development Facilitators (DFs) complete overnight stays in the communities two or three times a week. During the rest of the working week, the DFs either live in the ADP base in the week (without their family) or live close by with their family. This is a relatively new approach for Cambodia

- This has worked better with new recruits (hired specifically this approach) than older members of staff
- There are still concerns by staff for their safety and security during these visits (especially female staff)
- Cambodia is considering reviewing the minimum number of stays per week and trying to focus on the effectiveness of these overnight stays
  - Ensuring the people stay with different families
  - Focusing on special celebration days/community events etc.
  - Coaching on what should happen during overnight stays/making them effective

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Incarnational Living

Incarnational Living: Different Points of View

"I like the principle of the incarnation model, in terms of staff retention & the pressure on them – I think it increases the odds (of losing people) - if it (community living) is for 5 years vs. 2 months there is a big difference – sometimes having a little bit of space is a good thing especially if working cross culturally (this can also been between the well educated & those with less formal education)

Would living in ADP accommodation make a difference to people's living conditions?

"No difference to now (where staff currently live) but people leave because of the living conditions and people don't take the job because of it. It is a location that you can't take your family."

"I think they should live near by. They should also get plenty of stimulation to converse and meet with peers. In communities you can be protected by community and blood link – which you don't have in rural villages if you come in from the outside."

"I don't think it would make any difference. Honestly no, in my community, sleeping there will not make me part of the community After 19 years of marriage I am still an outsider, a welcome outsider – when my husband and I go to church we are treated as guests *(in his village)*. I doubt it will offer more value…just to sleep it won't help, but events spending time yes it would improve (but this already happens) Meetings mean that they spend on night there. It has to be optional for the community – in different parts of my country this may differ & be very welcome.

The approach taken to incarnational living will have an impact on the appropriate benefits to offer local level staff

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- Appendix C: Employee Survey Results
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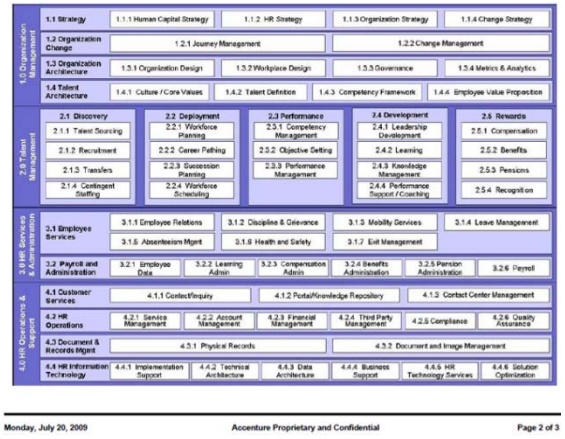
Complexity of HR in any Organisation

What is the HR Logical Operating Model (LOM)

The Logical Operating Model (LOM) has been developed by Accenture to provide a summary of all human resources processes from an operational perspective it is based on experience and Promising Practice insights from Accenture clients across the globe.

- The LOM acts as a baseline solution and initial process inventory from which organisations can review the baseline of efficiency and effectiveness of each entity
- It provides a holistic platform for HR discussions around transformation opportunities which will brings a better understanding the integrated nature of HR
- It should be understood that one process (for example 'Talent Management') may be completed throughout all levels of the model but real success comes from ensuring that the basics are in place and there is integration between processes
- An advantage of the model is also to enable HR professionals to articulate the breadth and complexity of HR's work

Illustration of LoM only. A larger model available in the next slides.



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What is the Human Capital Strategy and how it is different to an HR Strategy

This report refers to both the Human Capital Strategy and HR Strategy. It is important to understand that they two are different and that the Leaders, Managers and other functions have a part to plan in the Human Capital Strategy. Both should link back up to the overall Organisational Strategy and decisions about what actions to take based on them.

The Human Capital Strategy

Enables the organisation to become a high performance business by creating a plan for acquiring, developing, rewarding and retiring the right people, in order to create a workforce with the competencies to support the culture and the overall strategy.

HR Strategy

Define the focus of HR processes and initiatives to support the objectives of the organisation's business and Human Capital Strategy.

An Example

- An aspect of the Organisation's Strategy is to move a community empowerment model of development
- Therefore an aspect of the Human Capital Strategy must be to find an enable/grow People to facilitate community empowerment
- Therefore an aspect of the Human Resource Strategy must be to strengthen recruitment processes to find these people.
- Other functions must also commit (as part of their strategy) to support this

Complexity of HR in any Organisation

Criticisms of P&C

- Many National Offices have either been criticised for not having an HR strategy or for being proactive about National Office prioritises
- This may be fair in some cases and the intention of the report is not to discuss this in detail but to ask Regional and National Offices to consider what **investment** has been made in the **Capacity of P&C departments** in order to improve the situation
- In many cases P&C are only and administrative function; and to move from here investment needs to be made into getting the basics right and where necessary the right staff in place
- The more importance place on people for organisational success, the more focus is required on both staff and the functions which primarily exist to support them

Why has the LoM been included in this Report

- To illustrate and demonstrate the complexity of HR to Leaders in other areas of the organisation
- To illustrate the importance of the having the ‘basics’ right first i.e. the HR Systems, data structures and basic administration that need to work effectively and efficiently before HR Leaders are able to focus more on the more strategic levels of management
- To better support and provide a framework for the Country Self Assessment
- To illustrate the need for an overall integrated approach to Human Capital (People) management and to HR management

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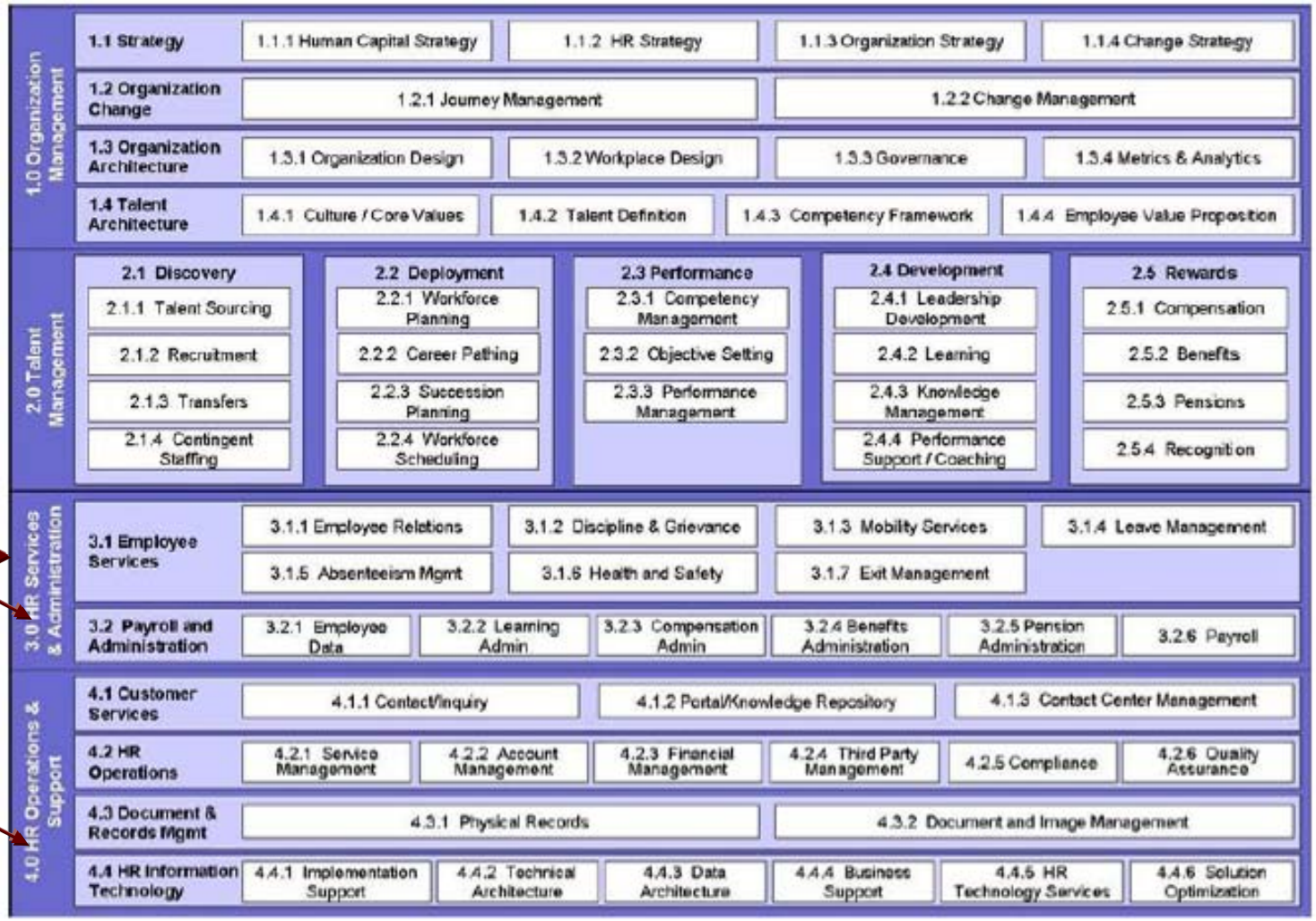
HR Logical Operating Model

Strategy Layers need to feed downward in order to ensure an integrated approach to all processes

Talent Management is the overarching header through the main processes which impact Retention

The administrative layer must be right first (if it isn't HR cannot pay the requisite attention to the top level areas

To be efficient it is under pinned by strong technology processes, data architecture and systems



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How the Recruitment and Engagement Sections are structured

Each section typically contains:

- Existing challenges or perceived future challenges with the area (not necessarily applicable to each NO)

Each subsection typically contains:

- A definition of the topic or sub-process
- 'Practices' broken down into
  - *Basic:* Should be considered the 'minimum' required to run the process
  - *Intermediate:* Strong practice bringing well-documented benefits
  - *Innovative:* Promising practice, but not yet common in the INGO field

Promising progressive & innovative practices

- Those requiring detail:
  - A description of the 'practice' (what & how)
  - The advantages & disadvantages of the practice and when it may and may not be effective
  - National Offices or Organisations that have implemented the practice
  - Barriers to implementation success
- Those which are straightforward:
  - Explanatory text only

Additional information includes:

- Areas requiring organisational or NO debate
- Other points of view
- A link to scripture where relevant
- Integration points with other processes (if not obvious)
- Quotations from interviews and the survey

National Offices are not all recommended to implement promising practices for all topics. Each NO should review what most urgently needs attention using the self assessment tool to do support this.

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Recruitment Section: Contents

Recruitment	
Challenges and Overview	On boarding and Orientation
Workforce Planning	Internal Transfers
Sourcing	Contract Types
Screening and Selecting	

Challenges and Overview
▪ Main Challenges and Improvement Opportunities ▪ Recruitment Challenges: the IPM Development Facilitator Role ▪ Recruitment Challenges: The Role, the Candidate & the Market ▪ Recruitment Challenges: What World Vision Staff Think

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Recruitment: Main Challenges and Improvement Opportunities

Existing Challenges with Recruitment of Local Level Staff

Overall challenges

- Finding the right staff for working in remote (in some countries also in non-Christian areas) locations and keeping them
- Identifying the right people for the right job (skills and preferences taken into account)
- Staff not having interview experience (resulting in 'fluffy' questions being asked/unsuitable job offers made)
- Non-structured pay scales or strategies can mean people are offered 'more than their old job' which lead to significant disconcert amongst existing staff
- Related to general Workforce Planning, the sector may have time to fill pressure due to grant funding (this was not raised within World Vision)
- Diversity: Staff are not always reflective of local populations (need to monitor recruitment for ethnic/tribal diversity as well as gender). Global Polices may not be followed.
- Workforce Planning not being completed as part of the recruitment cycle

Process challenges

- Preferred candidates are lost – due to location preferences not being considered or slow turn-around times
- Line Managers not always involved in the selection process
  - Team harmony less likely to be considered & candidates often make choices on the basis of the potential Line Manager will be

Suggested improvements

- Key metrics to be tracked – including # of priority applicants not accepting jobs, time to offer, recruitment success follow up
- Complete Interview training (module available within World Vision (Targeted Selection))

Recruitment Challenges: The Role, the Candidate & the Market

Do you know what you are looking for?

Whilst stating the obvious it is incredibly important that recruiters and managers fully understand the roles that they are recruiting for and the types of people and skills that they require to fill them.

There are job descriptions for ADP manager and roles below available as part of IPM – HR and Operations will need to jointly review and discussion them.

The Perfect Candidate?

World Vision is often asking for a lot from their staff in some countries. Where the perfect candidate does not exist, HR and Operations will need to discuss what the priorities are, where they can compromise, where they can provide capacity building and what salary is appropriate if the person does not meet the full criteria of the job description (this also means that they can grow into it).

The Market

Knowledge of the existing market should form part of a National Office's decision on scale up for IPM.

Progressive organisations will even try to influence the market as part of their longer term strategies for example by influencing educational institutions and younger people's educational decisions.

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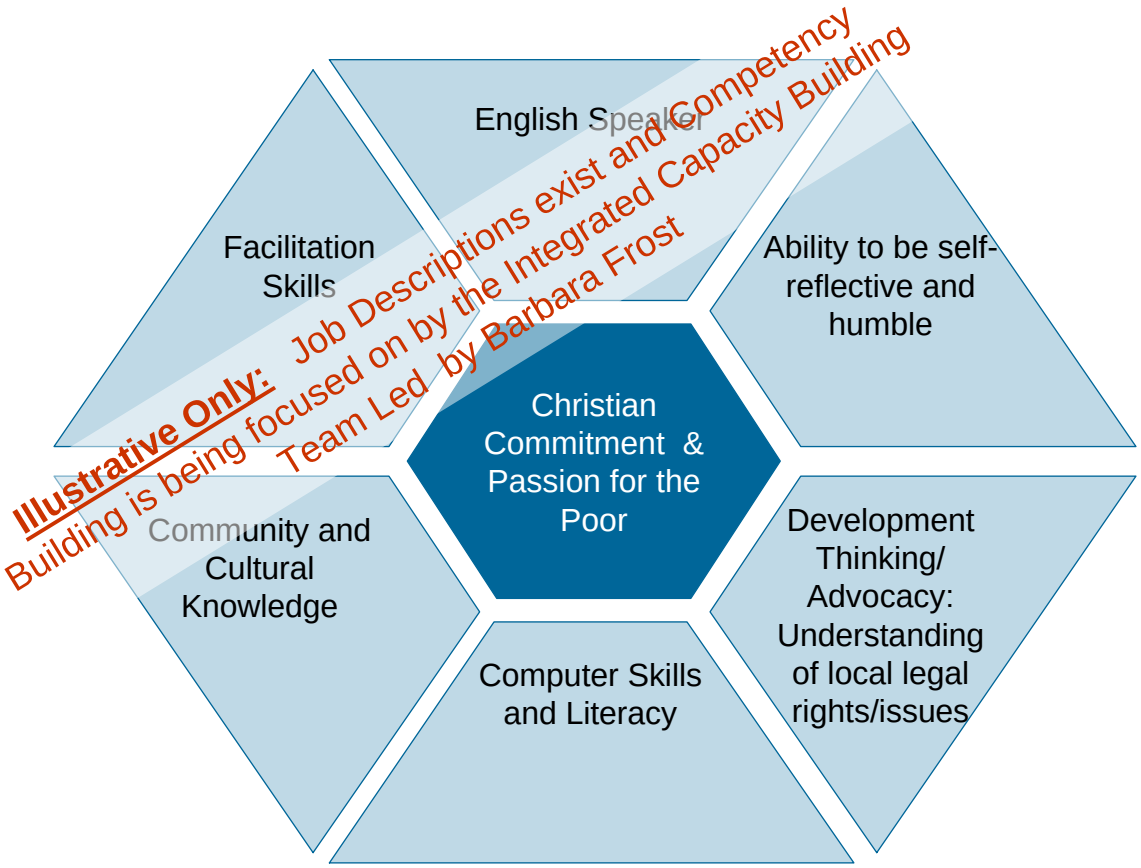
Recruitment Challenges: the IPM Development Facilitator Role

Below is an illustration of the qualities that World Vision might look for in a Development Facilitator.

This has been included to demonstrate how much is being asked of people completing this role. The details below are illustrative only.



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Recruitment Challenges: The Role, the Candidate & the Market

Essential capacities for IPM noted by staff include:

- Understanding of the implications of child well-being in programme design
- Capacity to shift from a service delivery focus to a partner facilitation focus. This requires a deep understanding of local culture and context.
- Appreciative Inquiry skills as staff work with potential partners and key stakeholders.
- Facilitation skills for:
  - meetings with stakeholders, particularly where there are mixed levels of power
  - working with children
  - using both formal and informal interactions to move the process forward
  - building the facilitation skills of local level partners and community members
- Communication skills to:
  - Help the team clearly articulate expectations to the potential partners.
  - Help share good practices and lessons learned with stakeholders at the local level and within WV as well.

- Capacity to deal with traumatic issues that children may report to them.
- Time management skills, particularly as staff are required to work on multiple tasks simultaneously.
- Programme skills in
  - Understanding the relationship between IPM and LEAP
  - Local planning
  - Monitoring
  - Process documentation
  - Resource mobilisation
  - Conflict management
  - Use of qualitative and quantitative data
- Capacity to work effectively with local churches and FBOs.
- Capacity to host exposure visits.
- Capacity building approaches for team leads to quickly and efficiently bring new staff up to speed on IPM and progress to date.

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Recruitment Challenges: What World Vision Staff Think

What the World Vision Staff think about current recruitment practices

Interviews overwhelmingly show that staff at all levels believe that the most important factor is Christian commitment. Many feel that current recruitment efforts source only 'nominal' Christians and that recruitment could be improved in this way.

"The challenge for us as we go through the recruitment process is that there are many applicants but not many can be hired. There may be highly technical people but they may not be facilitators which undermines the process, as they can be abrasive. In terms of the quality of the staff that we select, we are ok."

"It is very easy to recruit Christian staff; we don't struggle at all. We struggle much more with competency issues than with finding Christian staff."

"...so our recruitment system is not effective enough to ensure recruitment of committed Christians rather than nominal Christians."

"...we also try our level best to ensure that this level [ADP Managers] are staffed with committed Christians that will help to ensure that we maintain the spiritual objectives of our organization life."

The challenge in some contexts is to find employees with both Christian commitment *and* capability

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Recruitment Challenges: What World Vision Staff Think

Further quotations

"For example it is hard to recruit the ADP Manager position; it requires strong Christian commitment, often we find candidates who have the skill but not the Christian commitment. With internal applicants/candidates, often they have the spiritual requirements but not the capacity."

"No problem with finding Christians but the issue is the definition of 'Christian'. If Christian staffs' practices are similar to non Christians, then we need to revisit the definition of being Christian."

"We require the competence of an urbanite and the faith of a practicing Christian...That is a very difficult combination to find and retain."

"WV should make a greater effort to hire people who have never worked for WV before. WV staff are generally very dedicated, but sometimes lack management capacity. On occasion, the organization seems to value dedication to core values rather than competency."

"[New recruits need to be] God fearing & dedicated, sacrificing mind with strong commitment to needs on Christian values."

"Leadership shouldn't just be based on paper qualification but coupled with sound and clear Christian living."

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Workforce Planning

- Workforce Planning sits across nearly all recruitment processes and has strong links to many retention topics
- This section is atypical to the rest of the subsections. It has been introduced first so that the reader thinks about the impact of not having a regularly revised and detailed workforce plan on the recruitment process and teams
- It has been included as a request during stakeholder interviews

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Workforce Planning

The Benefits of Workforce Planning

Short-term

- Towards the end of a project staff who do not know what the organisational intent is for them, lose focus on their jobs and start to look for others (retention)
- Employees who know that there is plan in place are more likely to stay (retention)
- Intentional moves and capacity building avoid workforce stagnation

Longer-term

- Transitional stability; better control over ramp-up and down of projects, better understanding of workforce skills enables better programme planning and reduces under-spending
- Future workforce tends better understood and planned of e.g. understanding the % and location of the workforce with over 25 years service and nearing retirement
- Feeds into skills gaps, capacities to be bought and built
- If lead times for building the right capacity or having the correct workforce are known in advance and discussed in conjunction with programme design; programmes are likely to be more successful

Workforce Planning occurs to some degree at ADP and programme level; however there is much to do in terms of building a more strategic approach to Workforce planning, including having the appropriate systems, processes and metrics in place.

A project is currently being piloted in 8 countries; there are forecasting Excel-based tools that produce annual & quarterly metrics. See Appendix B for further details.

Note: Workforce Planning was not part of the scope of interview questions but is a topic that Leaders are interested in.

Workforce Planning

The process of analyzing and forecasting the talent that the Organisation needs to execute its business strategy while also creating plans to address any current and future gaps.

What is Workforce Planning

Workforce Planning in a pure sense involves performing resource / competency analysis to identify workforce demand and supply, fulfilling talent needs with the employed workforce, or via external sourcing and contingent staffing. Workforce Planning is a long-range view of staffing and training needs. More specifically, it is a systematic process for analyzing the current workforce, predicting future needs, identifying the gap between present and future, and implementing programs that bridge that gap and allow the organization to accomplish its mission, such as staffing increases or decreases, redeployment, retraining etc.

Several of the Operations Interviewees raised the need to be more proactive about workforce planning. To avoid a reactive HR service, HR and Leadership should jointly:

- Align the Human Capital Strategy with it's overall Organisational Strategy
- Understanding the existing workforce ages/skills/capability/mobility and aspirations
- Understanding future workforce needs to terms of skill, geography and workforce type
- Assessing the market conditions in the short and longer terms
- Make specific talent plans for each part of the workforce – avoiding broad brush approaches to avoid unintended consequences
- Understand which parts of the workforce should be bought (permanently hired) /borrowed (from other parts of the organisation) /rented (contracted) / built (internal capacity building)
- Review the plan on at a least a six-monthly basis ensuring updates are provided and understood by those responsible for recruiting

Workforce Planning

The process of analyzing and forecasting the talent that the Organisation needs to execute its business strategy while also creating plans to address any current and future gaps.

Workforce Planning

Basic

- Workforce Planning is equated to budget headcount planning
- Changes to workforce staffing & skill mix are made as necessary
- Annual targets are given to HR by the leadership team basis projections for organization goals
- Supply is identified basis existing tried & tested channels of fulfilment
- Gap analysis is performed for critical positions only, & flagged to leadership as potential risks in case of mismatch

Progressive

- Future business strategies & projections are periodically created to guide planning of future staffing levels & required workforce competencies.
- When workforce adjustments are deemed necessary, a workplace action plan is created to guide these changes
- High-level workforce planning goals & objectives are tied to business requirements
- Forecasting & action planning is in place, updated annually
- Demand & supply requirements are largely determined on the basis of past trends
- Comprehensive demand-supply gap analysis is conducted on a number of critical positions
- Multiple channels of fulfilment evaluated for innovative methods of gap fulfilment

Innovative

- Ops & HR Executives integrate Workforce Planning with goals & strategy to project talent requirements by workforce, location, etc. on a year-on-year basis
- Forecasts are compared to current workforce levels & competencies to identify gaps
- A systematic workforce planning process is in place to determine how to meet future staffing needs (downsizing, re-deploying, retraining, recruiting, etc).
- Workforce forecasts & action plans are regularly adjusted to meet changing conditions & strategies
- HR executives are experts in understanding demands & potential shifts in the talent market
- Comprehensive analysis of gaps in both demand & supply. Competency profiles & ratings are used to understand organization-wide competency gaps based on a comparison of anticipated future needs with current workforce competencies
- All channels are evaluated holistically for recruitment, sub-contracting, internal rotation/ re-deployment, staffing, turnover etc.

World Vision has a lot of room for improvement in this area. This year was the first year that the total number of employees was known at Partnership level

Workforce Planning

In order for Workforce Planning programs to be successful, organizations must effectively address a number of engagement, process and technology challenges.

Barriers to Implementation Success

Organisational Challenges

- Getting **leadership buy-in** for a formal planning process
- Belief that a **reactive approach** to workforce management is sufficient
- **Organisation** & **cultural objectives** that may appear to be divergent
- Multiple roles & process **stakeholders**, including HR, procurement, finance & the core organisation
- Unclear or unmeasured **accountabilities** for delivery of the plan, or the action plans
- In some HR organizations, a weak tradition for strategic planning, resulting in a lack of **organisational confidence** that HR can deliver in the role
- Organisational complexity, including globalization, presence of diverse multiple generations, federal models and matrix organisation models that result in workforce complexity

Operational Challenges

- Absence of good quality, usable **data** that is easily collected and evaluated
- Difficulty **integrating** external hiring efforts with internal mobility and career management assessments
- Difficulty in integrating employee and employment related **staffing** with contractor and consultant staffing
- Responding cost effectively to **rapid changes** in organisational demand
- Avoidance of **compliance related penalties**
- **Reconciling** soft data (competencies) with hard data (headcount and productivity)
- Lack of **organisational agreement** on productivity metrics and standards

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Workforce Planning

Below are the activities and activity definitions for Workforce Planning

Activity	Activity Definition
Assess Impact of Strategic Direction on the Workforce	Review the organization's human capital strategy and identify potential workforce impacts as a result of the plan. Determine the impacted areas (e.g., culture, governance, competencies) and workforces (e.g., sales, factory floor) as well as anticipated timing and magnitude. Assign an importance/priority for addressing the potential impact.
Perform a Strategic Job Evaluation	Assess the value of jobs in the target state of the business strategy. Assess the impact of current trends on job values and infer the value of jobs or functions in the future.
Project Workforce Demand	Forecast near-term and long-term workforce demand by leveraging historical metrics (e.g., revenue per employee) and expected workforce impact of current strategic direction. Apply discretionary contingencies as needed to control risk.
Project Workforce Supply	Forecast near-term and long-term supply of resources by leveraging historical metrics (e.g., attrition, hiring, use of contingent workforces) and expected business results of current talent management strategies. Apply contingency as needed to control risk.
Perform Resource / Competency Gap Analysis	Look at organizational needs, future workforce requirements, and existing workforce plans, and compare skills and competencies of the current and planned workforce to what is necessary to meet those demand. Prioritize the skill / competency gaps according to their relevance in meeting the strategic goals/requirements of the organization.

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Workforce Planning

Below are the activities and activity definitions for Workforce Planning

Activity	Activity Definition
Develop/Revise Workforce Plan	Develop an integrated strategy to close workforce gaps that includes a plan for both employed and contingent workforces (e.g., external hires, internal development through training or job rotation, reduction in force). The strategy should also address regulatory and contractual limitation as well as internal initiatives (e.g., diversity, workgroup ratios, succession management).
Design To-Be Roles and Jobs	Translate workforce plan into individual jobs. Leverage existing job families and identify jobs based on criticality, decision making authority, degree of diversity of skills, diversity of the needs of internal and external customers and work volume. Identify potential fulfilment options and develop an action plan.
Evaluate Job	Evaluate the job within the current compensation scheme. Benchmark against competitors, industry, organization policies, hiring grid, geography, etc.
Monitor Fulfilment of Workforce Gaps	Monitor target versus actual workforce numbers in terms of overall headcount and required competencies on an ongoing basis and adjust the plan accordingly for the next quarter and in advance of actual demand changes (e.g., a spike in natural attrition might mean more external hires are needed, a down-turn in profitability might mean fewer hires or workforce reductions).
Evaluate Effectiveness of Workforce Planning	Identify and track success metrics. Put in place checkpoints, and revise, and recalibrate workforce plan solution. Review workforce planning targets in terms of how effectively they supported/aligned with the business strategy as well as how efficiently the workforce was used.

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Workforce Planning

Sample key metrics required to effectively manage workforce planning

Metrics
Plan versus Actual in terms of Required Competencies
Plan versus Actual in terms of Workforce Ratios (e.g., diversity)
Percentage of Strategic Job Valuations Complete
Unmanaged Turnover
Managed Turnover
Diversity of Population at All Levels
Diversity of Population in each Talent Segment
Forecasted workforce growth
Bench Strength (Percentage of people ready now for promotion)
Optimized allocation of resources across business units (Qualitative)
Loss of revenue (lack of spend) due to open or insufficiently staffed positions (Qualitative)
Percentage of Workforce Plans Maintained

Lack of key integrated HR systems prevent the tracking and managing of key management processes. Where metrics are tracked there is an huge burden on staff to provide accurate & up to date information

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Sourcing
▪ Promising Practices ▪ Interview Quotations

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Recruitment: Sourcing

Based on identify talent needs (Workforce Planning) identify recruiting channels and search for target talent pools

Sourcing

Basic	Progressive	Innovative
• Newspapers / internet / development journals /radio/television • Word of mouth, community notice boards, churches, formal government agencies • Staff referrals • Internal sourcing (see 'Internal Transfers' section) • Accurate and realistic job descriptions	• Intern programmes • Networking (including alumni programmes) • Via community leaders who know of children working away • Christian groups within universities • Community/educational institutions • Promotion of volunteers • Recruit from other NGO's	• Identifying talent at grassroots level through sponsored children / community members /mission schools • Sourcing through effective workforce planning/intentional transitioning from one project to another (see also *Workforce Planning)* • Succession planning through the ADPs

Recruiters also need to have the right expectations for the country that they are working in. In some cases they may need to push pack on to revise Job Descriptions or to agree what the on-going capacity building will look like for each stage and Role of an ADP

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Sourcing Promising Practices

Intern Programmes

What and How

World Vision runs intern programmes and some summer placements. This allows World Vision to assess students competencies and create a pool of potential candidates. Interns may or may not be offered a job immediately after the internship. World Vision works with Universities to facilitate this process. Ideally interns would be assigned to an individual or have a structured programme to follow. Interns may or may not receive a credit for their University course.

Advantages	Disadvantages
• Can be analyzed for fit & competency prior to employment • Improves the quality of candidate pool • A low cost method of assisting ADP staff • Potential for World Vision to build reputation	• Developing and coaching interns may take time away from the other work of field staff • Risks associated with having staff doing field work without sufficient training if expectation on all sides for what interns should do are not clear • Time & resource cost of programmes

When it is effective	When it is not effective
• In building a talent pool & raising the profile of World Vision as a brand (in Universities) • When there are Universities willing to partner • When there is a structured programme & the student feel that they have contributed in a meaningful way & developed themselves / WV can assess them in different situations • When current sourcing practices have failed to identify good, committed employees	• If students are not adequately supported & used as 'volunteer labour' – may have a backlash effect in terms of word of mouth reputation in the University etc. • If interns have an expectation of a job offer, which WV is not able to provide • If no behavioural expectations are set • When managers don't make time to support and coach the interns

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Sourcing Promising Practices

Intern Programmes

Where to go for Help and Next Steps

Bolivia, Kenya, Mali, Philippines & Tanzania run programmes of a 6 or 12 month duration. The interns are assessed at the end of the programme, subsequent employment depends on vacancies. Some countries have more formalised processes than others.

Interns differ from volunteers in that interns are intentionally built and coached and there is an expectation of building a future talent pool via the Internship Programme.

Variations:

***Vietnam*:** uses government partners as interns in a very structured, formalised programme that allows for less World Vision staff in each ADP than there otherwise would be.

***Zambia*:** deepening its current intern programme to:

1. Partner with U.S. universities for interns to be placed in ADP areas where help is most needed. Students receive credit through the attachment of professors to the programme.
2. Have students living in Zambia for 6 months, whilst conducting studies and writing their thesis. The final work is published which is beneficial to World Vision.
3. Include consultation of professors (as well as government officials and community members) to help develop new ADPs. This allows for the injection of new ideas whilst the professors maintain field experience.

Internships can be an opportunity to allow staff to develop coaching and mentoring skills. (In Kenya interns are assigned to a Development Facilitator over the course of one year)

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Sourcing Promising Practices

Intern Programmes

Barriers to Implementation Success

- World Vision HR department not able to invest the time to have someone co-ordinate and manage the Intern Programme, building relationships with Universities etc.
- Lack of potential university partners. The courses that partners offer may also be a consideration (eg. do they offer degrees in development, social work, etc.).
- No process and system (Excel or other) in place to allow HR to store and search intern data for future potential (i.e. they need to get into the talent pool)
- Lack of infrastructure for granting academic credit
    - To give academic credit some Universities want to directly monitor their students. Zambia has resolved this by linking University professors to an ADP

World Vision Next Steps – Quality Control

Once a partnering relationship with one or more Universities has been established, World Vision may consider becoming involved with the course content of degree programmes to ensure that graduates have useful information/knowledge. This may take the form of:

- Working with partner Universities to design classes that are linked to doing a World Vision field internship, thus linking classroom learning to field experience
- Establishing networks through which interns can complete distance learning while in the field doing a World Vision internship
    - Note these networks could also facilitate distance learning for ADP roles

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Sourcing (and Learning) Promising Practices

Beyond Intern Programmes: Influence Country Education Levels

Influencing University Course Content

World Vision could consider helping Universities to establish or to improve the quality of relevant degree programmes, including relevant content and pragmatic input. Advantages are:

- More likely to get graduate right skills (may be less costly than capacity building programmes)
- Where WV sponsors staff to take further education, WV can better ensure that they get the right ROLI (Return on Learning Investment)

UNICEF in the Africa Region is looking into universities to coordinate the joint development and dissemination, of versioned and new accredited multimodal learning materials for the Social Protection and Care sector working with vulnerable children. The materials will be open educational resources published under a Creative Commons License**.**

Influencing Education (Corporate example)

Some Energy Companies invest in school funding and programmes to ensure that children are interested and qualified in engineering in geographies where they know from their workforce planning they will require engineers in a 10 year timeframe.

- These organisations believes the cost of doing this is offset by avoiding the future cost of expatriate staffing.
- Entails bursaries as well awareness raising and funding

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Sourcing (and Learning) Promising Practices

Beyond Intern Programmes: Influence Country Education Levels

Quotations

"Apart from the Development Facilitators and ADP Managers, we also have a Masters program in development studies in partnership with [a University] which targets the senior Managers. The package includes University (academics) and World Vision modules. We need the perspective that is gained from these studies to add value to World Vision."

"..in the University we have a Masters programme specialised in community development so even if we don't have the skills inside we can ask people to go to the programme. We already have existing staff registered in that programme – & I could see a big difference in their approach since they started."

"Some studies were done in Eastern Africa which found that there were very few academic programmes which were offered at distance & that (in any case) the courses were broad and out of touch. Higher education has not moved with the times and is out of...touch with the realities on the ground...the text materials etc. are very poor & may be referenced from the 1960s...so this means that people don't get good preparation even if they did make it to University..."

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Sourcing Promising Practices

Identifying talent at grassroots level through sponsored children / community members /mission schools

What and How

Children of Missionaries: ***India*** *(and Malaysia) has a* project linked to an organization which provides finance support to children of missionaries, who on completion of that course can apply to World Vision Development Training Programme. It is a feeder school with people from missionary backgrounds who have already been working in tough areas.

Sponsored Children: Long established NGOs have staff working for them who were actually sponsored children and many commented that some of these people were the most passionate and committed individuals they had who really understood development and the community. However *no intentional* practices for seeing these children as potential employees were observed

Community Members: Sourcing through community members is a process of networking and relationship building. Community members may know of children who have been formally educated and who are working away from home and would be willing to return or who for land inheritance/family reasons have returned to the community. In the IPM model the staffing plan taken by the pilot sites involved having only 2-3 staff initially, which would make this approach more workable but would require the ADP Manager to be more proactive in sourcing

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Screening and Selecting
▪ Promising Practices ▪ Debates and Discussion Points ▪ Interview Quotations

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Recruitment: Screening & Selecting

Identify talent needs and recruiting channels and search for target talent pools

Screening & Selecting

Basic	Progressive	Innovative
• Written tests • One-on-one interviews • Organisational specific application form (may not work for all roles/countries) • Ensuring that all interviewers have received interviewing training • Technical tests	• Competency Based Interviews • Panel Boards with gender diversity • Reference checking with Churches, communities, ex-organisations etc. • Focusing on team balance (try not to hire all the 'same) • 'Open' days	• Facilitated Workshop style events (dependent on role) • Pre-Selection Community Visits and Overnight Stays (with/without community based input)

Recruiters also need to have the ability to take risks in screening CVs, and also to understand when a person might be suitable for a different post. There needs to be a combination of potential, skill and educational qualification and combination of different personalities

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Screening and Selecting Promising Practices

Competency Based Interviews

What and How

These should be behavioural based interviews to be in alignment with Targeted Selection, World Visions standard of interviewing (which covers both national and international employees). Further information on this is available on Navigator

Open Days (also called 'career fairs' or career days)

What and How

In some countries, World Vision is seen as an employer of choice and people actively volunteer (with the hope of later getting a job). Other organisations that suffer from too many applications deal with this by inviting all people sending a CV to attend an open day, which they then use this to take applicant details and do a level of screening, this then allows them to call people at relatively short-notice for work and can be more efficient than screening CVs or telephone interviewing (which in some countries may not even be an option). Details are usually retained and kept on a talent database for future openings.

This was not raised by World Vision and is likely only to be applicable for volunteer roles (not covered by the scope of this report). However if it is appropriate to a countries circumstances, such days can also serve as more positive PR and a way of getting messages to a wider group of people about those issues impacting the communities.

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Screening and Selecting Promising Practices

Facilitated Workshop style events (dependent on role)

What and How

In addition to telephone screening and a written test, candidates attend a workshop style event.

This is facilitated by staff, playing 'roles', and may or may not include children.

Candidates are thorough debriefed afterwards and given feedback – even rejected applicants have reported a positive experience.

Advantages	Disadvantages
• Recruiters/Hiring Managers get to better understand candidate's style/way or interacting with others/willingness to adapt etc. • More similar to 'real life' • Those people who can 'do' but don't oversell themselves don't suffer • Enables recruiters to assess a large number of applicants in a relatively short time frame	• Additional time and resource cost • Some candidates may not be able to take the additional time off to participate • Timing can be difficult to co-ordinate • There may be deference to the eldest male by participants in some cultures • Facilitators need to be skilled to provide opportunities for people to shine

When it is effective	When it is not effective
• When interpersonal skills are really key to the job • When turn-over of new hires is disproportionate to longer-serving staff • When time permits (realistic recruitment timeframe is established in conjunction with Workforce Planning)	• Effectiveness reduced for some roles e.g. driver / administrative assistant • When recruitment is already robust, & is retention at the right level is high & the cost outweighs the benefits • Where very quick recruitment timeframes are required

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Screening and Selecting Promising Practices

Facilitated Workshop style events (dependent on role)

Where to go for help and next steps

Cambodia: Has a Recruitment Workshop Toolkit is a tool to aid World Vision recruiters in finding the best people for positions that require high level facilitation skills and/or are relationship based roles involving a large degree of direct engagement with ADP communities, as well as other stakeholders. The advantage of including a recruitment workshop in the total recruitment process is that it provides an opportunity to gauge attitudes and characteristics of applicants in a truer sense, thereby increasing the likelihood that the best people are chosen for these roles. See Appendix B.

Barriers to Implementation Success

- Not having the right staff or financial resources to facilitate
- Not having materials and exercises linked to each role
- Market with very few candidates who are not willing to spend the time going through the process

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Screening and Selecting Promising Practices

Pre-Selection Community Visits and Overnight Stays

What and How

Candidates are sent for an overnight stay in an existing ADP community and hosted by existing staff and the community. The candidates are given an activity to complete (write a topic about an issue, report back on a child or group of children)

The reports are then assessed along with feedback from the staff (and potentially the community[1])

Advantages	Disadvantages
• Candidate has the opportunity to understand if they would enjoy the job and some aspect of 'reality' (as opposed to the more 'shiny' National Office) • Recruiters see if the candidate can 'walk the walk'	• Additional short term cost • Some candidates may not be able to take the time off to participate • Burden on the community (often a cluster of communities near the recruitment site would share the burden)

When it is effective	When it is not effective
• Where recruiting is from Urban areas • When turn-over of new hires is disproportionate to longer-serving staff • Recruitment as a process is expensive, so a 'higher' cost per hire vs. 'numbers of hires' should be considered	• Staff are sourced from the community, or from a similar community in the first place • In some countries, there are differences in Rural contexts/tribal differences which should be considered • When recruitment is already robust, and retention at the right levels is high

1. See Performance Management section for debate on the pro's and con's of community based input

Screening and Selecting Promising Practices

Pre-Selection Community Visits and Overnight Stays

Where to go for Help and Next Steps

Philippines uses a system called “Pre-Selection Training” to improve recruiting success (also in use by ***Tanzania***).

Short-listed candidates accompany World Vision staff into the field for one week, living in the community and interacting with its members:

- Candidates receive a real understanding of what working in the field is like
- World Vision staff and members of the community evaluate the candidate

This process is part of recruitment for *all new positions* in World Vision Philippines (originally just used for Development Facilitators), and as a result the Philippines has seen a higher quality of commitment in staff across the organization.

Barriers to Implementation Success

- Adjusting/explaining to the community that potential staff will be coming in and out of the community
- Not having the right staff or financial resources to facilitate
- Not having materials and exercises linked to each role
- Market with very few candidates who are not willing to spend the time going through the process

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Debate points: Recruiting People from the Community vs. Urban areas

Why is this a debate?

Some people believe to really affect change in the community staff should be representative of the community. Others believe that the skills/mindset does not exist within the community.

Community sourced staff will typically:

- Understand local language & culture
- Build relationships quicker
- Stay with World Vision for longer
- Require less investment in terms of staff care
- Have lower salary expectations

- Be more susceptible to community pressure
- Be less educated
- Require more capacity building in terms of 'hard skills', critical thinking etc.
- May struggle for credibility with elders if from the exact same place

- Do people know what a good life is?
- Non Christian communities?
- Community leaders exert influence anyway – is it better to directly build their capacity to lead?
- What prevents individuals from an community have a 'formal' degree?
- Will the community respect locals more if they are educated?

Urban sourced staff will typically:

- Be highly educated & have high levels of technical skills

- Want a faster pace of life/career progression than can be offered
- More likely suffer culture shock, family pressures, find immersion more difficult
- Have higher salary expectations due to higher education & technical skills

- Will people stay, how long will they be committed for (no data for this)?
- How to avoid people who routinely use World Vision as a spring board for something else? (Although there is a benefit in 'country' capacity building)

Related Debates: Education Levels vs. Potential Capacity Levels

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Debate points: Education Levels vs. Potential Capacity Levels

Why is this a debate?

Some countries have high educational standards for development facilitators/community development workers and are considering downgrading the requirement.

Sourcing degree educated candidates:

- Where there is a strong market of highly qualified candidates who really have a passion for the work
- Proven critical thinking skills

- This can lead to high salary expectations
- Dissatisfaction with status/career development opportunities
- May lack a humble attitude and patience required for community transformation

- If the Job Descriptions says degree educated, does this mean the degree, the indication of a likely standard, English skills or critical thinking skills?

Valuing potential and experience over education:

- More diverse workforce (age and gender)
- More loyal (long staying) workforce
- Releasing potential within communities
- Salaries may start lower and then work up the scale as experience is proven

- Significant capacity building efforts required
  - This may mean for example paying less but spending more time filling roles via development programmes

- How to identify elder people with the capacity for self growth
- Countries where the education system has been disrupted by war or civil unrest
- Countries where woman are not typically educated to a high standard

Related Debates: Education vs. Potential, Age. See also 'other points of view' section

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Discussion Points

Nepotism

In some countries nepotism is a problem and most believe that it should be avoided. On the other hand, there is so reason why family members cannot apply for a job provided that it is not in the same reporting structure as there rest of their family. Transparent HR policies and processes with panel interview boards may alleviate problems as might requiring declaration of family relationships etc.

Some organisations run a 'global' ethics reporting line for staff which guarantees sensitive handling and investigation of complaints.

Recruiting employees' friends

A staff referral scheme is a good source of candidates and encourages employees contribute to the system. One external NGO in the survey, actively encouraged friends to work together when they were staffing isolated projects in remote areas – on the basis that their staff were proud of the organisation and only wanted to work with good people and that healthy personal relationships lead to healthy working relationships.

'Friends' must still go through, and must be seen to go through, the same rigorous recruiting process as any other applicant.

Prioritising field based roles

The ***Philippines*** makes field roles a priority over National Office roles and will even second people to the field if there is a need. This sends a message to employees that the field is important and can also mean that National Office staff get the opportunity to be better linked into what is happening at grass root level

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Discussion Points

Psychometric Testing

Technical, aptitude & competency testing can be very helpful indicators to understand candidates potential for roles & can be useful tools if designed and implemented against a well understood role & set of competencies. Personality testing is typically more useful for Leadership Development programmes and has a relatively high administration cost. They *could* be used to screen out undesirable personalities (or look at ways to identify those likely to struggle under difficult working conditions), but should avoid focusing on one 'type' of personality.

Probation Periods / Initial Fixed-Term (or Training) Contracts

Using probation periods effectively is the best way of managing early signs of unacceptable performance or attitudes. Most countries do seem to use this as an effective tool for correcting hiring mistakes, the end of a probation period should also be a check point to review an individuals development plan. Depending on the local legislation, some countries use an initial fixed-term (or training) contract in a similar way to a probation period (this has a higher administrative overhead, but may be necessary in cases of legislation, poor HR/Line Manager ability to follow up on probation periods.)

Hiring more people than required

Where new hire turn-over is high & the process is yet to be finely tuned enough to fix this, some countries may chose to offer jobs to more people than required on a fixed-term 'training' basis. This gives the flexibility of having enough staff when there are employee driven drop outs & allows the organisation the flexibility to the select the remaining best people at the end of the period. A disadvantage to this is that the initial short period of the contract may deter strong candidates from job offer acceptance. The process must be transparent & allows staff to build their capacity during this period. Some might dubious about this practice but if it is openly and clearly communicated from the start, people may see this as a positive move in terms of work experience and the ability to test their fit with the organisation. Also refer to debate on 'fixed-term vs. permanent contracts.

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Discussion Points

Age and Gender (and other diversity issues)

Some National Offices have guidelines on the preferred age of candidates for a particular roles. If there is a surplus of applicants with the right skills this may be a workable practice but it does beg the question as to why these would be considered to be genuine criteria. However in some countries this is illegal and it may also lead to missing some wonderful potential.

There may be genuine concerns valid in many cases about older applicants having a less flexible-mind set; to avoid missing good candidates and avoid anti-discrimination practices, it would be worth while thinking about how to do pre-screening to identify (and filter out) those not demonstrating a willingness to change.

The number of woman staff may not be desirable in some offices – if this is the case, the NO should look at whether it's recruiting practices indirectly discriminate against female applicants due to society-driven differing education levels etc.

Some National Offices may have specific diversity policies on tribal groups/ethnic minorities and at a minimum must be compliant with the statutory legislation. Where managers find genuine capacity issues which make them to reluctant from recruiting a particular group even when there is a *positive* discrimination policy in place the National Office may want to consider special development programmes, offering lower pay but with the aim on building capacity and paying the going rate at the end of the programme for those that successfully complete the programme.

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Participant Quotations

Recruiting Urban-centric Graduates

"The problem is more likely that ¾ of graduates just don't apply in the first place because they don't want to work in rural areas (this is in part, why we have the intern scheme)."

"But…people want to stay urban, how do you deal with that? Are there incentive systems to attract people? The best schools are in urban areas, so you are making sacrifices in your child's education if you go to a rural area."

Age of Staff

"Older people are seen as wiser but 'stuck in their ways' with less ability to mould them to World Vision"

"There is a set recruitment policy that we will take age 35 and below (for field staff). I'm not sure why that is the policy. One reasoning I had is that by that time (35+) the person would have likely settled into some kind of life experience, maybe marriage...and will be less likely to want to live in the field."

Representative Recruiting

"I would like to understand how recruitment can better reflect local cultures. I am curious to hear more. We prefer to have local representation, it is another thing to move people from the Urban centre and other districts to the communities)."

"Recruiting Christians - community representation vs. the slippery slope towards equal opportunity tribunals in some countries when some people want promotion"

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Participant Quotations

Capacity Building and Potential

"we recruit people with technical expertise (to be DFs) …when you are recruiting, you look for people with technical knowledge in specific areas (e.g. water), you don't find everything that you need but then you can grow the mobilisation, participation & methodology skills

"… the ideal of staff committed to the cause & not seeing it as a job or opportunity. I may be an idealist in this aspect but think it is important enough as IPM focuses on incarnational approach. It must engage the heart (including the spirit), head and the hand of the staff."

"...because of the high standard of World Vision...you needed to have a high degree to even be a Development Facilitator. Those people were then taking the job only as an opportunity to jump somewhere else when they had the chance. For me the core factor is to hire...people that have the passion to work with the communities...the passion should be the foundation.

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Discussion and Participant Quotations

Building analytical skills

Some roles in IPM will demand a greater level of analytic skills and problem solving that might have previously been required of the workforce. This will lead World Vision to ask: 'do we build the capacity or do we buy in the capacity' and the cost implications of both will need to be reviewed

"As far as the process of facilitation and process of implementation is concerned, once we trained them, equipped them and coached them, they should be able to do. I am not concerned about that."

"The [analytical] skills...have been easiest built in countries where there has been an encouragement of interest or curiosity in education culture etc. It also helps where there is already a relatively strong civil society."

"I have seen that work best in those countries in Asia where historically they have had to fight for e.g. independence and have had to create some kind of civil society and identity, some type of movement where people question the status quo."

"As to reflection and analytical skills, I don't know. The communities in [country] are not at the stage where they have the ability to reflect now, because they are coming out of a war zone, they want things to happen now. This would take a lot of time and modelling. For most of them these skills would not be there.

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Recruitment: On-boarding and Orientation

The process of inducting people into the Organisation or into new roles within the Organisation

On-Boarding and Orientation

Basic	Progressive	Innovative
• Written manual for new staff • Meet and greet of colleagues • Further explanation of roles and responsibilities • Work shadowing • 'Day One' training programme • Provision of employee manual, equipment etc. • Company mission & vision videos (use of the PoP - Partnership orientation Program	• Tailored orientation to role • Linking on-boarding success to a Line Manager's performance objectives • Implementing 'buddy' schemes • Implementing 'coaching' schemes *(see Performance Management section)* • Have defined fixed start dates for administrative efficiency	• Field immersion for all staff • Recruitment and on-boarding questionnaires sent to new hires, managers and colleagues of new hires • On-line orientation (in conjunction with normal face to face induction) • Pre-Boarding Orientation (on-line)

Successful on-boarding and orientation is the first step to ensuring that employees are satisfied with there work and their roles. Bad experiences in the first couple of weeks or feelings of alienation during this time lead to a lack of employee engagement.

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On-boarding and Orientation Promising Practice

Tailored Orientation to Role[1]

What and How

Consists of a role-specific orientation focusing on new hires' specific responsibilities and the expectations on them (this is in addition to general information about World Vision or development). This may be a structured programme/or a combined with on-the-job learning and coaching with a follow up to identify the new employees' learning needs. It is important to set both the employee & the Line Manager's expectation as to by when the employee will be expected to be able to do their job with 'normal' levels of support.

Advantages	Disadvantages
• Reduced ambiguity about what is expected from a specific role • New employees feel: empowered not 'lost', engaged & looked after from day one, clear on where & who to go for help or information • Line Managers are supported • Employee more likely to be effective quicker	• Can mean longer orientation period before new employee begins work (programme can be structured to avoid this) • Resources committed to developing job-specific orientation programmes

When it is effective	When it is not effective
• A written job description is not enough to fully understand the role • When accompanied by a buddy / mentoring scheme (not the person's Line Manager)	• If the job is very straightforward (e.g. driver) • If feedback from new employees/ Line Managers is not used in revising orientation

1. For relatively unique roles, it is unlikely that HR would create a specific orientation pack but they would work with the line manager or ensure that the Line Manager was providing sufficient information to the employee (as well as giving the 'standard' general information on World Vision

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On-boarding and Orientation Promising Practice

Tailored Orientation to Role

Where to go for Help and Next Steps

None of the people interviewed were aware of any role specific orientation. Useful staring points might be:

- ***India*** has role specific training for local level staff (all roles including drivers, finance etc) which they are applying retrospectively to all staff to try to bring them to the same level of understanding. This is known in India as the Development Training Institute.
- ***Rwanda*** uses workshop based orientations to give new staff hands-on induction
- ***IPM & Integrated Capacity Building (ICB)*** formal job descriptions, competencies developed at role level

See also: *On-line orientation*

Barriers to Implementation Success

- Role instability
- HR and Operational focus (time and resources (manpower) to implement and run programmes

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On-boarding and Orientation Promising Practice

Linking On-boarding Success to a Line Manager's Performance Objectives

What and How

Include effective people management an aspect of a Line Managers annual performance review. This is inclusive of on-boarding contribution and success and linked only strongly enough so that the Line Manager is clear that they have some accountability for on-boarding.

Advantages	Disadvantages
• Provides an incentive for Line Managers to invest time in coaching & mentoring new staff • Recognizes managers who are invested in the success of new staff • Facilitates more open discussions regarding performance	• None

When it is effective	When it is not effective
• When Line Managers recognise that there success is facilitated by having a strong empowered team • When Line Managers are not spending adequate time developing new staff • When the organisation rewards &recognises Line managers who takes care of their staff and has relevant processes in place	• When there is limited opportunity for the employee to feedback on on-boarding effectiveness • If there are centrally managed on-boarding processes and training (meaning that there is duplication of effort) • If the Line Manager is too new to understand what is expected of their team

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On-boarding and Orientation Promising Practice

Linking On-boarding Success to a Line Manager's Performance Objectives

Where to go for Help and Next Steps

In the scope of this project, no NO described linking a Line Manager's performance to on-boarding success of new hires. However, this is an effective way to ensure that Line Managers take some ownership of the on-boarding process. This is unlikely to be a specific objective but rather contribute to broader people management objectives (see the Performance Management section for more details)

Barriers to Implementation Success

- HR does not have a system by which to measure successful coaching
- Lack of adequate training for Line Managers on coaching skills, i.e. holding them to a standard which they cannot achieve
- Those in leadership positions not practicing what they preach

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On-boarding and Orientation Promising Practice

Implementing "Buddy" Schemes

What and How

New employees are assigned a 'buddy' from a group of more experienced peers. The buddy's role is to provide informal support to the new employee, to help them with basic questions about procedures, World Vision cultures, what is expected and not expected, who is who, the local 'reality' etc. The 'buddy' is supposed to be a 'safe' person for the new employee to go to and does not give input into performance reviews etc.

Advantages	Disadvantages
• Provides a 'safe' environment to ask questions and increases networking • Reduces burden from supervisors • Low cost; buddies do not require training • Gives buddies the opportunity to 'mentor', help another's development & so build skills	• Additional activity for staff (can be mitigated by making it voluntary scheme so people actively sign up to be a buddy)

When it is effective	When it is not effective
• When the 'buddy' role is taken seriously by all of the organization (i.e. recognised as a contribution in a performance review) • Buddies are available to engage with new staff and take their responsibility seriously and assigned promptly (even pre-start date)	• Less effective if the new employee and buddy do not get to meet face-to-face

Coaches should also be assigned during the initial on-boarding period. See section on x

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On-boarding and Orientation Promising Practice

Defined Fixed Start Dates for Administrative Efficiency

What and How

New hires start on predetermined (specific) days of the month e.g. one the 1st or 15th of the Month. This allows World Vision to:

- Plan and implement orientation effectively and efficiently
- Ensure that some staff don't go and work prior to receiving a basic induction
- Improve payroll efficiency and correct payment (where pro-rating is not automated by payroll system)

This has been implemented in the Global Centre and several National Offices and has provided vast improvement

Where to go for Help and Next Steps

- Easily implemented at NO level via discussion with HR, Payroll and Operations.
- This has been implemented by ***Cambodia***

Barriers to Implementation Success

- Getting all related parties (HR, Operations, etc.) to agree on defined start dates

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On-boarding and Orientation Promising Practice

On-line Orientation (in Conjunction with Normal Induction)

What and How

Some organisations use on-line orientation for staff (also available via CD). This is limited to employees equipped with computers. Covering for example:

- Scenario case studies with multiple choice of the right action to take and an explanation of why
- Frequently asked questions
- Explanation of forms and reports to be used with examples of well filled in forms/badly filled in forms and why the document is important, how it is used and by whom

World Vision has a pilot (but not for local level staff - GLO (Global Leadership Orientation). A standard Mission and Value CD is available (PoP -Partnership orientation Program).

Where to go for Help and Next Steps

There is generic on-line orientation available for international staff. Usually the business case for implementing this only works best if the basic infrastructure of a learning management organisation is already in place and where there are common language for delivery. However it can also be also implemented with CD based learning and questionnaires. In both cases the total cost of orientation can be vastly reduced. The recommendation is be that this should be a global or regional level initiative but not a priority

Barriers to Implementation Success

- Learning Management system (any) with the ability to identify with an employee's role
- Lack of shared services for learning organisation (NO silos are in place)
- Technical infrastructure / Lack of overall integration / Role/document instability
- HR and Operational focus (time and resources (manpower)

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On-boarding and Orientation Promising Practice

Field Immersion for all Staff

What and How

All staff are sent to the field to have some experience of what really happens at the core of the organisation, prior to starting their job. Alternatives to this include a one week mandatory field stay on an annual basis for all staff. This is a relatively common practice in the corporate sector for large retailers and supermarket chains.

Advantages	Disadvantages
• Implicit message to all staff that the field is the most important place • Non-field staff keep in touch with grass-root level staff and practices and build empathy for their colleagues • Removes barriers between staff	• Cost impact of travel and work not completed • May disrupt the community by bringing staff in and out for short stays

When it is effective	When it is not effective
• When mutual sharing and exploration takes place • When staff bring their experiences and learning back to their day job • When supervisors are supportive and see the value in field immersion	• When all staff just go to the nearest urban ADP and that ADP is subsequently inundated with visitors • When staff go to the ADP with an 'attitude' or continue to focus entirely on their day job with a laptop and phone constantly

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On-boarding and Orientation Promising Practice

Field Immersion for all Staff

Where to go for Help and Next Steps

India – field immersion programme will be part of induction for new National Office staff, lasting more than one week

Indonesia – all post-hires spend one month in the National Office followed by two weeks in the field.

Romania – community visits for all staff are part of orientation.

Barriers to Implementation Success

- Lack of commitment at the National Office level to ensure that every relevant staff member goes through the process
- Limited integration into the current induction process (including not allotting enough time for this in the full orientation process)

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On-boarding and Orientation Promising Practice

Recruitment and On-boarding Questionnaires Sent to New Hires, Managers and Colleagues of New Hires

What and How

Questionnaires are sent to new hires, managers, and colleagues of new hires so that HR can collect feedback on the recruitment and on-boarding processes. With this input, HR is able to make improvement based on tangible feedback from staff who have recently been impacted by the processes.

Advantages	Disadvantages
• Broadens the amount of input given to HR on how staff view recruitment and on-boarding • Cultivates a "feedback culture" • A successful on-boarding and recruitment process attracts better candidates	• May become just another form that staff have to fill out (would not be mandatory), adding another time burden to staff workload

When it is effective	When it is not effective
• When the questionnaires are valued by the staff filling them out as important HR tools • When gaps or deficiencies clearly exist in the on-boarding or recruitment process	• When input is not used to improve the on-boarding process • When staff don't give honest feedback (the survey being issued by someone other than the main recruiter promotes better input)

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On-boarding and Orientation Promising Practice

Recruitment and On-boarding Questionnaires Sent to New Hires, Managers and Colleagues of New Hires

Where to go for Help and Next Steps

This practice was not mentioned during the interview, but is a common practice for corporate organizations.

Such questionnaires are optional, but emphasise the value of responses (and how they will be used – i.e. to revise and improve the process or the way it is implemented). They are also feedback to the HR leadership to understand how their teams are performing.

Allowing the opportunity to provide feedback, builds a culture of continuous learning and feedback.

Barriers to Implementation Success

- Limited internet access disallowing staff to feedback in a timely fashion

It is also good practice to offer candidates who were not offered or did not accept jobs the opportunity to give feedback on the process (and/or) the reasons why they did not accept a job offer

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On-boarding and Orientation Promising Practice

Pre-Boarding Orientation

What and How

This practice was not mentioned during the interviews, but is used by corporate organizations to different degrees but with a high success factor. Applicants who have accepted jobs are given access to a website that allows them to navigate through various procedures, information, quizzes, information on other new hires starting around the same time as them etc. They are encouraged to update their own profile to help with networking and often assigned a buddy from an existing staff member that they can call for advice or questions before they start. This increases the employees positive perception of the process and makes them feel more connected to the organisation.

Barriers to Implementation Success

- Technical infrastructure
- Profile of staff; not all staff will have internet access easily accessible in their homes so it is unlikely that high levels of participations would reached

This practice is not being recommended to World Vision in the immediate future

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On-boarding and Orientation Quotations

Interview Quotations

"I would like to see more thorough training and better orientation for HR staff...so as to teach them about policies, what happens at the regional and global levels, etc."

"Here I am new in a management role and I got the best orientation I have ever had with World Vision but it still was not enough. I am learning to manage partly through my mistakes."

"[Mentoring] is not a formalized process; it is done on a one-to-one basis, so if you are lucky and have a good supervisor then you will grow..."

"Not everyone is a fast learner, so a week training is not necessarily enough to change people's mindsets to be a Development Facilitator..."

"Line managers are supposed to do this [coaching] but it is not always happening – some do it and some require regular follow –up"

" You don't get properly shown how to do your job or what it consists of when you start and then often you find out later and are told they are failing…during the induction the supervisor should be clear on what people need to do..."

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Recruitment Section: Contents

Recruitment	
Challenges and Overview	On boarding and Orientation
Workforce Planning	Internal Transfers
Sourcing	Contract Types
Screening and Selecting	

Internal Transfers
▪ Promising Practices ▪ Debates and Discussion Points ▪ Interview Quotations

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Recruitment Internal Transfers (and promotions)

The process of moving an employee to a different role within the organization

Transfers

Basic	Progressive	Innovative
• Consulting with employees prior to decisions being made • Understanding employees preferences (geographic and skills focused) • Operations and HR having a clear understanding of future target openings (workforce planning) • Effectively the Managing End of Projects	• Timing moves in line with end of school year, children's educational requirements • Transparent process • Consider employee driven requests due to change of family circumstances • Roles posted through-out the entire country • Linking with employees' personal development plans	• Intentional strategy about moving from less attractive to attractive areas • Temporary secondments to build skills and knowledge of staff • Transferring pregnant staff not living with family out of the field towards the end of the period • Intentional staff rotations

Employees need to feel a level of control over their fate. Some employees felt that there was no room to ever say 'no' and that they were transferred without consultation. A better message might be that the nature of WV is challenging locations, 'no' is an option but one which should be used sparingly & wisely

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Promising Practices Is there an intentional strategy for staff rotation?

Staff Rotation

What and How

Intentional Strategies for Staff Rotation have the following advantages:

- Enabling staff to have different experiences and build their skills base
- Intentionally build capacity for staff who have been identified as having high potential but need more experience to be ready for the next grade up
- Allowing more flexibility of workforce
- Guaranteeing staff a ‘fixed’ stay in less attractive locations making them less likely to look for other jobs
- Keeps staff ‘fresh’
- Some National Offices believe that staff staying too long in one place, become institutionalised and less objective and more at risk of becoming susceptible to community or political pressure
- Encourages cross-pollination of learning and different working styles between staff

Whilst this may seem more applicable to roles above ADP manager it can also be applied for roles below.

This should have strong links with workforce planning, succession planning and individual development planning processes.

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Employee Survey Quotations on Transfers (unsolicited input)

Performance, experience & qualification should be the criteria for promotion rather than on recommendations because it seems that some existing staffs are better than the newly appointed staffs for higher positions

"Job is challenging and satisfying. There should however be regular transfer or relocation of staff to avoid boredom. At least 3-5 years in a place will be O.K."

"In my team there are 4 people who are working at the same ADP for last 10 years and they are blessed by the superiors who do not want them to transfer to any other place. I do not know why"

"Staff should be laterally transferred from their departments to others so that one does not stay for over 5 years in one position that creates a lot of monotony at work."

"There should be clear guidelines for transferring the staff considering the rural & urban aspect."

"When a staff is transferred the Org should be willing to bear the education expenses from class one to above."

"Frequent transfer of members in team loses team spirit."

"all staff must be transferred in a rotational system."

"When you are being transferred to another place of work, little consideration is made about your family to the extent that you can be sent 100 KM away from where your wife is based & because the wife will not find a job at your new location you are forced to stay separate from your family."

"We must have a staff transfer policy Staff should not stay in one place more than 5 years."

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Promising Practices: Effectively the Managing End of Projects

What and How

During the transition stages of any project it is important to think about the next steps for staff and how this is handled. Invariably some staff will be required for other projects and some may not be.

- It is important to have a plan for all staff (Links to Workforce Planning, Succession Planning, & Transfers)
- It is equal important to communicate and manage staff's expectations and understand the impact on them during this time (this links to Staff Care)
- Training managers in appropriate ways to behave and communicate to staff is key
- Failure to do this well can lead to:
  - Staff looking for other roles during the end of transition (failed Retention)
  - Increased staff stress and reduced productivity
- Sometimes, lay-offs are inevitable. If conducted with dignity and care, these may become positive learning experiences for staff. **WV *Project MERLOT*** was a post tsunami response project to better equip staff leaving the organisation, the benefits were:
  - Giving participants a greater awareness of their skills & experience & teaching them how to apply these in the form of CVs and cover letters
  - Allowing staff to give and receive candidate and anonymous feedback to enable awareness and encourage improvement, when necessary
  - Providing an opportunity for participants to leave WVI feeling valued & better prepared for life
  - Creating a proven model and strategy for exit to be used across program closures in addition to a database repository of candidates and their skills
  - Being the only known NGO to provide such a service to exiting staff
- **Save the Children** have a big focus on this area and have invested time equipping managers to proactively manage the end of projects to good effect

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Contract Types
This section is atypical and doesn't include promising practices, but this is an important topic and each National Office should spend some time considering it.

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Contract Types

Should Community Based Staff be on Permanent Contracts or Fixed Term Contracts?

Why is this a debate?

Given the project based nature of community based roles, leadership needs to decide whether or not employees should be on fixed-term or permanent contracts (this should be based on a cost benefit analysis). The question is whether World Vision should commit to a 'permanent' contracts for staff and what are the risks of doing so vs. the risks of offering fixed-term contracts. For example:

- If there is a permanent contact, the employee does not want to move for work (assuming there is another project), is the organisation obliged to pay them redundancy money? Can it make them move as part of their contract or ask them to leave voluntarily? What is the cost of redundancy?
- Do surveys of applicants or market surveys show that World Vision is not getting the required quality or quantity of staff because they are offering a one-year contract and their competitors are offering more? If so, what is the cost of redundancy (against turnover projections) vs. the cost of lost talent?

What is the strategy

Part of any talent management strategy considers where talent comes from and how it should be sourced and retained. Part of any strategy considers what skills can be built, rented, bought and borrowed. This may be at role level / grade /sector level and will also be influenced by external market factors.

Some countries have taken an intentional stance towards this for local level staff but there is no commonality and not all countries may have thought this through (or revised their positions). There is a similar debate within the Partnership on expatriates which is currently being reviewed at Global Centre. Review the employee comments and factors to considered to provide input into local strategies.

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Employee Quotes: Made by employees on fixed-term contracts

Enough of career growth opportunities, earning, coaching, guidance has been provided…We have lots of opportunities working in professional way & learn from others, but I am not much interested in signing contract one at per year. Some is worried about the change (belonging to the domain of area & funding sources. etc)

"They exist [benefits] and are satisfactory but the conditions and terms of work make it difficult for staff to access, e.g. the six months contracted staff have not received health insurance cards 5 months into their contract."

"Expand on the contract period of work for Job security purposes. Staff with qualifications be valued and given equal opportunities of promotions like the HR staff."

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Contract Types: Fixed Term vs. Permanent

Factors to be reviewed (geography / market governed)

Nature of the Work

- Funding: A project has different lifecycles and may last up to 15 years
- NGO's income is tied to donors and sponsorship and is not guaranteed beyond the lifecycle of a project
- These two factors alone emphasise the importance of workforce planning

External Factors: What is the market, the competition and the legislation?

- What do other NGOs offer?
- Statutory
    - What is the country retrenchment/ redundancy legislation? What is the cost of separation?
    - What does a 'permanent' contract actually mean in the country of operation? How many times can a temporary contract be renewed? What is the legislation?

Workforce

- What is the positive or negative force impact of differentiating from the competition in in terms of attraction and retention?
- Is the workforce mobile? (some employees want to move around and some don't). What does the contract wording say about obligation to move
- If staff crave 'permanence' as well as Career Pathing and capacity building and retirement benefits what can be done for fixed-term or permanent contracted staff
- **Note:** In the corporate world (in Western society) people don't really have a 'job for life' anymore either – and don't expect to– there is a fluidity in the workforce

Contract Types: Fixed Term vs. Permanent

Factors to be reviewed (geography / market governed)

Internal Factors

- Some World Vision offices proactively promote employees not staying longer than three years in the same role to prevent stagnation
- What message does any segmentation send to staff and how is this messaging handled
  - In some geographies 'contractors' see themselves as powerful specialists with options, others feel like poor relations
- What is the investment in capacity building if someone is not on employed on a permanent basis (dependent on skills available to 'buy' or 'hire')
- What is the impact on the community if a contract isn't extended and a person still lives there (is this a moot point)
- If there is a segmentation of contract and non contract roles what is the strategy movement between roles, Career Pathing etc.
- In terms of generational difference (notwithstanding the debates on age). where real career progression is limited. do employees want the same thing at different stages of their life – how do you avoid stagnation?

"..The job security has been a good motivation for people to stay because the risk of being laid off is minimized as opposed to other organizations where you can only have 2-year contract. Compensation & salary makes people leave when they find something more attractive in other countries."

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Contract Types

What about other contract types/means of employment?

There should be further consideration of the ADP labour mix (**part-time vs. full time, job sharing**, etc). In some countries interviewed there was no concept of 'part-time' work at all. This results in:

- Staff being hired who only work part of the day and who sit around (e.g. cleaners)
- Reducing the number of potential candidates e.g.:
  - Mothers who would welcome a part-time income but don't want full-time hours (high loyalty/stability)
  - People who are a primary carer
  - Those studying part-time/completing education (high potential/enthusiasm)
- In some countries the concept of '**annualised'** hours exists. This is where employees are paid for a fixed number of hours a year but on a regular schedule. This:
  - Gives flexibility
  - Increases administrative and payroll complexity
- **Retirees**

– When staff retire from the organisation is there any way that they can complete a 'gradual' retirement, by reducing their numbers of hours, changing roles to provide more ministry services, coaching, capacity building, advisory roles etc.

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Monetary and Non Monetary Rewards: Salary	Aligning of Support Functions
Monetary and Non Monetary Rewards: Benefits	

Alignment of Supporting Functions
▪ Challenges ▪ Discussion Points ▪ Employee Value Proposition

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Engagement Challenges: What are the main challenges and improvement opportunities?

Existing Engagement Challenges

Overall challenges[1]

- Unattractive working locations
- Technical infrastructure inhibiting the good efforts of leadership
- Organisational culture and management style
- Long working hours

Process challenges

- Many key processes don't exist or exist at very basic or fledging stages (career planning, succession planning (link from workforce planning)), this is linked to organisational capacity as well as the lack of consistently applied processes across the partnership and global systems.
- Sometimes good processes and policies exist but are not applied consistently or effectively (e.g. undermining their intended effect)

Suggested improvements

- Encouraging a more open collaborative way of working, encouraging risk taking but with a focus on reflection on key learning
- Improving messaging to staff
- Key metrics to be tracked – examples: employee turn-over by role/grade/location/length of service and gender/age/performance rating, employee engagement scores

1. Some of these challenges are an intrinsic part of what it means to work with the poor in these kinds of locations (so the focus has to be on interventions) Consistent exit interview data is not available and in some case the capture mechanism (via the Line Manager) is not conducive to getting valid information. NO specific challenges of other competitors etc. are not included here and comments on organisational culture, style and hours are not necessarily true in all NOs.

Discussion points

Regular Communications and Listening to Staff

An observation is that World Vision could do more to communicate & educate staff on 'market conditions' and also to take the time to listen staff and receive their feedback

- Perspective is a very important thing: regular communications from Leadership to all staff on how their terms & conditions relative to other NGOs, general development updates, and general WV updates all contribute to employee retention & engagement if done well
- The staff care section of this report focuses on the positive impact on staff engagement and retention gained from just listening to staff

Turnover is a Good Thing – it is Unmanaged Attrition which is Bad

Turnover metrics need to cover which staff leave so if high performers are consistently leaving HR and Operations jointly rethink strategies. Turnover can be a good thing when poor performers leave and in some cases, a positive upside of a good employee leaving, may be that a Partnering organisation has gained capacity which can still benefit the Community and the Poor.

Retention is all about Paying Enough: Employees Value Much More than their Salary

- World Vision's unique Vision and Mission is a great attractor and retainer for many of it's employees
- Many people blame salary for attrition, which in some cases may be true but it is very important to have data and metrics to back this up; ensuring the salary benchmarking is completed regularly and exit interviews are taken, by a neutral person or by means of an on-line survey and the results are interpreted and acted upon:
  - For example, if the # 1 reason why people leave is because they have been offered a better job but the # 2 reason is that they didn't like their line manager, HR should be asking how is it that people are being offered other jobs (presumably because they are looking..)
- Refer to the Employee Value Proposition slides for related discussions

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Discussion point

When Different Cultures Collide

Christian values and professionalism are in no way mutually exclusive

- Few people reading this report that the above statement is in any way a question. However there are some views about what the 'Christian' way is, which may adversely impact new staff and World Vision's effectiveness as an organisation
  - There is sometime rejection of new ideas as they are considered not 'Christian' (although arguments are not necessarily logically consistent or well articulated, they may not be challenged if put forward on the basis of Christianity)
  - Giving higher than deserved feedback because it is the 'Christian' thing to do or not giving negative feedback to an individual
    - Praying to God that they will realise their behaviour, rather than directly giving the person the opportunity for that person to grow
  - Not firing people who have been dishonest/fraudulent because of the impact that the firing might have on the individual's family (without thinking about the impact that there has been on the poor)
- Sometimes 'culture' and 'Christianity' are confused which can cause unnecessary conflict e.g. attitudes to having a glass of wine with dinner
- There can be additional pressure on people not to speak out or to ask for help; as this might imply there is a problem with their faith or because they are being judged by their peers
- There is a pattern of people requesting staff with more tolerance and a 'love they neighbour' approach
- Not applying 'love they neighbour as they self' if their neighbour is not of the same ethnic and religious background

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Discussion point

When Different Cultures Collide

What has this got to do with engagement and retention?

- New hires being brought in to the organisation may face resistance to change on this basis
  - This may result in them wanting to leave the organisation
  - New staff should be given guidance on how to use language which is more amenable to more longer serving staff
  - Existing staff should be coached if challenging values inappropriately
- An unwillingness to deal appropriately with staff who are under-performing or who are guilty on misconduct acts as a de-motivator for other staff
- Existing and new staff may leave the organisation if they feel that their Christian or general work commitment is being questioned due to cultural differences or that they are discriminated against
- See also section on Performance Management

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Employee Value Proposition

The following slide is taken entirely from a World Vision Presentation[1]

What is an EVP?

- An Employment Value Proposition – (EVP) The set of attributes that the labour market and employees perceive as the value they gain through employment in an organisation

Why have an EVP?

- The Employment Value Proposition (EVP) is critical to **Talent Attraction and Commitment**. Based on research by the Corporate Leadership Council, constructing and delivering an effective employment value proposition allows an organization to source more deeply within the labour market, increasing its access to more passive candidates. It also improves the commitment of new hires by up to 29%.
- Improving commitment = Improving employee effort, level of performance and retention
- **Improving EVP Attractiveness Reduces New Hire Compensation Premiums by up to 50%.** When candidates in the labour market view an organization's EVP as attractive, they demand a smaller compensation premium when accepting an offer. Specifically, EVPs that are viewed as unattractive require a 21% premium to hire employees, while attractive EVPs require only an 11% premium.

Assuming WVI hires 500 people per year at an average salary of $5,000, the additional compensation premium that we pay by being relatively unattractive to the labour market is $.25 million per year in base compensation.

1. The survey was a random sample of over 500 international, national, and GC staff, it is not possible to identifying how many were local level staff. Staff were asked to indicate their top 5 reasons why they joined WV, why they choose to stay and where improvement is required. The tied top reason that people stay were 1.Meaningful Work & being a part of WV's mission and vision & 2.Christian Affiliation & Exciting & Challenging Work. **Learning & Development Opportunities** was in the **top 5 reasons people stay and the top 5 areas for improvement** – reflecting perhaps the differences between National Offices and the different structural entities and supporting the need for Country Level assessments prior to selecting the most impactful improvement areas.

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Organisational Culture
▪ This is an a-typical section without promising practices ▪ It asks leaders to consider the status of employees at local level ▪ There are strong links with Staff Care and how employees' voices are heard

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Engagement and Retention: Culture

Summary

Culture is a big topic

- One thing experts tend to agree on is that culture changes need to be started at the top and be lived by Leaders for a successful cascade down to the rest of the organisation
- Employees need to feel an affinity for the culture of the organisation to make them stay
- Applicants find it difficult to gauge the culture of the organisation when they join; they rely on mission and vision statements/core values and impressions of the staff in involved in the interview process to understand if they'll fit
  - it is only after entry that dissatisfaction comes if an organisation does not really live its stated values
- Within Organisations there are always sub-divisions of culture (country specific cultures, sector specific cultures)
- Given the geographic and country differences it does not add value to say more about culture than has already been said by other reports but it is worth saying each National Office should look at the culture within their own office, what they want it to be & to think about the implications of this & how to get there.
- There are however a couple of topics worth exploring:
  - Valuing employees at all levels
  - How new initiatives create/help culture changes and whether this should be actively managed and encouraged (practicing what we preach)
  - Embedding a continuous learning culture
  - Really thinking about what a performance management culture looks like (see section on Performance Management)

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Engagement and Retention: Culture

Creating a Continuous Learning Culture

Learning organisation[1]

- Create a culture that encourages and support continuous employee learning, critical thinking, and risk taking with new ideas
- Allow mistakes, and value employee contributions
- Learn from experience and experiment
- Disseminate the new knowledge throughout the organization for incorporation into day-to-day activities and
- Continually enhancing their capability to change/adapt and transform

Why

- Above are some definitions of a continuous learning culture, the link with IPM should be clear.
- Moving to a model of partnering and community empowerment will invariably require adaptability, the ability to learn from one's mistakes and the ability to experiment with what does and does not work well with a *particular* community or partner.
- A failure to embed such a culture at all levels of the organisation will lead to a failure of the IPM model

1. Extracted from WVI Knowledge Management Strategy see Appendix B for referenced materials

Engagement and Retention: Culture

External Experiences

- Those external organisations who had gone through a big shift and moved to a more partnering approach, right's based, child-centred or facilitative approach all emphasised the importance of culture change and management style as key success factors. Steps taken by other NGOs to support this included:
  - Restructuring around the new model
  - Focusing on an outcomes based approach to management
  - Making dramatic changes to Leadership where there was no-buy in
    - Ensuring that the person's line manager was very much focused on changing the mindset
    - Side-waves moves away from direct influencing
    - Dismissals

Time and money will need to be found to find and invest in trained facilitators; this will be undermined if the management style of the rest of the organisation is not also facilitative and open.

Engagement and Retention: Status of Local Level Staff

Status of Local Level Staff

Hierarchy

- There does need to be hierarchy for work to get completed. The problem with a hierarchical organisation is not the ‘what’ but the ‘how’
  - How are staff spoken to and considered
  - How are their voices heard

ADP Managers

- On the whole seem to be reasonably well integrated into the overall National Office structure
  - Several countries have representative forums for ADP managers
  - ADP managers will all largely say that they are too busy

Below ADP Manager: Community Based Facilitators

- Amongst the lowest hierarchically
- No forums for input for them as a group
  - Input and feedback is provided (if at all) via the ADP manager

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Engagement and Retention: Valuing and Respecting Individuals

Status of Local Level Staff

Being considerate of others is 'free'

The Global Centre EVP study[1] found that improvements needed to be made in the area of "we value people" in the treatment of staff**.**

Whilst this may not be wide-spread, that there is a room for improvement was identified during the consultancy in multiple locations. Some ADP managers have greater levels of autonomy than others and there are different leadership styles in evidence throughout the practice. The following slides show a hypothetical example to demonstrate this behaviour and the impact that it would have.

Unacceptable behaviour that causes stress on staff include:

- Calling people outside of their work-hours for non-emergency items
  - If people have email that is fine because the person can respond in their own time
- Scheduling meetings as standard outside of core hours

The perception may be more important than the reality; staff's perception that they are not valued and cared for has a strong detrimental impact on most individuals

The following story is illustrative but if it rings true to readers, the suggestion would be that action be taken to change some behaviours.

1. Taken from Employee Value Proportion study completed in early 2009 high-lighted this as an area for improvement; the survey covered a random sample of 500 employees from across the globe. The breakdown of field-based to other staff is not clear.

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Engagement and Retention: Valuing and Respecting Individuals

How a standard monthly report was collated

The Sunday before the Monday deadline…

Activity	Observer One Response	Development Facilitator Response
Person 'A' calls at 9:30 AM for some on information on the community	Thinks: *"Wow, why is he carrying the brief case?"* *"Oh I see"*	This is why I always carry my data around with me in a briefcase, even though it is Saturday
'A' calls again for something else at 11:00 AM. 'A' is hierarchically senior but not the manager.	*"Wow how does this guy get to relax? – I'll ask him.."* Thinks: "*Ok fair enough, I won't push the point"*	*"It is my duty, I am proud to service the community here"*
Line Manager calls for a chat about the report at 12:00 PM		*"My new line manager is new but seems much nicer than my old one."*
'A' calls to clarify another piece of information and have a 20 minute chat about the report	Thinks: *"Really, could this guy not have just asked for the information in one go may be I should just ask"* Asks *"is there is some emergency going on?"*	*"No, no emergency"*
Person 'B' calls to clarify something at 18:30 PM	"How many people have to call for one monthly report – why isn't there a 'push-out' mechanism instead of a 'pull' one."	Responds to the call, answers in a friendly manner, smiles and provides the answer
'B' calls again at 19:45	Thinks *"when I work on at the weekend because I am busy/unprepared/ unstructured/suits me, but if dragged my team into, no one would want to work for me, and I would there be less successful.."*	Responds to the call, answers in a friendly manner, smiles and provides the answer
'B' calls for the last time at 20:15	Thinks "*So basically this guy has been on call for nearly 12:00 hours and he hasn't had a break from work (it is bad enough he has to host me for the weekend)"*	Responds to the call, answers in a friendly manner, smiles and provides the answer

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Engagement and Retention: Valuing and Respecting Individuals

The Sunday before the Monday deadline…some observations and responses to the story

Unacceptable staff reactions to this story:

- This is a not surprising it is this way
- This is fairly standard practice
- People are committed and passionate so they don't mind these things.
- It is acceptable because they are passionate and want to do God's work.

How managers' manager should respond if they found out this was a regular occurrence

- This is not respecting individuals; this is unacceptable behaviour
- If an individual wants to work at the weekend because they can't organise *themselves*, this is their problem (though it should be discussed). However they should:
  - not make it other peoples' problem too
  - organise their disorder to get what they need from their people during core work hours
- If there is a crisis, it might be necessary ask people to work irregular hours sometimes; but as much notice as possible should be provided and efforts should be made to find out what times best suit the majority

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Engagement and Retention: Valuing and Respecting Individuals

The Sunday before the Monday deadline…some observations and responses to the story

What should happen

- Wednesday: request data
  - Not 5 phone calls by 3 different people on a Saturday
- Thursday: DFs collate/provide additional data
- Friday: resolve any final conflicts of information
- Alternatively
  - DFs to be more proactive and to call their teams in advance and find out what they need and by when
    - May be difficult culturally to push this point or to ‘demand’ when to do things to those more senior
    - May need to be an open culture at all level before the people at the lower ends of the hierarchy even feel they can suggest improvements
  - Arrange for report deadlines to be on Fridays

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Engagement and Retention: Valuing and Respecting Individuals

The Sunday before the Monday deadline…some observations and responses to the story

What might the employee really think?

Who knows but… some suggestions:

- I really do love the content of this job and love working with the community but on a day-to-day basis I feel stressed and find it hard to switch off
- I have some health problems which I suspect are stress related/exacerbated by stress
- I would prefer to work in the ADP office (*note the incongruity with the first point*),
  - I would like a role in the ADP office because I believe it would be less stressful, the other ADP office-based staff are just treated better, have only one boss
- I am grateful for my job so I don't feel like I can or should complain about this
- Other factors make that make my life (and work-life balance) harder:
  - Some processes, (e.g. people needing to sign if I eat with them) cause a lot of stress and can damage the relationship I have,
    - I know audit is important but sometimes getting people to sign is really stressful because it takes me a long time to explain why this is and I feel they don't trust me so much afterward
    - Some of my colleagues have just paid for the food themselves at times
  - People knock at my door at any of night or day time (if lives in the community)
  - Community members often ask me for money for medical needs I know to be genuine – I sometimes have to say 'no' but I then feel guilty. Sometimes I say 'yes' too and this also causes me challenges

Engagement and Retention: Valuing and Respecting Individuals

The Sunday before the Monday deadline…some observations and responses to the story

Conclusion

- Why would it be ok or follow that, because they are committed to doing God's work, that the staff themselves don't need a break?
- World Vision can really enrich staff lives by enabling them to work with the poor but also to make their lives a little better with more consideration.

"…goes beyond having a mission; I want my office to be a great place to work & we need to know what can we do to create that atmosphere in ADPs. So we must identify what those reasons are (that people stay with us) & make us a better organization to work for"

"So in everything, do to others what you would have them do to you". Matthew 7:12

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Engagement and Retention Section: Contents

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Staff Care	Career Pathing
Monetary and Non Monetary Rewards: Salary	Alignment of Supporting Functions
Monetary and Non Monetary Rewards: Benefits	

Learning
▪ Promising Practices ▪ Debates and Discussion Points ▪ Interview Quotations

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Engagement and Retention: Learning

‘Striving’ - the Step Beyond Retaining

Why is this an engagement topic?

- High performers want to learn and to be stimulated in the work place
- Where there are limited opportunities for career progression, the organisation should focus on ensuring that employees are still learning and building knowledge.
- Learning and knowledge sharing is a good way of keeping people connected and making them feel part of an organisation even recognising that they might be in remote and isolated communities
- This moves on more broadly from just retaining people to keeping them engaged, e.g. stimulated and really striving for success for themselves, for the communities and for the organisation
- Employees value an organisation contribution to their learning and this can lead to better engagement

Are there specific challenges in this area?

- Specific challenges may not relate directly to retention:
  - They relate to promoting a continuous learning culture and to breaking a mindset that training is the only way to build capacity or to learn
  - To improve HR efficiency with more effective ways of managing learning
    - Enable HR to spend more time on other retention activities
    - Being able to track efficiency on interventions (ROLI)
  - There is a reported culture of ‘presenteeism’ in training with many expecting a certificate of attendance
    - This has been reported in both Asia and Africa and may be a cultural habit, even if it is the case it would be better to move to an outcomes based approach of evaluation. Both have an administrative overhead but there is very limited benefit in the former.

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Engagement and Retention: Learning

Context and Integration

Contents of the Section:

This section aims to simply focus on promising practices which National Offices can consider adopting, to re-highlight some key areas for discussion and to draw the reader's attention to the good work already completed in this area:

Integrated Competency Development (ICD)

A collaborative Partnership-wide effort to provide programme teams and National Offices with guidance, resources and tools to enhance capacity building of local level staff to support the adoption of the Integrated Programming Model (IPM)

Knowledge Management Strategy

This has clear linkages with IPM. Here is an excerpt from the Executive Summary:

"Empowerment is born out of knowledge. The enormity of the challenges WV confronts, such as vulnerability, poverty, and the transformation of communities, require that each and every staff member be empowered to contribute to our mission. WV must have an organisational culture that allows staff to learn and stay on the learning curve, and that equips them with the tools and research with which to learn, thus creating knowledge for the organisation and so contribute to achieving WV goals."

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Engagement and Retention: Learning

Other Word Vision Studies on this Topic: Applied Learning Centre Assessment (Summary)

For a comprehensive overview of World Vision's current learning and capacity building environment, contact to Jeff Brunt. The summary finding were:

There is an urgent need to integrate WV structures, systems and strategy for capacity building, training and workplace learning for various reasons:

- *As part of WV's Our Future Strategy, Strategic Mandate 2 commits World Vision to strengthen "our grass roots field capacity and ministry."*
- *Within the sector, the growth of NGOs like World Vision is being increasingly recognised, both for the resources that they raise and for their ability to implement in the field. As the sector becomes more powerful and influential, there is growing pressure for a common set of professional standards and increased accountability to enable donors and beneficiaries to compare and measure NGO performance.*
- *Increasingly, as a leading humanitarian NGO, World Vision is being scrutinized for evidence of professionalism, creativity and integrity.*

To adapt to this environment, and ultimately to serve the world's neediest communities, World Vision must wisely invest in the capacity of its staff.

Having analysed what quantitative data was available, and considered the plethora of personal experiences, specific examples and general anecdotes raised about how learning is conducted, the commonly held perception was that '***we don't do it as well as we should***'.

1. Source: ALC Study 2008

Engagement and Retention: Learning

Other Word Vision Studies on this Topic: Applied Learning Centre Assessment (Summary)

The Findings:

Some examples of positive working practice were uncovered, however, numerous aspects which reduce the effectiveness of learning were evident:

- Use of coaching and 1 on 1 support as a learning tool
- Positive attitudes and culture towards learning and developing learning
- Action learning and 'learning by doing' were significantly evident
- Creative solutions to meet learning needs
- Evidence of partnering between individual groups and external vendors
- Drive to bring continuous improvement into learning and capacity building

- Little strategic alignment of learning with WV objectives at a global, regional and local level
- Insufficient capability and support for consistent design and development of learning content
- Few formally accredited Trainers delivering training
- Stand-alone scheduling of learners/instructors
- Manual or no content cataloguing and asset sharing across teams, offices and regions
- Lack of alignment between all groups in overall talent management process
- Inadequate means of measuring effectiveness and impact of learning on performance
- Demand for global collaboration, or coordinated learning support

1. Source: ALC Study 2008

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Engagement and Retention: Learning

The process by which an Organisation plans, delivers & manages the learning needed to increase the skills & knowledge of individuals. The purpose is to increase individual and Organisational performance.

Sourcing

Basic	Progressive	Innovative
• Classroom • Lecture based • Rote-learning • Academic • On-the-job • Using train-the-trainer programmes • 'Bonding' or training contracts where there is significant organisational investment • Computer based/e-learning	• Distance learning/remote study programmes • Combination classroom/field based courses • Structured curricula per role • Brown-bag lunches/Guest speakers • Newsletters/Case Studies • Appreciative inquiry based approach inc. through devotions • Effective knowledge management	• Influencing academic institutions • Measuring return on learning investment (ROLI) • Recognising generational differences between learning styles & preferences • Communities of Practice/chat boards • Mandatory reflection periods • Linking with workforce planning, WV strategy, Competency Model, Performance Plan, Development Plan

The above lists combine both learning delivery methods, aspects of organisational and external infrastructure and processes. This perhaps illustrates that Learning is more than just training and training by itself is not equal to development.

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Integrated Competency Development (ICD)

A collaborative Partnership-wide effort to:

- support National Offices to implement Guidance for Integrated Programming as part of their efforts to successfully adopt the IPM model

- begin to respond to the findings of the ALC Assessment study and help WV move towards a future state where local level staff capacity building is:
    - clearly aligned with national strategies
    - helps maximise WV's contribution towards child-wellbeing outcomes
    - supported by a culture of learning evidenced by continuous learning and reflection
    - underpinned and guided by common and robust standards, frameworks, tools and guidance

ICD Vision

Capacity building for programming effectiveness will strengthen the competence of local level staff to work with community partners to contribute to the well-being of children.

An ICD Resource Kit containing guidance, tools and resources (including 'good practice' approaches to staff capacity building) will be the main deliverable of ICD in FY10 – see next slide

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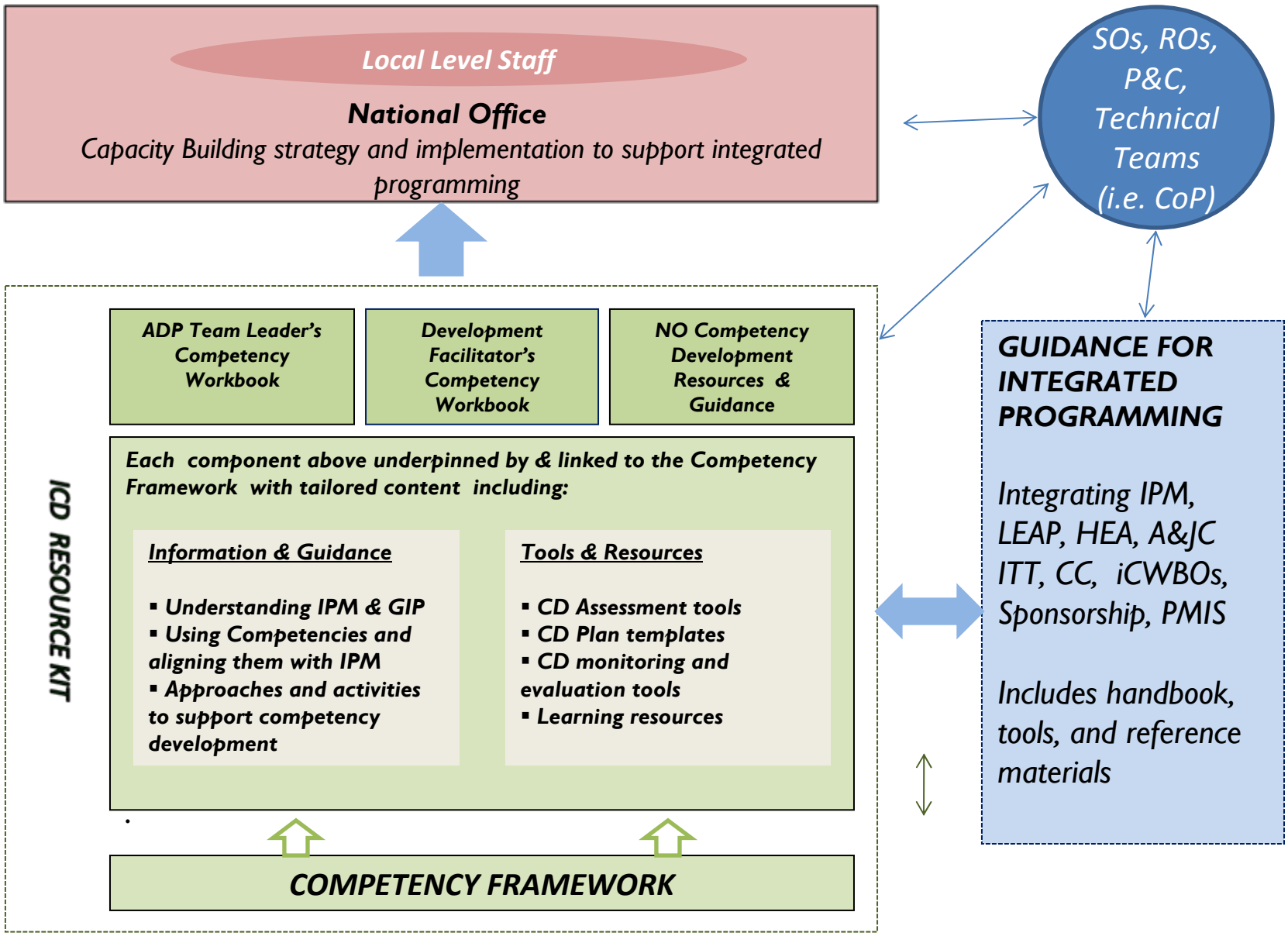
ICD Resource Kit – an overview



Promising Practices: Learning

For further information on promising approaches and practices to support local level staff competency development please see the Integrated Competency Development (ICD) Resource Kit due for release end of January 2010

Computer Based/e-Learning

There are many technical reasons why computer based learning might be a challenge for many NOs

- Infrastructure
- Internet access
- Additionally some employees may not have the minimum capability required to use a computer

However there are also some real advantages and courses can also be distributed via CD

- Employees learn at their own pace and at convenient times
- Assessment scores can be part of the course
- Consistency of message
- Reduction of trainers (more focus instead on course content and feedback)
- Reduction the cost of travel, transportation and lost time in the field
- Better for some individuals who find travel difficult for family reasons
- Can be used as knowledge pre-requisites for classroom based training
- There can still be an instructor available to support e-learning
- More NO cross sharing

None of the above negates the benefits to employees of meeting, networking and social interaction.

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Promising Practices: Learning

Distance Learning/Remote Study Programmes

These can be a great way to encourage staff development and learning.

- Many people with great potential did not have the opportunity/cannot go to a 'standard' University (*i.e. live on campus),* people must be able to eat, to feed their children etc, but are still incredibly hard working
  - Can build capacity and people's confidence
  - More likely to be spread over a period of years (employees don't have to quit to gain a degree)

Variation: Supported Distance Learning

- Different to 'distance learning'
  - There may be a teacher/facilitator and
  - There are cell meetings
  - In a ***UNICEF*** Pilot (attended independently by two World Vision Employees) cell group meetings may last all day
    - There is a focus on discussions on the material
    - The cell is from the same community (but a variety of roles, teachers, nurses, community developers etc) and all from within a 20 kilometres range
    - Great networking and community building opportunity

For a more detailed review of related topics see also Debates on Education vs. Capacity Levels, World Vision Contributions towards Higher Education, Influencing Academic Institutions (Learning and Recruiting sections), Higher Education Levels should mean a higher salary; but the link is not directly causal

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Promising Practices: Learning

Combination Classroom/Local Level Courses

The main concept here to try to ensure that courses are combined with an element of practical application or have a practical component which entails the participant applying knowledge of concepts/ ideas/ methodology learned in the classroom into the field.

- May be challenges with application if it is a development based training for a future role (so exercises need to be demonstrated accordingly
- This can be more resource intensive in terms of assessment
- Participants can be paired or grouped so that the application is applied as a small team
- No certificates (attendance or otherwise) to be provided prior to demonstrated proof of application
- Builds an action-learning reflective culture

India is currently trying to ensure that there is more applied learning as part of their core curriculum

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Promising Practices: Learning

Structured Curricula Per Role

A structured curricula per role type means that employees get the training that they need to do their job. Some training modules will likely be common across roles.

- **Cambodia** has a **Learning for Transformation** programme originally designed for Development Facilitators which has been summarised for management levels too
- ***India*** has a structured curriculum for all field based staff
- ***Indonesia*** is introducing an **'i-learn**' programme

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Promising Practices: Learning

Brown-bag lunches/Guest speakers

Encouraging knowledge sharing and learning does not need to be time intensive or costly. A common practice in consultancy is the practice of 'brown-bag' lunches. This entails:

- A team member sharing a presentation/exercise with a colleagues on a topic on which they are an expert
  - Alternatively the team brainstorms on the topics that they want to know more about, they take it in turn to do researches and presents back to the group
- This is usually on a rota-based system, perhaps once a month
- This is usually completed at lunch time (i.e. in non-work time) but could be applied at the end of monthly meetings when people are all in one location
- Guest speakers may occasionally be called in and the session extended to other teams
- This is seen as an effective way of sharing knowledge, building the speakers' presentation skills and confidence in a 'safe' environment (their own team) and helps the team to build awareness and appreciation of each others skills

1. The 'brown-bag' label probably originates from the fact that people in the UK and the States would often bring their lunch to work in brown-bags. It implies that people do not eat out but spend their lunch times learning.

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Promising Practices: Learning

Newsletters/Case Studies

It can be difficult for field based staff to keep up with trends in development thinking / news about government initiatives which have an impact on their work etc./receive fresh stimulation on typically community dilemmas and how to resolve them. Whilst the ADP or Programme level meetings and retreats help with this, the frequency with which they occur may not be enough in one sense (although to suggest that they were increased would be a significant cost increase and take people away from the field more).

- HR and Ministry (etc.) can support this effort with increased newsletters
- Internet access is often required but the ADP could print and send relevant articles to those working in the communities without internet access
- Prior to implementing this, local enquiries should be as to the appetite for this in NO
- A good knowledge management on-line tool makes this process a lot simpler
- In some organisations employees are rewarded for contributing to this kind of knowledge capital
- Case Studies or stories focusing on a problem and how it was resolved are often very helpful to get people thinking about their own situations

Appreciative-Enquiry Based Approaches inc. through Devotions

This is more a of method of learning which can be applied through any number of learning delivery mechanisms and has been an input to IPM. National Offices should consider making their devotions sessions open and participatory discussions (as opposed to Sermons) to encourage more participation and thinking.

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Promising Practices: Learning

Influencing Academic Institutions

See section on Sourcing (and Learning Promising Practices) – Influencing academic institutions/ University Course Content.

Additional considerations to this topic are:

- Ensuring the employee writes a paper/demonstrates how they have been able to apply what they have learnt on the course
  - Where World Vision has partially funded the degree programme/is influencing the course content they may want to make this a pre-requisite to the employee receiving their qualification
- Encouraging employees to share their thesis with colleagues (see 'sharing mechanisms')
  - Some organisation have functions for better knowledge sharing and publications (refer to knowledge management section)

Measuring Return on Learning Investment (ROLI)

If organisations invest in employee learning, even if to act as a retainer, they should expect to be able to measure and see a return on this investment.

Ensuring that the employee's contract states that they must pay back, *pro-rata*, any investment in them if they leave before a certain period is also critical to this.

It is difficult to do this in a quantitative way without collecting metrics and data for which many organisations don't have the infrastructure to do. However, any one who authorises learning spend, should be completing qualitative reviews to understand if the organisation is benefiting from the money spent.

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Promising Practices: Learning

Recognising Generational Differences Between Learning Styles and Preferences

All organisations have to recognise the generation difference between their staff, in terms of what they value, what they expect and how they learn. This should be part of any Talent Strategy and the balance between the older generation and the new generation is not easy. However

- The younger generation (X & Y) in many countries have grown up to be computer literate, to work and to live in a virtual environment. Many are quite happy learning by doing.
- The older generation are not as comfortable with technology and new ways of working but are just as capable of learning (may be, for some, at a slower rate).
- The ability to build relationships and relate to other still differs by individual
- Deliberate paring of the older and younger staff can build a continuous learning and sharing culture

Communities of Practice (CoP) inc. Chat Boards

"A CoP can be defined as a group of people who share similar goals, interests, and knowledge areas, and come together to learn, share knowledge, make decisions, and develop tools and standards with the purpose of enhancing the quality of their work, as well as fulfilling the organisation's goals and strategy[1]."

In reality communities of practice also included internet networking and forums and may be internal/external and formal/informal. They exist in community settings too – perhaps more face-to-face.

To build stronger learning culture, enforce informal learning and increase the support available for staff World Vision should be strongly considering prioritising these practices.

1. Source: WV Knowledge Management Strategy where this topic is discussed in detail.

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Promising Practices: Learning

Effective Knowledge Management

The knowledge management strategy is a detailed document covering all aspect of this topic and readers should be directed to this document for all content. It highlights the following tangible benefits:

- Making all successes repeatable and sustainable
- Recognising mistakes and avoiding recurrence
- Avoiding reinventing the wheel or duplicating effort so shortening the learning curve
- Organisational strategy and policies based on fact-based learning
- Decisions based on facts and the evidence to evaluate the impact of our decisions
- Saving money through reducing duplication of activities such as research and publications
- Delivering strategic research and development
- Delivering greater impact for programmes and contributing to fulfilling our promise to donor by using proven better practice
- Equipping staff to do their job
- Enhanced transparency and accountability to communities, stakeholders, staff and donors, and our decisions and impact can be validated against an evidence base
- Partner communities having access to information and knowledge about WV and its programmes
- WV is informed to lead external discussion and act our size
- Predictive modelling and forward planning to develop new ministry directions

Effective knowledge management is the key to equipping local level staff

1. Source: WV Knowledge Management Strategy where this topic is discussed in detail.

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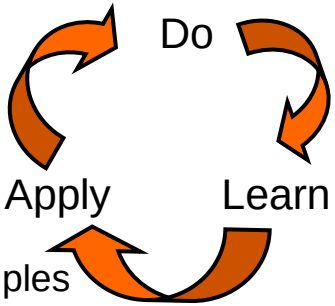
Promising Practices: Learning

Mandatory reflection periods



The Knowledge Management Strategy focuses on the principles of 'Do, Apply, Learn.'

The ***IPM Pilot sites*** have applied this to good effect and encouraged participants to reflect on their work, what they have learned, what has worked out well

Cambodia has an effective 'Learning for Transformation' (LFT) which applies similar principles

Building internal learning institutions

Some organisations, intentionally build internal organisations to manage knowledge and learning materials. This is something that could only be considered at a Regional or Global strategic initiative.

Practicalities

Whilst organisations can't always invest in formal learning for staff they can encourage those staff with potential and educate them on the choices available to them

In some cases people will leave anyway to further their education irrespective of internal opportunities.

- What is the policy towards people that leave on good terms to further their education?
  - Whilst jobs can't be guaranteed, it is possible to guarantee such people who leave automatic entry of roles at the same or one level above
  - In the case of some people, a job offer may be left open, on the basis of a particular role but in an unknown location to encourage good people to return (who require minimum training investment)

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Debate point: World Vision Contributions toward Higher Education?

Why is this a debate?

A number of National Offices allow employees to enrol in Masters programmes pertaining to development or social work, the cost of which is partially or fully covered by World Vision. Does investing in furthering an employee's academic credentials bring enough benefit to the organisation to justify its cost?

- Creates a more educated, qualified workforce
- May increase loyalty to the organization
- May greatly increase the capacity of employees & knowledge may also be shared with other team members
- Helps to foster a "continuous learning culture"
- Sharpens skills and methodologies

- Degree programme quality may not be high/relevant enough to significantly increase the capacity of the employee
- High cost to World Vision
- Qualification and eligibility rules may cause resentment from other staff are not approved may be offended that their education is not being paid for
- With higher academic qualifications, employees are at higher risk for getting other job offers

- What is the return on learning investment for the organization (ROLI)? Is there evidence that higher degree holders are performing better after completion of the programme?
- How will World Vision ensure that employees stay with the organization after gaining higher qualifications for long enough to gain the ROLI?
  - How do 'bonds' work with a fixed-term contract approach?
- How does World Vision ensure that the courses are relevant to their needs
- What is the appropriate contribution level?
- Should NOs have different policies?
- Who is eligible – what level of performance has to be reached before someone qualifies (at a minimum low performers should not be eligible

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Learning: Employee Survey Comments

Employee Quotations

Very satisfying though a serious consideration should be given for educational

Staff should be given the opportunity to further their education without asking them to resign

Growth opportunities are not clear. When is one promoted in World Vision? What are the opportunities for higher education? Yet during restructuring academic qualification in premium

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Staff Care
▪ Overview and Existing Status of Staff Care ▪ Promising Practices ▪ Debates and Discussion Points ▪ Interview Quotations

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Employee Engagement: Staff Care

Existing Status of Staff Care

What is Staff Care

- Staff care focuses on employee health, safety and well-being and includes both psycho-social support and pastoral care
- There is cross over and integration between some staff care offerings and benefits; staff care should be seen as and sold as benefit to all staff
- A good staff care policy and practice can greatly contribute to an employee's overall well-being and consequently their likelihood of staying with the organisation

Good News

- World Vision appears to be doing much more towards staff care and well-being than other NGOs and has good programmes e.g. SALTI in the Africa Region
- Many improvements can be made by changing the nature and quality of relationships between staff
- However it is still an *initiative* in some countries and not seen as part of the core support structure required. From an external perspective, this is odd, as it is integrated in most corporate organisations where arguably staff work under a lot less stressful conditions

Taboo areas

- In many cultures and organisations, stress or mental health issues are seen as a sign of weakness and/or that people aren't fit to do their job; this can impede early intervention / preventative measures being taken
- Some think spiritual support is not required, not because it is not an individual's accountability to seek help but because it is not required if faith is strong enough

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Employee Engagement: Staff Care

Staff care focuses on employee health, safety and well-being and includes both psycho-social support and pastoral care

Staff Care

Basic	Progressive	Innovative
• Ensuring staff are aware what support is available • Security briefings • Counselling schemes • Immunisations for staff being sent away from home • Wellness workshops (test BMI, stress, blood pressure etc.) • Life Insurance/medical insurance/travel insurance	• Critical incident and stress management courses prior to critical incidents • Regular communications • Policy for staff to travel in pairs in dangerous areas • Flexible working practices • Clubs and games (recreational allowance at ADP level) • Retreats • Listening to staff	• Have a 24 hour security hotline • Direct connection to the government, weekly alerts (updates) • Trained peer counsellors and support within the organisation • Incorporating family life into staff care • Proactive approach to stress management

Come to me, all you who are weary and burdened, and I will give you rest. Take my yoke upon you. Learn from me, for I am gentile and humble in heart, and you will find rest for your soul. For my yoke is easy and my burden is light. Matthew 11:28-30

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Staff Care Promising Practices

Staff Care Practices

Where to go for Help and Next Steps

For all practices and initiatives relating to staff care, please contact **Michael Hegenauer**, Staff Care, GC P&C.

What and How

Counselling and assistance schemes: Schemes vary greatly throughout the world. The may contain trained in house staff with external referral sources (Christian counsellors, missionaries or churches in required geographies, psychologist assessments, they often utilise the Christian commitment co-ordinators).

Other offices co-ordinate prayers and have a schedule for particular ADPs and recognise those with individual or family health issues and problems.

The SALTI programme (staff assistance for life counselling and medical care) provides HIV support, assistance with malaria and hepatitis, etc. , it provides medication to infected people if needed. This is an anonymous program and World Vision pays the cost of the medicine. Currently this is only implemented in the Africa region.

Regular staff communications: This helps employees to think about their own issues and what steps they can take to resolve them, it also removes a feeling of isolation 'I am the only one who..'.

Communications may range from health and exercise tips and facts to case studies or short stories.

Some provide health tips and health statements on payslips

See related sections on Organisational Culture and Benefits which have strong links to Staff Care

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Staff Care Promising Practice

Barriers to Implementation Success

These differ depending on the intervention, however the biggest barriers are:

- Lack of prioritisation of staff care issues and lack of senior management buy-in or understanding of staff needs
- Organisational culture not being supportive of perceived ‘failure’ or ‘weakness’
- No network of counsellors in the country (counsellors from neighbouring countries may train residents within project teams to do rudimentary counselling and then they can refer if necessary)
- Poor infrastructure inclusive of distance between ADPs and communities within the ADP as well as lack of telephone and internet connectivity.
- Lack of integration between countries can mean that implementation costs are higher where third-parties are involved. World Vision could use its buying power across countries / regions to negotiate reduced third party costs

The relevance and necessity of staff care interventions (especially those with a direct financial element) differs greatly depending on geography/culture/whether or not the staff are local to the area in which they are working etc.

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Staff Care Promising Practices

Flexible Working

What and How

Implement policy and guidelines to allow staff to have flexibility of working hours. World Vision should recognise that many community based staff work far greater hours than they are contracted to work, that in some countries community members 'drop' into people's homes at all hours and community events are more effective in the evenings etc. Programmes need to be reflective of country/community needs. This may be based on:

- A weekly schedule:
  - Formal (agreed working hours outside of a regular 9-5)
  - Core hours for the team and the rest chosen individually
  - Informal (minimum hours) to suit both the individual, ADP and community
  - Agreements to revert to core hours for monthly meetings
  - Monday AM and Friday PM off
  - On a roster basis if coverage is required at all times
  - Working from home location (depending on the role and type of work required)
- Project needs and dependent on whether or not staff are local to the area they are working
  - Additional time allowed in home location
  - Additional days accrued (as agreed with manager) for rest and recuperation for tough locations/situations
  - Flexible arrangement so that staff can take a two hour break in the day for child care emergencies

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Staff Care Promising Practices

Flexible Working

Advantages	Disadvantages
• Staff have flexibility to work with community needs & to work with their own family commitments • Staff feel more empowered and more in control of their life • Two-way relationship project needs and employees needs both considered • Can improve workforce diversity (woman with young children etc)	• Works better for some roles than others (e.g. development facilitator more than administrative assistant) • Some Line Managers feel that they have lost 'control' • Depending on formality of agreements can cause more HR & Payroll overhead and administration

When it is effective	When it is not effective
• For results based work • Staff can work longer hours during busy periods and cut back during lulls • When staff realise that flexible working is a privilege	• When colleagues consistently make demands during agreed non working hours • When requests of staff are not treated with equal consideration by line management • When there is no trust and formal monitoring systems are required

Where to go for Help and Next Steps

Few written formal policies exist. Should be managed by HR at regional and NO level in conjunction with Operations

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Staff Care Quotations

Interview Quotations

We leave it to ADP managers to work with their staff in defining reasonable work policies. Work varies a lot based on season, so if the staff are very tired the ADP Managers will arrange for them to take a day or two off.

"We have contact with professional psychologists just in case we need their support to help staff dealing with children who are abused & staff are informed about this….if you need time off…can get it…

"Sometimes the stress comes from the fact that staff don't know how to deal with those cases. So we have country child rights manager that helps to train staff in dealing with those cases."

"How do I offset the quality of life differences (recognize them (field based employee) for sacrifice of their quality of life)? They don't talk about it but I think they feel that the NO only takes care of itself, etc."

"Connectivity to family and no time for rest and recuperation (people may travel Saturday and Sunday) so more flexibility"

"…a global conference on staff care, and a training programme for managers & HR staff to give them the tools to handle the kind of situations that have a major impact if not handled well – redeployment briefings, end of programmes, critical incidents etc – if managers don't have the tools these kind of things can be very disruptive for staff – so have had a major focus over the last few years & this has been very effective"

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Staff Care Promising Practices

Engaging with and Listening to Staff

What and How

Very simple: Listening to staff concerns / understanding and understanding needs and wants and providing opportunities for input improves productivity and performance.

- Management visits where the management is candid about the issues and employees really feel that they are getting honest attention and feedback
- Engagement studies where staff provide input and the results and resultant management decisions and actions are communicated back to the staff
- Communities of practice
- The ability to provide feedback and receive responses on support function processes etc.
- The ability to volunteer to provide input for new initiative etc.

Anecdote: During a facilitated session of community based workers the feedback was 'some of us have worked here for over 20 years and this is the first time we have ever been asked for our input'.

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Staff Care Promising Practices

Proactive approach to stress management

"" Mental health issues are still a big stigma within many cultures..& in most parts of WVI… ran a training course on suicide, prevention, intervention and recovery (of those affected such as loved ones and colleagues). At the time, I got many responses from senior leaders, saying that this was not necessary, that World Vision staff are Christian and educated so it is not possible that suicide is an option at any level for them. However very recently we have had one very high profile suicide and two attempted suicides and now we are being asked to run the course as a priority for staff."

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Staff Care Conceptual Framework: Wellness in the workplace

"Wellness in the workplace is the active art of building resilience to job stress and daily life. It is more than the absence of illness – it is an approach to life. Wellness embraces the best of who we are in body, mind and spirit. It is proactive and preventive. It touches every part of our life by emphasizing good health care, cultivating self-awareness, living according to our value and beliefs, being our own best friend, and realizing the value of family, friends and co-workers." (O'Hara, 1995, chapter 1, pg. 9).

With this, the 11 key components that are the conceptual framework to these standards are[1]:

- **Wellness**. Giving more focus to what makes you healthy, rather than what makes you sick; and learning what you can do to enhance your well-being and health.
- **Work-life balance.** Giving equal concern and attention to work, personal, family and community responsibilities, needs and interests.
- **Social support.** Staff who have emotional support & positive relationships with co-workers and supervisors are better able to maintain their health and well-being and are more productive at their work.
- **Team cohesion.** The ability of a team to give and receive affection amongst its members. And the bonding together of [aid workers] in such a way as to sustain their will and commitment to one another, their [team] and [project] despite [project stress].
- **Consultative leadership.** Refers to those in charge needing to lead by example, acting out the kind of responses that will safe guard both the physical and mental health and personal safety [of their staff].
- **Resiliency**. An unusual good ability to adapt, even when under severe stress.
- **Ecological**. Creating work environments that promote wellness, support and personal safety for all staff.
- **Staff centred**. Simply put, staff know what the issues and solutions are in their work. On-going informal and formal forums are needed to allow staff and management to discuss these issues and together identify solutions.
- **Role of the Individual.** Each individual also has a responsibility to maintain his or her health, well-being and personal safety.
- **Culture**. When applying the above components, culture, language, traditions, local resources and strengths and context must be taken into consideration.
- **Biblical Guidance** Scripture will give a biblical foundation and guidance to understanding and following health, well-being and personal safety practices in the workplace.

1. Some of the conceptual framework definitions come from Dr. Valerie O'Hara's two books **Wellness At Work: Building Resilience to Job Stress** (1995) and **Five Weeks to Healing Stress (**1996) both published by New Harbinger Publications and Graham Fawcett **Preventing Trauma in Traumatic Environments,** chapter 3, in John Fawcett (Ed) **Stress and Trauma Handbook: Strategies for Flourishing in Demanding Environments** (2003) published by World Vision publications

Staff Care Guiding Principles

Staff Care Guiding Principles: Michael Hegenauer

- The following eight principles are influenced by the philosophy and teachings of Paolo Freire, the Brazilian educationalist & Carl Rogers, the father of humanistic psychology. These eight statements give us a simple and achievable set of guiding principles that will allow us to develop effective staff care services within WV. The eights principles are:
  1. Our staff know the problems & issues that they live with each day - they are the experts
  2. Our staff know what the solutions are to these problems and issues
  3. Every problem has a solution
  4. Lets create work environments, which allow our staff to talk openly about their problems, their issues & most importantly, their solutions
  5. Lets learn to listen
  6. In order for this to work, senior management has to “buy-into” and support the above five points
  7. Together, lets learn how to effectively respond to their solutions in a culturally appropriate and practical manner
  8. If we follow the above eight points, then together, we can solve any problem before us
- In short, it’s not about counselling or psychotherapy, or “experts” delivering services. It’s about relationships. Relationships where we all: talk openly, listen, understand, learn, and then respond with simple, practical solutions.

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Engagement and Retention Section: Contents

Retention	
Overview and General Opportunities	Monetary and Non Monetary Rewards: Recognition
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Monetary and Non Monetary Rewards: Salary	Alignment of Supporting Functions
Monetary and Non Monetary Rewards: Benefits	

Monetary and Non Monetary Rewards: Salary

- This section focuses on
  - the types of the need to be clear on compensation strategy and to understand the local considerations
  - Considerations for when certain allowances might be applicable and how they might be applied

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Engagement and Retention: Salary

The process for identifying, tracking and developing the organisation's future leaders, subject matter experts and executives to ensure sustainable organisational continuity

Salary

- There are really no 'basic', progressive and leading practices related to salary
- This is a need for a compensation strategy:
  - Having a compensation strategy entails knowing
    - Where World Vision wants/needs to pay in relation to their competitors
    - Where World Vision needs to be in relation to other employees in the country (Corporate, Government etc.)
    - If pay rates compared with the market should be different for particular roles (hard to recruit for/high investment level) roles? (Linking in with Workforce Planning)
  - Each National Office should understand how they currently pay relative to the market
  - Within job grades, there should be bandings and it should be clear and transparent how these are applied
    - For example, paying higher salaries to those who have taken a role from a higher paying organisation compared with those in equivalent roles is not appropriate and will cause resentment with existing staff
    - Paying a higher salary to someone promoted in to a specific specialist position may make sense
- It is also important to regularly review the market and if World Vision is paying well relative to the market make sure that this is communicated clearly to all staff

This topic is closely linked with benefits and should be looked at from the view of total rewards and compensation

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Engagement and Retention: Salary

Salary Components

Using different allowances in addition to base salary can help an organisation be more flexible.

Allowance Type	Further Considerations
Location Allowance	▪ See 'Benefits Section on '**Location Based Considerations: Allowances and Benefits'** – Very difficult topic: • Some will argue they need more because they live in a city and their cost of living is higher, others that the lack of facilities in a rural area mean more should be made to attract staff • There is no definitive answer. It is dependent on the workforce and the difficulty of recruiting and retaining the right staff ▪ Can be stopped when if the employee moves, or if the ADP closes/conditions change within the area – allows for flexibility of salary bill.
Performance Related Pay Increase	▪ May not be a strong attractor and depends on market conditions ▪ Employees who are not performing according to expectations should <u>not</u> receive any performance related pay increase. To do so: – Sends the wrong message to the employee about their performance • If these employees leave as a result of not receiving an increase this is probably a good thing • Employees not performing according to expectations should be working with their line manager more closely to make these improvement – Acts as a 'de-motivator' for those employees that are performing according to the expectations of their role

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Salary: Discussion point

The Global Economic Crisis

Why some staff think they should be paid more and why they shouldn't

- Some Employees surveyed had a skewed view of their own rights in the current economic conditions, indicating that they should be paid more during these difficult times. World Vision needs to explain that:
  - whilst some organisations are having to reduce staff and/or salaries they are trying to avoid this
  - employees may not be receiving a raise but, in relation to the rest of the market, they are lucky
  - the likely impact on communities of the crisis & the trickle down effect (& the message a raise would send to donors and to communities)
- Education about the economic reality & implications may be a low cost way to dissatisfaction (additionally in such times development opportunities & flexible working can prove more influential than salary
- Effective HR Operators are using the global crisis to make tough and smart decisions about their workforce
  - Along with Leadership, clearly communicating the impact of the economic recession to the organisation, the organisations structure, the implications to projects etc, future intentions towards staff (what they are doing and not doing to support this) and what their competitors are doing
  - Making structural & tough decisions knowing that the workforce are grateful for their jobs & less likely to leave or gripe as a result
  - Redundancy/retrenchment based of overall workforce based those poorer performers
  - Salary reductions within the workforce to minimise the number of redundancies
  - Hiring new talent that have left other organisations (often on a voluntary redundancy basis)
- For many roles, HR can pay less for more people, this is efficient, and in a World Vision context should mean that more money can be spent on the poor/reduced donor contributions are partially offset

A question for any Business Leaders asking themselves if staff should be <u>paid more</u> due to the economic crisis (e.g. staff families may have lost their jobs)
Is World Vision operating a charity to help the poor or is World Vision operating a charity for it's staff?

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Salary: Discussion point

Communicating the Compensation and Benefits Position

Helping Employees and Leaders understand staff compensation in relation to the market

- It is human nature to want more - even in a Christian workforce; but wants are also always relative
- Employees will always say that they want and deserve more. Ignoring the words 'want' and 'deserve', HR and Leadership need to understand:
  - Where does World Vision pay relative to the market and what is their compensation strategy (where do they want to pay)
    - Where does World Vision need to be in relation to other employees in the country (Corporate, Government etc.)? i.e. is it even possible/sensible to set a regional level strategy?
    - Is this different for certain hard to recruit for/high investment level roles (Workforce Planning)
- Salary Benchmarking Report should be used to understand the status quo information[1]
- The reality may be that there is an unfounded *perception* that overall compensation is poor but actually the majority are being paid very competitively
- Many organisation invest time in communicating such findings to staff.
  - In some cases this may be as simple as communicating the statutory minimum benefits in comparison with the organisation's package
  - In some organisations where there are cut-backs, senior leaders forgo rises so that there staff can receive something; if this is the case many of the benefits are lost if this is not well communicated
  - Information about average country wages / household incomes (as available/suitable)

1. Birches Surveys have recently been run for 14 different National Offices for certain roles. Unfortunately it was not possible to easily (and accurately) extrapolate local level staff data from these reports. Such reports normally include the 'Total' Package inclusive of benefits. Contact Ginny Cordon in Global Centre for further information about participation.

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Salary: Discussion point

Higher Education Levels Should Mean a Higher Salary; But the Link is Not Directly Causal

What is the value of an Academic Qualification?

- Employees greatly value having higher education & if an employer can support this goal that is commendable
- The Employee Survey showed that some thought that they should be paid more because during their tenure they had bettered themselves educationally
- What does a higher or upgrade education give staff?
  - The ability to perform their current role better
    - new knowledge and skills
    - the ability to perform their current role better or to more quickly reach their potential
    - confidence in themselves which is reflected in their day-to-day work
  - New opportunities;
    - inclusive of the above, the ability to reach the minimum qualification for a new role
- However, employers should not mistake education for performance
  - People with degree level education are paid more on average because on average they have better jobs
  - Those receiving educational support, should receive a salary increase only if their performance is increased as a result and this is reflected in there performance review[1]
- Paying people different amount for the same role & grade because one has a Masters and one doesn't would amount to discrimination in many countries

See section on 'Education and Learning' for more details

1. Counter arguments like accountants & lawyers receive increases on qualification don't work as they are (legally) able to take on more responsibility and their role/grade changes – additionally many are on training contracts so if they don't qualify, their contracts don't get renewed.

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Monetary and Non Monetary Rewards: Benefits

- This section focuses on
  - the types of benefits which might be applicable to field based staff
  - Considerations for when benefits might be applicable and how they might be applied
- It is important decide on the approach to be taken to **incarnational living** to be taken as a result of IPM and to think about which different benefits staff might require as a result

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Engagement and Retention: Benefits

Benefits covers the design and implementation of benefits programmes (incl. cost benefits analysis) & vendor relationships

Benefits

- Categorising different benefits or benefit process into ‘basic’, progressive etc. will not help National Offices. Instead each National Office would be better to consider whether or not there should be specific benefits for particular local level staff or roles within the local level staff that would make posts more attractive for these individuals.
  - For example if Development Facilitators are expected to move to live within a particular community are there any benefits available to them to recognise this sacrifice? (especially if their ADP colleagues are allowed to live in the nearest town (and are therefore enjoy the facilities of that town))
- This section contains
  - Benefits which some National Offices and other NGO’s employ that other National Offices might want to consider as part of their overall retention strategy
  - Overall benefit design considerations
  - The IPM’s incarnation living approach has strong implications for this section

Benefits should not be reviewed in isolation from the an employee’s Total Compensation Package or Staff Care Practices and need to be country, market and context specific.

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Engagement and Retention: Benefits

Incarnational Living: A National Office Specific Approach

What does this mean?

'Incarnation' simply means to embody or personify something, so in this example, incarnational living is to live with the community like the community to be better able to share and help and to demonstrate good living.

- IPM states that the best approach is to have community based staff living in and with the local communities but recognises that this may not be an option in some NOs

Is it optional?

- The key intent behind the approach is a focus on relationship building.
- The National Office must make the decision what will work best for them including in that the feasibility of recruiting and retaining people to do live within the community. Factors that will determine this and the implementation success are:
  - How the approach is communicated and how staff understand the reasoning & benefits behind it
  - The strategy of any transition approach
  - Where people are sourced and staff staffed from
  - Any additional HR practices/benefits/allowances and policies
  - The likely reaction of the community to the approach (experimental approaches may be required)
  - How can staffs' families be supported (especially with regards to education of children) and work opportunities for spouses.

"As the Father has sent me, I am sending you." John 20:21-22

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Engagement and Retention: Benefits

Incarnational Living: A Country-Specific Approach

India

All Development Facilitators to live within the community the work inclusive of their immediate family. This is non-negotiable and is part of the job description.

- This appears to work reasonably well and challenges lie with newer staff members
- Some geographic areas within the region are more challenging than others
- The HR, Operations and Staff Care have had to implement a number of initiatives focusing on security, living arrangements etc.
  - The top issues remaining are children's education (with some feeling like they are sacrificing their children's future for their communities) and spouses' ability to find work

Cambodia

Development Facilitators (DFs) complete overnight stays in the communities two or three times a week. During the rest of the working week, the DFs either live in the ADP base in the week (without their family) or live close by with their family. This is a relatively new approach for Cambodia

- This has worked better with new recruits (hired specifically this approach) than older members of staff
- There are still concerns by staff for their safety and security during these visits (especially female staff)
- Cambodia is considering reviewing the minimum number of stays per week and trying to focus on the effectiveness of these overnight stays
  - Ensuring the people stay with different families
  - Focusing on special celebration days/community events etc.
  - Coaching on what should happen during overnight stays/making them effective

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Engagement and Retention: Benefits

Incarnational Living: Different Points of View

"I like the principle of the incarnation model, in terms of staff retention & the pressure on them – I think it increases the odds (of losing people) - if it (community living) is for 5 years vs. 2 months there is a big difference – sometimes having a little bit of space is a good thing especially if working cross culturally (this can also been between the well educated & those with less formal education)

"I think they should live near by. They should also get plenty of stimulation to converse and meet with peers. In communities you can be protected by community and blood link – which you don't have in rural villages if you come in from the outside."

Would living in ADP accommodation make a difference to people's living conditions?

"No difference to now (where staff currently live) but people leave because of the living conditions and people don't take the job because of it. It is a location that you can't take your family."

"I don't think it would make any difference. Honestly no, in my community, sleeping there will not make me part of the community After 19 years of marriage I am still an outsider, a welcome outsider – when my husband and I go to church we are treated as guests *(in his village)*. I doubt it will offer more value…just to sleep it won't help, but events spending time yes it would improve (but this already happens) Meetings mean that they spend on night there. It has to be optional for the community – in different parts of my country this may differ & be very welcome.

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Benefits

Types of Benefits

General Benefits

Benefit	Further Considerations
Pension schemes / retirement schemes	This was a strong theme in the employee survey; many employees value retirement/pension benefits and place a great deal of value on their futures. In Europe very few employers offer a 'final salary' scheme or are able to compete with government employers; having a more flexible workforce has also changed HR strategies towards pensions or retirement schemes with some segmenting Employer contributions based on the employees age / length of service. Consider how retirement offerings fit into strategies on the length of contracts and how transferable such offerings are for the employees on exit (e.g. offerings with a high cost of exit are a retainer but this may not be the kind of retainer that World Vision wants).
Health/medical insurance and cover	This cover is highly valued by employees. NO's should align the policy what is provided by the state and what other organisations provide. Some consideration needs to be made as to: • Accessibility of service (are employees disadvantaged/out of pocket due to travel costs) • What is the coverage and definition of dependents? – Coverage up to x size of legal dependent, with employee contribution for more dependents – Employee cover only, with family cover optional with employee contribution – Dependent parents included • Whether staff feel disadvantaged if they are single by the existing policy • How the policy is accessed. If staff need to pay upfront whether loans available to those that do not have the cash for this. How efficient and clear the re-claim process is.

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Benefits

Types of Benefits

General Benefits

Benefit	Further Considerations
Life insurance / disability allowances	These and possibly medical coverage providers may not even exist within a country; some NGOs have created their own funds from which to manage these occurrences. Life insurance coverage makes employees more secure about the future of their family/loved ones. Disability allowances help employees to feel valued if they are injured on the job, and can keep good employees with World Vision by not forcing them to find work elsewhere.
Loans	Employees see loans as a benefit. They are an administrative burden to the payroll and HR function but can be greatly valued by staff in emergencies. If a country offers a loan as a benefit, there need to be clear guidelines for the circumstances in which loans will be given are essential to ensure fairness and consistency. Usually organizations offer loans only on the basis of direct payroll deductions as the way of making repayments.
Sports and social allowances/facilities	These have strong links in with staff care policies and may be administered at individual team/group or community level. Sport and/or social programmes may have a low monetary cost to World Vision, but can be very useful in promoting staff well-being. Corporate organisations can demonstrate a financial benefits from such schemes (i.e. healthy and active staff have fewer sick days) as well as harder to measure benefits of better team bonding. Examples are: running sports teams (volleyball, football, etc) encouraging designated social events like dinner at a colleague's house or family picnic days.

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Benefits

Types of Benefits

General Benefits

Benefit	Further Considerations
Staff Care Policy	Having psycho-social and spiritual support accessible to employees promotes their personal well-being, which in turn feeds into their productivity at work. See section on 'Staff Care.'
Distance education programmes	To be used in conjunction with country policy on further education. Employees typically require internet access. The benefits are: ▪ Employees refresh and upgrade their skills & knowledge without having to travel to urban locations and spend precious time away from the field ▪ Promotes a 'continuous learning culture' ▪ Employee's value further credentials/qualifications World Vision: ▪ can facilitate distance education just by letting employees know what choices exist ▪ Would ideally link this to a World Vision on-line learning system ▪ Better utilise internal training by using distance learning technologies Equally beneficial to NO staff. **See also slide on 'Distance Education/Further Education'** in the Learning Section.
Flexible Working Policy	Flexible working should be positioned to employees as benefit rather than a 'right'. See section on 'Flexible Working' in 'Staff Care'.

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Benefits

Location Based Considerations: Allowances and Benefits

One improvement is to show recognition to those disadvantaged by their work location (unfavourable work locations/conditions) and differentiate benefits accordingly:

- Some locations are more attractive (and therefore easier to recruit and retain for than others):
  - –Does the management information exist to identify these locations?
  - –Is location the real driver (as opposed to for example management style)?
  - –What is the staffing policy local staff or any national staff?
  - –Will additional benefits & allowances change the relative attractiveness of the area to potential & existing staff
- Other factors need to be considered:
  - – How many staff are local to the location/moved voluntarily/moved at the request of World Vision
  - – Is there a business case for treating employees differently yet equitably & how can this work?
  - – What benefits should be ‘one-off’ benefits with a ‘bonded pay-back’ period
  - – How often are benefits reviewed
  - – How are decisions & benefits communicated? (to all employees not just those impacted)
  - – Employee input should be taken into account (via regular surveys/exit interview etc)
  - – Integration with other policies e.g. transfers/contract types
  - – What is the approach to ‘incarnational living’? Will employees be required to live in the community/ complete overnights stays, move their homes to the area that they work, travel long-distances?
  - – How to avoid criticism of having more ‘family friendly policies and ignoring single people
  - – Are benefits actually accessible to staff in really rural areas?
  - – What is the cost and complexity of administering benefits (as opposed to just giving an allowance)

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Benefits

Types of Benefits

Location Based Considerations

Benefit	Further Considerations
Additional rest & recuperation (R&R) times	In conjunction with flexible working, World Vision may consider. • Additional R&R post stressful/intensive periods of work • Additional holidays dependent on location (***India*** allows staff in high stress locations one week of paid family holiday) • Ensuring that travel policies for mandatory events don't disadvantage those staff posted further away from the National Office From a staff care perspective there is high value in having strong policy to ensure that staff actually take all of their holiday allowance and have line managers actively encourage and support this.
Rural / hardship/ danger allowances	Locations have clear criteria for categorization into rural, urban, danger, etc. so that allowances can be justified and based in policy. Rural allowances may encourage staff to take positions in otherwise unattractive placements, however staff in urban areas already complain that they should be paid more based on cost of living. Clear communication of the reasons for the policy is important.
Relocation payments	Helping with relocation payments may encourage staff to moving to a difficult/rural ADP. Such payments are normally bonded. Policies often differ based on new entrants vs. internal hires etc.

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Types of Benefits

Location Based Considerations: Allowances (continued)

Benefit	Further Considerations
Transport	There should be travel policies based on additional travel beyond standard travel between home and contractual work location[1]. National Offices should also consider what transport employees use. ▪ Vehicles need to be equipped with first aid kits / communication kits etc. ▪ Is vehicle insurance / breakdown cover provided? ▪ Minimum criteria to be set for vehicles ▪ Although motorbikes are commonly used in Africa and Asia, automobiles may be considered for long transport through difficult areas (especially for women)

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Benefits

Types of Benefits

Location Based Considerations (continued)

Benefit	Further Considerations
Accommodation	Many ADP staff currently commute, so this issue may not have been addressed fully. Accommodation standards can be a real issue for the recruitment and retention of staff and differ vastly. ▪ ***India*** currently follows an incarnational approach for their Community Development Co-ordinator role and on a need-basis has: – Provided electricity generators – Installed toilets – Provided better education on safety & security (including fire education etc). ▪ ***Kenya*****:** simple (tin) houses have been built ADP/Staff in areas where there is nothing ▪ ***Zambia:*** built central chalets ▪ ***South Sudan (non ADP):*** looks to find funds for camp development and to put up better structures for staff – Seen as positive by both staff and community leaders; it shows that World Vision are serious and that the community will have the structure when World Vision leaves There is also value in better explaining incarnational approaches to staff.

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Types of Benefits

Location Based Considerations (continued)

Benefit	Further Considerations
Maternity	▪ Health and safety assessments for pregnant woman as to understand if the role needs to change during pregnancy/nursing ▪ Consider rotations to more appropriate locations during the pregnancy ▪ Amending transport agreements during this time ▪ Pairing up staff as appropriate The above is also dependent on the approach to incarnational living taken and the home location of the woman. ***Cambodia*** relocates pregnant staff to areas which are close to an urban centre. They also ask pregnant mothers to stay out of the field as they approach their due date.
Women only benefits	There may be special considerations required for women where diversity targets are not being met. These may not be benefits as such & positive discrimination will not be discussed in detail here. Examples are: ▪ Encouraging two or more women to live together in some locations especially if the women are not married ▪ Some woman survey respondents have raised concerns about riding motor bikes ▪ World Vision should be aware that in some societies the role may be more stressful for women than for men. Note: Feedback from Plan International was that they moved to a rights–based approach and changed the recruiting mechanisms they increased the number of female staff.

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Benefits: Discussion point

Flexible Benefits and Allowances

Other Considerations

Are monetary allowances (as opposed to organisational managed spending/direct invoicing) better?

- It depends on what the benefits is, for example:
  - The cost of managing company cars is so high (and incurs a high tax burden in the UK) organisations typically provide a car allowance instead (leaving the employee free to buy/lease a car as they chose)
    - this just becomes a one-off payroll set up activity when a person reaches a certain grade as opposed to a company of 10,000 hiring 3 employee just to manage their car fleet)
  - An NGO example could be whether or not to manage housing provision versus giving the employee a one-off allowance and a day off to move
  - A centrally managed Private Management Insurance Scheme on the other hand, allows the organisation to leverage their buying power to purchase cover at a far better rate than the employee would be able to do as an individual
- It depends on the run and management cost to the organisation
  - How efficient is the payroll system? – can you set up future dated payments (to be paid in a month in the future), can you set up regular recurring payments (if not, allowances need to be manually tracked and keyed/uploaded in every month)
  - How efficient is the vendor?
- Allowances allow staff to flexibility in how they spend their money but are certainly not recommended for all benefits

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Benefits: Discussion point

Flexible Benefits and Allowances

Other Considerations

Flexible benefit schemes

- Flexible benefit schemes provide employee with some ‘mandatory benefits’ and a fixed sum of money that can be divided over the options that best suit their particular needs/wants
  - Can be efficient if for example both spouses work and both receive medical cover for themselves and their families
    - This is why many organisations only cover the one spouse and offer to subsidise the family
    - Employees often don’t tell the organisation about their changes of circumstances leading to greater payout by the organisation
  - Employees like the choice and there are less complaints about favouritism towards single or married people
- However, for these to be run optimally there is a reliance on a good quality standardise HR management system and web-based access for the employee so at this stage, this would **not be** a recommendation for World Vision

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Benefits: Discussion point

Flexible Benefits and Allowances

Other Considerations

Better leveraging of global spend on benefits

- This doesn't better retain staff but is an observation on efficiency
- In HR Transformation programmes a sizeable chunk of any business case comes from better consolidation and management of HR spend (the biggest cost saving are usually in benefits and training (vendors/materials etc.))
- World Vision should look for opportunities to harmonise in this area
  - An organisation with 40,000 employees should be able to negotiate some great rates with vendors
  - Vendors may be grouped geographically rather than globally
  - Realising this often requires more standardisation of process and technology and stronger process governance
  - Any plans for Shared Service concepts are more effective with consolidation (vendors provide cheaper costs, administrative complexity, forms used etc. are standardised (and cheaper)

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Benefits: Discussion point

Eligibility for Benefits and Allowances

Other Considerations

The opening slides in this section suggested a number of questions to be asked when looking at a benefit. It may be worth National Offices, exploring further is the idea of equality:

- How equal should things be… i.e. should something only be a benefit to those who have been asked to move to an area
- The sourcing section talks about people hired to be local to a region often having lower salary expectations etc.
- The question is then about discrimination between local and non-local hires in benefit programmes:
  - If the allowance is a one-off based on the employee being asked to move this is ok
    - Policies are different for Expatriates (though they don't typically work in development at local level)
  - To avoid discrimination/excessive costs, what is the sourcing policy? Is it more attractive/cost for managers to hire (and then possibly mentor) locals?

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Engagement and Retention: Benefits

Employee Survey Quotations:

"Healthcare is best. But some allowance to support staff children education, staff housing, car purchase will be most helpful."

"Benefits are ok. Exception is when claims (medical reimbursement) take too long time to be done."

"They [benefits] are mentioned in the hr manual but not well organised. Staff who is sick has to pre-finance the health cost to be reimbursed later. Adequate provision should be made for staff to access health services without pre-financing by getting a doctor for staff."

"The organization arranged excellent arrangement for treatment and other benefits package that is satisfactory.

"My problem is staff annual leave - staff should at least be allowed to go on leave at his or her own convenient time..."

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Comments and facts from Employee Survey

Common Themes from the Survey

The biggest employee concerns were based on the following areas:

- Transport
- Accommodation
- Retirement
- Insurance
- Children’s education

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Engagement and Retention Section: Contents

Retention	
Overview and General Opportunities	**Monetary and Non Monetary Rewards: Recognition**
Organisational Culture	Performance Management, Individual Development Plans and Coaching
Learning	Succession Planning
Staff Care	Career Pathing
Monetary and Non Monetary Rewards: Salary	Alignment of Supporting Functions
Monetary and Non Monetary Rewards: Benefits	

Monetary and Non Monetary Rewards: Recognition

- Promising Practices
- Debates and Discussion Points

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Engagement and Retention: Recognition

Key Message

- A key finding from the research was that in many cases there are employees who either aren't valued or don't feel valued or recognised by the wider organisation
- Most people know at least intellectually that employees who feel recognised and valued, are happier in the workplace and are more willing to make the extra effort to succeed
- Many of the promising practices don't required any further explanation than the one liner provided – what is required is a management focus and culture change to enable this

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Engagement and Retention: Recognition

Recognising employees for high performance, commitment to the organization, etc. through public and private processes.

Recognition

Basic	Progressive	Innovative
• Positive verbal reinforcement from managers regarding good performance • Awarding increments based on performance • Recognition of years of service	• Employee surveys where staff can mention an outstanding peer or leader (requires internet) • Inviting families & communities to recognition services • Encouraging & enabling communities to thank field staff • Personalised/handwritten notes	• Peer voting for awards given at annual ceremonies (e.g. “best team player,” “above the call of duty” awards)

Recognition awards need not have a high cost. They can include simple things like newsletters/email communications and sharing success stories.

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Debate point: How to give recognition (individually/teams and public or privately?

Why is this a debate?

Cultural views on public vs. private, team vs. individual recognition differ from country to country. Both the organizational & the country culture will be factors in deciding how to recognizing performance or achievement. Leaders are encouraged to experiment and not just assume something won't work

Individual Recognition

- Everyone is happy to be told they are doing a good job by their boss
- Can motivate individuals to work harder and perform at higher levels
- May serve as a tool for identifying high achievers (an indicator)

- May encourage resentment of certain individuals by other staff
- Depending on how the recognition process works, it may be viewed senior staff just recognizing favourites
- May increases competitiveness (decreasing cooperation)

- Different cultures react differently to public recognition and how it is implemented
- Will individuals be chosen for recognition through peer voting, by senior management, or through designated committees?
- How is the process adjudicated?

Group/Team Recognition

- Can motivate teams throughout the organisation
- Recognises collaboration
- Reduces competitiveness within teams
- Increases pride in achievement and sharing of accomplishments

- Individuals within a group could be recognised for high performance without contributing much causing frustration to peers

- How will the performance of one team be compared to another?
- How is the process adjudicated?

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Engagement and Retention Section: Contents

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Monetary and Non Monetary Rewards: Benefits	

Performance Management, Individual Development Plans and Coaching

- Overview
- Promising Practices
- Debates and Discussion Points
- Interview Quotations

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Performance Management Challenges: What were the main criticisms of the existing processes?

Lack of overall performance management culture

Status quo

- Overall the process is adequate and there are tools and frameworks in place. The process is not a problem, rather the cultural and individual maturity of people to use the process; for it to be successful and useful it must be more than just a *process* but rather a way of life and thinking.
- The problem is in the application of the process and a high tolerance of non-adequate performance
- The categorisation of employees is adequate but the guidelines for percentages of employee to fall into a performance rating category are not taken into account. See debate on 'forced distribution'
- What managers say *about* employees to HR is not always reflected in their reviews; improvements have been seen but everyone recognises that cultural changes take time

Improvements to be considered (expanded on following slides)

- Emphasis on personal accountability for own performance and self growth
- Implementing common performance factors for the entire workforce (with slightly different expectations for different grades and roles) - this can be integrated with competencies
- Emphasis on performance factors based on: 'people management / self development / learning
- Consider how the reviews and ratings are completed to make the process fairer
  - Initial rating given by supervisor (having collected feedback from peers and colleagues)
  - Discussion with programme level group to 'equalise' ratings and have broad and fair discussions
- Employees to complete a 'self assessment'

The challenges with the performance management culture are best illustrated by the quotations

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Engagement and Retention: Performance Management

Quotes

"We are moving forward inch by inch…There were times when there was a bit of intimidation from managers on local staff...at the end of the year the manager called you & told you all of your sins of the last year (as opposed to timely feedback). Now I see a lot of bonding between staff & managers during outside training."

"Managers are taking advantage of authority to give poor rank in performance assessment." (Staff comment)

"I think it (the success of difficult conversations) depends on your experience in the past as an impact on how you provide it or feel more comfortable having the discussion"

"The way the system has been revised to ensure fairness is a strength. Where we could improve is that managers still express the need for them to work on objective agreements. We still have a good format, but we need an intentional performance agreement where both sides understand."

"Some of the managers threaten staff before the [performance assessment] meeting by saying I can use this tool against you."

"...there is a mindset that a satisfactory rating is not good; some managers want to please their staff or show appreciation by giving a higher rating. We have tried to fix this."

"[People view] performance management as a tool to measure whether they have done or not done their work to the manager's liking and then equating that to increment. Do people see it as a process of development and growth? No. They see PDM results as salary increase."

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Engagement and Retention: Performance Management

Quotes (cont.)

"There need to be clear indicators of performance so that it is not so subjective – can we make clearer indicators with examples for performance in a tool for staff?"

"[A performance culture is] not a very popular thing to do...has taken a long time trying to establish it. The challenges are not from receiving the feedback - it is more the fear of people giving it."

"Generally we give and receive feedback well. This varies on person and style of the support unit. We do get cases where there are clashes. However we also give training every year on the process."

"The staff...don't always confront reality and don't always want to be the 'bad boys' or 'bad girls.' Lots of ADP Managers complain about staff performance but then appraisals turn out good. It is part of the mind set change that is required in performance management."

….it is a development tool, not a punishing tool. We make sure that every manager uses as a learning tool (instituted two years ago), it is becoming a learning tool.

.. under the Performance Management process one seldom gets less than a four in their Performance Review. Everyone is very positive here; we would overlook problems and give them other roles. It will change over time but change takes a critical mass of leadership leaving/other assurance..."

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Engagement and Retention: Performance Management

World Vision point of view of the impact of Performance Management

Source: Performance Management Framework

Engagement and Retention: Performance Management

The process of assessing and measuring individuals against clearly defined performance targets and behaviours

Performance Management

Basic	Progressive	Innovative
• Setting performance targets • Completing bi-annual reviews • Having open and honest conversations • Reflection and learning from mistakes • Including personal development plans as part of the Performance Management review	• Self objective setting & self assessments • Continuous coaching & 'just-in-time' feedback • PM as more than salary increments – mind set • Grading & rating completed by supervisor peer level • Using forced distribution of ratings • Individual accountability for development & growth	• Coaches or mentors • 360-degree feedback taken into account for management levels • External feedback systems – moving towards a partnering approach • Implementing common performance factors for the entire workforce

The old adage 'what gets measured gets done' is true. This is also true of behaviours and desired cultural changes. It is very important that personal development and people development are part of the Performance Review Process

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Performance Management Promising Practices

Including individual development plans as part of the performance review

Detail has been included to emphasise the importance of this exercise for staff at all levels.

- An individual's development plan should be included as part of their objectives
- Part of the performance review should focus on whether or not the development plans were reached
- Development plans comprise technical skills, knowledge, soft skills and creating personal growth opportunities
  - They should include what the employee will do and what will be facilitated by the Line Manager
- There should be integration with the timing of plan creation and budget setting for training
  - Although not all developmental goals can or should be met by attending training
- Development plans may be used as input to wider capacity building plans
  - this is best facilitated with a standardised list of skills from which to select from
  - there must be free text for employees to explore their personal development needs, to think about how these can align with the organisations and to articulate how this can be built into annual performance objectives
- Individual development plans work better when there are 'defined' competencies and skills for different goals and levels so employees better understand to what they should be aspiring

World Vision templates already have the individual development plans included (not yet with defined competencies and skills). In many countries the focused needs to be on the effectiveness of these, how they are used and how they are followed up.

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Performance Management Promising Practices

Self objective setting

- Allowing an employee to contribute and set their own objectives enables
  - The employee to think about their own performance and objectives for the year
  - The supervisor to understand if the employee has a good grasp of the expectations of their role
- The Line Manager should review and discuss the objectives with the employees
- Sometimes this works better with a hybrid approach i.e. some specific objectives set for all Development Facilitators in the same ADP
- Can be disempowering if the Line Manager does not spend adequate or focused time with the employee

Self-assessment

- Where the employee drafts their own view of their performance against agreed objectives
- This allows the Line Managers the advantage of knowing what the employee thinks of their own performance and enables them to adjust how developmental feedback is given. For example with:
  - Employees with a full awareness of their developmental needs - the conversation can be directed to ways for improvement
  - Employees with limited awareness/denial - the conversation can be based on examples where ideal performance has not been met, to build a common understanding, prior to discussing what should change
- Many employees find praising themselves very uncomfortable; this can mean that Line Managers who have not paid sufficient attention overlook skills.
- Line Managers can be unduly influenced by self assessments and there can be culture and gender differences in terms of levels of humility and over-confidence.

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Performance Management Promising Practices

Continuous coaching & 'just-in-time' feedback

The message here is that there should be no surprises at annual or mid year review time. If the employee hears negative feedback for the first time in their review meeting, the Line Manager has not done a good job. Employees should be praised or given tips for adjustment in a timely fashion.

Viewing performance management as more than *just* salary increments

Managers need to better understand that the Performance Management is also a way of identifying talent, of helping people with their career goals and individual development plans. Currently forced distribution isn't implemented and an above average number of employees have been rated as 'above fully competent.' There is also a perception that more developmental feedback isn't given. It has been observed that where there were no increments due to the financial crisis, ratings were better distributed.

Using forced distribution of ratings

People's performance on average falls over a bell curve distribution. High performing organisations typically use a forced distribution and apply this to the population; they do this by ranking those of the same grade and then forcing the distribution accordingly. The argument is that employees have more incentive to perform because they are aware of the process and the expectations. From a HR perspective the advantage of this is the top and bottom performers can be quickly identified. In these models, no one is 'forced' into the very top or very bottom rankings.

World Vision is trying to achieve this but often this is calculated after the ratings have been given – one small improvement would be to ensure that the distribution is met at ADP cluster level – template spreadsheets can be provided which calculate how many people can sit in each area - see section on *'Grading & rating completed by supervisor peer level'.* Where there are exceptions they should be agreed at NO & Regional HRD level only.

Performance Management Promising Practices

Grading & rating completed by supervisor peer level (Round tables)

What and How

- Performance reviews are drafted and discussed with employees (no ratings are given at this stage)
- Supervisors meet, discuss employees doing the same roles as a group and rank them
  - Achievements, challenges and the working context is shared
    - Moving away from a service delivery model community level transformation'
    - A DF may not have achieved their goals in terms of community mobilisation but may be working in a very resistant community and achieved real in-roads, whilst another may have achieved objectively more but had an amazingly co-operative community to work with
    - The former DF shouldn't be penalised due to working in more difficult circumstances. Having a group discussion can help both supervisors see where the two Development Facilitators should be rated relative to each other.
  - The group should be facilitated by an HR person and a executive level experienced person
  - Ranking or 'ordering employees relative to one another enables fair distribution
- The final rating being agreed at this meeting
- Ratings given to staff

One persons idea of 'Outstanding' or 'Fully Competent' may differ from another's, especially with more junior managers. This can lead to employees feeling disadvantaged or being disadvantaged or to receiving a higher ranking than they deserve. Many good managers feel that their team is the 'best'.

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Performance Management Promising Practices

Grading & rating completed by supervisor peer level

This is a future aim of World Vision but not being considered at this stage

Advantages	Disadvantages
• Removes a level of subjectivity • Enforces distribution of ratings • Higher chance of a fair outcome for all staff • Line Managers educated on performance expectations for their teams • Senior adjudicating Line Managers have a better view of their own teams' maturity • Reduces employees perceptions of the impact of favouritism in receiving ratings	• Risk that people are only as good as the person representing you in the room • Immature lines managers may blame the 'system' and still not be honest about why a person hasn't received a 'consistent' or higher rating

When it is effective	When it is not effective
• When there is a critical mass of employees to be compared at the same level (over 10) • When rating distribution doesn't fall into populations norms • When senior leadership really leads by example, understands and buys into a Performance Management culture • When the facilitator has authority & experience	• When Performance Management practices are not enforced by senior leadership • When a job is based on very simple metrics e.g. volume & number of defects (e.g. factor workers) • When meetings are not effectively facilitated (can lead to in-fighting and resentment) • When the facilitator is not able to be objective • When employee's rating outcome is out of line with initial discussion about performance

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Performance Management Promising Practices

Individual accountability for development and growth

Line Managers have accountability for the Performance Management process. However employees need to be empowered to be accountable for their own development and growth as well. This is a required cultural change (employees currently equate 'growth' to physically attending training courses). To enable a culture change, more needs to be done to make 'learning' part of the culture in the field - see 'Learning Section'.

Coaches or Mentors

What and How

Assign independent coaches or mentors to employees. Ideally the coach is assigned at point of entry and of a senior level to the employee but is not involved with the employee on a day-to-day. The role of the coach is to help and coach the employee; they review the end of year performance feedback and development plan with the employee and provide an independent point of view.

Advantages	Disadvantages
• Provides an independent, neutral party for employees to call and have a sounding post for issues and to gain a sense of perspective • Coaches provoke the employee to reflect in a 'safe' environment	• Difficult to implement in a field based context as face-to-face meetings are difficult

When it is effective	When it is not effective
• When face-to-face meetings can take place • If coaches have a genuine interest in helping staff, ask questions, *listen* & are forthright in delivering difficult messages	• When coaches are entirely sympathetic to their coachees and don't offer a balanced view

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"I think this is absolutely crucial to enriching & substantiating the process & experience of performance management/personnel development. Coaching is also culture-changing, if we do it well & invest…."

Coaches or Mentors

Where to go for Help and Next Steps

India – formal coaching process that pairs senior and junior ADP Managers for six months, but has not yet been worked into the performance assessment *(more of a 'mentoring scheme')*

Asia Region – has a Leadership Coaching Program and a pilot coaching project is currently being proposed. Contact Lai Wan Chung for further details

Barriers to Implementation Success

- Limited systems in place by which to identify potential coaches and pair them to staff appropriately (based on new staff's career path, availability of coaches, etc.)
- Lack of incentives and structures for staff (i.e. the Performance Management system doesn't recognise and reward individuals who spend time coaching or mentoring are not schemes are not made part of the performance management system, etc.)

What ever steps World Vision takes the concepts need to be clear; the Line Manager should also be a coach to all of their employees.

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Performance Management Promising Practices

360-degree feedback taken into account for management levels

- Full 360-degree feedback for all levels can be expensive in terms of time and money. They can be:
  - Mainly used as a development tool and a formal process (and often outside of the main Performance Management process)
  - An informal process and a habit
  - Difficult, but not impossible to implement in some cultures
- At a minimum supervisors should be asking for informal feedback from other staff who have interacted with the employee that they are assessing
  - Employees should be encouraged to ask for feedback from people they work with in an informal manner, on a regular basis
  - Line Managers need to understand how to provide feedback and when it is appropriate
- Feedback from Partners and the community has a role to play here although Line Managers have to be sensitive in terms of both how this is given and understood
  - See

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Performance Management Promising Practices: Community Based Input

Understanding the Communities' views on staff or potential staff (link with recruitment)

What and How

One observation of the differences between NGOs and the Corporate world is that the feedback loop may be missing from the NGO world in that the 'customers' aren't able to answer back or to use a corporate metaphor to show their satisfaction by consuming or not consuming the goods or service. Community based input may be one step toward addressing this, however before considering community based input the following should be considered.

Advantages	Disadvantages
• Really understanding what is happening on the ground	• Community members may feel that they have a hold over people if they give input • Communities may be used a Service Delivery Approach and resent the empowerment method and judge a person accordingly

When it is effective	When it is not effective
• When the manager collating feedback is sensitive to communities issues/personalities and can ask probing questions • When a subtle approach is used	• When the manager asks for written community feedback • When the manager believes that only 'popularity' equates to effectiveness and success

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Performance Management Promising Practices

External feedback systems – moving towards a partnering approach

Related to but separate to individual performance management processes

- An other NGO has developed a feedback system with their church partners
  - The church partners evaluate the NGO's staff throughout the course of the partnership
    - Creates a constant feedback culture in which the NGO and their partners are valued
    - Both parties can improve the level of service provided
    - Adds another layer to the performance management process (on an individual and organisational level)
- As partnering becomes a core part of ADPs input on World Vision staff from these partners will be invaluable.
- Developing a process for this to be completed in a meaningful way and helping line managers to receive and interpret this will be critical

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Performance Management Promising Practices

Implementing common performance factors for the entire workforce

What and How

World Vision

World Vision is moving toward this approach, the following are global Operations and P&C initiatives but not yet targeted to ADP level

1. Establish common goals for National Directors and other operational leaders. This includes consistent operational measures which are supplemented by other goals unique to a National Office.
2. Standardise the goals and measures of "leaders" throughout World Vision. The Core Capabilities Framework (CCF) has been simplified to the Leadership Capabilities Assessment (LCA) which is currently in use in all regions (see appendix)

Corporate Example:

The entire organisation is assessed on the same performance factors, these are:

- Adjusted to expectations according to the role and grade
- Integrated back to the organisational strategy and core values
- Flexible enough that individual objectives can still be added.

Advantages are:

- Continuity throughout career; people grow within the organisation knowing what is expected of them at each level.
- Examples of these factors at each level are available to all staff so that they can really understand the requirement
- Making necessary ‘difficult’ conversations easier as Line Managers are better equipped with examples
- Leadership team can better ensure that a balance of skills and attitudes is rewarded encouraging more rounded reviews
  - E.g. so a manager who delivers ‘at the expense of their team’ is not rewarded as highly as a manager who also delivered and developed their team.

The following slides show an example of overarching performance factors and the common individual factors which can sit underneath them. The overarching example used is for ‘People Developer’.

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Performance Management Promising Practices

Implementing common performance factors for the entire workforce

Whilst here there are standardised objectives, there is still scope to narrow down the ‘what and how’ i.e. use individual SMART objectives.

Under this system some who scored highly on only 2 out of 3 criteria shouldn't be eligible for the top performance grade.

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Performance Management Promising Practices
Implementing common performance factors for the entire workforce

Implementing common performance factors for the entire workforce

Overarching factor	*Individual level*	*Leadership Level: Performance Coach*
Learning for growth and development: *Routinely looking for opportunities to learn, improve, change and grow*		
	•Reflects on experiences to draw out learning	•Seeks personal mastery in critical skill areas
	•Pursues learning both formally and informally	•Uses all experiences as learning opportunities
	•Seeks feedback on performance and acts on it	•Invests significantly in the development of staff
	•Takes risks and learns from failure	•Coaches staff to high levels of performance
	•Asks for help in solving problems	
	•Encourages and supports others to grow and develop	

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Performance Management Debates

Myths not upheld by the Partnership

“It won’t work in our culture”

This is not true. A performance culture *can* be implemented

- Global corporate organisations which operate in the same areas as World Vision operates follow global practices and standards.
- However it is understood that:
  - Some cultures will naturally find performance culture harder to implement than others
  - The interventions and speed may differ from country to country and must be applicable to that culture
  - There is a the National Office culture and a country culture which needs to be understood

“This is not the Christian way”

This is not true and not in line with the overall Partnership thinking

- Core Christian values entail being good stewards of World Visions’ resources. Under performing individuals are not being good stewards and are not using resources effectively
  - What impact is a top performer having on the poor vs. the impact on someone whose performance or attitude requires significant improvement?
- Not providing feedback to people is depriving them of a way in which to develop and grow

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Performance Management Promising Practices

Overall

Where to go for Help and Next Steps

Please contact your regional P&C contact as the first point of contact for all Performance Management related support. Please see appendix for details of available Performance Management Materials including the Performance Management Tool kit and internet links

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Engagement and Retention Section: Contents

Engagement and Retention	
Overview and General Opportunities	Monetary and Non Monetary Rewards: Benefits
Culture	Monetary & Non Monetary Rewards: Recognition
Valuing and Respecting Individuals	Performance Management, Individual Development Plans and Coaching
Learning	**Succession Planning**
Staff Care	Career Pathing
Monetary and Non Monetary Rewards: Salary	Alignment of Supporting Functions

Succession Planning
▪ This is an atypical section which discusses Succession Planning generally ▪ Interview Quotations ▪ Key Success Factors for Succession Planning

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Engagement and Retention: Succession Planning

The process for identifying, tracking and developing the organisation's future leaders, subject matter experts and executives to ensure sustainable organisational continuity

Succession Planning

- It is difficult to categorise different succession planning processes. At local level, staff succession plans should be in place (at a minimum) for:
  - **ADP Managers**, which then feed into Operations Manager roles
  - Cluster or National Office Specialist Roles, which can be **fed from local level specialists**
  - Opening and closing of projects (as part of workforce planning)
- Succession planning has strong links into the overall workforce planning process, with inputs from:
  - Competency modelling, Career Pathing, Performance Management, Leadership Development and Learning
- Organisations which are *intentional* about succession planning are more likely to identify and develop the skills, potential and interest of existing staff, avoiding the need to 'buy in' new talent.

Succession planning does not have to be complicated, in fact in many cases it is more effective if kept a simple. The key is that succession must be made a part of the overall strategy of the organisation, requiring buy-in from all relevant parties (young talent to senior managers).

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Engagement and Retention: Succession Planning

In the context of IPM succession planning is tough; there are limited senior roles to which people can move to. However most people demand and see a need for Leadership with field experience. Leaders with field experience typically command more respect from their staff. Using fixed-term contracts doesn't mean that succession planning cannot happen; this should also be communicated to employees.

Advantages	Disadvantages
• Organisation is more stable, WV is prepared with the right people to fill vacancies due to retirement, opening of new projects, etc. • Staff stepping into new roles have been sufficiently up-skilled to do so • Staff are developed	• None

When it is effective	When it is not effective
• When HR and Operations work together and create and maintain workforce planning systems and identification of future workforce needs	• When systems aren't in place to identify employee skills, interests and potentials • When role requirements and competencies are not clearly defined, making it more difficult to make informed and fair decisions about potential successors

Limited scope for progression makes it all the move important that staff at all levels feel valued for the contributions that they make by the leadership teams

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Engagement and Retention: Succession Planning

Interview Quotations

We primarily want ideas around how we manage succession planning. Not the entire workforce, just key positions for succession planning. Building leadership at certain levels so that the flow of leadership is smooth.

We would like to learn from other offices, I think this is an assumption but maybe we cannot copy lessons learned from others but at least we want to see them in terms of succession planning in country. In this area we have much room to improve.

No, there is not much ability for upward movement and not much succession planning. It is more of an opportunistic progression: if a position opens up then we will fill it with a good field staff

The second liner concept is very new and right now ADP Managers told HR that they need HR support in terms of identifying second liners and developing them. They have trouble with this. They need to know how to teach management, leadership skills, etc...we are moving slowly in this area.

Yes, we have a succession planning system that has not been working. In our context you have to be very careful talking about succession planning, so it's a theory but as a practice it is not very good.

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Indicators of Promising Practice Succession Planning

The following are some indicators of some indicators for succession planning

This section is brief based on the focus of this report on Local Level Staff

- Take a development oriented rather than a replacement oriented approach to succession planning
- Use flexible and sophisticated succession methods to identify current and future business critical roles and risks, taking into consideration business and demographic trends such as aging workforce, trend away from "lifetime" employer, diversity management, pace of industry change, etc.
- Integrate succession planning with talent definition and workforce planning to better identify mission critical workforces for the organization and a wide pool of potential candidates
- Create a profile for each succession management role, indicating key skills and competencies required
- Build and segment "talent pools" enabling employees to move into a range of different positions, rather than targeting employees for a specific position. Create specific development programs for each pool
- Document the criteria for how each succession candidate will be evaluated and ranked against their competition (e.g., educational qualifications, past experience, performance appraisals, manager and peer inputs, competency assessment)
- Solicit nominations from managers, co-workers, and other relevant sources for each prospective candidate
- Assess business risk (i.e. timeframe available to develop capability) as part of measuring candidate readiness
- Measure candidate readiness to step into a succession managed role and if no viable candidates exist, develop a structured response to close capability gaps and mitigate business risks (i.e. determine how to develop or hire a candidate with the right skill set)

Indicators of Promising Practice Succession Planning

- Remove candidates from the succession list when they repeatedly fail to progress on their development plans, or their performance is lower than expected for an extended period of time
- Promote talent exchanges within the organization for defined periods of time as a development opportunity for succession candidates
- Create transparency and encourage participation in succession efforts, which has the effect of motivating and retaining high potential leaders, and ensuring a more collaborative and objective identification of talent
- Openly communicate and promote succession planning, clearly explaining the role of succession planning in driving business success, the entry / exit criteria for talent pools, and the approach to candidate development
- Effectively communicate that belonging to a talent pool is not a guarantee of promotion and, most importantly, that being removed from a talent pool is not a disgrace
- Hold business leaders accountable for identifying and developing capability within their teams and releasing those individuals identified to move into critical roles

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Engagement and Retention: Succession Planning

What and how:

Some National Offices have introduced a **Second-Liner** concept. This means that those in management positions need to identify people that can take responsibility on an interim basis (holiday cover) and on a longer term basis. Pro's and con's can change depending on how the concept is communicated to employees

Advantages	Disadvantages
• Organisation is more stable • Staff stepping into new roles have been sufficiently up-skilled to do so • Staff are developed	• Perceptions of favouritism need to be managed

When it is effective	When it is not effective
• When it is clear what it means to be a second-liner and the staff understand what development needs they have to be considered as potential to take the step up • When Line Managers are effective people managers	• If promises are made to second-liners and then other people are recruited above them when the previous incumbent of the job they were second-lining for leaves • When the line manager doesn't focus attention on all staff

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Engagement and Retention Section: Contents

Retention	
Overview and General Opportunities	Monetary and Non Monetary Rewards: Recognition
Organisational Culture	Performance Management, Individual Development Plans and Coaching
Learning	Succession Planning
Staff Care	**Career Pathing**
Monetary and Non Monetary Rewards: Salary	Alignment of Supporting Functions
Monetary and Non Monetary Rewards: Benefits	

Career Pathing
▪ General overview of Career Pathing ▪ Interview Quotations

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Engagement and Retention: Career Pathing

The process for identifying, tracking and developing the organisation's future leaders, subject matter experts and executives to ensure sustainable organisational continuity

Career Pathing

- Currently World Vision does not have an intentional career path for local level staff
- None of the external NGOs surveyed had these defined and structured either
- A reality is that there are limited jobs at upper levels for all staff to have the standard upward 'career' growth that some industries experience. However
  - in any case all staff require:
    - opportunities to grow and to learn
    - the feeling that they are equally and fairly considered for the opportunities that do exist
    - a way of understanding if they have grown within their existing role (c.f. different grades)
    - opportunities to specialise if they want, to adapt into roles that meet their career goals and skill sets
  - Those staff that have made it from the field command a lot of respect from existing staff;
    - future High Potentials need support to find their way to the top; career pathing helps

Horizontal Career Pathing can be as valuable to an organisation as a vertical pathing.

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Career Pathing: General Details

What and How

Typically Career Pathing is completed with the following components:

- Clear sets of defined Competencies and Capabilities
- Different levels of proficiency defined for the competency and capability
- Jobs categorised into Job Families with (a grouping of related capabilities with broad similar content)
  - E.g. Finance might be the job family (or Organisational Support), with Finance Administrator and Finance Manager being two jobs within the family with different grades)
  - Technical Specialists might be a job family, with Education specialist and Nutritional specialists two jobs within the same family of the same grade
- Defined routes for horizontal and lateral movement between jobs

Organisations typically allow lateral movement between job families if there is a match of

- Professional Competencies - must have a match of several professional competencies

Allow lateral movement between jobs at same level if there is a match of

- Qualification
- Experience / Unique Requirement
- Competencies

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Career Pathing: General Details

General Objectives of Career Pathing:

- Enable job-person match in order to increase organization's people productivity and cost-effectiveness.
- Encourage a competency-development approach to career development
- Improve communication of career opportunities to employees.
- Reduce employee turnover.
- Give a framework for a more flexible working/progression and less hierarchical career development.
- Integrated with structured approach to compensation and benefits
- Allow the removal of tenure and automatic progress from the equation to be replaced by performance-based promotion and reward
- Enables employees to be more specific in their development plans and to know what they are working too
- Reduced risk (perceived or otherwise) of threats of favouritism if competencies and steps are clear to all

Specifically for the ADPs:

- Reduce the 'brain drain' – from the field to the National Office
- Reduce the implicit message that people hear which is that the National Office is more important
- Send explicit messages about horizontal growth:
  - Encourage person to grow toward their gifts
  - Make people feel valued for what they do and their skills
- Enforcing and critical to the concept of empowering staff to be self-learners and be responsible for their own performance and growth opportunities

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Career Pathing: General Details

To achieve this for ADPs National Offices could consider:

- Additional grades with the ADP roles. Allows people to 'grow' within their roles and provides flexibility for:
  - Complexity or project
  - Size of budget managed/team size
  - Competency in number of disciplines
  - Senior advisory roles
- Creating senior roles who have responsibility for coaching new staff, whilst continuing to practice in the field,
- Reviewing location strategies for roles that would previously have been based in a National Office. Do they need to be, or if the communications are in place and the management structures right, can the role still located in an ADP programme/area office?
- To aid general development of staff consider:
  - Secondments to other ADPs
  - Forming Communities of Practice (develops employees' skills and interests)
  - Encouraging knowledge sharing across ADPs
  - Horizontal moves/cross team learning
  - Implementing advisory groups with certain employees representative key roles (on a rotational basis to provide opportunities for more staff)
  - Formal coaching responsibilities (pairing of new and more experienced staff)

Even where it is difficult to formalise career pathing and culture of emphasise on growth and knowledge important for staff

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Career Pathing: General Details

Other NGOs

- The review found that many other organisations had the same challenges and that none interviewed had a fully functioning defined Career Path at local level.
- However, like World Vision there were intentional moves of key individuals were those with potential were identified.
- Some interviewees recognised the strong links between competency models, performance management being seen as a development tool and the Line Managers' mindset of mind-set of recognising potential and try to make opportunities for their staff.

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Employee Survey Comments on growth and opportunities

Employee Quotations: Many of these are focused on general opportunities rather than career pathing.

Lower level leaders are deprived from building their carrier for future development. The organization can rethink about this level.

There seem to be no clear cut opportunities for growth in personal, professional, learning etc..

Extremely dissatisfied, because local level staff have no chance to build their career.

"Career growth opportunities are not clear, it is becoming very critical for field staff and so there is the urgent need to look at that.

This is the worst point in our office. Unless you grow by yourself in the hard way or in your own way, there is less opportunity to grow in our career.

There is no opportunities for some people to advance themselves. Improvement is reserved for some people

No career growth for young people

Employee Survey Comments on growth and opportunities

Employee Quotations: Many of these are focused on general opportunities rather than career pathing.

There is no growth seen. The Organisation should see the capabilities of their staff growth possibilities.

We are seeing that only the same staff have the luck to be trained & to be travelling

Here is no so many steps of position that for future career growth

"Career growth opportunities are not clear, it is becoming very critical for field staff and so there is the urgent need to look at that.

Once you work with World Vision there are a lot of opportunities to explore.

No clear career and personal growth. Good chances of learning and development

"I think WV has good career growth opportunities but the challenge is that they are not well planned. Even when they have developed people, they do not retain them. Meaning, it is done haphazardly.

.. during last two-three years HR department is doing well & they have taken many initiatives for staff development & their career. Should continue their initiative.

Engagement and Retention Section: Contents

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Staff Care	Career Pathing
Monetary and Non Monetary Rewards: Salary	**Alignment of Supporting Functions**
Monetary and Non Monetary Rewards: Benefits	

Alignment of Supporting Functions

This is an a typical topic but is a crucial one to focus on. It contains:

- Why is this a retention topic
- Lessons learned from other transitions and organisations
- Example Impacts for each function (will need to be completed at National Office and Support Office level as part of Country Impact Assessment

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Engagement and Retention: Alignment of Supporting Functions

Why is this a Engagement topic?

- A common cause of employee stress is a feeling that ‘the right hand doesn’t know what the left hand is doing’
- Such stress and frustrations should be sought to be reduced wherever possible; especially when the nature of the work is already stressful and can be emotionally demanding
- For some, an auditor who doesn’t show empathy can be the final straw for an employee leaving and this is in a steady state with no changes.

An organisation where all functions, understand and are aligned to a common mission, vision and values is key, but what does this actually mean?

- It means articulating what a (new) strategy means for each:
    - Each function
    - The way in which the function can support and enable the Other functions
    - The value added by each function and the new strategy
    - What ‘success’ looks like for each function
    - The behaviours required for success from leaders/managers etc.

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Engagement and Retention: Alignment of Supporting Functions

Lessons learnt in moving towards 'community level transformation'

- ***Cambodia*** Learning for Transformation Programme
  - Heavy focus on local level staff, initially some managers felt a little 'left' behind as they weren't too sure what their staff were supposed to be achieving or what '
- ***Plan International*** moving to a rights based approach (Child-Centred Community Development (CCCD)
  - Strong focus on aligning support functions such as finance and marketing
  - Strong internal marketing with key stakeholders identified in each region
  - Found they need to also understand the standard 'country' donor base better – some have had a stronger preference for one-to-one sponsorship than others
- ***Compassion*** – Partnering champion
  - Recognised that it is difficult to have an equal partnership without equal amounts on income
  - Hired a 'Passionate Champion', makes sure Compassion is a good Partner
    - who checks for the burden being placed on Partners, the documentation being issued etc.
- ***Nepalise NGO***
  - Hired a Programming and Partnering Lead to:
    - Challenge the partnering recommendations, assess whether one group was being favoured above others, understand if the right ratio of mature and new partners was included etc.
    - Sign off all partnering decisions
  - Changed their organisation so dramatically that they hived off some areas and set them up as independent and autonomous NGOs
  - Made tough decisions on leadership and restructuring

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Engagement and Retention: Alignment of Supporting Functions

Is this focusing on all functions realistic?

- Budget is and will always be limited but what is the cost of not doing something?
- The focus should be '*what is the minimum required for each function & the most effective way of doing this'*

The minimum 'minimum'?

- Change must come from the top; it very rarely moves upwards (especially in a hierarchical organisation)
- Country Leadership needs to buy in, to understand and to be supportive of the approach. They should:
  - Consider asking each function to do their own 'impact assessment'[1]
    - What will my function need to do differently?
    - How will I know if this is being achieved?
    - What forms/reports/processes/technology need to change?
    - Does information flow any differently? /What different information do I need to know?
    - How do I need to react differently?
    - Do my 'controls' change?
    - Does my decision making authority change?
    - Have a strategy for up-skilling other functions and track it
  - Review these impact assessments with individual functions and then jointly
  - Consider asking other functions to assess impact on functions outside of their own build integrated thinking and helps leadership to understand gaps in understanding
  - Have a mechanism for what is working well/not working for all roles
  - Have a strategy for up-skilling other functions and track it

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1. **A pre-prepared alignment document is available as a starting point**

Engagement and Retention: Alignment of Supporting Functions

The following table is illustrative only – impact is based on the current status quo in each NO and the approach that each NO takes to introducing IPM. The overall impact of misalignment is a frustrated Community level workforce.

What might change	Impact Statement	Example Changes	Impacted Group						
			HR	Finance	Audit	NO L'ship	NOOps Mgr	Mkting (SO)	SO General
Partnering Approach	World Vision staff 'do' less, facilitate more – dependency on other parties to achieve goals	▪ HR Capacity Building: Focus on facilitation skills and appropriate decision making ▪ Support functions make suggestions to how objectives are achieved don't dictate how. e.g. Child monitoring ▪ Finance understand different costs per task are dependent on availability of partners and can differ	x	x					
Partnering Approach	Partnering approach should in the long-term mean that fewer staff are required.	▪ Workforce Planning needs to make assumptions about Partnering ▪ HR needs to get closer to a level of community level detail and understand who else is working in the section ▪ Project Budgets are structured differently ▪ Support offices can articulate and discuss this with their sponsors ▪ Reports showing 'under spend' adjusted to new budgets							

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Engagement and Retention: Alignment of Supporting Functions

The following table is illustrative only – impact is based on the current status quo in each NO and the approach that each NO takes to introducing IPM. The overall impact of misalignment is a frustrated Community level workforce.

What might change	Impact Statement	Example Changes	Impacted Group						
			HR	Finance	Audit	NO L'ship	NOOps Mgr	Mkting (SO)	SO General
Partnering Approach	Spend' patterns will change; like less money will be required to be spent on things, more money may be spent on people	▪ Project Budgets are structured differently ▪ Reports showing 'under spend' adjusted to new budgets		X	X	X	X	X	X
Partnering Approach	New management requirement on partnering advice	▪ Existing management structures may not be set up to advice on partners – Challenge the partnering recommendations, assess whether one group is being favoured above others, understand if the right ratio of mature and new partners was included etc. – Sign off all partnering decisions ▪ Is a new role of new person required to support this	X	X	X	X	X	X	X

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Engagement and Retention: Alignment of Supporting Functions

The following table is illustrative only – impact is based on the current status quo in each NO and the approach that each NO takes to introducing IPM. – The overall impact of misalignment is a frustrated Community level workforce.

What might change	Impact Statement	Example Changes	Impacted Group						
			HR	Finance	Audit	NO L'ship	NOOps Mgr	Mkting (SO)	SO General
Partnering Approach	Finance & audit departments to be flexible and understand that WV will be making monetary investments in communities alongside these partners.	▪ Changing inhibitive financial policies which disallow or make difficult partnering attempts will hinder IPM, whilst managing risk ▪ Finding a way to track and allocate money effectively to partners – without overburdening the community based staff to achieved this.							
Partnering Approach	A level of 'control' will need to be surrendered when achieving true Partnering	▪ Support Offices will need to understand and be able to articulate the change to donors. Agreements with donors must be in-line with IPM model and ADP planning process (otherwise the model will ultimately be very difficult to implement (and field staff will become incredibly frustrated). ▪ How will marketing be different? How will inevitable failures be explained to the donors in terms of learning and progress. ▪ What changes with funding?							

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Engagement and Retention: Alignment of Supporting Functions

The following table is illustrative only – impact is based on the current status quo in each NO and the approach that each NO takes to introducing IPM. – The overall impact of misalignment is a frustrated Community level workforce.

What might change	Impact Statement	Example Changes	Impacted Group						
			HR	Finance	Audit	NO L'ship	NOOps Mgr	Mkting (SO)	SO General
Empowering Local Communities	To be completed	▪ To be completed							
Facilitations Skills	To be completed	▪ To be completed							

This is being further addressed in the tools being developed for National Offices adopting IPM

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Engagement and Retention: Alignment of Supporting Functions

Other factors are

Aside from thinking about each aspect of the IPM model and the impact of each function, other factors to be taken into consideration are:

- The roll-out approach
  - The approach to transition of existing ADPs, ADPs at key stages, new ADPs only
  - Will the National Office be running the 'old' way and the 'new-way' in parallel
- How many different types of development programmes are running
- What other changes are occurring in the National Office or Region
- What is the proportion of new staff to long-serving staff
- How dramatically have community based staff's roles changed
- How strong is the operational level leadership
- How much does the region have the capacity to support/pool resources etc.
- What are the existing NO challenges
- What is the profile of a typically 'donor'/types of donors; in the support offices for the NO

"the IPM team has to discuss how we can work through these issues, for finance for example I don't know how we give the money [to partners] & how we can track this. So the principle skill is dialogue and negotiation."

"What we fear most here, is the Support Office and the audit team, – will they allow us to partner? Will the Support Office allow us to do our job? If not, the partnership will fail."

"...Support Offices play a big role in this, because they have their own expectations which may be unrealistic. If we roll out IPM...The SO needs to understand what it means for the ADP, the NO..."

"There can be an attitude of 'we have to do it 'fast'' and in reality when you deal with people, you can't do it fast…. ability to be is walking along side & bring them (the community) through a process so that people can understand their own issues. So there is a balance to be struck between speed & walking along side the community at their pace.

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Next Steps at Global Level

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What and How

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How the region can help

HR in the Region

What and How

- The regional role depending on how it is implemented can either add a lot of value or act as an inhibitor to success
  - Better co-ordinate knowledge sharing
  - Focus on how information is distributed and channelled
    - Who is the key contact? Is it the HR Director is it the National Office Director. If it is the National Office Director why is that?
  - Agreement on governance and routing
  - How are requests to and from the region supported
  - Helping support People and HR strategy production and then tracking
  - Constantly challenges themselves on the relevance of what they are doing to the National Offices/the Partnerships strategic goals
  - Consider implementing P&C community of practice calls on a bi-monthly basis
    - Facilitates cross sharing across National Offices
    - May help the growth of more junior P&C staff where HR Directors don't have time to support and coaching

Again, without an HR Information System in place there is a risk that Regional HR are rendered impotent/put a greater burden on the National Offices in terms of requesting information.

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Country Self Assessment on Recruitment & Retention Practices for Programme Staff

Country Self Assessment

See Excel spreadsheet for details

- First Level of completion by HR staff responsible for a particular area
- Second Level of review by HR Director in conjunction with Region if required
- Third Level of review with HR Director, National Office Director and Senior Operations Lead

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List of suggested National Office Inputs

Possible inputs to better understanding the local context	Who owns this
Are you having any problems recruiting? If so for what levels?	P&C
Do you have retention issues with a particular workforce or a particular geographic area?	P&C
What is the country educational background? Generally what skills exist & where are the biggest gaps	P&C
What is the level of civil society?	P&C
What are the overall country demographic by age/gender/race/religion - does this reflect your workforce? If not is this ok? If there significant different in age generations how will this affect World Vision?	P&C
What are the trends and themes in the employment market at the moment. For example, what are other NGOs in the area doing, is there an upsurge/down surge employment in corporate/private organisations?	P&C
What is the level of mobility of people in the country (i.e. is it normal for people to move for work)	P&C
How easy is it to find English speakers in your area?	P&C
Importance of Christian background at ADP level to the NO	Leadership
Prevalence of Christianity in general population (by geographic area if necessary)	P&C
How closely do HR understand the organisation's needs and do we have the processes and systems in place to enable them to support those needs? Current status of HR? In an administrative role or moving towards strategic business partners	P&C
How big is the gap between IPM and the current way of doing programming? Which areas require the most attention? which will be hardest to implement	Operations with input from Leadership & P&C
How do the current skill profiles of existing local level staff differ from those in the IPM job profiles? Do the skills and capacities required exist in the external market at the right price?	P&C
Other relevant items	Depends on the item

List of National Office decisions required identified in this report

Section	Sub Section	Debate or Discussion Point
Recruitment	Sourcing	Recruiting People from the Community vs. Urban areas
Recruitment	Sourcing	Education Levels vs. Potential Capacity Levels
Recruitment	Sourcing	Prioritising field based roles
Recruitment	Sourcing	Probation Periods / Initial Fixed-Term (or Training) Contracts
Recruitment	Sourcing	Hiring more people than required
Recruitment	Sourcing	Age and Gender (and other diversity issues)
Recruitment	Sourcing	Building analytical skills
Recruitment	Contract Types	Should Community Based Staff be on Permanent Contracts or Fixed Term Contracts
Recruitment	Internal Transfers	Is there an intentional strategy for staff rotation
Retention	Organisational Culture	What is the desired end state culture required for IPM and what are the current gaps?
Retention	Learning	Should World Vision Pay for Higher Education
Retention	Salary	What is the compensation strategy
Retention	Salary	Should the compensation strategy be different for particular roles (hard to recruit for/high investment level) roles? (Linking in with Workforce Planning)
Retention	Benefits	Location and Eligibility Based Considerations: Allowances and Benefits
Retention	Benefits	Incarnational Living: A Country-Specific Approach
Retention	Recognition	Debate point: How to give recognition
Retention	Supporting Functions	What additional different support is required

Inventory of Promising Practices: Resourcing

Sub process Area	Practice	Category
Sourcing	Intern programmes	Progressive
Sourcing	Networking (including alumni programmes)	Progressive
Sourcing	Via community leaders who know of children working away	Progressive
Sourcing	Christian groups within universities	Progressive
Sourcing	Community/educational institutions	Progressive
Sourcing	Promotion of volunteers	Progressive
Sourcing	Recruit from other NGO's	Progressive
Sourcing	Identifying talent at grassroots level through sponsored children / community members /mission schools	Innovative
Sourcing	Sourcing through effective workforce planning/intentional transitioning from one project to another (See 'Workforce Planning' section)	Innovative
Sourcing	Succession planning through the ADP (see 'Succession Planning' section)	Innovative
Screening & Selecting	Competency Based Interviews	Progressive
Screening & Selecting	Panel Boards with gender diversity	Progressive
Screening & Selecting	Reference checking with Churches, communities, ex-organisations etc.	Progressive

Inventory of Promising Practices: Resourcing

Sub process Area	Practice	Category
Screening & Selecting	Focusing on team balance (try not to hire all the ‘same)	Progressive
Screening & Selecting	‘Open’ days	Progressive
Screening & Selecting	Facilitated Workshop style events (dependent on role)	Innovative
Screening & Selecting	Pre-selection immersions	Innovative
Screening & Selecting	Community based input	Innovative
On-Boarding and Orientation	Tailored orientation to role	Progressive
On-Boarding and Orientation	Linking on-boarding success to a Line Manager’s performance objectives	Progressive
On-Boarding and Orientation	Implementing ‘buddy’ schemes	Progressive
On-Boarding and Orientation	Implementing ‘coaching’ schemes (see Performance Management section)	Progressive
On-Boarding and Orientation	Have defined fixed start dates for administrative efficiency	Progressive
On-Boarding and Orientation	Field immersion for all staff	Progressive
On-Boarding and Orientation	Recruitment and on-boarding questionnaires sent to new hires, managers and colleagues of new hires	Progressive
On-Boarding and Orientation	On-line orientation (in conjunction with normal face to face induction)	Progressive

Inventory of Promising Practices: Resourcing

Sub process Area	Practice	Category
On-Boarding & Orientation	Pre-Boarding Orientation (on-line)	Innovative
Transfers	Understanding employees preferences (geographic)	Basic
Transfers	Operations and HR having a clear understanding of future target openings (workforce planning)	Basic
Transfers	Effectively the managing the end of projects	Basic
Transfers	Consulting with employees prior to decisions being made	Innovative
Transfers	Timing moves in line with end of school year, children's educational requirements	Progressive
Transfers	Transparent process	Progressive
Transfers	Consider employee driven requests due to change of family circumstances	Progressive
Transfers	Roles posted through-out the entire country	Progressive
Transfers	Intentional strategy about moving from less attractive to attractive areas	Innovative
Transfers	Temporary secondments to build skills and knowledge of staff	Innovative
Transfers	Transferring pregnant staff not living with family out of the field towards the end of the period.	Innovative
Transfers	Linking with employees' personal development plans	Innovative
Transfers	Intentional staff rotations	Innovative

Inventory of Promising Practices: Engagement and Retention

Sub process Area	Practice	Category
Learning	Computer based/e-learning	Progressive
Learning	Distance learning/remote study programmes	Progressive
Learning	Combination classroom/field based courses	Progressive
Learning	Structured curricula per role	Progressive
Learning	Brown-bag lunches/Guest speakers	Progressive
Learning	Newsletters/Case Studies	Progressive
Learning	Appreciative-enquiry based approach inc. through sermons	Progressive
Learning	Influencing academic institutions	Innovative
Learning	Measuring return on learning investment (ROLI)	Innovative
Learning	Recognising generational differences between learning styles & preferences	Innovative
Learning	Communities of Practice/chat boards	Innovative
Learning	Mandatory reflection periods	Innovative
Learning	Effective knowledge management	Innovative

Inventory of Promising Practices: Retention

Sub process Area	Practice	Category
Staff Care	Critical Incident and stress management courses prior to critical incidents	Progressive
Staff Care	Regular communications	Progressive
Staff Care	Policy for staff to travel in pairs in dangerous areas	Progressive
Staff Care	Flexible working practices	Progressive
Staff Care	Clubs and games (recreational allowance at ADP level)	Progressive
Staff Care	Retreats	Progressive
Staff Care	Listening to staff	Progressive
Staff Care	Have a 24 hour security hotline	Innovative
Staff Care	Direct connection to the government, weekly alerts (updates)	Innovative
Staff Care	Trained peer counsellors and support within the organisation	Innovative
Staff Care	Incorporating family life into staff care	Innovative
Staff Care	Proactive approach to stress management	Innovative

Inventory of Promising Practices: Retention

Sub process	Practice	Category
Recognition	Peer voting for awards given at annual ceremonies (e.g. “best team player,” “above the call of duty,” awards)	Progressive
Recognition	Employee surveys where staff can mention an outstanding peer or leader (requires internet)	Progressive
Recognition	Inviting families &communities to recognition services	Progressive
Recognition	Encouraging & enabling communities to thank field staff	Progressive
Recognition	Performance Award Point schemes	Innovative
Performance	Self objective setting & self assessments	Progressive
Performance	Continuous coaching & ‘just-in-time’ feedback	Progressive
Performance	PM as more than salary increments – mind set	Progressive
Performance	Grading & rating completed by supervisor peer level	Progressive
Performance	Using forced distribution of ratings	Progressive
Performance	Individual accountability for development & growth	Progressive
Performance	Coaches or mentors	Innovative
Performance	360-degree feedback taken into account for management levels	Innovative
Performance	Implementing common performance factors for the entire workforce	Innovative

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Inputs and Contributors

Project resources and time:

- One consultant for 12 weeks and one intern for 8 weeks

Key informant interviews conducted with:

- Representatives across the Partnership across HR & Operations at all levels

Number of formal interviews by geographic distribution

Region	#
Africa	9
Asia	21
Global	6
LACRO	1
MEER	2
Grand Total	**39**

Africa	#
Kenya	1
Keyna	1
Mali	1
Nairobi	1
Rwanda	1
S. Sudan	1
Sengal	1
Zambia	1
Zimbabwe	1

Asia	#
Cambodia	5
India	10
Indonesia	1
Philippines	1
Singapore	1
Thailand	1
Vietnam	2

LACRO	#
Bolivia	1

MEER	#
Albania	1
Romania	1

Number of formal interviews by Local or split between HR and Other Roles

Location	#
GC	3
NO	27
RO	7
SO	2
Grand Total	**39**

P&C or Other	#
Other	23
P&C staff	16
Grand Total	**39**

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Inputs and Contributors

Employee survey

- The response from the survey was as follows:
  - 836 complete responses over 32 National Offices
- Participants were invited to:
  - Rank the overall areas related to their employment
  - Comment on their satisfaction with area of these areas
  - Comment on ways to strengthen recruitment and retention practices.
- Whilst the survey provided valuable input, completion rate was low compared with the overall population, likely for the following reasons:
  - It was provided only accessible via the internet and available in English, French, Spanish and Portuguese. Some community based staff do not have high levels of English and do not have any or regular internet access
  - Limited timeframe for completion and reminders (one-month)
  - Lack of management priority in distribution
  - Of those that started completion rate was only 60%; people struggled with the ranking (which was enforced by the survey). The 836 reflects complete responses only (response which were obviously not from programme based staff were also excluded).

Employee Survey Responses by Region

Region	#
Africa	468
Asia	274
LACRO	25
MEER	69
Grand Total	**836**

Stakeholder Groups

- Some small breakout groups in India (Community Development Workers in seniority groups) and ADP managers also provided input

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Inputs and Contributors

World Vision Internal Documentation and Research

Area	Topic	Contact	Contains	File Name or Website
Exit Mgt	Exit Management	Jeff Brunt	Evaluation and methodology of the approach used to provide outplacement services of CV creation and skills evaluations of staff leaving the organisation post the Tsnami	Phase 1 ProjectMERLOTEvaluation_151206.pdf
General	Metrics	Reinhard Scheumann	Metrics programme is part of the P&C current projects but is still in early stages. For more information on metrics please contact Reinhard	Contact Reinhard directly
IPM	Capacity Building	Barbara Frost	Integrated Capacity Building Strategy	ICB draft strategy August 09 - Final.doc
IPM	IPM	Mark Lorey/ Felipe Chaparro	IPM Executive Summary - 5-09.doc	IPM Executive Summary - 5-09.doc
IPM	IPM	As above	Guidance for NOs Interested in Opting in to IPM	Draft Guidance for NOs Interested in Opting in to IPM - 7-10-09.doc
IPM	IPM	As above	Guidelines for Project Model Dev and Review	Draft Guidelines for Project Model Dev and Review - 5-30-09.doc
IPM	IPM	As above	Brief IPM Project Update for AG	Brief IPM Project Update for AG - 7-09.doc

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Inputs and Contributors

World Vision Internal Documentation and Research

Area	Topic	Contact	Contains	File Name or Website
IPM	IPM	Mark Lorey/ Felipe Chaparro	Current status of IPM pilot sites against the model	IPM Pilot sites - Status - Jul 09.xls
IPM	IPM	As above	Learning from the IPM Pilots	Summary of Learning from IPM Pilot Programmes - 7-09.doc
IPM	IPM	Jon-Paul Bowles	Project Models Summary Matrix - tracks the project models developed and planned to date. It is continuously revised through consultations with technical groups within World Vision (including CIM, ITT, HEA, FPMG, etc.)	Project Models Summary Matrix - 7-3-09.doc
IPM	IPM	Mark Lorey/ Felipe Chaparro	Overview of Guidance for Integrated Programming and an overview of Integrated Capacity Building	Overview of GIP and ICB - 5-09.doc

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Inputs and Contributors

World Vision Internal Documentation and Research

Area	Topic	Contact	Contains	File Name or Website
Learning	Learning for Transformation	Elaine Stavnitzky Nigel Goddard	LFT Curriculum and materials	
Learning	Applied Learning Centre	Jeff Brunt	Summary of the Applied Learning Centre assessment and outcomes	ALC Study.ppt
Learning: Knowledge Mgt	Knowledge Management Strategy	Eleanor Mombiot	Learning: Knowledge Management	GKM Strategy FY 09 - 13 final.doc
P&C Effectiveness	P&C Effectiveness	Maria Beghloyan	An independent HR Benchmarking Study comparing World Vision P&C with other peer organisation NGOs. Completed by the Hackett Group	HR Benchmarking Results (NXPowerLite).ppt

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Inputs and Contributors

World Vision Internal Documentation and Research

Area	Topic	Contact	Contains	File Name or Website
Recruitment	Screening and Selecting: Facilitated Workshop style events	Nigel Goddard, Cambodia	Recruitment Workshop Toolkit has been developed by the Learning for Transformation Project, an initiative of LEAP, World Vision Cambodia.	"RECRUITMENT_MANUAL.zipPowerPoint Approach, Recruitment Guide etc."
Retention: Compensation	Compensation	Ginny Cordon	Birches Group Survey	"http://www.birchesgroup.com/site/ "
Retention	Employee Engagement	Maria Beghloyan	Employee Engagement	ESAT-presentation updated.ppt
Retention	Benefits	Ginny Cordon	Details of the broad benefits for all NO's (bar one)	Benefits Survey Backup 0430.xls
Recruitment	Screening &Selecting:	Nigel Goddard, Cambodia	Facilitated Workshop style events. Recruitment Workshop Toolkit developed by the Learning for Transformation Project, an initiative of LEAP, WV Cambodia.	"RECRUITMENT_MANUAL.zipPowerPoint Approach, Recruitment Guide etc."
Retention	Performance Management -Coaching	Lai Wan Chung	"World Vision Asia-Pacific Executive Development Series (EDS) Leadership Coaching Program (LCP)"	LCP (General Info).doc

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Inputs and Contributors

World Vision Internal Documentation and Research

Area	**Topic**	**Contact**	**Contains**
Retention	Staff Centered Philosophy	Michael Hegenauer	Staff Centered Philosophy.doc: One Pager on eight statements give a simple and achievable set of guiding points that will allow us to develop effective staff care.
Retention	Staff Care	Michael Hegenauer	Adjustment Risks of Humanitarian Aid Workers.htm CISM Multi-Component Elements Jan 2009.doc cism_research_summary.pdf Mental_Health_Aspects_Of_Disaster_v1.2.pdf PASS Model - 2009.doc PastoralCrisisInt Everly.pdf Peer Support - Profile and what they do.doc / Peer Support Best Practice - Tunnecliffe 2007.pdf Risk factors HAW May 2005.ppt Signs and symptoms of stress 08.doc Staff Care in emergencies chart v2 July 2006.doc / Staff Care minimal standards 28 Jan 2008 v2.doc / Staff care workplan MEERO v3 FY08 - FY10.doc Staff Care, CISM, Insurance for InterAction February 2009.doc The recruitment of emergency personnel different agency perspectives.htm The theories, mechanisms, benefits, and practical delivery of psychosocialeducational interventions for people with mental health disorders.htm V.Welzant-Impact.on.Lives.pdf WV Staff Care Framework.doc

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Inputs and Contributors

External Documentation and Research

- External Interviews were conducted with participants who currently worked for or had worked with a number of Peer organisations. The questions were broadly similar to those for the internal interviews

Participants contributed from the following Organisations	
Catholic Relief Agency	Save the Children
ChildFund	TearFund
Compassion	UNICEF
Plan	United Mission to Nepal (UMN)

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Inputs and Contributors

External Documentation and Research

- The following external documentation was collated during the research.

Topic	Contact	Contents	File / Website	Distribution
Facilitation as part of programming	Greg Keen (Compassion International)	Impact of Local Level Facilitation, Report	Impact of Local Level Facilitation, Brazil, November 2007.	Unpublished report - request to keep to a small working group only. For details contact Maria Beghloyan or Mark Lorey who will contact Compassion.
Human resource management	http://www.tearfund.org/	Contains basic HR practice and process knowledge and concepts. Useful introduction for new P&C team members with limited previous experience.	http://tilz.tearfund.org/Publications/ROOTS/Human+resource+management.htm	Available to download.
Retention – Staff Care		Website containing resouces for missions and mental health. Contains a series of brochures and case studies	http://www.missionarycare.com/index.htm	Available to download.
Retention - Staff Turnover	HPN	Analysis of the **causes** and **effects** of turnover focusing on the humanitarian sector	Understanding staff turnover.pdf	HPN (Humanitarian Practice Network at the Overseas Development Institute) Or: Contact Maria Beghloyan for a copy Note: Reader will need to comply with copywrites details on the report

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Inputs and Contributors

Accenture Methodology and Best Practices

Accenture's internal resources were used to identify best practices from other sectors.

Accenture Development Partnerships (ADP)

Accenture Development Partnerships is a not-for-profit group within Accenture that provides business and technology consulting services to organizations working in the international development sector. Our overall aim is to channel Accenture's business and technology skills to help address international development challenges and fight global poverty, working in collabouration with non-governmental organizations (NGOs), foundations, and donor agencies. ADP represents an initiative that puts corporate citizenship at the heart of Accenture's business, utilizing the organization's people and core capabilities to have a positive social impact.

ADP strives to help our clients become high performance organizations. We apply our experience in the private sector to help NGOs and donors to maximise the impact of their programs in the field, and to improve the efficiency of their operations.

We offer our clients Accenture's full range of management and technology consulting services, adapted to a development sector context. These include:

- Strategy
- Organizational Development
- Supply Chain & Logistics
- Information Technology
- Performance Management

In addition, we apply these consulting capabilities to help drive innovation in a range of programmatic areas that are important to our clients, such as:

- Livelihoods and Enterprise Development
- ICT for Development
- Cross Sectoral Partnerships
- Sustainable Program Delivery Models

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Inputs and Contributors

Accenture Development Partnerships (ADP)

We focus on the things that we know well from our private sector experience, working closely with our clients who have relevant development sector technical expertise and knowledge of the local context, culture, and needs. We believe the combination of these complementary capabilities can deliver powerful results.

Our Clients

Since our launch in 2002, we have worked in over 52 countries with 45 different development sector organizations, including the following:

- *Donors, Multilateral Institutions, and Foundations*
- International Finance Corporation (IFC)
- Shell Foundation
- UK Department for International Development (DFID)
- United Nations Development Programme (UNDP)
- United Nations Children's Fund (UNICEF)

Non-Governmental Organizations

- Catholic Relief Services (CRS)
- Oxfam
- PLAN International
- Voluntary Service Overseas (VSO)
- World Vision
- NetHope

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Author & Review Tracking

Report Author: Jo Peachey, Accenture Development Partnerships (jo.peachey@accenture.com), with support from Paul Shorkey.
Standard Sections also typically sent to the Core Team and to the HR Working Group

Date	Section	Issued to	Feedback received	Status
30/07	Recruitment	Susan Bandow, Strategy Director, Staffing Solutions & Diversity	Move WP to recruitment section. Additions to pro's and cons' slides/other comments Added section on staffing mix in contract section.	Incorporated & complete
05/08	Staff Care/ Benefits	Tony Culnane Staff Care Advisor, WVI		
04/08	Performance Management	Maria Beghloyan, PM Analyst	Wayne also provided detail input prior to submission to JC/MB. Received and updated.	90% input included
04/08	Performance Management	Joo-Chong Lim HRD Cambodia	Verbal Feedback. PM ▪ Focus more on is it done and is it effective ▪ Debate/Taboo not clear enough on 'grace/Christianity vs. developmental feedback General: ▪ Focus on a more bulleted approach – too much text ▪ Consider being 'stronger' about deficiencies ▪ Consider summarising practices and giving them to NO HRD to yes/no (*will be done at assessment level only)*	Incorporated & complete

Review Author & Review Tracking

Will be moved to appendix after review with HR Working group

Sections also typically sent to Core Team (ML/WP/BF/FC)

Date	Section	Issued to	Feedback received	Status
13/08	Performance Management	Lai Wan Chung Regional Learning & Development Manager	Provided additional supporting documentation. More countries are recognising Coaching as not just another leadership/mgt tool, but a strategic intervention and change tool. Coaching enables managers to manage well across distances (tele coaching) which is of practical value to our operations here which spread across vast distances even within a single NO operation. I am stepping in to provide a solution to whomever is interested at this stage. The Regional IPM Learning Coordinator is also firmly behind this latest effort of ours. Pursuing coaching is strategic and in line with WVI's shift in ministry methodology from service delivery to empowerment (IPM).	
12/08	Salary & Benefits	Ginny Cordon, Comp & Bens Lead GC		
12/08	Learning	Jeff Brunt, Manager, Humanitarian Competencies Project & Capacity Development Advisor (Global P&C)	Telephone call verbal feedback	Incorporated

Review Author & Review Tracking

Date	Section	Issued to	Feedback received	Status
13/08	All	Jaisankar Sarma		

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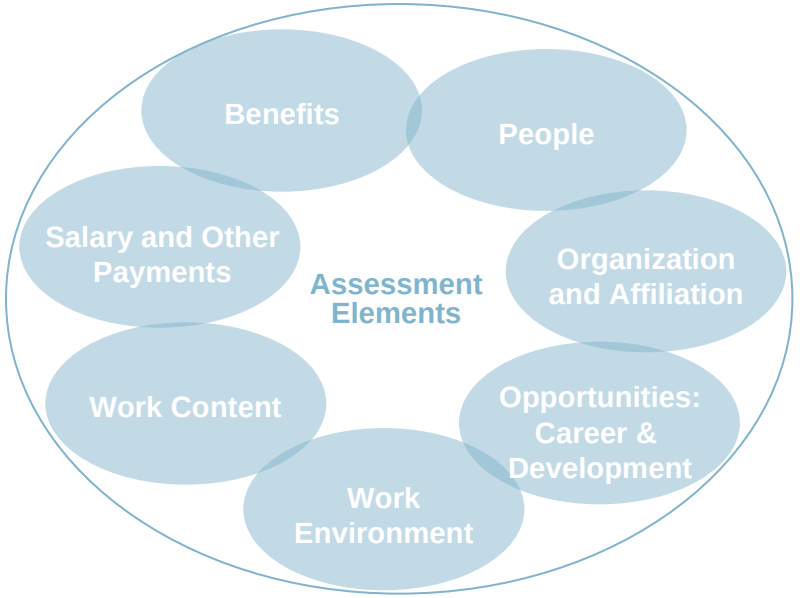
Employee Survey Results Introduction

Background

Local Level Employee Survey

- Employee engagement style survey to better understand what is valued by existing local level staff and their current levels of satisfaction.
- There was a total of 840 complete responses from over 32 National Offices
- The survey was based on the following factors



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Employee Survey: Assessment Elements

Element	Description
People	Team & colleagues, managers, other World Vision networks
Organisation	Vision, Mission and Values, Christian ethos, ministry, policies, practices, diversity, brand & reputation
Work Environment	Work/life balance, resources, physical work environment sleeping arrangements etc, safety incl. travel to and from work, support within work, employee care
Salary and other payments	
Benefits	Health care, transport, holiday/ vacation, retirement benefits, family benefits, housing, education etc.
Work	Your day-to-day job, the content of your work and your satisfaction work activities, processes and people programs, communities
Opportunities	Career growth opportunities, personal & professional coaching and guidance, learning and development

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Employee Survey: Assessment Elements

Summary of Results

Global Level

- Overall Satisfaction Levels (overall average and average by category)
- Overall prioritisation of what is valued

Regional Level

- Overall Satisfaction Levels (overall average and average by category
- Overall prioritisation of what is valued

Global Role Level

- Overall Satisfaction Levels (overall average and average by category
- Overall prioritisation of what is valued

Role by Region (e.g. ADP Manager / Development Facilitator/ etc.)

- Overall Satisfaction Levels (overall average and average by category
- Overall prioritisation of what is valued

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Employee Survey: Assessment Elements

Country

A report has been prepared for each NO where more than 25 responses were.

It is strongly recommended that the NO Leadership responds to this survey acknowledging the good responses, the concerns and emphasising any interventions that are happing in NO to alleviate any of these concerns.

Country Level

- Overall Satisfaction Levels (overall **average** and **average** by category)
- Overall prioritisation of what is valued

Role Level

- Overall Satisfaction Levels (overall average and average by category)
- Overall prioritisation of what is valued

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