

Realize. Learning your way.
Be a strong community leader.
Toolkit Workshop Series

Series: Management Essentials for Non-Profits
June 1, 2022
**Effective Recruitment & Retention:
Attracting (and keeping!) Staff &
Volunteer Talent**

Facilitator: Shari Hildred, PMP

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Our Objective! Your Opportunity!
Cultivating best practices in non-profits!
To move up the experience curve, wherever
you and your organization are!

Workshop Facilitator

- Shari Hildred, PMP
- Email: shari.hildred@valmoreconsulting.com

Logistics

- Session Outline
- Timeline
- Connect, engage!
- Q & A and dialogue!

Valmore Consulting acknowledges the homelands of the Indigenous Peoples of this place we now call Saskatchewan and honours the many territorial keepers of the Lands on which we work. We acknowledge that in Saskatchewan, we are on treaty land. We are committed to moving forward in the spirit of collaboration and reconciliation between immigrant Canadians who have settled over centuries and the First Nations people who have walked these lands since time immemorial.

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Seminar Reference



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Related Community Engagement!




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Overview/Topics:

- Importance of Corporate Culture
- Link of Culture to Values to retention
- Today's challenges and opportunities!
- Recruitment best practices
- Aligning for retention success
- Effective onboarding and beyond
- Organize and expand current knowledge
- Application and take-aways for both small and larger organizations



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Effective Recruitment and Retention
Why it Matters!

- 22% of staff turnover occurs in the first 45 days
- 40% of senior managers fail within 18 months
- 60% of organizations don't set goals for new hires
- Cost of losing an employee estimated at 3x annual salary




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Why do employees leave?

Lack of...

- Fairness & positive atmosphere
- Feedback, autonomy, involvement in decisions
- Rewards & benefits

...and high...

- Stress
- Market demand

Employee voluntary turnover

TRUE Cost of Employee Turnover

- Direct Costs
- Indirect Costs
- Causes

87%
of employers said that improving retention is a critical priority for their organization.
Source: Future Workplace and Kronos

Now What??

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What is Corporate Culture?

Culture & Values

Nearly two-thirds of employees say their company does not have a strong work culture

Less than half of employees know their organization's mission, vision, and cultural values

70% of employees credit their peers for making their job fun

Workplace culture is one of the top correlated factors to employee happiness

25% of employees agree that a strong culture can improve productivity

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What is a Values Statement?

Values

Considers:

- HOW we carry out our Mission!
- Guiding principles
- These help to direct decision making
- Our stakeholders
- Our relationship with them
- How we help them
- How they help us

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Values = Guiding Principles
Ruthie, Learning your way.
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Values can help direct decision....

United Way Value:

Service - "We are motivated by a strong commitment to service – to our donors, our neighbours and our region. Our achievements are defined by the collective success of the communities we serve."

Project Management Institute Value:

Engagement - "Encouraging diverse viewpoints and enabling individuals to contribute to the project management profession and to the Institute. Through times of growth and change, our core values provide continuity and a moral compass, communicating our beliefs and guiding our behaviour."

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Vision, Mission, VALUES!

Google's Core Values

- Fast is better than slow.**
We know your time is valuable, so when you're scrolling an ad on the web you want it right away-and we aim to please.
- You can be serious without a suit.**
We believe that great, creative things are more likely to happen with the right company culture.
- Democracy on the web works.**
Google search wants to make it easier on the millions of individuals poring links on websites to help determine which other sites offer content of value.
- Doing one thing really, really well.**
We do search. With one of the world's largest resource groups focused exclusively on solving search problems.
- Do the right thing; don't be evil.**
Honesty and integrity in all Google do. Our business practices are beyond reproach. We make money by doing good things.

KPMG Values

- We lead by example.
- We work together.
- We respect the individual.
- We seek the facts and provide insight.
- We are open and honest in our communication.
- We are committed to our communities.
- Above all, we act with integrity.

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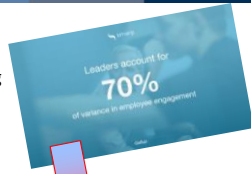
Values, Culture and Engagement

CULTURE	ENGAGEMENT
How we do things around here to execute organizational strategy	How I feel about the way I'm expected to do things around here to execute organizational strategy
About employees interactions, leadership, and organizational performance	About individuals' satisfaction, commitment, and performance in their roles
About the purpose and meaning of the organization's mission and vision	About the level of impact, the purpose, and meaning of my work, and how these affect my motivation and effort
Shows how organizations differ from each other	Gives insight into employees' day-to-day experiences

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Leaders

- Care about people
- Embrace differences to make a big difference
- Help employees' experience
- Be accountable like everyone else
- Be mindful of employee needs
- Trust
- 'Live' the organizations VALUES



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THOUGHT FOR THE DAY

Research on Values

- Strong link between financial performance and the alignment of an organization's operating values to the employees' personal values.
- Companies that consistently focused on building strong corporate cultures over a period of several decades outperformed companies that did not by a factor of six and outperformed the general stock market by a factor of 15*.

* Source: Built to Last, Jim Collins

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What skills are employers seeking? What has changed??



Top 10 Skills 2018

1. Ability to work in a team structure
2. Ability to make decisions and solve problems (tie)
3. Ability to communicate verbally with people inside and outside an organization
4. Ability to plan, organize and prioritize work
5. Ability to obtain and process information
6. Ability to analyze quantitative data
7. Technical knowledge related to the job
8. Proficiency with computer software programs
9. Ability to create and/or edit written reports
10. Ability to sell and influence others

Top 10 Skills 2020

1. Data literacy
2. Critical Thinking
3. Tech Savviness
4. Adaptability and flexibility
5. Creativity
6. Emotional intelligence
7. Cultural intelligence and diversity
8. Leadership skills
9. Judgement and complex decision making
10. Collaboration

Top 10 Skills 2021

1. Growth mindset
2. Continuous learning
3. Critical thinking
4. Survival skills
5. Resilience, curiosity
6. Flexibility
7. Dedication
8. Coaching mindset
9. Comfort with ambiguity
10. Thriving in virtual environment

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Benefits and Getting Started!



Hiring the right person will:

- Result in the provision of better quality services
- Most likely lead to job satisfaction
- Create an effective, better motivated workforce
- Reduce labor turnover
- Reduce absenteeism
- Reduce stress levels



The quality of the people you employ and retain is the heart of your organizational success.

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Consider this!



168 hours/week



Average 52 hours sleep
Waking hours 116

On average, people spend 50 to 70% of waking hours working, preparing for work, thinking about work.

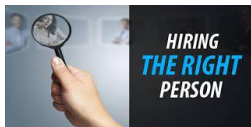


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Recruitment Strategy!!

Best Practices:

- Have a strategy!
- Job Description
- Advertising
- Interview Questions
- Reference Checks
- Orientation and Onboarding
- Retention Strategies!
- What about volunteers? (yes, to ALL of the above for volunteers too!!!)



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What is a job description?

A job description is a summary of the major duties and responsibilities of a position. It also includes the education and experience required to do the work.



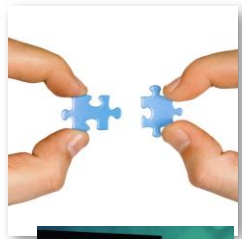
DO's and DON'T's



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Job Description Guidelines

- Jobs NOT people
- Facts NOT judgements
- The job as it is now
- 6 Main components



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1. Job Title and Identifying Info



HELLO
my job title is

??

JOB DESCRIPTION

Section 1: IDENTIFYING INFORMATION

Position Title:
Employment Facilitator

Supervisor's Title:
Employment Services Manager

Job Title vs Occupation Comparison Table

Characteristics	Job Title	Occupation
Definition	Is a specific name used regarding a position or job.	Is a broad term used regarding an activity carried out in exchange for a payment.
Broad/specific	Is specific	Is broad
Job hierarchy	Shows the job hierarchy in an organization	Does not show the job hierarchy in an organization

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2. Job Purpose

Section 2 POSITION SUMMARY



The Employment Facilitator, reporting directly to the Employment Services Manager, is responsible for assisting a caseload of consumers to move through the Labour Market Services Employment Dimensions to achieve the employment goals identified in their career action plan with the goal of getting and maintaining employment.



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3. Job Duties

Case Management - Assist a caseload of consumers to move through the Labour Market Services Dimensions to:

Achieve the goals identified in their career action plans using measurable milestones, timelines, and steps. Assess /understand the impacts of disability, including identifying appropriate supports and accommodations. Access community supports as needed. Identify strengths and skills and applying them to determining vocational direction, career growth and manage career growth and manage career change. 3.5 Develop/improve essential workplace skills as applicable, in basis of literacy, numeracy, computer and document use, problem solving and communication and customer service skills. Gain knowledge of labour market demands and develop plans to improve work skill sets. Learn how to navigate the job search process with the goal of obtaining employment. Gain awareness of job maintenance skills to maximize employment potential.

Class Facilitation - Research, develop and deliver employment classes as required.

Engagement with Employers - Target relevant employers based on consumer action plans as required: Assist in identifying job supports and accommodations for consumers. Provide disability awareness and support to employers to enhance job maintenance for consumers.

Administration - Collect, record, update and maintain confidential reports including Employment Services monthly statistical and narrative case management reporting as required for submission to the Employment Services Manager. Update government referral agents on progress of referrals through monthly reporting as required. Record and deliver monthly contact sheets, timesheets, units and indicators to Manager as required. Other duties in promoting of the Independent Living Philosophy within our community.

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4. Qualifications

Education

- Degree in Social Work or Education
- Reality Therapy/Choice Theory accreditation and/ or equivalent is an asset.
- Personal and professional values consistent with the Independent Living Philosophy.
- Combination of training, skills and experience necessary to design, deliver, and evaluate employment classes.
- The ability to work effectively with a wide range of people in a diverse work place.
- Independent initiative and ability to be proactive in a team environment.
- Knowledge of employers, community resources, supports, agencies, and programs.
- Ability to build solid partnerships.
- Strong oral and written communication skills.
- Excellent reporting and administrative skills.
- Strong emphasis on the combination of experience, training, certification and ability to successfully work with individuals in the area of employability, job search skills, job maintenance skills, workplace accommodations.
- Ability to use MS office package, internet and e-mail applications.

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5. Competencies and Abilities

- Personal and professional values consistent with the Independent Living philosophy.
- Knowledge, skills and abilities developed through life experiences as a person with a disability and /or an awareness of issues experienced by persons with disabilities that impact employability and self-sufficiency.
- Demonstrated ability to respond effectively to a flexible, changing work environment.
- Ability to manage a variety of tasks simultaneously.
- Demonstrated ability to prioritize.
- Strong interpersonal and communication skills with demonstrated skill in establishing rapport with individuals.
- Demonstrated skill in motivating, stimulating people to effective action.

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6. Working Conditions

- **Operational model** - How we do what we do is based in the Independent Living (IL) philosophy. Our team members bring personal and professional values consistent with IL, along with knowledge, skills and abilities developed through life experiences as a person with a disability and/or an awareness of issues experienced by persons with disabilities that impact employability and self-sufficiency.
- **Blended work model** - Our team works in a blended in-office and virtual (remote) model which means all staff are scheduled for some in-office time and have the flexibility to book their clients for in-person or virtual appointments.
- **Work Ethic** - We have fun, but we work hard. This role will be as demanding as it is rewarding. Planning, organization, and follow-through abilities are not just assets, they're requirements. Only self-directed individuals that require little direct supervision with thrive in this role.
- **Enthusiastic and positive** - Bringing a huge amount of positive energy into this role is critical!

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Ready to Advertise!

We're Hiring! - We are looking for an **Employment Facilitator** to become part of our team! If you are interested in working in a rewarding, fun, friendly environment that is blended (in-office and virtual work), read on!

This position reports to the Employment Services Manager and is responsible for assisting a caseload of consumers to move through Employment Dimensions to achieve employment goals. We are seeking a person who brings personal and professional values consistent with Independent Living philosophy, along with skills and abilities developed through life experiences as a person with disability and/or an awareness of issues experienced by persons with disabilities that impact employability and self-sufficiency.

Key Requirements - If you're interested in being a part of our team, there are several key skills and attributes you should make sure you have before you apply:

Interpersonal Skills - You are friendly, compassionate, respectful, a great communicator, and able to connect effectively with people. You possess the ability to network with all types of people and build productive healthy relationships with colleagues.

Work Ethic - We have fun, but we work hard. This role will be as demanding as it is rewarding. Planning, organization, and follow-through abilities are not just assets, they're requirements. You will need to demonstrate that you're someone who is self-directed!

Enthusiastic and Positive - Bringing a huge amount of positive energy into this role is critical!

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Screening Applications

Best practices:

- Screening resumes
- Screening cover letters
- Screen video applications
- Phone screen
- Assessments
- On-site interviews
- Virtual interviews
- Background checks
- References



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Screening Applications - Assessments

Resume Screening
Position: Employment Facilitator
Closing Date:



	Name	Phone	Email	Follow Instructions ¹	Requirements of the position ²	Relevant work experiences ³	Score ⁴ (Total 25=5)	Remarks	Interview date and time
1.	Muhammad	(000) 123-4567		2	5	14	21		March 26 10am via Zoom
2.									
3.									
4.									
5.									
6.									
7.									
8.									
9.									
10.									

Resume Screening Qualifications

- Work Experience
- Education
- Skills and Knowledge
- Personality Traits
- Competencies

52%
of Talent Acquisition leaders say the hardest part of recruitment is screening candidates from a large applicant pool

¹ Resumes, Cover letter, application deadline (1+1+1)
² Bachelor's Degree, Health Therapy, Ability to use MS office, internet (3+1+2)
³ Experience on Disability and Inclusion, Employment support, facilitation, Non profits (1+1+3+3)
⁴ Person with Disability will get additional 5 points (2)

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Interview Preparation

Best Practices:

- Technical Skills
- Emotional Intelligence
- Finding the Balance!



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Behavioural Questions

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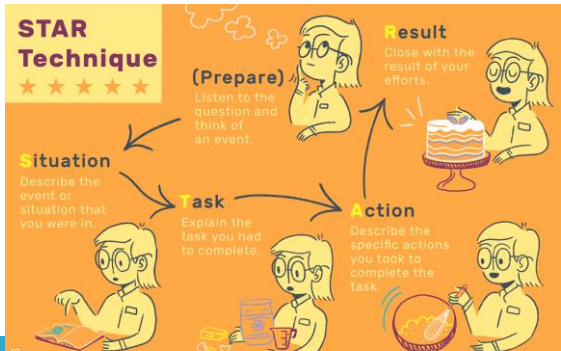


The Power of Storytelling!



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Situational Questions – STAR Technique



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Gathering Interview Information and Assessment

Candidate's Evaluation Form
Position: Employment Facilitator



Candidate's Name: _____ Date: _____

Interviewed by: _____

Scoring

This form is to be completed by the interviewer to rank the candidates overall qualifications for the position. Under each question the interviewer should give the candidate a rating point and write specific notes. The rating point is based on the following:

5 – Exceptional 4 – Above Average 3 – Average 2 – Satisfactory 1 – Unsatisfactory

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Gathering Interview Information and Assessment

1. Tell us about your background, work experience, knowledge, skills and attributes that you would bring to this role that will help make you successful.

5 - Exceptional	4 - Above Average	3 - Average	2 - Satisfactory	1 - Unsatisfactory
-----------------	-------------------	-------------	------------------	--------------------

Comments:

2. Tell us about your experience in assessing the impacts of disability, including identifying appropriate supports and accommodations?

5 - Exceptional	4 - Above Average	3 - Average	2 - Satisfactory	1 - Unsatisfactory
-----------------	-------------------	-------------	------------------	--------------------

Comments:

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Gathering Interview Information and Assessment

12. **Candidate Enthusiasm** – How much interest did the candidate show in the position?

5 - Exceptional	4 - Above Average	3 - Average	2 - Satisfactory	1 - Unsatisfactory
-----------------	-------------------	-------------	------------------	--------------------

Comments:

13. **Overall Impression and Recommendation** – Final comments and recommendations for this candidate.

5 - Exceptional	4 - Above Average	3 - Average	2 - Satisfactory	1 - Unsatisfactory
-----------------	-------------------	-------------	------------------	--------------------

Comments:

Total Score

1	
2	
3	
4	
5	
6	
7	
8	
9	
10	
11	
12	
Total	

Interviewer:

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Top 10 Tips to Hire the Right Candidate!!!

- Adaptive
- Ask questions
- Curious
- Work flow management
- Team players
- Efficient use of resources
- Relationship management
- Own mistakes
- Enjoy learning
- Feel for 'fit'



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Keys to becoming a great Interviewer!

- Practice, Practice!
- A good interviewer will.....
- Be Authentic
- Avoid these pit falls.....
- Practice!!



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Background Checks

- As may be appropriate:
- Criminal record check (CRC)
 - Vulnerability sector check
 - Driving record
 - Education verification
 - Certifications current
 - Reference checks
 - What else do we look at??



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Reference Check Questions



Given the description of the position provided, can you tell me about how (name of individual's) background, work experience, knowledge, skills and attributes would align with this role?

Can you describe this person's experience working as a member of a team?

We work in a collaborative, respectful and compassionate way is very important – it is what we value and it is part of our corporate culture. Can you give an example of when this person worked for you and demonstrated collaboration, respectfulness and compassion?

We all have areas of improvement – what do you think that would be for this person?

Can you describe this person's ability to work independently and self-managing a work load?

List three adjectives that you think best describe this person, this person's work style, and/or this person's work ethic.

How did this person handle conflict, pressure and stress?

Would you rehire (if applicable) if the opportunity arose?

Thank you for your reference. In closing, is there anything you would like to share?



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Orientation

Best Practices:

- What it is
- Why it is important
- What new employees need
- Tools that can help
- Informative
- Engaging



Orientation & Onboarding

- 0-3m** • Welcome Aboard
- 4-6m** • Reality: Did I make the right decision?
- 7-12m** • Adjustment: Do I want to do this?
- 13-18m** • Integration: I'm in the right place



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New Hire Checklist Before they arrive and First Day

- Welcome them to the team
- Complete electronic paperwork
- Set up their internal communication
- HRIS account
- Email account
- Collaboration accounts (Slack, Asana, etc.)
- Set up their training
- Prep their workspace
- Workstation (including IT connections)
- Computer
- Chair
- Office supplies
- Business cards
- Parking passes
- Prep the team
- Intro email

Orientation: First Day

- Work space, access and equipment
- Introductions, public welcome, tour
- Agenda, access to key information
- HR file and paperwork
- Time with direct supervisor, review job description and objectives
- Prioritized policy review and contextual information



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New Hire Checklist First Week(s)

Orientation: First Week

- Introductions to key stakeholders
- Essential training – including jargon
- Initial understanding of where they fit in, performance objectives, and how values are lived, culture
- Help them get something meaningfully done within the week (1st day, if possible)
- Invite for their participation in orientation

Housekeeping items for the first two weeks:

- | | |
|---|---|
| <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">SET UP FOR SUCCESS</div> <input type="checkbox"/> Review job role and responsibilities.
<input type="checkbox"/> Discuss manager style & expectations.
<input type="checkbox"/> Review performance goals.
<input type="checkbox"/> Schedule meetings with the key "players" working with the new hire.
<input type="checkbox"/> Overview of common programs & useful websites.
<input type="checkbox"/> Explain conference room reservations.
<input type="checkbox"/> Provide employee directory.
<input type="checkbox"/> Explain desk setup and how the hire can request needed items.
<input type="checkbox"/> Schedule weekly 1:1s.
<input type="checkbox"/> Add new hire to regular team meetings.
<input type="checkbox"/> Confirm that employee has received and reviewed policies and procedures. | <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">CREATE A WARM WELCOME</div> <input type="checkbox"/> Prepare a week one agenda.
<input type="checkbox"/> Make lunch plans for their first day.
<input type="checkbox"/> Have team sign a welcome card.
<input type="checkbox"/> Give employee company swag: tshirts, notebooks, thermos, mug, etc.
<input type="checkbox"/> Send welcome e-mail to staff.
<input type="checkbox"/> Introduce employee to co-workers.
<input type="checkbox"/> Introduce to department leads and executive teams.
<input type="checkbox"/> Take a walking meeting outside the office to learn more about the employee's life outside of work.
<input type="checkbox"/> Suggest a welcome game of ping pong in break room. |
| <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">MAP THE LAY OF THE LAND</div> <input type="checkbox"/> Break rooms
<input type="checkbox"/> Bathrooms
<input type="checkbox"/> Conference rooms
<input type="checkbox"/> Photocopy and fax machines
<input type="checkbox"/> Supplies and purchasing policies
<input type="checkbox"/> Transportation & Parking
<input type="checkbox"/> First aid kit & emergency supplies | <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">SHOW INVESTMENT</div> <input type="checkbox"/> Identify the training and development activities new hire needs in the next 6 months. Sign up for classes.
<input type="checkbox"/> Suggest influencers to follow on LinkedIn Pulse.
<input type="checkbox"/> Give new hire 1 month membership to LinkedIn.
<input type="checkbox"/> Identify and set measurable career goals for the next months or years. |

Awesome extras that will surprise and delight your new hire:



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Onboarding: First Year

- Regular check-ins, celebrate milestones
- Probationary review (and annual performance)
- Mentoring and/or coaching
- Communicate impact of results
- Reinforce commitment/connection; understand motivators, reward and recognition
- Longer term development; broaden exposure



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Expert Tips!

1. Begin prior to day one
2. First impressions matter
3. Sense of belonging and quickly!
4. Onboard and retention go hand in hand!
5. Have a plan, commit and use a checklists



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Areas of Focus

- Centre on Company Culture
- Start Small
- Prevent Stagnation
- Adopt Core Values
- Be Flexible
- Show Appreciation
- Commit to Wellness
- Support Professional Growth
- Seek Feedback
- Work Hard, Play Hard!

EMPLOYEE RETENTION STRATEGIES

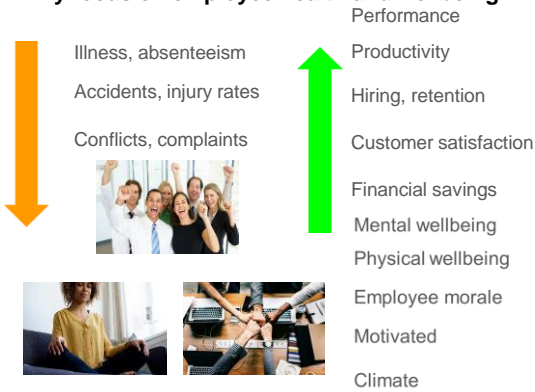


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Why focus on employee health and wellbeing?

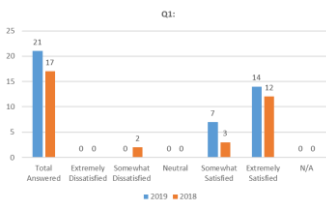


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Annual Employee Survey

Q1: Overall, I feel valued and satisfied working as an employee of the organization.

	Total Answered	Extremely Dissatisfied	Somewhat Dissatisfied	Neutral	Somewhat Satisfied	Extremely Satisfied	N/A
2019	21	0	0	0	7	14	0
2018	17	0	2	0	3	12	0
	0	0	11.76	0	17.65	70.59	0



- 66.7% of respondents extremely satisfied.
- 33.3% of respondents somewhat satisfied.

Individual Responses to Question #1:

1. A great place to work! I get regular feedback and am consistently encouraged in what I am doing.
2. I'm only a casual worker.
3. Wonderful place to work!

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Effective Recruitment and Retention



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Questions? Discussion!



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Series: Management Essentials for Non-Profits
Effective Recruitment & Retention:
Attracting (and keeping!) Staff & Volunteer Talent

Thank You!
Facilitator: Shari Hildred, PMP



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