

Organizational Standards Initiative: Consultation Report

In the summer of 2008, the Organizational Standards Initiative consulted widely with community based immigrant and refugee serving agencies. This report provides a summary of findings from these consultations and outlines priority organizational development issues, recommended next steps, and a shared vision for the sector that emerged through the consultation process.

Introduction

The Organizational Standards Initiative (OSI) began in late 2007 in response to OCASI members calling for capacity development, standardization, and professionalization of the sector. The OSI aims to strengthen organizational capacity across the immigrant and refugee serving sector and demonstrate a commitment to accountability and the provision of relevant and high quality services to immigrants and refugees. The present phase of the initiative is a two year project funded by the Ontario Trillium Foundation, focused on research and extensive consultations with the sector in the development of voluntary organizational standards, an organizational self-assessment tool and related resources, and fleshing out a concrete implementation plan.

From July to September 2008 the OSI consulted with executive directors, managers, and frontline workers – through regional meetings and an on-line survey – to get input and direction in the development and implementation of standards and an agency self-assessment tool.

Ten consultations were held with agency representatives across the province: seven in conjunction with OCASI's regional meetings, one with the French Consultative Group, and two with frontline staff. The consultation meetings focused on getting input on organizational capacity development needs and priorities. A total of about 150 people participated in the meetings.

The Survey & Consultation Document asked respondents to think through what organizational issues should be captured in the set of standards. Respondents rated the importance of various organizational elements and identified the extent to

which their agencies currently have them in place. This provided us with an aggregate snapshot of organizational priorities, strengths and challenges. A total of 122 people responded to the survey, 8 of them in French. Sixty-three different agencies were represented, almost all of them OCASI members. Of the respondents, 37% were managers, 36% Executive Directors or CEOs, and 27% frontline staff, with a small number of board members, volunteers and students.

Summary of Consultation Findings

Support for Standards

Throughout the consultations we heard a great deal of support for standards. The OSI is seen as a tremendous and timely strategic opportunity to develop a shared vision of what we want to be as a sector, articulate and assert the sector's importance and credibility, and gain access to capacity development supports, all the while strengthening accountability to ourselves and the communities we serve. In the consultation meetings, OCASI members talked about the interdependent nature of agencies and the need for a shared approach to strengthen and professionalize the sector through organizational standards, service standards and core competencies for staff.

Consultation participants also shared their concerns. Some talked about the internal and external challenges that might impact their ability and willingness to undertake an organizational self-assessment – lack of time, resources, infrastructure and board support. Many emphasized the need for the self-assessment tool, process, and follow-up to be

relevant to community and region-specific challenges, a variety of reporting systems and relationships with funders, and to be sensitive to different stages of organizational development. We also heard that agencies would like the self-assessment tool to be harmonized with other standards initiatives they use.

Strengths of the Sector

The results of the Organizational Standards Survey told us we are generally headed in the right direction with the standards we have identified. Respondents were asked to indicate the importance of a range of components of organizational operations and systems, and to indicate the extent to which their agency has them in place.

Most of the survey items were characterized as being *very important*, while the range of responses regarding implementation in many areas confirmed the need for capacity building support in the areas of governance, board development, human resources management, financial management and the development of space and information management infrastructure.

Respondents provided many examples of areas of strength within their agencies, including knowledgeable and committed staff and boards, a collaborative spirit across the agency, management responsiveness, and programs and services that are in line with their mission.

More than anything else, the survey showed that our sector's strengths lie in our community based approach – areas such as being grounded in the communities we serve, addressing the diversity and complexity within these communities through inclusive service delivery, and understanding the need to take a collaborative approach with partner agencies.

Vision and Current Context

Through the consultations, a clear, shared vision for the sector emerged:

- ❖ strong, well governed and managed organizations that support staff to be optimally effective, responsive and accountable to ourselves and the communities we serve
- ❖ a sector that can clearly assert our value and leadership role in working towards a shared vision for a just and equitable Canada

- ❖ a sector that clearly measures and communicates our achievements

This common vision arises out of our shared values as community-based agencies serving immigrants and refugees, which were often identified throughout the consultations as a key strength and defining feature of the sector. These values include:

- ❖ an anti-oppression approach, taking into consideration accessibility and equity
- ❖ a commitment to be accountable to ourselves, the communities we serve, and the broader Canadian public
- ❖ a user-defined and client-centred approach, that takes leadership and direction from the communities we serve
- ❖ an approach to service delivery that facilitates self-empowerment and supports individuals to develop the skills and knowledge to advocate for themselves
- ❖ a focus on capacity building and leadership development in the communities we serve, which includes our staff, boards and volunteers
- ❖ an holistic approach that addresses the physical, social, psychological and spiritual needs individuals have as they settle in Canada
- ❖ an orientation towards positive change and advocacy

The consultations also revealed a shared understanding of the current environment and the opportunities and challenges it presents for the sector. There is much uncertainty about what will happen beyond the current five-year funding envelope attached to the Canada-Ontario Immigration Agreement (COIA) that expires in March 2010. COIA has provided tremendous opportunities and much-needed funds for Ontario's immigrant and refugee serving sector and it is changing the landscape of agencies providing settlement services. Major shifts in immigration policy, such as the increasing focus on temporary workers, will lead to major shifts in demographics and changes in community needs. Short-term, project-based funding, lack of investment in infrastructure, and increased accountability and reporting requirements contribute to ongoing organizational development, governance, human resources, and management challenges.

Priorities

In the OSI consultations and survey, participants were asked to tell us about their main organizational development priorities. They talked about their ongoing organizational development needs in all areas of agency operations, from board development, to financial management, to HR management, to internal communications, to the challenges of implementing anti-oppression policies. As we heard from more and more people, some key priorities emerged:

❖ **Lack of sufficient program and administrative staff/infrastructure**

OCASI members are certainly not lacking in their commitment to deliver high quality services and build positive work environments. Rather, one of the most common challenges agencies face is the lack of sufficient program and administrative infrastructure – particularly administrative staff – to strengthen and improve their organizational systems.

❖ **Human Resources Management**

Human resource issues are a challenge for all nonprofit sectors, including ours. Consultation participants identified priority needs in all aspects of HR, but particularly focused on the hiring, recognition and retention of qualified personnel, fair and competitive salaries and benefits, addressing staff wellness, and clarity around how staff can be engaged in decisions that affect them and the people they serve.

❖ **Evaluation and Research**

Another very common theme across agencies was the desire to develop individual and collective capacities to both measure and communicate about our successes. For participants, this included being better equipped to understand broad trends and changing community needs, to access to relevant research, and measure, monitor and improve upon organizational and service effectiveness.

❖ **Addressing Systemic Issues**

For some, public education was identified as a critical means to address systemic

discrimination and barriers facing immigrants and refugees; for others it's about communicating better with the public and policy makers on the needs and contributions newcomers provide to strengthen Canada. Whatever their preferred approach, consultation members called for capacity and leadership development,

as well as effective resources, in addressing systemic issues.

❖ **Collaboration and Service Coordination**

While many identified one of the key strengths of their agencies was in the collaborative approach it took to partnerships, we also heard quite consistently that this is an area that really needs to be further strengthened. There is a need for more effective partnerships within and across sectors, sharing of resources, expertise, leadership & promising practices, and better service coordination amongst agencies who share the same client group(s).

❖ **Relevant Training & Info Needs**

Everyone talked about the need for more training. For EDs and managers, it was more about the lack of time to participate in professional development opportunities. For staff, they talked about the dire lack of ongoing, relevant, and consistent training and information. While broad pieces of information are available, consultation participants called for more localized and specific settlement information to meet their needs. They also called for ongoing & consistent training across the sector

Recommendations

Based on the feedback we gathered from you on how OCASI can support meaningful member participation in the implementation of organizational standards, and taking into consideration the current context, opportunities, and challenges facing our sector, we have distilled what we have heard into the following recommended next steps for OCASI:

❖ **Ongoing Implementation of Standards & Capacity Development**

Consultation participants were emphatic that this work cannot end at the two-year mark with a self-assessment tool that will be left on a shelf to gather dust. Organizational capacity development and standards implementation should be a long-term priority for OCASI. A multi-year organizational development and standards implementation work plan should be fleshed out, outlining clear goals, objectives, and priorities.

❖ **Facilitate Access to Organizational Development Funds**

It's been common, since COIA money has been rolled out, to hear that "money is no object in this sector", yet

organizations continue to find it challenging to access sufficient funds for infrastructure and organizational development costs. Through the sharing of information and strategies across agencies on how to address these gaps in funding, including support for organizational planning, we can start to tackle these challenges. Over and over we heard OCASI members call for the creation of a dedicated pool of funds administered by OCASI to ease access to organizational development monies.

Consultation participants have also called for continued dialogue with funders to increase the availability of funding for infrastructure development.

❖ **Organizational Development Support**

While most participants agree that a self-assessment process can be very useful, many agencies would like increased opportunities for group and one-on-one support – through expert coaching that addresses the specific needs of individual organizations, through an external guide to help steer the organizational change process and build board buy-in, and through peer support on various aspects of organizational planning. OCASI could play a role in facilitating access to these peer and one-on-one supports – by vetting a list of qualified consultants and supporting leaders and mentors within the sector.

❖ **Enhancement of Human Resources Management and Coordination**

Resources exist – job descriptions can be found on the internet, along with information about performance management systems and employee recognition initiatives. Lack of time and staff keeps many agencies from accessing these resources. For some this can be addressed through improved organizational planning and learning about strategies to acquire funds for administrative staff, but gaps still remain for small to medium-sized agencies. Some ideas to address these gaps include better coordination and sharing of information on promising HR practices across the sector, and hiring an HR manager who is shared amongst a number of agencies. These ideas, as well as models in other sectors and regions, need to be further explored.

❖ **Support Capacity and Leadership Development in Advocacy**

Many called for strengthening the capacity and leadership of individuals, particularly EDs and board members, to communicate more effectively with government officials,

politicians, and the broader public in order to further the rights of the immigrant and refugee communities they serve. Identifying OCASI as a leader in addressing systemic challenges facing newcomers and racialized communities, conference participants suggested increased training and networking opportunities in this area.

❖ **Increase Access to Training, Information and Agency Networking Opportunities**

There are numerous professional development and training opportunities that exist for non-profit staff and managers, as well as on-line resources on HR management, board governance, and organizational development. What OCASI members would like to see is enhanced access to relevant and targeted training, information, and agency networking opportunities.

Further Recommendations Beyond the Scope of the OSI

Throughout our consultations we heard a clear articulation of the connection between the development of organizational standards and the development of service standards and core competencies for staff. Together these can be thought of as three pillars of the strengthening and professionalization of the sector as we move into the future. Service standards and core competencies do not fall within the scope of the OSI, but are being pursued through other projects. Currently under negotiations with funders, OCASI proposes to research, develop, test, and support the implementation of Core Occupational Competencies for settlement service workers. The project will involve a highly consultative approach in partnership with the OCASI membership, other immigrant service organizations and many relevant stakeholders.

What's Next?

The next steps for the OSI are to pilot and finalize the organizational self- assessment tool and related resources. A plan for standards implementation and capacity development for the sector will also be developed.

For more information about the Organization Standards Initiative, and to sign up for email updates, visit:
www.ocasi.org/orgstandards

Organizational Standards Initiative: Priority Issues & Recommendations for Next Steps

CONTEXT

PRIORITY ISSUES

RECOMMENDATIONS for OCASI

VISION for the SECTOR

Sectoral Values

- Anti-oppression, accessibility & equity
- Accountability
- User-defined & client-centered
- Facilitating self-empowerment
- Community capacity building
- Holistic (physical, social, psychological, spiritual)
- Focus on positive change & advocacy
- Leadership of sector in community-based approaches to settlement, equity, and anti-racism

Current Environment

- COIA: Current 5-year funding envelope expires March 2010
- Changing landscape of agencies receiving settlement funds
- Shifts in immigration policy leading to changing demographics and community needs
- Short-term, project-based funding & lack of investment in infrastructure, leading to ongoing organizational development, governance, HR and management challenges
- Increased accountability and reporting requirements

Lack of cohesive planning to ensure sufficient program & administrative staff/infrastructure

Human Resources
Particularly staff recognition & retention, benefits & salaries

Evaluation and Research
Capacity to measure and communicate success
Awareness of trends and changing needs

Addressing Systemic Issues
Need for capacity and leadership development in advocacy

Collaboration and Service Coordination
Partnerships, sharing of resources, expertise, leadership & promising practices

Relevant & Consistent Training & Information Needs

Ongoing Implementation of OSI & Capacity Building Supports
Including a multi-year implementation work plan

Facilitate access to OD Funds
Through provision of information, support for organizational planning, creation of a dedicated pool of funds & continued advocacy for increased funding for infrastructure development

Organizational Development
Facilitate access to peer & one-on-one support from qualified and vetted consultants & leaders in the sector

Enhancement of Human Resources Management & Coordination

Support Capacity & Leadership Development in Advocacy through Training & Networking

Increase Access to Training, Information and Agency Networking Opportunities
Virtual Library, links with existing training, increased opportunities to share info & strategies

To have strong, well governed and managed organizations that support staff to be optimally effective, responsive and accountable to ourselves and the communities we serve.

To clearly assert our value and leadership role in working towards a shared vision for a just and equitable Canada.

To clearly measure and communicate our achievements.

