



Developing a Human Resources Strategy

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IIED

Oxfam GB

Marie Stopes International

World Vision

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Author

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Foreword

Since its inception, People In Aid has been bringing together agencies working in aid and development with the overall aim of improving the management and support of their personnel – people who often face difficult living and working conditions for the sake of others.

This handbook aims to provide some guidance mainly to organisations, which are planning to develop a HR strategy for the first time or reviewing an existing strategy. We hope that it will help you to plan your process and to avoid some of the pitfalls along the way. For those agencies who have already got a HR strategy, we hope that it will help you to think through how to improve on the process that you used last time.

The People In Aid Code of Good Practice suggests that human resource policies benefit the organisation most when staff have been involved in their creation. We would also like to reiterate that for policies to be effective, staff should be briefed or trained in their use and management must ensure that they are implemented and their effects monitored.

About People In Aid

People In Aid is a **global network** of development and humanitarian assistance organisations. We help those organisations, whose goal is the relief of poverty and suffering, to enhance the impact they make through better management and support of staff and volunteers.

The impact and effectiveness of relief and development operations depends upon the quality of staff and volunteers and the support given by an organisation. People In Aid's very practical output can help organisations enhance that quality.

Our Vision, Mission and Values

People In Aid's **vision** is of a world in which organisations work effectively to eradicate poverty and reduce suffering.

Our **mission** is to advocate, support and recognise good practice in the management of people in the humanitarian and development sector worldwide.

We achieve this principally by:

- Engaging and developing good relationships with our members
- Advocating good people management practice - gathering and presenting the evidence that good people management enhances organisational effectiveness through research and publications
- Stimulating and facilitating learning - creating opportunities for members to learn from us and others through conferences workshops and special interest groups worldwide
- Strengthening people management capacity - providing members with access to HR services including diagnostic support from the HR Services Team in People In Aid
- Recognising good practice and certifying achievement – guided by the People In Aid Code of Good Practice and its principles, providing an audit and certification framework, with the aid of the necessary tools and skills, for members to use and be committed to, together with publicly acknowledging the improvements and commitments organisations have made to their people management practices.

We work towards the **values** which reflect those of our members and focus on people. These values inspire us to be open and fair, to encourage creativity and effectiveness and to work with integrity and compassion.

If you would like to find out more about People In Aid and what we do, or if you know someone else who would benefit from our services, then please

Contact us:

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1. Why develop an HR strategy?

During the 1980s there was a move in the corporate sector to link people management with the business strategy. This move had been mirrored in the not for profit sector. Whereas historically the contribution of the HR (or personnel) function was seen as marginal in the development and delivery of the business/organisation strategy, even in the more people-centred not for profit sector, it is now seen by many organisations as central and as constructively contributing to the organisation's development. As a result of this shift in thinking the role of HR has moved away from being reactive and piecemeal to one which is key to the delivery of the organisation's strategy and thus less operational.

As HR has become more strategic there has been increased interest in developing HR strategies which are aligned with the corporate strategy and which ensure the efficient and effective delivery of the strategic goals.

The reasons for developing an HR strategy could include the following:

- It enables the delivery of the corporate strategy
- It is a means of clarifying the role of the HR function and the resources needed to fulfil that role.
- It is a means of clarifying HR's relationship with other parts of the organisation.
- It helps to ensure the effectiveness of the HR function.
- By involving staff in the development of the strategy it allows them to input to the development of the HR function.
- It is a means of communicating what the HR function intends to deliver and how it intends to work
- It provides a basis for measuring the performance of the HR function.

2. What drives the development of an HR strategy?

It is possible that there is a range of different factors, which will drive the need to develop an HR strategy. At any one time there may be one or more of the following bringing pressure to develop such a strategy:

- **The development of a corporate strategy** – will have implications for the development and organisation of the people within the organisation leading to a need to articulate the way in which these HR issues will be addressed and how the organisation's people will deliver the corporate strategy.
- **Chief Executive** – a Chief Executive, who recognises that the development of the people and the organisation are key to the achievement of the organisation's goals, will create the culture where an HR strategy is seen as central and essential.
- **Board of Trustees** – in executing their responsibilities, the board of trustees may recognise that they need to assure themselves that the organisation has the appropriately skilled, experienced and structured staff to ensure the achievement of the organisation's goals. To this end they may require an HR strategy, which describes the goals for staff management and development and describes how these goals are to be achieved.
- **The HR team** – may itself drive the idea of developing an HR strategy, and at the same time highlight the need for an organisation strategy if one does not already exist. This impetus may arise because of the arrival of a new head of HR or other new members of the team.
- **Growth/change** – as an organisation grows and/or changes the need to develop and manage the staff in different ways often becomes a key factor in responding to the growth/changes. At this stage senior managers may recognise the need to be more strategic in the way that staff issues are handled.
- **A crisis** – may highlight the need for the organisation to be more strategic in its approach to HR issues. For example, an expensive employment tribunal, which could have been avoided, may lead to a better understanding of how HR can contribute to the organisation.
- **Staffing issues** – such as high staff turnover or the inability to recruit the right staff, may give the HR function the opportunity to demonstrate how they can make a difference in these areas and lead to developing an HR strategy for the organisation.
- **An external evaluation** – may highlight the need to focus on HR issues, which are impeding the work of the organisation. This may lead to an

internal discussion about how to improve these areas and result in the development of an HR strategy.

- **Donors** – may undertake an evaluation, which results in (or requires) the development of an HR strategy as above. Donors may also be looking for quality assurance indicators in a range of areas including HR and this may prompt an organisation to adopt the People In Aid Code and/or other management frameworks which will require the organisation to take a more strategic view of HR.
- **Value for money** – there is constant pressure on all functions within organisations to show that they are providing value for money. The development of an HR strategy can show what HR plans to achieve, how it will do it, how it will contribute to the organisation's objectives and what resources are needed to implement the strategy. In this way HR can provide measurable objectives and provide justification for its actions and the necessary resources.

3. The role of the HR function

In the past 10 years there has been considerable debate about what roles HR functions should be undertaking and how these are changing to encompass the need for HR to be more strategic.

David Ulrich has led the way in this discussion with his model of HR partnering, which originally included four main HR roles/activities and which he has subsequently redefined with five roles, which are:

1997	2005	Description
Strategic Partner	Strategic Partner	HR partners with line managers in a range of ways: business expert, change agent, strategic HR planner, knowledge manager and consultant/facilitator.
Administrative Expert	Functional Expert	This works on multiple levels: <ul style="list-style-type: none">– creating solutions to routine HR problems– creating menus of choice based on best practice– consulting with and adapting to business needs– setting overall policy and direction for HR practices
Employee Champion	Employee Advocate/ Human Capital Developer	Focuses on the needs of today's employees and on preparing employees to be successful in future
Change Agent	Also Strategic Partner	The Change Agent role has been amalgamated with the Strategic partner role.
	Leader	The HR leader can function in each of the above roles and in addition: <ul style="list-style-type: none">– leads the HR function– collaborates with other functions– enhances the standards for strategic thinking– ensures good corporate governance.

It is argued that adopting the Ulrich model of HR partnering will lead to the restructuring of HR into three specialist areas:

- **Shared services** – a unit that handles routine HR transactions e.g. payroll, advice, absence monitoring. Shared services are customer-focused and the customers are able to specify the level and nature of service that they require. An increasing number of organisations are out-sourcing some of these routine tasks e.g. payroll.
- **Centres of excellence** – small teams with specialist knowledge who try to enhance the organisation through innovations in HR practice e.g. reward strategy, learning.
- **Strategic partners** – people who work closely with the organisation leaders to develop and deliver strategy. Their role is to make sure that the organisation makes best use of its people and has the people with the right qualities to deliver the strategy. An important part of this role is to identify HR issues that managers don't see and to support managers in planning and managing change.

The imperative for making the changes indicated above are:

- The need to reduce costs and for HR to demonstrate its value added.
- The need for organisations to have staff who are skilled, creative, challenging, motivated, flexible and committed, if they are to survive and prosper in the current environment.
- There are increased expectations of what HR can and should deliver to organisations.

Organisations need to determine the roles they need their HR function to perform and what the balance is between those roles. However, care should be taken in interpreting Ulrich's model, as some have found that adopting a more strategic approach has resulted in them moving away from the traditional role of employee champion/employee advocate, sometimes with dire consequences for employee motivation and performance within the organisation.

The process of developing an HR strategy should encourage a discussion of the contribution that HR could make to the delivery of the organisation strategy. The finalisation of the strategy will lead to an agreement on the role that it will play in future and the ways in which it will work.

4. Developing an HR strategy

The UK-based Chartered Institute of Personnel and Development (CIPD) has produced a toolkit for developing an HR strategy, which we gratefully acknowledge, and reference in this section. The toolkit identifies a number of steps, which will lead to the production of an HR strategy. These steps are:

1. Decide who is to be involved and how
2. Define the business strategy
3. Analyse the context
4. Identify business needs
5. Identify key HR issues
6. Develop the strategic framework
7. Define specific HR strategies
8. Assess HR capability and resources required
9. Prepare action plans

4.1 *Decide who is to be involved and how*

Participation is a key value in most INGOs and therefore it is critical to ensure that the development of any strategy, and particularly the HR strategy, involves the right people. This should ensure that the strategy is appropriate to the needs of the organisation and is understood, accepted, resourced and implemented.

A key part of this stage of the process will be ensuring that people understand why an HR strategy is needed, how it will be used and what it aims to achieve. This may require some considerable investment of time in organisations where the potential contribution of HR is not clearly understood.

4.2 *Define the business strategy*

Where HR is proactively involved in the development of the organisation's strategy they are able to influence the decision making around the strategy and to ensure that HR issues are understood, given full consideration and incorporated into the organisation strategy. This approach puts employees and the HR function in a more central position in terms of delivering the organisation goals.

However, it is not always the case that HR people are fully involved and listened to in the development of organisation strategies. Where this does not happen, the implications of the business decisions for the current and future workforce may not be considered or understood. In this case, the HR strategy is more reactive to decisions already made and has to develop approaches that "fit" or "match" the organisation strategy, rather than being an integral part of it.

In ideal circumstances therefore HR staff should be involved in the development of the organisation strategy. Where there is no strategy but the

HR function is anxious to have its own strategy, it will need to gain an understanding of the mission, values and strategic direction of the organisation through conversations and reading documents.

4.3 *Analyse the context*

It is critical to understand the context in which the HR strategy will be developed and implemented. The following questions need to be addressed:

- What are the strengths and weaknesses of the organisation?
- What are the strengths and weaknesses of the current workforce?
- What is the current culture of the organisation? How does it currently support or hinder the work of the organisation?
- What are the strengths and weaknesses of the HR function at the present time?

4.4 *Identify business needs*

This is the critical stage of the process. The organisation strategy should be analysed so as to identify the needs in terms of HR. Although the corporate strategy may be short on detail it is important that the implications of key objectives are thought through. This will include a consideration of:

- Numbers of staff required
- Location of staff
- Types of skills and competencies needed
- Ways of working
- Structures
- Change management needed

4.5 *Identify key HR issues*

The next stage is to identify the key HR issues that will need to be addressed in order to ensure the effective and efficient delivery of the strategy. At this stage, these should be grouped under broad headings such as organisation structure, reward policy, staff development, communication etc.

4.6 *Develop the strategic framework*

Having identified the broad key issues that need to be addressed these can be used as the framework for developing strategic objectives/goals for the HR function. It is important that the strategic objectives are seen to relate directly to the organisation objectives/goals and that they are in themselves interrelated, mutually supporting and consistent. As part of this stage of the process it will be important to determine the priorities for the organisation and the sequence in which the HR strategy will be introduced.

4.7 Define specific HR strategies

At this point, it is helpful to define in greater detail what the specific parts of the HR strategy aim to achieve, how it will meet specific needs, what resources are required and what the priorities and plan for implementation are. This then needs to be communicated, discussed and understood by key people.

4.8 Assess HR capability and resources required

Following the detailed work described above, the HR function needs to understand its own current strengths and weaknesses and to assess what changes need to take place to ensure it can effectively deliver the HR strategy. These changes need to be understood and agreed by senior management. Where additional resources are required but cannot be made available, adjustments may have to be made to the strategies – organisation and HR.

4.9 Prepare action plans

Having had the HR strategy agreed and resourced then the next step is to produce action plans for the implementation of the strategy.

5. Issues to be addressed

In successfully developing and implementing an HR strategy the HR function is likely to have to address a number of issues. These may include:

1. Understanding the HR contribution
2. Getting buy-in
3. Alignment
4. Resourcing
5. Monitoring and evaluation
6. What to include
7. Developing country programme strategies
8. Communication

5.1 *Understanding the HR contribution*

In many INGOs there is a lack of understanding of the contribution that HR can (and does) make. Before starting out on the strategy process, the HR function should be very clear about what it contributes at the present time, what it could contribute in future and the conditions necessary for this contribution to be made. This should then be shared with other staff at all levels – not just those in senior positions.

5.2 *Getting buy-in*

As with all change processes it is important to get buy-in to the process before it starts (though some of the buy-in may come as the process develops). In developing an HR strategy, it is critical to get buy-in from the senior management team but it is also important that line managers and other staff understand and are brought on board. If staff do not understand the purpose of the HR strategy they may be cynical about what it is meant to achieve. It is important to get people on side as early as possible. This is after all the one strategy that directly impinges on the well being of all staff.

5.3 *Alignment*

The literature on HR strategies talks about how the HR strategy must be aligned with the corporate strategy. Where HR is involved in the development of the corporate strategy it is more likely that the HR implications of possible decisions are thought through before the strategy is finalised and HR thinking is integrated within the corporate planning process. However, where HR is not involved in the decision making around the corporate strategy they may then find that they have to produce an HR strategy that “fits” the corporate strategy. This may lead to less than optimal use of the HR resources and be demotivating and frustrating for the HR staff.

Where the organisation does not have a formal organisation strategy the HR staff will need to determine the mission, values and strategic direction through

conversation and reading relevant papers. They may find themselves leading the development of an organisation strategy by default.

In organisations that are producing other sub-strategies e.g. programme strategy, advocacy strategy, there needs to be alignment between those strategies as well. The HR function particularly needs to be kept involved with the development of sub-strategies as they will identify some of the detail of the HR implications of the organisation strategy.

5.4 *Resourcing*

Where there is a good understanding of what HR can contribute to an organisation and how it needs to operate, it is more likely to be able to argue for the resources needed. Where this understanding is lacking it is likely that HR will find it difficult to argue for additional resources and may find it is given low priority. It is important for HR to be able to demonstrate its contribution so that it can argue for resources. The size and nature of the funding of an organisation may also affect the ability of the organisation to allocate resources to HR. Having a strategy that clearly contributes to the organisation strategy and which has measurable outcomes will help to justify requests for additional resources.

5.5 *Monitoring and Evaluation*

One of the problems that is constantly discussed by HR specialists is their lack of hard indicators of their contribution to the organisation. In developing the HR strategy, it will be critical to have some key performance indicators (KPIs) that will measure progress towards both the HR strategy and its contribution to the organisation strategy. Identifying and agreeing these KPIs may need considerable investment of time. The KPIs may include information that is available from the internal management information system but could also include information from staff surveys, benchmarking exercises with other organisations and external quality assurance through standards such as People In Aid and Investors in People.

5.6 *What to include*

The format of the HR strategy should be discussed at the early stages of the development process but may change as the process develops. Some organisations may already have a format that they use for strategies and HR can follow this format amending it where necessary. Where there is no agreed format this will need to be developed and agreed. It is important to remember that there is no fixed format for an HR strategy. The organisation should develop one that meets its own needs. More important than the final document is the process for developing the strategy. Invest time in developing an inclusive process and see it as an opportunity to engage staff and develop their understanding of the contribution that HR can make.

An HR strategy may include:

- A statement of the organisation's vision, mission and values
- A summary of the organisation's strategy
- A vision for the HR function
- A mission statement for the HR function
- A statement of how the HR function will be "expressing" the organisation's values
- The strategic objectives for HR – indicating the links to the organisation strategy
- Key Performance Indicators
- Assumptions/risk analysis on the strategy

The format and content of the HR strategy should:

- Communicate to all staff what the strategy hopes to achieve (and perhaps something about how it will be implemented)
- Guide the HR staff on the priorities for their work
- Give clear performance measures

5.7 Developing country programme strategies

In INGOs there will normally be an organisation-wide HR strategy. It is very important to ensure that country programmes are involved in the development of the overall strategy so that it reflects their issues. Following the development of the overall HR strategy country programmes will normally be expected to develop their own HR strategy. Head Offices should consider what support they need to give to regional offices/country programmes to enable them to develop their own HR strategy, which is not only in line with the overall strategy but also meets their own strategic needs. For their part regional offices/country programmes will need to ensure that the strategy they develop meets their own needs and capacities. The guidelines in this booklet should help in developing the strategy.

5.8 Communication

It will be critical to the success of the HR strategy that all staff understand why it is being developed and what it hopes to achieve. The process for developing the strategy should involve as much participation and consultation as practical and there should be regular feedback to staff on progress.

The final strategy should be "launched" in a manner that gets both understanding and buy-in from all major stakeholders e.g. board, senior management, trade unions, staff associations, line managers, staff. The strategy document itself should be "user friendly", written in non-HR language, easy to understand what is going to be done and how you will know if it has been achieved.

6. Using the People In Aid Code to develop an HR Strategy

6.1 *The People In Aid Code of Good Practice*

The People In Aid Code of Good Practice is an internationally recognised management tool that helps agencies enhance the quality of their human resource management.

The Code provides a comprehensive and sector specific framework relevant to organisations of any shape or size.

As a management framework, it is also an important part of agencies' efforts to improve standards, accountability and transparency amid the challenges of disaster, conflict and poverty.

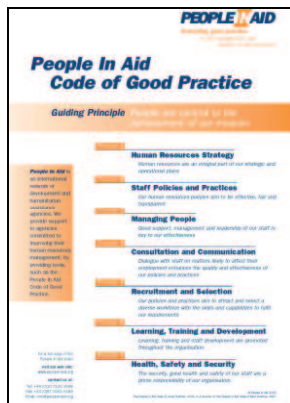
It can be used to:

- plan and develop HR strategy
- monitor and evaluate the implementation of existing human resource policies
- identify where improvements can be made
- demonstrate to key stakeholders that people are central to the achievement of your mission.

It is an ideal tool for helping to develop an HR strategy and many organisations have found the implementation process useful in guiding the development of their own HR strategic framework or action plan.

The Code comprises a guiding principle 'People are central to the achievement of our mission' and seven principles covering the main aspects of human resources management.

Each of the seven principles is elaborated by a number of indicators, which can help organisations identify the areas in which they might need to concentrate performance improvement activities.



Guiding Principle

People are central to the achievement of our mission

Principle 1: Human Resources strategy

Human resources are an integral part of our strategic and operational plans

Principle 2: Staff Policies and Practices

Our human resources policies aim to be effective, fair and transparent

Principle 3: Managing People

Good support, management and leadership of our staff is key to our effectiveness

Principle 4: Consultation and Communication

Dialogue with staff on matters likely to affect their employment enhances the quality and effectiveness of our policies and practices

Principle 5: Recruitment and Selection

Our policies and practices aim to attract and select a diverse workforce with the skills and capabilities to fulfil our requirements

Principle 6: Learning, Training and Development

Learning, training and staff development are promoted throughout the organisation

Principle 7: Health, Safety and Security

The security, good health and safety of our staff are a prime responsibility of our organisation.

Taking the implementation process (below) as a guide, the four key stages equate to the steps one might take to develop an HR strategy.

Beginning with **commitment** and buy-in from key stakeholders to embark on the process of developing a strategy, the next step would be to **engage with stakeholders** (internal and external where appropriate) in order to **define gaps, prioritise key areas** in order to **implement improvements**. Equally, a review of opportunities and threats would be in order. Once done, the information gathered is analysed and prioritised and reported back to and **discussed with stakeholders**. Those priorities form the basis of an **action plan**, which is in effect a strategy, and addressing the actions (implementing the strategy) might span over two or three years.

6.2 Brief summary of the People In Aid Code implementation process

A detailed explanation of implementation can be viewed on our website <http://www.peopleinaid.org/code/implementation.aspx> or downloaded in the form of a free implementation manual <http://www.peopleinaid.org/pool/files/code/implementation-manual.pdf>

Implementing the People In Aid Code is based on a process of social audit. Agencies that formally commit to implementing the Code are recognised as being 'Committed to the People In Aid Code', by People In Aid.

Implementation itself is evaluated through an independent assurance process, enabling successful agencies to gain the second Quality Mark and be 'Verified compliant with the People In Aid Code'

The implementation process is a continuous cycle and has four key stages:



1. Commitment, entailing scoping the implementation process; planning for reviewing organisational practices; ensuring senior management commitment and securing adequate resources for the implementation process.
2. Stakeholder engagement, involving reviewing organisational practices, consulting with stakeholders to identify key issues, reviewing findings and generating an action plan. The Principles and Indicators of the People In Aid Code provide a framework for the dialogue, review, and analysis, and from this targets for improvement are set.
3. Reporting and auditing, entailing the preparation of a full report on how the organisation has performed against the Code and an action plan, which acts as the basis for an independent external audit, and ultimately, verification by People In Aid.
4. Continuous Improvement, where the organisation implements its action plan, monitors achievements against objectives, and continues the social audit process in accordance with the audit cycle.

Full support is available to implementing agencies from People In Aid www.peopleinaid.org or email info@peopleinaid.org

7. Frequently Asked Questions

1. How can I convince my colleagues that it is worthwhile spending time developing an HR strategy?

- Ensure that you and your HR colleagues are clear about what an HR strategy can achieve for the organisation, how it will be developed, what it will look like when finished and how it will be used.
- Convince a few major players in the organisation, including at least one member of the senior management team, preferably the Chief Executive who will act as champions.
- Set up a cross-organisation steering group to guide the development of the HR strategy.
- Develop a plan for communication and consultation about the strategy. This is the strategy that affects all staff and volunteers and their understanding and buy-in is critical.
- Undertake a staff survey and/or focus groups to understand what is important to staff and volunteers.
- Understand the current strengths and weaknesses of the HR function and also how others in the organisation perceive the function.
- Decide how you can improve your performance, dispel the myths and convince people of your contribution.

2. How do we get staff to understand what HR does and how it can contribute to the development of the organisation?

- Be clear yourselves about what HR can contribute and how it does/could do this.
- Communicate your role to staff, possibly using discussion groups etc so as to get feedback from staff.
- Involve staff in the development of the HR strategy, individual policies and procedures and HR plans.
- Publicise new policies, procedures etc
- Share your annual plans with staff.
- Be prepared to spend time with groups or individuals explaining your role and how you want to work with managers and staff.
- Be flexible in what you deliver and how you do it so as to encourage staff to see the HR function as supportive and available.
- When you have been involved in a situation where you could have given more help if you had been called in earlier, discuss this with staff after having helped to resolve the issue.
- Look for quick wins or visible actions that will demonstrate how you can contribute to the organisation and the individuals in it.
- Be seen to deliver.

3. How do we get line managers to understand their role and how we can support them in carrying it out?

- Does your organisation have a view of what the role of a line manager is? If not then this needs to be developed through a participative process.
- The Staff Handbook should include a description of the role of the line manager.
- Job descriptions should clearly state the responsibilities of the line manager.
- Person specifications should be clear about the skills and experience needed to be a line manager.
- The induction and management development programme should help line managers understand their role.
- Ensure that the HR staff have a clear view of their role in relation to line managers.
- All HR policies and procedures should be clear about the roles of the different parties including the role of HR and the line manager.
- There should be regular training and updating for managers on new and existing HR policies and procedures.
- Appraisals should focus on the line management responsibilities of managers as well as their functional management responsibilities.
- Where 360-degree feedback is used as part of the appraisal process HR should be asked to contribute to the feedback on line managers.
- HR staff should understand the work of the organisation and be able to “speak the language” if they are to be able to communicate with and support line managers effectively.
- Line management should be seen as something that the organisation values and rewards (not only through money).

4. In developing our HR strategy how do we ensure consistency, equity and fairness across the whole organisation while remaining sensitive to legal and cultural differences in our different offices across the world?

- Work with stakeholders from across the organisation to develop the strategy.
- Develop a set of standards for HR policies and procedures, which are in line with the values of the organisation.
- Each country office/regional office should develop their own plans, policies and procedures to meet their local circumstances but in line with the set standards.
- Ensure that each location has the necessary HR skills and expertise to be able to develop the policies and procedures and to implement them in line with the overall strategy.
- Ensure that there is adequate support and training for both HR and other staff.

- Having regular contact (including some face-to-face contact) across the various HR functions will encourage sharing and shared learning and lead to greater consistency and adherence to the standards.
- Seconding staff to different parts of the organisation can help to develop consistency.
- Seconding operational staff to HR can develop their HR understanding and skills while at the same time helping HR to better understand programming issues.

5. How do you monitor and evaluate an HR strategy?

- It is critical to set up the monitoring and evaluation framework for the HR strategy at the time of developing the strategy.
- The strategy should be written in such a way that it allows information to be collected to monitor progress against the objectives.
- The strategy should contain a limited number of key performance indicators – monitoring these will give a clear view of the progress of the strategy.
- The systems for collecting information for monitoring the strategy should be set up at the beginning of the implementation process.
- In addition organisations can benchmark themselves against other organisations (inside or outside the sector) perhaps using People Count (see references) as part of this process.
- External accreditation through People In Aid or other management standards can also provide evidence of achievement of standards.
- Staff surveys, exit interviews, complaints/grievance processes can also provide evidence of progress, or otherwise, towards the strategic HR goals.
- Staff should be involved in the monitoring and evaluation processes.
- It is important for the credibility of the HR function to show that it is accountable to all its stakeholders i.e. all staff, volunteers and trustees so the monitoring and evaluation outcomes should be shared as widely as possible.
- Finally the HR function itself needs to monitor and evaluate its work to ensure that it is achieving its goals, focusing on the priorities of the organisation, making best use of its resources and constantly seeking new ways to improve its performance.

8. Dos and Don'ts of HR strategy

Output from the plenary session on a previous People In Aid Workshop

Do

- get the operational side of HR right before attempting to move on to the strategic work
- create ownership within the organisation – particularly with management.
- understand the politics of the organisation.
- use a consultative process for developing the strategy.
- make clear the links between the organisation strategy and the HR strategy.
- communicate regularly about the purpose, process and progress on the strategy.
- be realistic about your ability to deliver and about the resource implications.
- identify and deliver your quick wins.
- finally get something out – even if it is not perfect. Just make sure it is “good enough”.

Don't

1. do it in isolation from the organisation.
2. do it yourself.
3. take total responsibility and ownership – it has to be a shared effort.
4. set unrealistic objectives.
5. just focus on the written output – the process is at least as important.
6. forget to cost it.
7. think of it as something separate or stand-alone – it has to be part of the whole organisation development plan.
8. do it if you don't need to. (Some organisations have HR and organisation development as part of their organisation strategy. In this case the next step is to produce an HR implementation plan not a separate strategy.)
9. be afraid to take risks and to move on from where you are.

9. Resources – further reading

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Ulrich, D. and Brockbank, W. 16 June 2005. Role call. *People Management*.. pp24-28.
<http://www.peoplemanagement.co.uk/pm/archive/2005-06/rolecall>
(Needs log in details)

Useful websites and publications

Chartered Institute of Personnel and Development
www.cipd.co.uk

CIPD's Change Agenda - The Changing HR Function - the key questions
http://www.cipd.co.uk/subjects/hrpract/general/_chnghrkyqs.htm

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Quality in Management. May 2004. *People In Aid*.
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10. Appendices

Appendix 1: Framing HR Strategy

Slide 1



PEOPLEINAID®

Strategy = ?

Strategy = 'a plan designed to achieve a particular long-term aim'
'Road Map'

Strategic = 'forming part of the long term plan'

HR Strategy includes:


- Choosing what to do and choosing what not to do
- Knowing what the organisation *stands for*, where it is *going*, where it is *now*, and how it is *doing*

HR strategies may look different in different organisations
Process and speed of development?

HR strategies change; things may get missed

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Slide 2



PEOPLEINAID®

Core Areas of Strategy

1. Strategic Analysis – analysis of the environment, opportunities, mission and objectives
2. Strategy Development – strategic options have to be developed and then selected
3. Strategy Implementation – selected options have to be planned and implemented

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Slide 3



Drivers for the development of HR Strategy include:

- ✓ Corporate strategy, or new strategic directions
- ✓ Growth / organisational change
- ✓ External change
- ✓ Organisational performance
- ✓ Donors
- ✓ Chief Executive
- ✓ Crisis
- ✓ Staffing issues

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Slide 4





Approaches to developing strategy

The bird approach

Start with your environment – scan it for opportunities to seize upon, trying to make the best of what you find.

You resemble a bird, searching for a branch to roost on in a large tree. You see more opportunities than you can make use of – the whole forest, many trees, and many branches.

You cannot stay up in the air for ever, and your decision may be arbitrary, and may be risky.

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Slide 5



Approaches to developing strategy

The squirrel approach

Start with your organisation and what you do best – where you are at with the skills and the experience that you have.


In this approach you resemble a squirrel climbing that same large tree. This time you are starting from the trunk, from familiar territory, working your way up cautiously, deciding on the branch that suits you best at each fork.

You only have a few alternatives to choose from at a time – but your decision, because it is made on a limited number of options, is likely to be informed and less risky.

The bird makes single big decisions, the squirrel makes many small ones. The squirrel may never become aware of some of the opportunities that the bird sees, but he is more likely to know where he is going in the near future.

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Slide 6



What is HR's role in the organisation?

- What is special about HR's role in INGOs?
- Role is not to take over people management from line managers
- Current use of Ulrich model & 'HR partnering'?

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Slide 7



Slide 8

PEOPLEINAID®

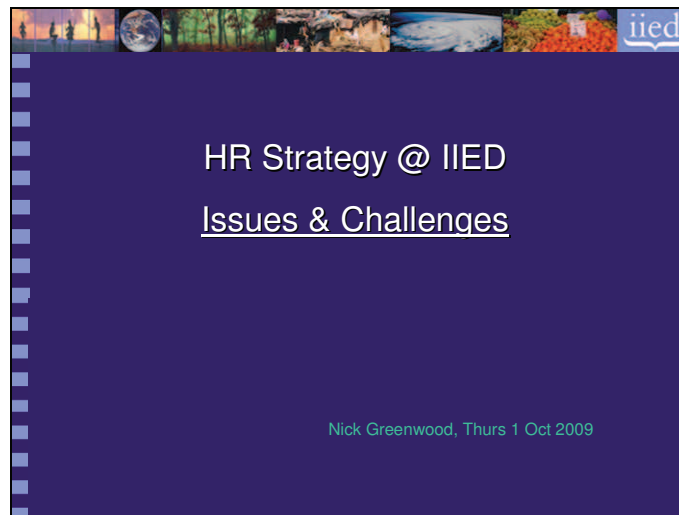
Some questions that we respond to in HR Strategy

- What skills do our people need to deliver the organisational goals?
- Can we develop the skills of the people we have?
- If we need to attract...how and from where do we attract people?
- How do we want to assess and measure the performance of our people?
- How do we want to reward them?
- How do we want to continue to develop them?

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Appendix 2: HR Strategy at IIED: Issues & Challenges

Slide 1



HR Strategy @ IIED
Issues & Challenges

Nick Greenwood, Thurs 1 Oct 2009

The slide features a dark blue background with a decorative border of small white squares on the left side. At the top, there is a horizontal strip of six small images: a sunset, a globe, a forest, a cityscape, a blue sky, and a field of orange flowers. The IIED logo is in the top right corner.

Slide 2



About IIED

- Policy research institute: sustainable development
- 83 staff (70 FTE), mainly in London
- Work with partners on “policy that works” from “global to local”
- Participation, decentralisation and “bottom-up” processes
- 2008-09: Strategy process – new 5-year Strategic Plan; teams organised around objectives

The slide features a dark blue background with a decorative border of small white squares on the left side. At the top, there is a horizontal strip of six small images: a sunset, a globe, a forest, a cityscape, a blue sky, and a field of orange flowers. The IIED logo is in the top right corner.

Slide 3



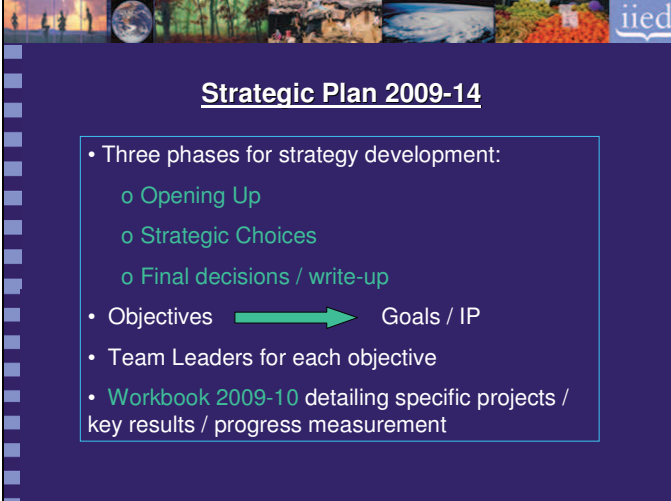
The slide features a header with a collage of images (sunset, globe, forest, city, landscape, autumn leaves) and the 'iied' logo. The main content is on a dark blue background with a light blue box for goals and a light green box for institutional priorities.

Strategic Plan 2009-14

Goal 1: Tackling the resource squeeze
Goal 2: Climate Change
Goal 3: Cities for People and Planet
Goal 4: Shaping responsible markets

Institutional Priority 5: Communicating & Influencing
Institutional Priority 6: Governance
Institutional Priority 7: Investing in institutional performance

Slide 4

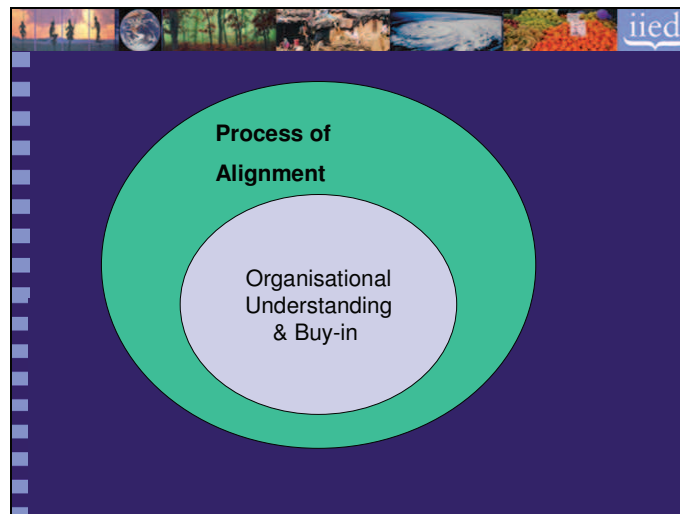


The slide features a header with a collage of images (sunset, globe, forest, city, landscape, autumn leaves) and the 'iied' logo. The main content is on a dark blue background with a light blue box for strategy development phases.

Strategic Plan 2009-14

- Three phases for strategy development:
 - Opening Up
 - Strategic Choices
 - Final decisions / write-up
- Objectives → Goals / IP
- Team Leaders for each objective
- Workbook 2009-10 detailing specific projects / key results / progress measurement

Slide 5




Slide 6

The slide content is presented on a dark blue background. At the top, there is a horizontal strip of small images including a sunset, a globe, a forest, a city, a landscape, and a group of people, followed by the 'iied' logo. A vertical strip of small squares runs down the left side of the slide. The main content is organized into two steps:

STEP 1:
Clarity, understanding & commitment to Institute's mission, vision and values
HR's role in developing, demonstrating and defending org values

STEP 2:
Understand the organisational culture(s)
HR's role in shaping org culture

Slide 7



STEP 3:

Build, demonstrate and market the strategic importance of the HR function:

- Role of Head of HR
- Role of HR within organisation; importance of line managers
- Build trust, respect, integrity
- Demonstrate impact/value-added through operations
- Attend departmental meetings etc.
- Grasp nettles, even if they sting
- Employee Survey

Slide 8



STEP 4

Input into the strategic planning process & spotting strategic 'entry points':

- Understand Drivers, Choices, Priorities
- Share in the "top-down, bottom-up" conversations & dilemmas
- Understand where HR can drive change / shape org climate
- Promoting exchanges on potential role of HR to help deliver strategy in 'reactive' way
- 'HR-branded' inputs outside HR Strategy

Slide 9



Slide 9 features a dark blue background with a decorative header bar at the top containing a series of small images (sunset, globe, forest, city, landscape, autumn leaves) and the 'iied' logo on the right. A vertical column of small blue squares runs down the left side of the slide content area.

STEP 5

- Build HR Strategy with clear priorities, 'what success will look like', links to rest of strategy
- Use "Institute language"
- Analyse & ensure alignment within overall HR Strategy

Slide 10



Slide 10 features a dark blue background with a decorative header bar at the top containing a series of small images (sunset, globe, forest, city, landscape, autumn leaves) and the 'iied' logo on the right. A vertical column of small blue squares runs down the left side of the slide content area.


STEP 6:

Communicate, Consult and Engage

- Open presentations
- Union engagement
- Individual meetings
- Internal Newsletter
- Departmental agendas
- Management Team agenda

Make the strategy an iterative process

Slide 11



STEP 7:

Monitor and Evaluate

- Use of Metrics – Employee / Pulse Survey
- Internal interrogation
 - Peer Review
 - Management Team
 - Board of Trustees
- External interrogation
 - Donors
 - Action learning set
 - Benchmarking

This image shows a single sheet of white paper with horizontal blue ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

Appendix 3: HR Strategy at Oxfam

Slide 1



Slide 2



Slide 3



Slide 4



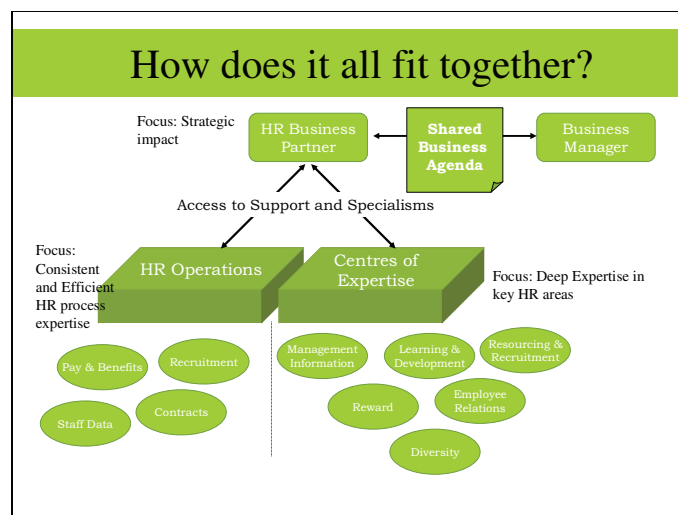
Slide 5

Our People

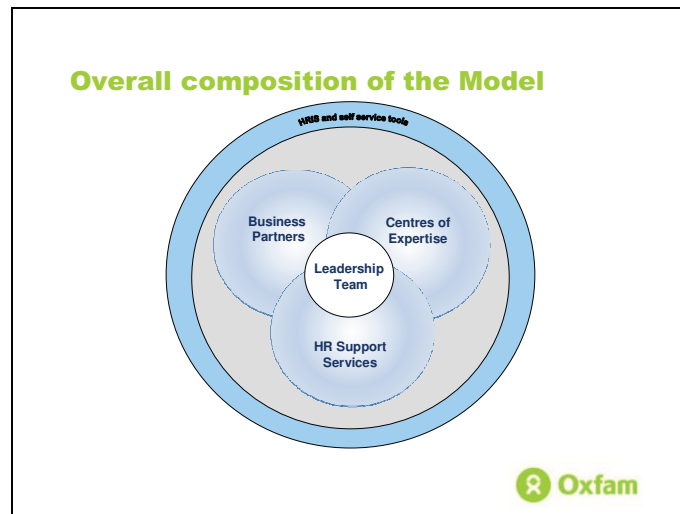


We will focus on delivery through embedding effective people management and developing our skills and approach to project management, planning and processes.

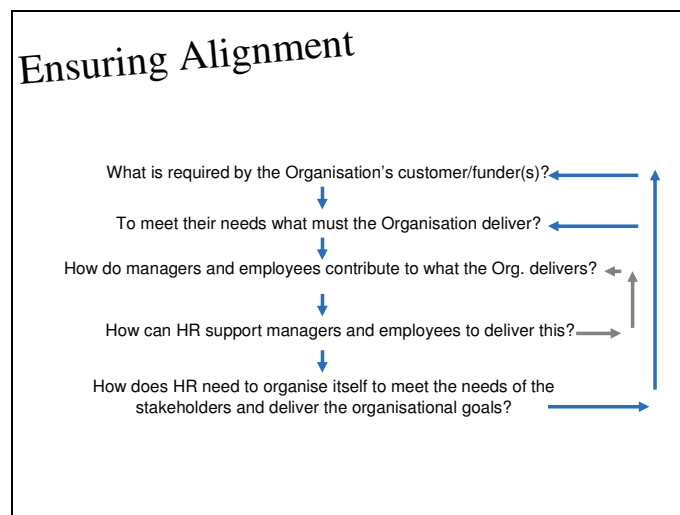
Slide 6



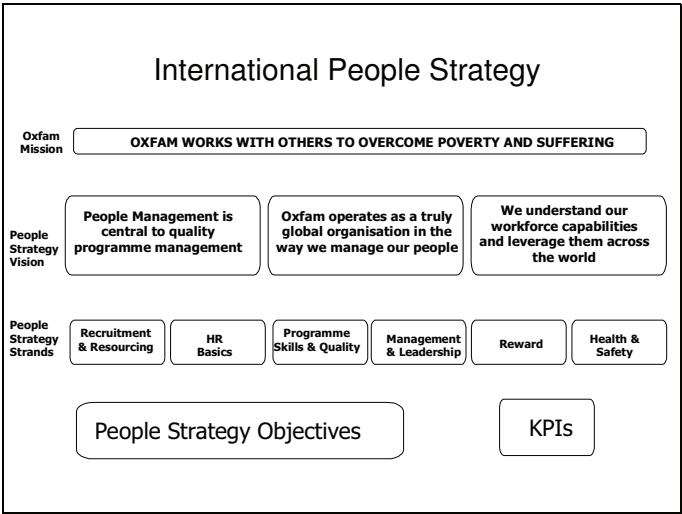
Slide 7



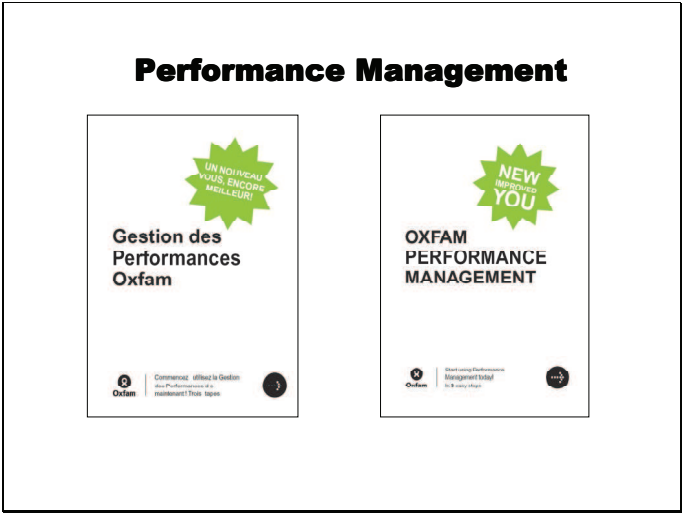
Slide 8



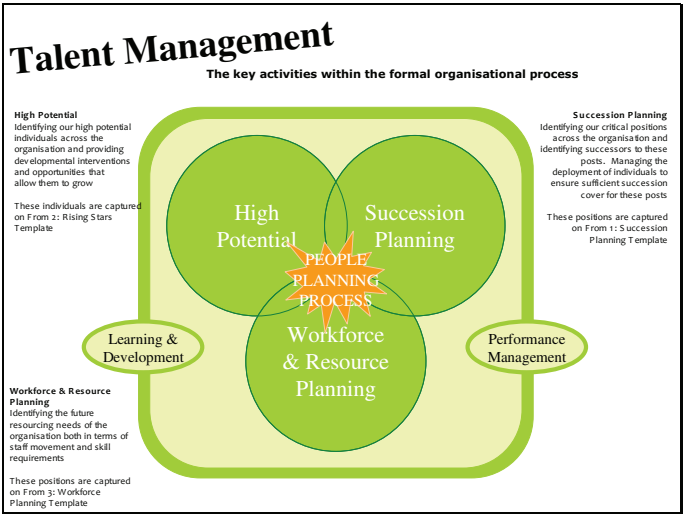
Slide 9



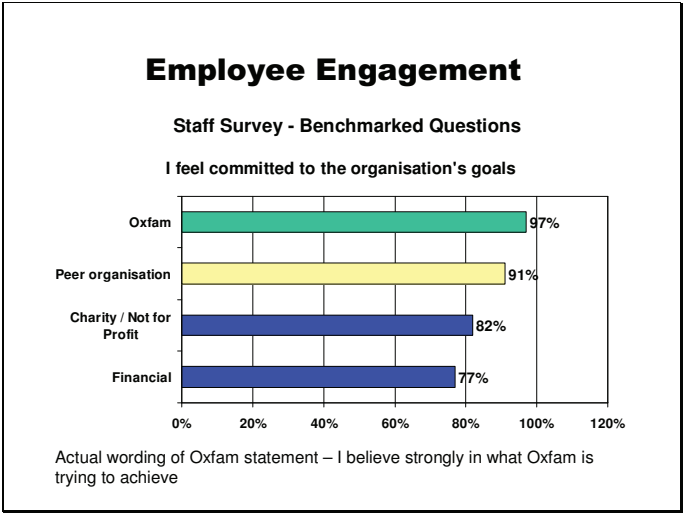
Slide 10



Slide 11



Slide 12



Slide 13

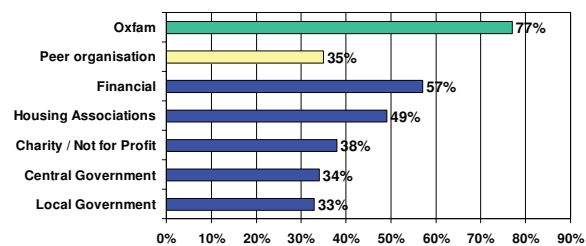
Engaging Employees through Communications

- Cascade briefing x
- Emails/intranet x
- Interactive “Have Your Say” blogs ✓
- Barbara’s letter ✓✓
- Visits/secondments/projects ✓✓✓

Slide 14

Staff Survey - Benchmarked Questions

Senior management provide effective leadership




Actual wording of Oxfam statement – I find that the managers at the top of Oxfam are clear on what they want to achieve

HRD's Lessons/Top Tips


1. Keep it simple – and never let up on the basics
2. Don't keep changing with HR fads and fashions – if it's good enough stick with it
3. Remember that empowerment and accountability are 2 sides of the same coin
4. Be clear what must be managed tightly (non-negotiables) and what can be more flexible
5. Think about how much diversity of management style is acceptable – how much risk are you prepared to take?

Appendix 4: The People In Aid Code & HR Strategy

Slide 1



The People In Aid Code & HR Strategy



www.peopleinaid.org

Slide 2



Who are we?

*People In Aid's vision is one of a world in which **organisations work effectively** to eradicate poverty and reduce suffering.*

- Created by NGOs, for NGOs; responding to sector need
- A global, not for profit, HR network of more than 150 agencies working in the international development and humanitarian sector.
- We help organisations increase their impact through better people management and support.



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Slide 3

PEOPLEIN AID®

People In Aid - our focus

- 1) Advocacy / promotion of good practice
- 2) Strengthen people management capacity
- 3) Facilitate & stimulate learning
- 4) Recognise achievement of good practice

→ Global operations; Regional presence
UK/ Europe, USA, Central America, East & Horn of Africa, Australia / Asia Pacific

→ Working through partnership

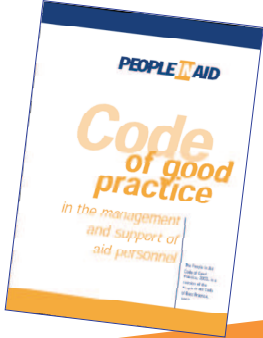
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Slide 4

PEOPLEIN AID®

The People In Aid Code of Good Practice

An internationally recognised management tool.



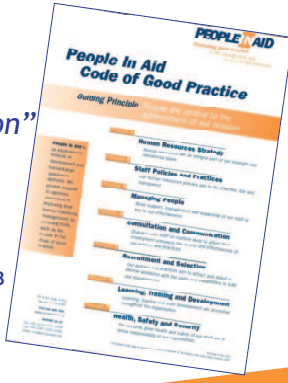
www.peopleinaid.or

Slide 5

PEOPLEIN AID®

“People are central to the achievement of our mission”

Guiding Principle
People In Aid Code of Good Practice, 2003



www.peopleinaid.or

Slide 6

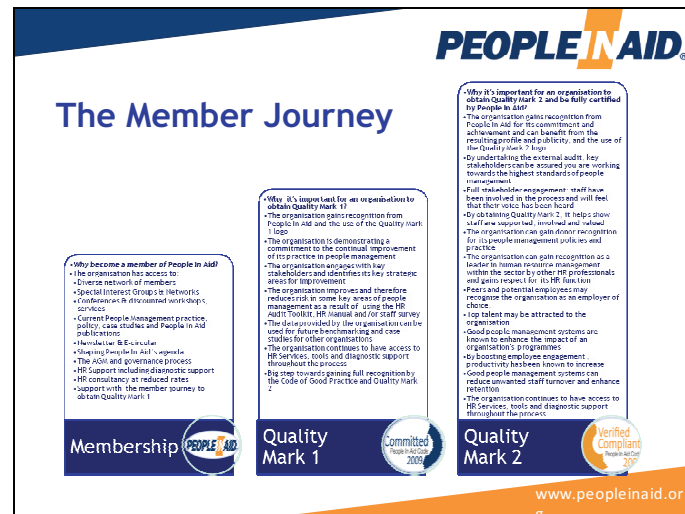
PEOPLEIN AID®

The Code of Good Practice

- Principle 1: Human Resources Strategy
- Principle 2: Staff Policies and Practices
- Principle 3: Managing People
- Principle 4: Consultation and Communication
- Principle 5: Recruitment & Selection
- Principle 6: Learning, Training & Development
- Principle 7: Health, Safety & Security

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Slide 7



Slide 8

PEOPLE IN AID

Membership

Why become a member of People In Aid?

Access to:

- Diverse network
- Special Interest Groups & Networks
- Conferences & discounted workshops, services
- Current People Management practice, policy, case studies and People In Aid publications
- Newsletter & E-circular
- Shaping People In Aid's agenda
- HR consultancy support at reduced rates
- Support with the member journey to obtain Quality Mark 1

PEOPLE IN AID

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Slide 9



PEOPLEINAID®

Membership

Types of membership

- Full
- Associate
- Partner
- Associate


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Slide 10



PEOPLEINAID®

Certification - recognising good people management practice


Organisations can be accredited by People In Aid, through a two-stage quality mark process:

Quality Mark 1 - “Committed to the People In Aid Code”

Quality Mark 2 - “Verified compliant with the People In Aid Code”



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Slide 11



Quality Mark 1

- Public commitment to the Code of Good Practice & two of the following:
 - HR Manual
 - HR Audit
 - Employee Survey



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Slide 12



Quality Mark 2

Two ways to full certification:

- Using existing systems & practices
- Using the Implementation Manual and producing a report

Both ways are externally verified



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Slide 13




Why do people stay or go?

Reasons for leaving	Changes to persuade longer service
Better pay and terms elsewhere	Better pay and terms and conditions
Poor leadership values and culture	Better leadership
Lack of career opportunities and growth	Career paths and better prof. development
Burnout, disillusionment, frustration	Better work life balance

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Slide 14

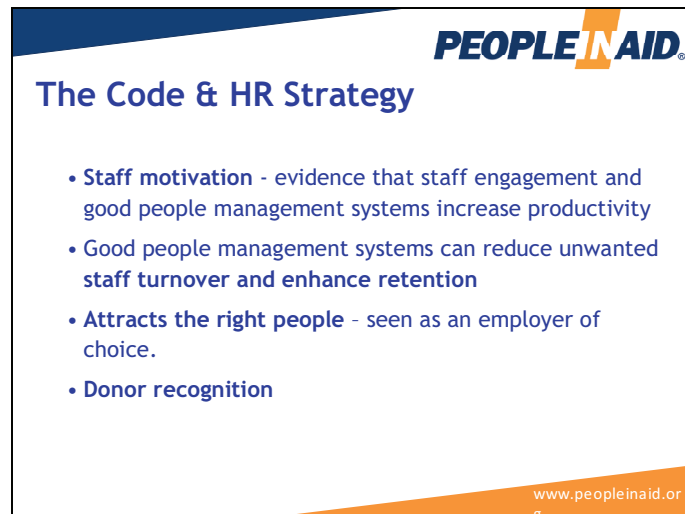


The Code & HR Strategy



Some examples.....

- **Certification** - recognition for commitment & achievement
- **Staff have engaged** and are supported, involved and valued
- **Assessment tool** - HR Audit & Employee Survey
- Working towards the **highest standards of people management**

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This image shows a single sheet of white paper with horizontal blue ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

Appendix 5: Case study – World Vision, Nairobi October 2008



Africa People & Culture:



FY09-11 Priorities

for

Building World Class People
Capability
Across World Vision Africa

WV Africa People & Culture

September 2008



Critical Organizational “People” Challenges

<p>No Partnership wide <u>LEADERSHIP</u> strategy:</p> <ul style="list-style-type: none">▪ Shallow succession pools▪ No integrated management/leadership development▪ No cohesive talent identification process▪ Poor ‘culture / DNA’ reinforcement in leaders▪ Subjective, non-credible senior appointments
<p>Inconsistent drivers on <u>ENGAGEMENT</u>:</p> <ul style="list-style-type: none">▪ Incongruity in values and practice (valuing people vs. ‘chew up, spit out’)▪ Pressing employee well-being needs▪ Highly variable contractual / benefit arrangements
<p>Lack of enablers & strategies developing <u>ACCOUNTABILITY</u>:</p> <ul style="list-style-type: none">▪ Poor accountability for performance / follow-through▪ Culture of poor consequence management▪ HR tools / systems do not support the front line in managing performance
<p>Lack of Partnership wide <u>DEPTH OF TALENT</u>:</p> <ul style="list-style-type: none">▪ Poor workforce planning▪ Shallow talent pools▪ Lack of competitiveness in attracting in key markets▪ Gender/diversity goals not reached despite activity▪ Lack of global focus on talent – top 200▪ Lack of coordination of development, career and learning

Our people challenges are deep and wide. We need to act now.

Hackett: An External View of WV HR

World Vision

People&Culture
creating value through people

Hackett Findings:

- World Vision **does not have a scalable HR Service Delivery Model** in place today
- More than 80% of Stakeholders perceive HR's involvement in traditional HR services as **Reactive, Limited, or Not involved**
- Almost 66% of **HR FTEs are focused on transactional activities** and staffing services **compared to 49% for World Class**
- **Only 16% of data management is automated** compared to 29% for Peer and 61% for World Class
- At \$999 per employee, **Total HR investments are significantly lower** for the in-scope processes than Peer or World Class suggesting substantial underinvestment

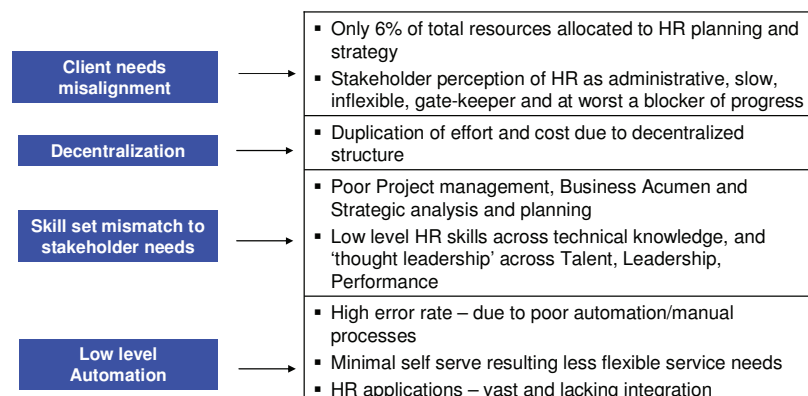
Source: Hackett Group, 2007

2

Our Delivery Model is Ineffective

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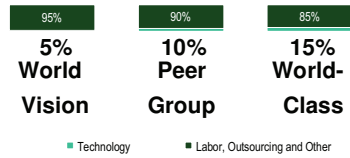
Source: Hackett Group, 2007

World Vision HR Technology Investment is Significantly Low Against Peer and World Class Companies

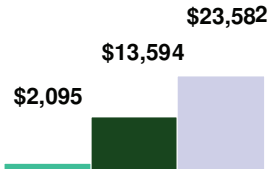
World Vision

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creating value through people

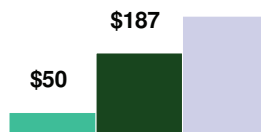
Technology Cost as a % of Total HR Cost (includes salaries and other costs)



Technology Cost (\$) per FTE



Technology Cost (\$) per Employee



WV Africa's staff strength has TRIPLE in the past decade. In the same period, investment in our People and HR has stood still / gone backwards.

Source: Hackett Group, 2007

4

People Solutions to Critical Organizational "People" Challenges

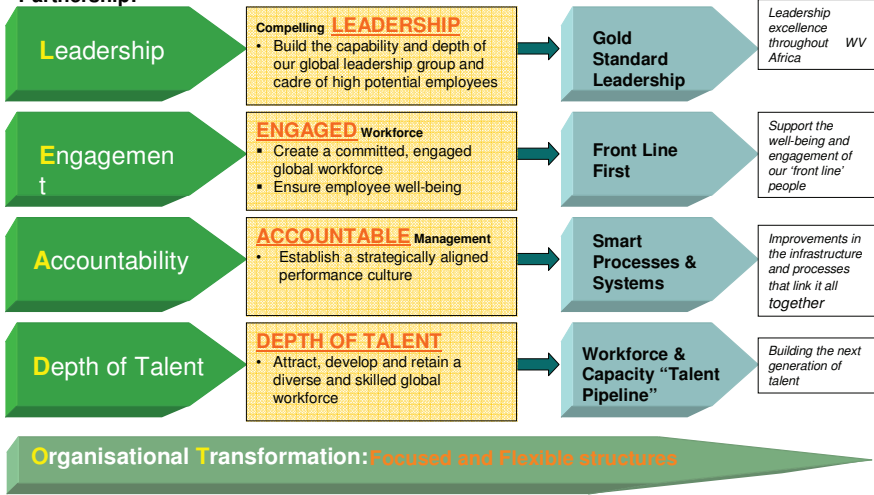
World Vision

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We have identified the following strategic priorities for the Partnership:

Four Broad Strategic Priorities

These lead to the next steps of priority action:



5

Leadership

World Vision

People & Culture
creating value through people

Gold Standard Leadership

Leadership Excellence throughout World Vision Africa

Building leadership capability across World Vision is critical and fundamental to our mission: it is also probably our largest deficit.

Global P&C focus will be:

- **Identifying and selecting** emerging management and leadership talent
- Implementing stepped **management development strategies** aligned to key career points
- Using **leadership development** to preserve World Vision's 'story' and reinforce our cultural 'DNA'

Africa's specific interventions / priorities for FY09-11 will be to:

- Establish Regional Leadership & Talent Development Unit
- Establish coordination of existing leadership and technical capacity building programmes
- Establish succession planning process & talent pools
- Establish senior leadership development programmes (for various levels of leaders eg. Upscaling TEAL, programmes for NDs and regional leadership)
- Align with global leadership development priorities

6

Engagement

This must be our priority – ensuring that our people systems work where it counts most.

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creating value through people

Front Line First

Support the well-being and engagement of our 'front line' people who are WV's face, hands, heart. They are also the group we are in most danger of taking for granted.

Global P&C focus will be:

- **Equipping and enabling** our staff (preparation, skills, etc)
- Intentionally promoting **well-being and engagement** (refreshment / renewal of staff / families; work / life integration strategies)
- Upgrading existing front-line **HR processes / systems / tools**
- Enhancing HR **service delivery and capacity**
- **Stimulating innovation** from the front-line

Africa's specific interventions / priorities for FY09-11 will be:

- Upscale SALT I to provide a more holistic Africa-wide staff wellbeing solution (SALT I Integration project)
- Increase Crisis Incidence Situation Management capacity
- Develop model for staff retention in hardship countries
- Design and implement new service delivery model - HR Business Partnering model – includes developing business partnering skills in P&C staff (Lift up the bench strength of HR)
- Conduct Staff Opinion Surveys that have clear management / leadership accountabilities
- Harmonising regional HR policies
- Equip front line staff and managers in basic people management skills and processes.

7

Accountability

Without measuring how we are tracking, the effectiveness of our efforts will not be clear

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People & Culture
creating value through people

Smart Processes & Systems

Improvements in the infrastructure and processes that link it all together. Our focus on accountability, initially, will be on three fundamental drivers:

Global P&C focus will be:

Performance & Reward Management

- Seeking **strategic alignment** (balanced scorecard)
- Providing **simple performance tools and processes**, with accessible training and guidance
- **Monitoring follow-up action** and consequence management
- Reinforcing with **sensible pay and reward processes**

HR Systems

- Will require several years of build and investment to get to a stage that will adequately support our strategy
- Global IT and Global HR will joint venture to **begin this build, with small steps and adaptation** of current systems at first, leading to a **more integrated end-game over time**
- Begin move to new Operating Model

HR Metrics

- We will focus on a **few critical metrics**: those things that evidence tells us provide genuine leverage
- We will also ensure that **key initiatives are anchored** to human capital impact rationales.
- Our goal will be to provide a **quarterly review** of how we are tracking against our strategy.

Africa's FY09-11 focus will be:

Performance & Reward Mgt

- Establish Performance & reward mgt unit
- Establish Africa P&C balanced scorecard
- Establish & conduct Africa-wide salary surveys – especially for leadership positions
- Establish competitive pay plans for all categories of staff
- Implement HAY Job grading & pricing at RO & NO levels
- Complete CFP roll-out and build capacity to enforce consequence management.

HR Systems

- Procure Africa HRIS system that can serve both Region and NOs
- Develop P&C knowledge databases eg. Africa P&C Team Room

HR Metrics

- Determine with NOs those few critical metrics that can be measured to provide evidence of improvement.

8

Depth of Talent

Workforce & Capacity : Find, Get, Grow.....

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creating value through people

“Talent Pipeline” - Building the next generation of talent

If there is a ‘war for talent’, then World Vision is fighting on all fronts. To ‘win’ this war, we need to:

Global P&C focus:

- develop a **‘talent mindset’**: a passionate belief that great talent is essential and every leader committed to that goal
- craft a winning **employee value proposition**, globally: a distinctive, attractive and competitive reason that draws people to World Vision and makes them want to stay
- pursue a **targeted recruiting** strategy: identify new markets and sources of talent, recruit ahead of plan, inject new skills and perspectives, remove barriers to mobility
- create **systematic and pervasive development** opportunities: build clear career pathways and stretch opportunities; remove barriers to mobility; increase feedback and institutionalize mentoring, supplement with focused training.

Africa's specific interventions / priorities for FY09-11 will be:

- Identify new recruitment pools for talent / human resources in WV non-presence countries in West Africa.
- Conduct capacity assessments to understand the gaps of skills / competences and design solutions.
- Institutionalise strategic workforce planning (including development of key talent pools)
- Revamp regional orientation of employees to WV values, culture, story
- Establish HR and Change Management certification programmes.

We need to creatively strengthen the way we deepen our talent reserves.

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Organisational Transformation:

World Vision

People & Culture
creating value through people

The LEAD Strategy will need to be supported by a parallel review of our organisational and functional structures, if it is to have the desired impact.

Global P&C focus:

- Build organisational transformation capacity in the partnership.
- Develop change management tools and processes
- Build in change management in global initiatives from design stage through to implementation.
- Policy reviews

Africa's specific interventions / priorities for FY09-11 will be:

- Build organisational transformation capacity in the Region and NOs
- Provide change management tools and simple processes.
- Provide technical assistance in conducting organisational reviews and designing new structures that will support growth experienced by NOs.
- Support the Regional Office and NO redesign process.
- Support implementation / roll out of policy changes and new policies (eg. I&RR)
- Implementation of Regional Support Services Units
- Harmonise regional HR policies

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Reality Check

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The global direction has been given and the plan is in place.

The regional priorities are firming.

Our regional team is coming together to deliver and action planning underway.

People & Culture are now taking the LEAD.....

But how serious are we?

Do we *really* want a strategic HR response that cuts through and transforms?

If so, we need to confront some fundamental realities around:

1. Investment
2. Structure / Influence
3. Functional Reporting Line
4. Executive Leadership & Decision-Making
5. Orthodoxies

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FY09-11 Costs to deliver our agenda????

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- HRIS and HR Knowledge databases – \$ 90,000
- Regl support for RO/NO organisational reviews & policy implementation – \$ 90,000
- Salary surveys driven by the region – \$150,000
- Staff Opinion surveys – \$150,000
- SALTl Integration (regional support) – \$ 25,000
- HAY Implementation (\$4,000 per NO) – \$100,000
- West Africa Recruitment Networking project – \$ 25,000
- Conducting capacity assessment (WAA Pilot) technical support – \$ 20,000
- Staffing (regional technical and project coordination staff - 6) – \$850,000
- Strategic Capacity Building: (*Use Train-of-Trainer approach as much as possible*)
 - Leadership development programmes driven by the region – \$300,000
 - General Management and People Management skills – \$300,000
 - Coaching for Performance - \$ 75,000
 - Change Management Certification – \$310,000
 - HR business partnering and HR management skills - \$200,000
 - Customer service orientation - \$ 90,000
 - Staff care / Stress management capacity building (eg. CISM) – \$ 75,000
 - Integrity & Risk Report training & implementation - \$ 80,000

ESTIMATED TOTAL - \$2,840,000

HR Strategy - case study

Marie Stopes International

Jan Carver
Team Development Manager

Marie Stopes International

- Partnership of c40 country programmes
- Prevention of Unwanted Births
- Children by Choice not Chance
- Values Driven
- Team Development
- Emergent Strategy

MSI HR Strategy

- Values Driven
- Focused on Business Objectives
- Strategy?

Strengths:

- Focus and Direction
- Concise – quick to produce & used
- Easily Understood
- Integrated with Operational
- Accountability and Responsibility
- Responsive and Flexible

Preparing the Strategy Document

- Starting from Values & Business Objectives
- Functional Goals & targets
- General Approach & Broad Supporting Actions
- Bullet Points – limited detail
- Agreed & Shared

Using the HR Strategy

- Team Goals & Objectives
- Personal Objectives
- Resource/Time Allocation
- Development Activities

Appendix 7: Marie Stopes International Team Development Strategy, 2007

- 1) To provide increased support to both UK-based International Division and MSI Partner Programmes, in the form of:

- a) Increased technical assistance (TA) visits to Partners (during 2006, 2 visits were provided; aim for 2007 is to offer availability of 4-6 trips).

Where appropriate, incorporating capacity building and coaching in Team Development/HR to other MSI/Partner team members.

- b) Produce support documentation for on-going or future use, throughout the Partnership, by Team Development or others e.g. audit checklists, training modules.
- c) Arranging and facilitating training when required eg Leadership training for Partners, Induction (design and coordination) for MSI Australia.
- d) Produce a framework for employing and supporting MSI employees based overseas (expats, placements etc.), including standardising packages and systematising support. On-going management of international workforce.
- e) Launch alternative ways of working for MSI e.g. internships, fellowships, and volunteers.
- f) Increased availability to advise UK-based team leaders and team members on HR matters.
- g) Any other areas identified by Programme Support teams (team leaders to advise what support they would like).

- 2) Organisation Values/Culture: to enable MSI to evolve in directions it wishes to while holding on to the organisation's core values. Team Development's role is to facilitate discussion and identification of what is important to MSI going forward, leading to strategies to ensure this takes place.

- a) Arrange a workshop for Team Development and Senior MSI Managers to explore management of values and relationship with culture etc.
- b) Create a framework for defining scope of accountability, responsibility and authority for Team Development (individual and team levels) that may then be rolled out to other teams.
- c) Pro-actively champion Leadership Behaviour, including setting and supporting the achievement of targets.

- Senior managers (SMs) in MSI and Programme Directors (PDs) need to gradually extricate themselves from involvement in the operational activities of the organisation, in order to devote time to other activities e.g. allowing time to think, to adopt a more strategic approach, to coach and develop their teams etc.

By end 2007, all SMs and PDs will have released 25% of their time from operational consideration.

- In order to do this we need to ensure that the right level of ability and resource is available at the next level, coaching and support for individuals to delegate and move away from their comfort zone.

By the end of 2007 all SMs and PDs will have made concrete progress in terms of restructuring their teams to enable this to happen.

- d) Talent identification and management. Need to change our mindset so that we become talent scouts for the MSI of the future. This particularly impacts on recruitment and development activities where we need to look at an individual's potential beyond the current job.

Target: 33% of all CMs and PDs appointed will be internal candidates (2007)

50% of all CMs and PDs appointed will be internal candidates (2008)

- e) Dignity at work. At the Global Workshop, agree a statement of principles and a code of professional conduct, based on consensus across the Partnership.

3) Other:

- a) Recruitment: linked to the website redevelopment, review all aspects of recruitment – from look and content of ads, to the method of applying and how the process is administered with a view to streamlining an administratively intensive process and improving its effectiveness.
- b) HR database to be rolled out to team leaders, providing more readily available management information to support team leaders in the management and development of their teams.
- c) Investors in People accreditation due for renewal July 2007.
- d) Review and revise (if necessary) MSI benefits.
- e) Improved management of performance by team leaders. Target: all appraisals to be completed on an annual basis.



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