

ACT – CIVIL SOCIETY ORGANISATION (CSO)

ORGANISATIONAL DEVELOPMENT (OD) INFORMATION SHEET

HUMAN RESOURCE MANAGEMENT/PEOPLE MANAGEMENT

The **purpose** of this OD Information Sheet is to provide CSOs with a guide to the relevant skills and techniques necessary to develop capacity in Human Resources (HR) Management. HR plays a key role in the survival of any organisation, so this has been designed to outline techniques that CSOs use to better manage their personnel and ensure a balanced working environment. The content will focus on the 7 topics as follows:

1. Human Resource Strategy
2. Recruiting
3. Learning and Development
4. Performance Management
5. Compensation and Benefits
6. Conflict Management
7. Gender and Social Inclusion

1. Human Resource (HR) Strategy

What are Human Resources? CSO's human resources are the 'people' that the CSO finds, screens, employs, trains and supports in its organisation. The HR Department manages the CSO's recruitment, retention, benefits, terms and conditions, staff development, conflict management and terminations. The workforce can include both staff and volunteers at all levels. The HR department is an essential part of a CSO, regardless of how big or small it is. It's the place where an employee/volunteer goes with questions about their position at the CSO, to address concerns, and to air grievances.

What is an HR Strategy? Strategy development is the way by which the CSO focuses on managing, actively advancing and improving a CSO's workforce, its culture and its environment, with the objective of improving the organisation's effectiveness. The CSO's people will be organised to get the best performance possible to achieve their objectives. The strategy must keep up to date with employment laws that can affect the CSO and its employees.

Why should CSOs have a HR Strategy? The essence of having an effective HR Strategy is to achieve organisational goals while ensuring staff/volunteer satisfaction. CSOs set targets to ensure optimal performance, the quality of the personnel will play a vital role. Having an HR Strategy will ensure CSOs are intentional in achieving results through its greatest asset, which is their people.

Steps to Crafting the HR Strategy (How)

- **Understand:** The first step is to understand the CSO's objectives, goals, strategy and context. An HR Strategy does not exist outside of the organisational strategy, so it must align with the CSO's strategic plan.
- **Recognise:** the climate the CSO is operating in, as well as internal and external factors. The climate is the immediate environment the CSO operates in.
- **Input:** When preparing the HR strategy, it is important to get input from others - including the Board of Trustees, staff, volunteers
- **KPIs:** Develop Key Performance Indicators (KPIs) to measure the effectiveness of the HR strategy over time.
- **Monitor and review** strategy as required – an HR strategy is a living strategy and should be reviewed regularly, and revised when necessary.

From CSO Strategy to Individual HR Practice Strategy

To develop the HR strategy, the CSO must identify their focus, ie: if the overall strategy is to grow donor funds by 20% year-on-year, then the HR strategy should align with that, eg:

- Recruitment – skills required are those of relationship building – then it is important to find employees who are skilled in building relationships eg: with good communication skills
- Learning and Development of staff - will be focused on developing Fundraising, Monitoring, Evaluation and Learning skills
- Performance management – performance may be measured by the achievement and impact of the staff members. This may include an increase in the number of active donors and an increase in the positive changes at the CSO's constituents level
- Culture – a collaborative culture in the CSO, teamwork, supportive of each other, to gather and share project learning; skills in place to report to donors and to assist with fundraising

2 Recruiting

What is “recruitment”?

This is the gateway for getting the right staff for the CSO. Recruitment involves identifying, attracting, interviewing, selecting, hiring, and on-boarding employees. Recruitment commences from the stage of identification of the staffing need to induction of the new hire.

Steps in the Recruitment Process

- Identify the staffing need – in line with the CSO's strategic plan, determine and identify current and future needs, as well as the knowledge, skills, and experience required for each of the role(s). Also, how the role should be filled - is it something that can be filled with temporary contract staff, interns, full time staff, volunteers, consultant, etc.
- Write a Job Description. A good Job Description should consist of the following:
 - Job Title
 - Department
 - Organisation description
 - Description of duties and responsibilities (key)
 - Qualifications, experience and skills (key)
 - Location
 - Compensation and Benefits (optional)
 - Additional qualities that would be an added advantage

A good Job Description clarifies for both the candidates and the supervisor/manager what the employee will be doing. It is also a tool that will be used for the selection of the employee and to ensure new staff know what they will be responsible for, as well as to monitor performance. While it is common in smaller CSOs for an employee to be flexible and take up multiple responsibilities, a clear Job Description gives clarity.

- **Searching for the Candidates**

The role could be filled with internal or external candidates. External candidates can be found by:

- Advertisements – Print or Digital Media
- Social Media
- HR Recruitment Agencies
- Professional Associations/Bodies
- LinkedIn
- Referrals
- Internship

- **Candidate CV Screening and Shortlisting**

- Screen applicants based on minimum qualifications required
- Next, sort CVs that have the preferred credentials by looking at their qualifications, relevant experience, technical competencies, and other specific skills that are required for the role
- HR, with support from relevant management staff, together shortlist candidates who have both the preferred credentials and the minimum qualifications
- Finally, note any concerns or queries in the CVs so they can be clarified during the interview

- **Interviews**

- Screening: Often a first step is to screen the candidates against the knowledge, skills and experience outlined in the Job Description. This can be done via telephone or video conference. It should be short (it's not an interview, but a checking process), but make sure you also take the time necessary, so you can eliminate the irrelevant profiles first
- Agree an interview panel with relevant understanding of the role and good gender balance
- Face-to-Face Interviewing: This could be done in a panel or series of one-to-one interviews. The intent is to review the shortlisted candidates from the screening step, and is more thorough
Depending on the role, the candidates could be asked to do case studies or perform some short technical task, but all face-to-face interviews typically involve being asked questions around the core competencies and sometimes functional competencies required for the role
At the end of the interviews, the interviewers agree on the best choice for selection, including consideration of their likely character-fit with the CSO, and also a back-up candidate

- **Evaluation and Job Offer**

- Check the references and the credentials of the selected candidate
- Make the final job offer - the job offer should be clear. Once the candidate has accepted the job (often verbally), then the offer is shared in writing, including the contract, the terms and conditions, the job description, start date, compensation, working hours, conditions of service, etc.
- The contract should be signed by both parties.

- **On-boarding**

This describes the key steps in the first 3-4 weeks:

- Develop and provide a good induction programme, have an on-boarding plan (a micro action and development/training plan for their first week or two). The better this is, the higher the chance that the employee can perform optimally quickly.
- Team Integration – ensure team members are clear on the new hire’s role.
- The line-manager should create an action/work-plan with the new hire, and set up regularly monitoring and support meetings, and provide timely constructive feedback for motivation and development.

Tip: Ensure new staff are clear and grounded in the basics of his job. Set her/him up for success!

3 Learning and Development

Why is Learning and Development important?

The goal of Learning and Development is to equip individuals with the necessary knowledge and skills to perform their roles successfully, now and in the future, with the overall objective of impacting CSO’s performance. (It is not only about providing new skills to a new member of staff, but also about upgrading skills of the staff already in place.)

Benefits of Learning and Development

- Boosts employee morale
- Increases employee retention
- Increases productivity
- Builds talent for succession planning
- Enhances the CSO’s reputation - which helps to attract talent

Differences between Staff Training and Staff Development

Training	Staff Development
<ul style="list-style-type: none"> ▪ Training is short and focused ▪ Training is mostly a singular or a modular event ▪ Training is designed to meet the needs of employees and the position or function the employee occupies ▪ Training is often in response to current needs (eg: new systems) ▪ Training can be initiated from either the employee or the management team 	<ul style="list-style-type: none"> ▪ Development is longer-term ▪ Development, overall, refers to the long-term strengthening of the individual or the staff team ▪ Development focuses on not only the employee, but the development or evolution of the position or function (functions evolve over time, they need to be refined) ▪ Development requires longer-term, continuous planning, and programme development ▪ Development focuses on the overall team and organisation, not necessarily on specific skills ▪ Development is mostly initiated by management team members

There have been misconceptions about Training and Staff Development. Learning and Development is all encompassing and includes all activities that relate to employee’s growth, empowerment, and development of skills for optimal performance within the CSO.

Finding the right training programmes

Getting the right training could pose a challenge at times, CSOs can explore the following options:

- Check with Professional Associations – ACA, CIPM, etc
- Online Training from online providers
- Source reputable Training Providers with open courses

Measuring Training Effectiveness

It is important to define the skill/performance gap or expectations and the behaviours that indicated the gap or the skills to be displayed in future. For example, the ability to generate and submit simple management reports or write a grant proposal. When the training is completed, the difference in the behaviours or performance is measured again.

4 Performance Management

What is a Performance Management System?

All the activities that surround the measurement of the outcome of tasks -vs- the expectations; with the objective of ensuring that the individual, and in turn the CSO, achieves its goals.

Performance Management should compose of the following elements

- The CSO's goals
- The individual's goals linked to the CSO's goals
- The skills, resources and support required to achieve those goals
- Measurement of the set goals against the set-out objectives
- Rewards, remedial actions, and consequences

When designing Performance Development systems

1. Develop and deploy performance development systems and processes that:
 - Drive consistent performance standards and expectations across the CSO
 - Establish a clear linkage between strategic plan/project plans and individual priorities/work plans
 - Promote a culture of accountability
 - Focus on developing the strengths of employees via robust development plans
2. Assess and measure performance of employees in such a way that it fully enables them to develop their performance and potential

Performance Review Cycle

- Monthly – Review progress, mainly informal
- Quarterly – Formal review of the work plan for the quarter, should be documented
- Annual – Reviews the work plan for the year

Annual Performance Review

At the year end the annual work plan is reviewed – the goals set at the beginning of the year are compared with the results achieved. This is often the time when training or staff development is discussed and agreed by both parties. If a staff development plan has been developed, its progress of is also reviewed. If the Performance Review is done right, there should be no surprises as there should have been regular reviews with the employee all year round.

Annual review process and overall statement

1. The Manager starts the annual review by asking the employee to:
 - a. Update the work plan for the year with notes of progress;
 - b. Propose a group of individuals for the 360⁰ feedback – this group should comprise peers, subordinates (if any), superiors, internal and key external stakeholders
2. After agreeing the list, the manager sends an email to each individual in the group asking for confidential feedback on the employee’s performance and interactions; also asks for thoughts on their strengths and opportunity areas
3. The employee shares the completed work plan with progress notes with the line-manager for her/his to input their comments in an overall statement (containing both perspectives).
4. Manager and employee agree a date for a formal discussion to review the work plan, and both parties’ notes, for the year.
5. The Annual Performance Review should focus on ‘what’ the employee has achieved over the year, as well as ‘how’ the results were achieved (or not) during the past year. This is an opportunity to discuss challenges, areas for improvement and potential development opportunities.

Rewarding Performance

Accountability: One of the key objectives of a Performance Management System is to drive accountability. The tools to reward performance can include:

- Salary increase in accordance with performance (for example: move to the next level up the salary scale)
- Bonus
- Recognition via an organisational recognition programme
- Promotion

5 Compensation and Benefits

CSOs are competing with ‘for-profit’ businesses for staff talent and being able to set the right level of compensation can make the difference between attracting and retaining qualified employees or, suffering from high turnover, in other words not being able to retain talented employees for long periods. The issue of staff ‘attrition’ is often a challenge for CSOs, who’s staff build experienced in the CSO and are then ‘enticed’ by other organisations who can offer better conditions/salary.

Compensation Package components, can include:

Component	Description
Basic Pay	This is the employee’s basic salary. It is a fixed compensation paid to an employee.
Guaranteed allowances	This includes all guaranteed cash allowances which makes up part of the employee pay. E.g. Housing allowance, Transport allowance, Leave allowance, outfit allowance etc Having guaranteed allowance is not mandatory but is recommended. It improves overall total pay perception in some cases. It also allows for flexibility to make interventions in one portion of employee’s pay without making changes to all.
Variable Pay, Incentives and Bonus	A portion of a Worker’s salary that is not guaranteed but is determined on other factors (typically based on good performance, individual or collective) e.g. Performance bonus
Benefits	This are programmes/plans which are given to employees in addition to the monetary compensation to provide specific benefits. Examples: <ul style="list-style-type: none"> • Medical Plan • Paid sick leave • Life Insurance

	<ul style="list-style-type: none"> • Employee Savings • Pension Plan (although this is increasingly a statutory requirement for all employers) • Vacation (Maternity, Paternity allowances)
Statutory payments	This includes all payments that employers are expected to make for their employees. In some cases, these will vary by organisation size. Most of such payments will have an employee deduction component eg: Pension contributions, Life Insurance, Savings scheme, etc.

Components to consider when designing pay packages:

1. Legally required: These are pay components that are legally required by the Labour Act.
2. Highly recommended: This includes elements that are not legally required but highly recommended for the CSO. A good example is a medical plan, as this ensures employees are also able to take good care of their health and in turn allows for better productivity.

Compensation Principles

There are various principles around managing salaries. For example:

- Paying competitively
- Paying for performance
- Paying a living wage
- Lead (pay higher than most of the market); lag behind (pay higher than a small fraction of the market) or mid-point (pay in line with the middle of the market).

6 Conflict Management

What is Conflict?

The Cambridge dictionary defines **Conflict** as ‘an active disagreement between people with opposing opinions or principles’.

While conflict is typically viewed negatively, this is not necessarily correct. There are some conflicts that are healthy, for example a disagreement with the status quo which leads to a better, more efficient, and cost-effective way of doing things.

Main causes of conflict in the workplace

- Personality differences
- Differences in styles – leadership, management, approach to work
- Team mates perceived as not doing their fair share of work or taking undeserved credit
- Favouritism
- Performance reviews
- Bullying, harassment, oppressive behaviour
- Unfair (perceived or otherwise) treatment

Employers can manage workplace conflict by:

- Creating a CSO culture that focuses on conflict prevention by doing the following:
 - Leadership - leading by example
 - Establishing trust:
 - between team members
 - between managers and direct reports
 - between the CSO and employees

- Transparency, ie: a culture of openness and honesty on all fronts
- Fairness, ie: employers should be impartial to all, irrespective of their differences
- By dealing promptly and fairly with conflict that employees cannot resolve among themselves
- Being consistent in the way and manner conflicts are resolved

To manage conflict, employers should consider the following:

- Ensure that policies (including a grievance procedure) and communication are clear and consistent and make the rationale for decisions transparent.
- Ensure that all employees—not just managers—are accountable for resolving conflict
- Take steps to resolve conflict at the earliest opportunity. Research shows that conflict escalates if left unresolved. It then becomes more difficult to settle.
- Seek to understand the underlying emotions of the employees in conflict.
- Approaches to resolving conflict should depend on the circumstances of the said conflict. Conflicts could be resolved through informal ways, ie: bringing the parties involved together for discussion, resorting to the CSO's policies or staff handbook. Conflict resolution can move all the way to litigation.

Participants in Resolving Conflict

- The Employees themselves
- Line Managers
- Human Resources staff (HR)

Topic 7: Gender and Social Inclusion

What is Gender and Social Inclusion (G&SI) mainstreaming in the workplace?

It is about recognising that while we all have similarities, we are also unique individuals and thus have differences. G&SI is about appreciating the value in our uniqueness by creating an environment where individual diversity in gender, disability, age, ethnicity, religion, etc, are welcomed, tolerated, and leveraged to enable every employee to flourish and perform at their best. This allows the CSO to deliver excellent results, based on expertise and the diversity amongst the employees reflects that within the communities the CSO supports.

A CSO that is inclusive by mainstreaming G&SI demonstrates to all of its stakeholders its commitment to sustainable development – in the absence of diversity and inclusion, no development work can lead to sustainable change.

Consequences of not managing diversity

- Discrimination
- Narrow-mindedness – limited perspectives/lived experience
- Impairs employee morale
- Leads to workplace conflict
- Strains employee relationships
- Focuses on bias (often unconsciously) and not on the merits of individuals

Tip - Please note:

Diversity brings 'differences' into a CSO.

Inclusion is 'utilising those differences' and making all those differences into functioning parts of a whole to the benefit of the CSO and its results.

Avoiding bias

- Similar-to-me effect – perceive others who are like us, more positively than we perceive people who are different
- Social status effect – perceive individuals with high social status more positively than those with lower social status
- Knowingly and willingly denying diverse individuals, access to opportunities and outcomes in a CSO

How to create a G&SI environment

- Leadership and Line Managers act as role models with their words and actions
 - Eg: avoiding use of a language that is not understood by everyone
 - Use of inclusive language – for example, not using ‘he’ for professionals and ‘she’ for domestic staff
 - Develop self-awareness and encourage everyone to consider and identify their own biases and where they come from
 - Ensure diversity and inclusion at all levels of the CSO, including at Board level
 - Demonstrate to your CSO constituents and other stakeholders that you are a Gender and Socially Inclusive CSO (and G&SI is reflected internally and in all project work)
- People management practices (eg: hiring and promotion) should be scrutinised for G&SI and designed against bias
- Develop and promote policies that champion diversity and inclusion, eg: accessibility/maternity/paternity/childcare policies
- Make the workplace culture an inclusive one
- Make the office environment truly inclusive – eg: having enough toilets for both sexes; accessibility for people with differing types of disabilities; recognition that digital is important to younger employees (and not always fully accessible to older employees)
- Avoid stereotyping, eg: jobs for men and jobs for women; making assumptions about what people from specific ethnic groups are like. Interact with and experience each employee on their own merit.

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Find out more

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