

A group of seven diverse children of various ethnicities and ages are smiling and posing on a green lawn. They are arranged in a cluster, with some sitting on the grass and others standing behind them. The background is a soft-focus outdoor setting with trees and sunlight filtering through.

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**TRANSFORMED APPROACHES:  
Human Resources Practices in  
Networked Organizations**

**High-level framework**

**May 2024**

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This high-level strategy framework is part of the second phase of work commissioned by Canadian Parents for French (CPF) National<sup>1</sup> to optimize opportunities for collaboration within its pan-Canadian Network. Phase II of this important work is focused on implementation and builds on pathways identified in an April 2022 report and the commitment of Network partners at a Leadership meeting in August 2022 to improve strategic collaboration.

One area identified for better collaboration was the development of a Network Affiliation Agreement. This has culminated in an Agreement signed by all but one Branch in 2022<sup>2</sup>. It clarifies roles and responsibilities, creates formal mechanisms for mutual accountability and establishes formal alternative dispute resolution mechanisms. The Agreement will improve the effectiveness of decision-making and create opportunities to collaboratively grow revenues and impact.

With the implementation of the Agreement, attention turned to specific areas of collaboration within the Network. The first and second phases of in this work culminated in two high-level frameworks, one for Digital Membership and Fundraising<sup>3</sup> and another for Chapters and Teams<sup>4</sup>. Key recommendations from these earlier reports are being refined and are now being implemented.

A final area of improvement identified for Phase II includes the strengthening of paid human resources (as opposed to volunteers) with a focus on sharing of CPF staff across the boundaries of branches and the Network Office. This exploration is motivated by a desire to increase CPF's organizational impact on young people, their families and decision makers while also growing revenues.

It is against this backdrop of the ongoing implementation of the Network Affiliation Agreement and the implementation of changes to CPF's membership, digital strategies, and volunteer engagement strategies that this Framework will be mapped out. The intent is to offer a high-level sketch – not a detailed implementation plan – for discussion with CPF Network leaders. The detailed implementation of this Framework as adapted with input from Network leaders will be the responsibility of CPF National in collaboration with CPF Branches and Chapter and Team leaders.

The paper opens with a discussion of external factors which are changing the nature of work. A very quick picture of the demographic, economic, social, and technological changes as well as those that affect employment in the not-for-profit sector are discussed to glean their implications for CPF. CPF's current Strategic Plan and the Network Affiliation Agreement will illuminate the current context and aspirations for the future in terms of HR practices.

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<sup>1</sup> In this paper, references to Canadian Parent for French, National means the national backbone organization headquartered in Ottawa and incorporated under the Canadian Not-for-Profit Corporations Act. 'Branch' denotes the provincial members that are typically incorporated by provincial statute. 'Chapter' denotes unincorporated local structures accountable to the Branches. 'Team' denotes small groups of volunteers also accountable to Branches created in areas where Chapters are not present that have joined forces to implement one or more local activity in a specific time window. 'CPF' denotes the sum of the backbone organization, its Branches, Chapters, and Teams.

<sup>2</sup> CPF-New Brunswick is currently completing the process of disaffiliating from the CPF Network.

<sup>3</sup> Savoie, Yves. *Transformed Approaches for Membership and Digital Fundraising: High-Level Framework*. May 2023.

<sup>4</sup> Savoie, Yves. *Transformed Approaches for Chapters and Teams: High-Level Framework*. November 2023.

The second part of the paper offers insights from the data and inventories pathways for action for the CPF Network to deepen collaboration, reduce duplication and establish common standards of practice where appropriate. The recommended pathways also aim to strengthen the branches and the backbone organization in ways that reflect their respective unique strengths and roles. Together, these approaches will strengthen the Network’s capacity to attract and retain skilled employees.

## METHODOLOGY

A review of key internal documents provided the baseline for this work<sup>5</sup>. I also reviewed the recent Canadian Heritage Review Report and recommendations published upon completion of the Department’s audit of CPF in September 2023<sup>6</sup>. Primary data were collected through confidential interviews with a small number of CPF volunteers and staff<sup>7</sup> selected by the Network Office to reflect a range of perspectives and roles. I am grateful for their participation and readiness to share openly with me. The interviews were conducted in English or in French via Zoom. Participants were consented formally. The views reflected in this report are my own and no comment is identified with any of the participants. A copy of the Conversation Guide shared with participants before each interview is attached at [Appendix A](#).

At various intervals throughout this process, I solicited discussions with or information from Nicole Thibault (Network CEO) and Debbie Powers (Network Manager, Human Resources) to validate the report’s conclusions and obtain data and materials for discovery.

## A NOTE ABOUT SCOPE AND EARLY INSIGHTS

This paper is about the sharing of paid human resources across boundaries in the CPF Network. Boundaries here refer to the legal boundaries between branches and CPF-National each of which is legally separate. While my exploration touches on various aspects of human resources practices, the methods and analysis were not designed to yield detailed recommendations about all aspects of human resources practices including compensation, pay equity and job evaluation, human resources policies, employee engagement, diversity and inclusion, employee brand, talent management, learning and development, job attraction and retention strategies, and workplace culture. The focus of this paper is on the sharing of human resources across boundaries to increase impact through advocacy and through the delivery of programs and services. Discussions of other aspects of HR practices are limited to those which serve to enlighten the sharing of HR across organizational boundaries.

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<sup>5</sup> Documents consulted included: CPF Code of Conduct and Ethics; CPF Organizational Charts (Network Office and branches); Job descriptions; Employment contracts for shared staff (redacted to eliminate personally identifiable and salary information); Direct supervisor Guides (Onboarding/Performance Management); ED Level Performance Review 360; Hiring Guide for Direct Supervisors; Network Employee Handbook; issues of the CPF Network Operations Bulletin; and, CPF Network Completed Tarp (Sept 2022).

<sup>6</sup> Government of Canada, Department of Canadian Heritage. *Review Report: Canadian Parents for French.* Office of the Chief Audit Executive, Recipient Audit Services, September 2023.

<sup>7</sup> The interviews took place between April 2-May 17, 2024. The participants were: **Megan Chartrand**, National Coordinator, Quebec & Nunavut Project; **Betty Gormley**, Executive Director, CPF Ontario; **Rebecca Lancaster**, Executive Director, CPF Nova Scotia; **Janet Loseth**, President, CPF Saskatchewan Branch; **Walter Parsons**, President, CPF Newfoundland & Labrador Branch; **Sylviane Picardie**, Director of Finance, CPF Canada; **Trish Rognvaldson**, Manager of Programming, CPF Alberta & CPF NWT; **Rosemary Sutherland**, Manager, Chapter Development & Outreach.

It is also important to note that while this work was originally focused on sharing of paid human resources, confidential interviews with CPF staff quickly surfaced the need to further delineate the notion of ‘sharing of paid human resources.’

To this end, I further define the notion of sharing paid human resources at three levels:

- **Level I: Staff sharing information and resources:** Branch and CPF-National staff (each staff belonging wholly to a single entity) sharing information and resources across the boundaries of the respective entity to which they belong.
- **Level II: Shared staff without shared infrastructure:** Two or more CPF entities (e.g., a branch or branches and/or CPF-National) formally sharing a paid human resource across their respective boundaries without regard to the harmonization of the infrastructure deployed and used by the shared staff. For example, a communication specialist shared by two branches uses different software applications for web and social media content management and for design and production of e-newsletters.
- **Level III: Shared staff with shared infrastructure:** Two or more CPF entities formally sharing a paid human resource across boundaries combined with efforts to harmonize the infrastructure deployed and used by the shared staff. For example, an accounting specialist shared by three branches and CPF-National all using the same software-as-a-service accounting application with a common chart of accounts and a shared process for selection and contracting of public auditors.

There is widespread sharing at Level I. Many structures exist to facilitate and encourage sharing in this way (e.g., Council of Executive Directors, periodic meetings of community development staff, etc.). Examples of sharing at Level II are growing but continue to be emergent or opportunistic meaning that this type of sharing emerges from situations of crisis (e.g., a staff person in one Branch taking an indeterminate leave for personal or health reasons, financial management issues causing a branch to part with an Executive Director without delay). Examples of sharing at Level III are also growing but they are not strategic and deliberate. They either involve CPF-National providing back-office<sup>8</sup> functions to some but not all branches or branches sharing an Executive Director (e.g., PE and NL; BC and YK; and AB and NWT).

So, while Level III sharing creates conditions for significant efficiencies and productivity improvements, there is little in the way of concerted action across the Network to seize these opportunities to equip the backbone organization to support shared back-office functions in IT, HR, and finance.

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<sup>8</sup> Back-office functions commonly refers to the operations of an organization which are critical to its success but do not involve direct interaction with volunteers, participants, teachers, parents, elected and other officials in government or in the education system. In this paper back-office functions include financial management and accounting, treasury and cash flow management, payroll administration, health/group RRSP benefits administration, HR, IT infrastructure, IT applications, data, data management and privacy, risk and insurance, legal, procurement, contracting, and leasing. For brevity, back-office functions may be described as IT, Finance and HR.

Most interview participants reflected a desire to see more concerted efforts to embrace Level III sharing. Yet, this sentiment was not unanimous. Participants cited resistance to such change among their colleagues and some reflected varying levels of resistance in their own views. In this report, we will explore data insights across this typology for the sharing of human resources. The broad conclusions are clear. There is a unanimous recognition of the need to deploy staff across the country to lead and animate important place-based activities (or to manage outreach activities to volunteers who do so) that impact young people directly. Volunteer/chapter/team engagement, programming and advocacy require presence across the country to deliver impact. We will explore how best to approach the sharing of staff resources with an appreciation for the need to maintain spatial distribution of staff who support these activities.

The rationale cited for the absence of or slow progress in integrating back-office functions (i.e., finance, HR, and IT) throughout the organization is that government funders place restrictions on funding requiring funds to be held within the jurisdiction of a given funder. The net result of this lack of back-office integration is the sub-optimization of the resources applied to those back-office functions.

On scrutiny, this rationale does not hold. There is no single example cited of government funding being withdrawn where Level II and Level III sharing of human resources has been implemented. There are no examples cited of government contracts limiting the autonomy of a branch to contract suppliers which are headquartered outside of that branch. For instance, no one cited a government funder which requires that branches not use Microsoft office productivity tools (e.g., MS Word and Excel) because Microsoft is not headquartered in their jurisdiction. Yet, I have no doubt that some if not all branches contract Microsoft for licenses to its office productivity tools. Similarly, no one argued that Branches were required to contract banking and financial services with a bank or credit union headquartered in their jurisdiction.

In fact, there is clear evidence that the Department of Canadian Heritage is supportive and recommends integration of back-office functions. The September 2023 Review Report highlight the following recommendation (#3):

- CPF-National should support all Branches by providing accounting services, such as bookkeeping, preparation of financial reporting and management of payroll, with the financial decision-making remaining under the Branches' authority;
- Document the respective financial responsibilities and agree on a cost sharing methodology; and,
- Use a common set of financial systems.

The report notes that 'these measures will bring standardization and consistency in the Network's financial management<sup>9</sup>.'

While some provincial governments, municipalities or school boards might not be explicit in their support for integration of back-office functions, no one provided evidence of an explicit interdiction

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<sup>9</sup> Ibid., p. 11.

issued by a provincial government or school board to implement the recommendation of Canadian Heritage.

*Evidence of productivity improvements and resulting increased impact on young people is reported by participants who already have direct experience in their branch with shared human resources. This report is therefore an invitation to embrace these early successes and go from good to great.*

My conclusion is that there is no rationale for the continuing balkanization and concomitant waste of precious resources associated to the lack of integration of back-office functions. My recommendations in this connection are fully aligned with those of the Department of Canadian Heritage albeit more detailed and comprehensive. My hope is that this report and that of the Department of Canadian Heritage will serve as a clarion call to be strategic in creating significant integration in back-office functions which will generate productivity improvements and thereby liberate resources for mission impact. We will explore how best to approach the sharing of staff resources in these areas, acknowledging important cautions about change management, with an appreciation for the potential productivity improvements to grow CPF's impact young people. Evidence of the productivity improvements and enhanced impact on young people is reported by participants who already have direct experience in their branch with shared human resources. This report is therefore an invitation to embrace these early successes and go from good to great.

## CPF STRATEGIC PLAN AND NETWORK AFFILIATION AGREEMENT

In painting the broad picture for our exploration of these issues, it is important to recall the broad outlines of CPF's strategic ambitions.

Pillar D of the CPF Network Strategic Plan (2020-2025), outlines the Networks ambition to 'Build Leadership Expertise.' The initiatives flowing from that pillar call on the Network to (1) 'communicate and share information regularly on proven practices for effective governance and operations and (2) offer leadership learning/capacity-building opportunities to Network staff and volunteers to ensure highest levels of competence.' These initiatives are about creating conditions for Level I sharing of resources. The Network Strategic Plan is otherwise silent on opportunities for sharing of human resources at Level II or III. By contrast, the recently approved Network Affiliation Agreement creates a framework for extensive sharing and optimization of resources through more fulsome integration of back-office functions (refer to Schedule C which outlines the Roles, Rights and Obligations of various parties to the agreement).

# EXTERNAL ENVIRONMENT

## WORK: CHANGING DEMOGRAPHICS AND EXPECTATIONS

The ageing of Canada's population is accelerating with younger baby boomers now entering retirement in large numbers. The ageing of Canada's population is tempered by the fact that Canadians of retirement age are continuing to work longer (in part, because of insufficient savings for retirement) and by high levels of immigration. These forces are profoundly affecting Canada's labor market. On balance, we are and will continue to see labor shortages in many sectors combined with relatively low levels of unemployment.

A tight labor market means upward pressures on wages. The high levels of inflation which accompanied the lifting of pandemic restrictions has placed additional pressures on wages and shifted power to workers in salary negotiations and collective bargaining. In a study commissioned by the Ontario Non-Profit Network, the Mowat Center found that 'two-thirds of nonprofit organizations in Ontario were facing at least one recruitment or retention challenge. Key challenges identified for both recruitment and retention included non-competitive wages and lack of career mobility/paths<sup>10</sup>.' Many nonprofits rely on time-limited contract funding. For many, this means a reliance on term-limited non-permanent employment which places additional challenges to attract talented individuals in a competitive labor market.

The pandemic unleashed significant changes in ways of working, some of which are proving to be enduring. Professionals and office workers have mastered the technology required for work from home and embraced hybrid work, combining visits to the office with work from home. Hybrid work models vary. Some workers live and work in the same community and visit the office 2-3 days per week. Other workers live and work in different communities with fewer periodic visits to the office for larger team meetings. Hybrid models are proving attractive as they allow workers to reduce commuting time and to better integrate work and personal/family commitments while retaining the benefits of belonging to a team through periodic presence and social interaction at the office. Many national organizations are embracing new models of work to distribute their workforces in more equitable ways across the territory. Remote work also offers the opportunity to expand the internal labor market as remote work opens the door to promotions which may not always require relocation.

There is a debate about the impact of generational differences in the workplace. Some argue that these generational differences are small, and that intra-generational differences are more significant<sup>11</sup>. Others suggest that the skill profile of younger generations 'shaped by a blend of digital nativity, global awareness and a desire for social impact—is refreshing and revolutionary<sup>12</sup>.'

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<sup>10</sup> Ontario Nonprofit Network and Mowat NFP. 'Shaping the Future: Leadership in the Ontario Nonprofit Labour Force,' (September 2013) accessed at <https://theonnc.ca/publication/shaping-the-future-executive-summary/>

<sup>11</sup> Eden King, Lisa Finkelstein, Courtney Thomas, and Abby Corrington. 'Generational Differences at Work Are Small. Thinking They're Big Affects Our Behavior.' Harvard Business Review, August 01, 2019. Accessed at <https://hbr.org/2019/08/generational-differences-at-work-are-small-thinking-theyre-big-affects-our-behavior> on April 24, 2024.

<sup>12</sup> Hassan Choughari, 'The Impact of Gen-Z in the Workplace.' Forbes, February 5, 2024. Accessed at <https://www.forbes.com/sites/forbeshumanresourcescouncil/2024/02/05/the-impact-of-gen-z-in-the-workplace/?sh=2dc9414569a7> on April 24, 2024.

Research conducted by the director of polling at the Harvard Kennedy School Institute of Politics, reveals important attitudinal shifts for the rising generation. He posits that they are charting a different course in three important ways: (1) family, community, and mental health come first, (2) they have low expectations that government, corporations, and other institutions will prioritize them or take their needs into consideration, and (3) they seek a new social contract that enables a more balanced life that enables one to afford a stable home, but also provides the flexibility to travel, explore their passions, and spend time with family and loved ones. Generation Z (18-25) also want to be part of something bigger than themselves. Standing up for those who are vulnerable, or without a voice is an important part of who they are to a greater degree than older generations<sup>13</sup>. In surveys of nonprofit leaders, the Ontario Nonprofit Network found that the top recruitment challenge in the sector is non-competitive salaries (40%) while the top retention challenge is the lack of career mobility/paths (43%)<sup>14</sup>. The combined economic pressures and generational shifts raise the bar significantly in matters of HR for a sector already under significant pressure. These trends are echoed strongly in interview data collected for this report.

In my earlier report about digital fundraising and membership<sup>15</sup>, I painted a picture of rapidly changing technology. These are changing the ways we donate and engage as volunteers and are also changing the ways we work. Our world is now characterized by the ubiquity of broadband (internet) and computing devices with sharp increases in the use of mobile devices and quantum leaps in their processing power. Digital transformation has created new ways of being and feeling connected, often without regard to geographical boundaries. Because the marginal cost of communication over long distances is eliminated with the advent of broadband (think WhatsApp and Zoom), the need for our places of work and our homes to be in the same place continues to be eroded. Virtual tools have created opportunities for workforces deployed over large geographies to be more connected and for the participation of remote worker in decision-making to be more equitable. Town halls with the CEO are no longer the purview of folks at head office.

Lacking capital to invest in new technologies, many charities have been slow to harness the power of new technologies. Networked organizations which fail to pool resources to scale investments in new technologies are even slower to adapt new technologies. They forego the benefits of group purchasing for shared IT as personal preferences and history continue to dictate these choices. Too often, opportunities to realize efficiencies in back-office operations are sacrificed for lack of courage to implement change or for the inability to muster the resources to implement change thoughtfully. The growing threats of cybersecurity also pose a challenge to charities which have too long ignored the need for professional management of IT infrastructure, applications, and data.

The rise of cloud-based solutions and the proliferation of software-as-a-service<sup>16</sup> offers significant advantages to those who work remotely as it allows them to access tools and data from anywhere.

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<sup>13</sup> John Della Volpe, 'Looking Forward with Gen Z: A Gen Z Research Report.' Murruration conducted in partnership with the Walton Family Foundation (2022). Accessed at <https://murruration.org/static/Looking-Forward-with-Gen-Z.pdf> on April 24, 2024.

<sup>14</sup> Ontario Nonprofit Network and Mowat NFP. 'Shaping the Future: Leadership in the Ontario Nonprofit Labour Force,' (September 2013), p. 4. accessed at <https://theonn.ca/publication/shaping-the-future-executive-summary/>

<sup>15</sup> Savoie, Yves. *Transformed Approaches for Membership and Digital Fundraising: High-Level Framework*. May 2023.

<sup>16</sup> Cloud-based solutions and software-as-a-service are promising developments for capital-poor charities. Organizations procuring those solutions can now forego significant upfront capital costs, instead subscribing to software services accessed through the internet whose infrastructure is housed remotely and accessed through the internet in the 'cloud'.



For example, the suite of Microsoft Office tools is typically a subscription- and cloud-based service with the benefit that remote/hybrid workers can access their OneDrive and SharePoint files via internet from anywhere. This revolution eliminates the need for local area networks (LAN), it reduces or eliminates the risk of storing sensitive data on poorly secured local servers and the barriers to accessing LANs for those not in the 'local area.' Increasingly, vendors are developing offerings which are 'federated' meaning that a customer can license a software solution but have many instances of the application which allow data to be segregated across each of those instances. To illustrate, CPF might procure a common accounting or fundraising software for the entire Network but maintain separate instances of those applications for each branch and the Network Office. The advantage of these federated approach to purchasing IT applications are many: reduced costs through group purchasing, cost savings from cross-training and sharing staff, reduced dependency owing to the use of applications which have a single or few users, and improved integration of those data which need to be interfaced when creating impact or financial reports for the entire Network.

The growth of solutions and platforms which are 'federated' is not unique to IT. Financial services organizations are also offering suites of products which allow more than one segregated account on a larger account platform allowing complex or networked organizations to benefit from a coordinated banking solution while permitting the segregation of relevant funds and information for relevant parts of the network (e.g., branches and the Network Office). These solutions offer significant benefit in pooling cash across those segregated instances allowing organizations to earn interest on excess cash that is not required for cash flow. Currently, CPF manages its cash flow requirements independently for each branch and the Network Office with the net result that too much cash is being held in low yield chequing accounts. While the amounts may not be large, this is foregone revenue which CPF could apply to increased impact. In a constrained resource environment, all efforts must be made to shift resources to increase impact on young people.

## SHARING STAFF AT CPF: CURRENT REALITIES

### WORKFORCE, SCALE, STRUCTURE AND SPECIALIZATION

The workforce of CPF is small on an overall basis with 43 different positions representing 30 full-time equivalents (FTE)s. The Network Office is also small with a (FTE) team of 10. Branches have 1 to 5 FTEs with only Ontario and BC/YK with more than 3 FTEs. Of the total 43 different positions (some of which are part-time), 20 have a title signaling a managerial role (e.g., manager, director, executive director, CEO) amounting to a 47 per cent weight of managerial positions to the overall number of positions. This overweight of managerial roles is magnified by the fact that all staff in a managerial role occupy a full-time role, meaning that the weight of managerial FTEs is 66.6 per cent of total FTEs.

CPF PAID WORKFORCE* BY BRANCH/NATIONAL OFFICE				
	Full-time (permanent) (FTEs)	Part-time (permanent) (FTEs)	Part-time (contract) (FTEs)	Total (FTEs)
Alberta	2		1	3
British Columbia	4		1	5
Manitoba	3			3
National	10**	5**	2	17
Newfoundland	1			1
Nova Scotia	2		1**	3
Ontario	5		1	6
PEI	1		1	2
Saskatchewan	2		1	3
<b>TOTAL</b>	<b>30</b>	<b>5</b>	<b>8</b>	<b>43</b>

\* Data are based on BambooHR and have not been audited for accuracy or comprehensiveness.  
 \*\*Includes vacant positions posted at the date these data were generated.  
 Source: CPF-Network Office (April 2024)

For every individual performer, CPF employs two members of management which, by a significant measure, is evidence of a top-heavy organization that is not staffed in an optimal way.

There are likely numerous reasons for this relative top-heavy structure. It may be that there is ‘title inflation’ in the use of titles which connote a managerial role as a strategy to improve retention or delineate roles which require more technical expertise or enjoy a greater level of autonomy<sup>17</sup>. It could also be that the legal separation between branches and the Network Office continues to justify separate management teams (or separate management roles for some functions which could be better integrated) in each branch (except for a small and growing number of more recent examples in PEI and NL, or in linking two territories to larger branches).

*For every individual performer, CPF employs two members of management which, by a significant measure, is evidence of a top-heavy organization that is not staffed in an optimal way.*

There are inefficiencies present in a structure which is top heavy. Some work which might be carried by frontline individual performers is currently being carried out by more highly paid managers and directors, or by executive directors. This is an inefficient use of resources that diminishes the potential impact of the organization. CPF lacks career ladders that offer those in entry-level roles the opportunity to imagine ways to grow within the organization in ways that offer stepwise progression to more senior roles. This means that talented early-career workers are leaving the organization in higher numbers to pursue other careers for lack of opportunities within CPF. This is also a waste of precious resources (as

<sup>17</sup> There are many monikers available for titling of frontline roles which are not managerial while reflecting more seniority, a higher level of required skill or a higher level of autonomy without resorting to monikers that imply a managerial role. For instance, the titles ‘senior coordinator’, ‘specialist’, ‘lead’ or ‘officer’ can serve to describe frontline roles albeit ones which are more senior than that of a coordinator.

recruitment, onboarding, and training of new staff to fill vacancies is a significant drain on productivity). The absence of pathways for stepwise growth in the organization is even more dramatic if one focuses on the limited career ladders (or the absence thereof) in individual branches.

Top-heavy structures yield other impacts in organizations. They are characterized by bureaucratic and burdensome decision-making cultures and processes as managers are not inclined to devolve appropriate decision-making rights to individual performers. This impacts the capacity of top-heavy organizations to be flexible and to innovate.

The degree of specialization available in small organizations is limited. But at CPF, it is further limited by the boundaries which exist within the Network. If you imagine each CPF entity hiring separate people to implement an IT infrastructure and processes to fend off the growing cybersecurity threats, the likelihood is that in smaller branches, this work will be performed by generalists without specialized IT expertise and may be done ‘off the corner of the desk.’ In large branches or at the Network Office, the task may be performed by an IT generalist or database administrator. By contrast, if CPF elected to implement such a strategy for the Network as a whole, it might hire or source a specialist with the relevant IT expertise to implement a cybersecurity strategy with greater ease, fewer costs, and more impact.

We know from the study of micro-economics that specialization spurs efficiencies and, in turn, enables growth. This explains why many large commercial organizations do very few things well. McDonald’s is a classic example of an organization that achieved large scale by developing efficiencies through specialization in the making of burgers and fries (whether you like their burgers and fries or not, you cannot dispute that they have mastered the art of making those things efficiently and fast). One cannot imagine automobile manufacturers operating at a small scale without foregoing the benefits of deep specialization in robotics, carbon fuel emission control, and distributed manufacturing. Would you want to buy your next iPhone from a 3-person shop?

*As consumers, we naturally understand the benefits of specialization. No one wants to buy an iPhone from a 3-person shop. Yet, CPF fails to seize opportunities for specialization of roles by pooling resources in ways that would boost efficiencies*

As consumers, we naturally understand the benefits of specialization. Yet, CPF fails to seize opportunities for specialization of roles by pooling resources in ways that would boost efficiencies and drive more impact for young people.

For some years, CPF has made inroads in pooling some activities with a higher degree of specialization in the Network Office. This is true in visual identify and brand management, in the purchase of commercial liability and directors and officers’ errors and omissions insurance, in the procurement of employee extended health, dental and future income benefits, and in the development of research reports and other thought leadership activities

which undergird advocacy efforts from coast to coast. CPF National continues to play a role in enterprise risk management and has quietly stepped in when HR terminations or performance issues in the branches require legal advice and/or significant unbudgeted severance payments.

In more recent years, several branches and the Network Office are playing a leadership role in the development of program materials which can be used from coast to coast, or which are implemented in a virtual format. For example, AB/NWT leads the development of 'Enhanced French for Parents (self-guided)' online learning modules. The Network Office develops 'Concours d'art oratoire' materials and programs. CPF SK sponsors the Speakers Series which is open to all CPF Members to attend. CPF BCY coordinates the video contest, *Dites-le en video*, open to all youth across Canada. CPF PEI/NL hired an expert to mentor youth in preparing for Concours, the sessions were recorded and then posted on website and made available to all Concours participants.

*CPF MB developed French for Life with restricted funding from the Manitoba Government. They then sought and obtained permission from the funder to offer access to the program across the country. This served as confirmation and recognition of the quality of their work.*

Smaller branches are achieving higher levels of job specialization by sharing staff in various roles (e.g., communication, programming, chapter development, and executive director). The Network Office continues to expand the range of services it offers on a pooled basis including in HR administration (HR policies, recruitment and onboarding, payroll, performance management, job evaluation and compensation strategies, etc.), in financial administration and in web design and maintenance. The hiring of Director of Advocacy with a mandate to develop tools and resources for the Network is currently in process and serves as another encouraging example of this trend. Yet, these hopeful gains apply in pockets of functions or in sub-sets of participants within the Network. The opportunity to realize the benefits of a better designed workforce therefore have their limits as they have not been applied systematically to all back-office functions nor have they been implemented in way which encompass the larger branches.

In discussion with participants, many contended that program and advocacy staff need to be present in communities. This is often cited as a reason for the challenge of working across branch boundaries. Yet, most branches have staff teams concentrated in one location<sup>18</sup> (typically the capital city or a metropolitan area) and they have learned to build networks of volunteers and to implement outreach activities to deliver impact in communities where CPF does not have staff. The ability to deliver impact without being present in many communities will remain a constant for CPF. This is especially true in Canada's largest provinces (Quebec, Ontario, Alberta, or British Columbia<sup>19</sup>) which cover vast geographies often with very low population densities.

There are also unique realities for communities which border two provinces. Lloydminster is unique in Canada as a municipality which straddles the provincial boundaries of Alberta and Saskatchewan and is incorporated by each province. Kenora is a small city in northwestern Ontario. It is two hundred kilometers east of Winnipeg and eighteen hundred kilometers northwest of Toronto. Residents of Kenora access most of their tertiary and quaternary health services in

<sup>18</sup> Some branches have seasonal, contract or part-time staff living and working outside of the branch main office. While this means there is a modicum of spatial distribution of staff in some branches, it does not permit systematic coverage of all communities by staff. It does allow staff located outside of the metropolitan or capital cities to be more effective in their outreach activities in remote regions.

<sup>19</sup> Canada's three largest provinces each cover an area of more than 900,000 square kilometers with Quebec at almost 1.4 million square kilometers. For comparison, France is Western Europe's largest country at 543,941 kilometers meaning that Canada has many provinces with more geography than a country with approximately twice Canada's population.

Winnipeg by agreement between the governments of Ontario and Manitoba. For residents of Kenora, accessing services in Winnipeg is less expensive than doing so in Toronto. Deepening the collaboration of neighbouring branches in serving the people of those two cities and of other neighbouring communities makes sense.

The governance of the CPF Network (e.g., meaning the legal structure of the branches) parallels the structure of Canada's constitutional and political structures with one branch for every province and territory. There are benefits for this model in the ability of each branch to reflect the specific dynamics of the linguistic and educational issues in its jurisdiction. But does the administrative structure of the CPF Network need to be closely tied to the structure of the governance of the CPF Network? Bold thinking invites consideration of a future where the administrative functions and staff teams might be organized in ways that better reflect the distribution of Canada's population with three administrative regions one each in Ontario, Western Canada, and Quebec/Atlantic Canada<sup>20</sup>. The relative weight of the three administrative regions so organized would be comparable<sup>21</sup> and each region would have sufficient scale for a more efficient and effective organization. An important caution here. This kind of bold thinking does not mean that CPF would forego a staff presence in each province as it currently enjoys (see [Recommendation 7](#)).

## **FUNDING, DIVERSIFICATION, FUNDING RESTRICTIONS**

CPF relies significantly on governments for its funding. A small percentage of program fee, membership and fundraising income complements government grants and contributions.

Government grants and contributions have not increased in ways commensurate with the level of inflation in recent years. This means that, in real terms, CPF's main source of funding represents a diminishing resource and reduced purchasing power.

Among the sources of government funding, CPF continues to enjoy significant levels of support and to rely for its core operations on grants from the Official Languages Program of the Department of Canadian Heritage. Some branches are successful in complementing this funding from provincial and territorial governments either directly or through school boards and local schools.

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<sup>20</sup> The Yukon and Northwest Territories would form part of the Western Canada Region while Nunavut would form part of the Quebec/Atlantic Region.

<sup>21</sup> Census data reveals the population of each of the three regions in 2021 as follows: Western Canada 11,819,474; Atlantic Canada and Quebec 11,095,997, and Ontario 14,223,942. Census population counts by province or territory (2021 Census), *Canada at Glance*, Statistics Canada accessed at <https://www150.statcan.gc.ca/n1/pub/12-581-x/2022001/sec1-eng.htm>

Because of a high reliance on government funding, CPF is well acquainted with the rules which accompany government grants and contributions. They are: (1) time-limited, although some may be multi-year, (2) require significant documentation and reporting, (3) require that all monies granted be expended within a fiscal year lest unexpended funds are repatriated to the consolidated accounts of the government, and (4) offer little flexibility to make changes in the way in which grant funding is applied to specific budgeted line items. Increasingly, governments are demanding more detailed reporting that goes well beyond financial accounts to offer evidence of longer-term impacts on youth. Generally, government grants and contributions provide inadequate levels of contribution to an organization's back-office operations (e.g., IT, HR, finance, and governance).

Interview participants cite the nature of government funding restrictions as the most important reason for the limited sharing of staff across branch and National boundaries. These arguments did not survive more detailed probing.

It is readily understood that grants and contributions from provincial/territorial tax-base revenues must impact the people in that province/territory. Yet, no one could cite an example of a contribution agreement requiring that all expenditures including those for administrative and back-office purposes were limited to the jurisdiction in question (as noted earlier, this would have the perverse effect of preventing branches and the National office from procuring software licenses from Microsoft which is a US-based corporation). All accepted that the use of reasonable estimates by management in apportioning expenses which are shared across boundaries would be acceptable to grant-makers. The notion that more efficient overhead processes would release funding for programming was also understood to be attractive to funders. And, finally, no one could cite a government funder which cancelled or did not renew a funding agreement because a branch had elected to pool some of its operations with a neighbouring branch or through the Network Office.

*Interview participants cite the nature of government funding restrictions as the most important reason for the limited sharing of staff across branch and National boundaries. These arguments did not survive more detailed probing.*

Interview participants were unanimous in their agreement that provincial/territorial and school board funders are keenly attracted to place-based programming but not in ways that prohibit or exclude the possibility of appropriate use of online or hybrid programs. Place-based programming begets the need for staff and/or volunteers to animate place-based programming. Time zone differences and the size of Canada's geography are also part of the rationale for distribution of staff across the territory. As noted above, there are limits to CPF's ability to have staff present in all communities. Unlike fire, ambulance and primary health services which are closely located to all communities, there are many communities in Canada which are very far from CPF's closest staff member. What is apparent is that CPF needs to have staff distributed regionally whose focus is building relationships with volunteers, elected and other officials in government and in the education system, teachers, and parents. Staff focused on these activities must have a ready understanding of the local and provincial/territorial issues and culture. But CPF cannot reasonably be expected to be present in all communities. Their outreach efforts may include periodic travel to neighbouring communities, to remote regions of a large province, or to the

capital city. They may also rely on volunteers to supplement their advocacy and program-related efforts when it is not feasible to be present in a particular locale. CPF currently has three executive directors successfully serving more than one jurisdiction applying a mix of these approaches. CPF also has several other staff providing leadership in roles which span more than one entity.

My conclusion is clear. There are significant and deep opportunities to rationalize back-office operations by sharing staff and other resources across boundaries on a more intentional and strategic basis. There are fewer but not insignificant opportunities to pool staff and other resources for programming including for place-based aspects of program development and delivery. The opportunity present is to transform CPF's approach to HR into one where the Network conceives of a single internal labor market with staff more optimally distributed in ways across our vast geography. This will take time and needs to be implemented cautiously and respectfully of those staff already in place.

## **PATHWAYS FORWARD**

### **Planning for change, change management and communications.**

I noted earlier that there is excitement about the promise of better sharing of resources throughout the CPF Network. Yet, this excitement is tempered by pockets of resistance. Some resistance is for reasons that do not survive the test of more deliberate probing. Yet, some resistance is a natural response to the prospect of change amplified by the fear that changes may affect the nature of one's role or conditions associated to one's employment. For these reasons, any of the recommendations highlighted below are understood to be placed in the context of requirements for thorough implementation planning, the application of sound change management practices with opportunity for continuous feedback loops by those potentially impacted, and a zealous commitment to timely over-communication. CPF has a culture of inclusive decision-making and broad consultation before implementing decisions which will serve it well in this context. Broad consultation is important when setting broad directions and mapping an overall plan. Consulting broadly at every step of the way once implementation has commenced will grind the process to a halt. CPF must therefore balance its tradition of inclusive consultation and decision-making with a dose of efficiency when the time is right for detailed implementation.

The process designed to build and implement a plan should involve leaders from all branches and the Network Office which are party to the Network Affiliation Agreement. Plans should be implemented on a symmetric basis meaning that no single branch should be allowed to opt out of elements of the plan as the opportunities for integration will be quickly diminished if some branches, especially the larger ones, stand to the side of the process. My observation is that larger branches have not experimented as much as smaller branches with the sharing of back-office and other staff (except where larger branches are providing management services to a neighbouring territory where there are few or no staff). The success of such a process will be enhanced by the availability of strong leadership of larger branch executive directors from the get-go. The success of such a process will also be enhanced by the availability of strong leadership from smaller branch

executive directors, as small branches have relevant experience and may fear that less populated regions of the country could lose ground in such a transformation.

In similar major transformations in other networked nonprofit organizations, transformation processes have benefited from the leadership of visionary staff leaders who were a few years from retirement and who chose to launch processes of transformation in the period before their retirement. Doing so allowed them to remove their own career interests from the optimal design of the transformed organization.

I note that a few interview participants reflected an appetite for changes that went beyond the scope of this project. They wanted to explore opportunities for the closer integration of branches and the ‘merging of their governing boards.’ While I received these suggestions as expressions of appetite for change, my scope was clear to not tackle more fundamental legal transformation of the CPF Network. Any discussion of changes to the legal and governance structure of the CPF Network is therefore outside of the scope of this report. I note that nothing in the legal separation of the branches and the national organization prevent greater pooling of resources and staff.



Recommendation	Description
1.	<p><b>Planning must be pro-active, intentional, and fulsome.</b></p> <p>This report offers pathways for implementation only. It is not a detailed plan. It does not link financial resources, timeframes, and individual accountabilities to each aspect of the plan. Planning is a critical building block before launching such process and must be led by CPF staff who have more intimate knowledge of available financial and human resources.</p> <p>As part of the planning process, CPF leadership should take care to solicit and receive feedback from major funders from both the Federal and provincial governments.</p> <p>The responsibility for the planning of this process should rest with the Network CEO in close consultation with the Council of Executive Directors. Input from all governing boards of CPF should be solicited and received before the plan's approval.</p>
2.	<p><b>Time horizon of 2-3 years will be required. Seize opportune time for launch of process.</b></p> <p>As a rough guide, I would estimate that from start to finish such a plan will take upwards of two years to be fully implemented. The time horizon for the full integration of IT infrastructure and other professional services will no doubt be longer than 2-3 years (more about this later).</p> <p>I noted above that leaders who near retirement may be well placed to provide visionary leadership to a process of this kind as it removes them personally from the impacts of change. It also creates opportunity to recruit successors in key roles with knowledge of a transformation in process. Knowledge of impending retirements may influence the most opportune time to launch and implement such a transformation. The renewal cycle of the Department of Canadian Heritage 3-year contribution agreement with CPF may also be a factor in determining optimal timing.</p>
3.	<p><b>Change management.</b></p> <p>Apply the principles of effective change management and budget adequate resources for change management activities from the get-go. Provide mechanisms for broad involvement and consultation when designing the high-level framework and plans. Offer feedback loops including ones that allow staff to share and obtain confidential information.</p>
4.	<p><b>Communicate systematically and pro-actively.</b></p> <p>Communication is a two-way process which involves transmission and reception. To be effective communication must be timely and relevant. It must create pathways to listen and hear feedback. Note that the ability to receive communication is eroded by mistrust. Seek to eliminate surprises throughout the process as surprises have the effect that they quickly erode trust.</p> <p>High-context synchronous communications (in person, or via video conferencing) add richness, tone, and depth to communication efforts. Ensure that communications for this process are both in writing and in other models which permit richer and higher-context communications (e.g., in person, via synchronous video technology, in small groups, in private, et al).</p> <p>Use existing vehicles (e.g., CoED, CoP, all-staff virtual and/or in-person meetings, branch and National Board meeting, meetings of members) to socialize aspects of this transformation and receive input early.</p>
5.	<p><b>Implement a symmetric approach to transformation.</b></p> <p>All branches and the Network Office should participate in this process. Smaller branches have more experience in sharing of resources across boundaries. Their experience will be important. Larger branches cannot be allowed to stand on the sideline as a failure to include them will significantly diminish the benefits of such a transformation.</p> <p>The Network Affiliation Agreement maps roles and responsibilities clearly and outlines decision rights for a broad range of functions and activities. Of note, leadership for back-office operations is</p>

Recommendation	Description
	clearly assigned to the Network Office. Do not re-negotiate the Network Affiliation Agreement in implementing a transformation to share staff optimally. Build on the success of the Network Affiliation Agreement.

### Implement intelligent approaches to sharing staff.

Sharing staff across boundaries makes sense in some places. In others, CPF must continue to locate staff regionally to be closer to important place-based activities that impact young people. Sharing staff optimally does not mean an effort to centralize resources or decision-making in the Nation’s Capital. Doing so will guarantee the failure of this transformation.

6.	<p><b>Maintain teams of program, advocacy, and volunteer engagement staff across the country for place-based activities that impact young people and support volunteers.</b></p> <p>Distributing staff for place-based activities should and can involve staff across branches on a regional model. Much of this happens informally but is focused on sharing of information on an opt-in basis. Some formal sharing of resources happens but this is limited. The process has been emergent (growing out of circumstances) not strategic.</p> <p>Be pro-active in identifying opportunities for sharing more staff that support place-based activities.</p> <p>Ensure professionals charged with supporting place-based activities are expected and recognized to lead outreach efforts in and travel to communities where CPF has no staff office or permanent staff presence. Develop outreach tools and practices to strengthen the outreach function.</p> <p>In all communities – especially where CPF staff are not present – leverage the talent of volunteers as ambassadors of CPF to government officials, school administrators, teachers, and parents.</p> <p>Important work that relates to programming, government relations and volunteer engagement is not place-based. Developing resource materials and tools, guides and templates, toolkits, templated marketing materials (e.g., social media and web content), surveys, and tools for formative evaluation are activities which need not be based in the specific community where the program or activity might be carried out. These activities require specialized resources and can easily be adapted or replicated for use in different communities. Ensure the pooling of these efforts where feasible and use such pooling efforts as opportunities for career enhancement opportunities of staff in various locations.</p>
7.	<p><b>Reorganize branch staff teams into three administrative regions (Western Canada, Ontario, and Quebec/Atlantic Canada) while ensuring a staff presence in all provinces.</b></p> <p>Each regional staff team would have as its head an Executive Director.</p> <p>The regional staff team would have as their focus programming, advocacy, volunteer/chapter/teams recruitment and engagement as well as the governance of their respective branches.</p> <p>The branch board and governance structures would be unchanged. Executive Directors in Western Canada and Quebec/Atlantic Canada would support the governance of more than one branch.</p> <p>At minimum, CPF should establish the principle that one or more CPF staff persons will live and work in each province. In provinces, where the Executive Director is not resident, a staff member would be designated as the lead for that branch office.</p>

Recommendation	Description
	<p>Ensuring staff presence in all territories will not be possible without significant additional resources. A guiding principle might be that budgeted allocations allow staff visits to each territory at least twice a year.</p> <p>This is not a recommendation to implement reductions or relocation of existing staff. Efforts ought to be made to implement this recommendation through normal turnover and attrition although some incentives for early retirement may be considered in select cases.</p>
8.	<p><b>Distribute Network Office staff outside Nation’s Capital where feasible while retaining its nucleus in Ottawa.</b></p> <p>The Network Office should implement national searches when positions become vacant with the view to distribute some staff beyond the Nation’s Capital while privileging recruitment in communities where CPF has a branch office. Some roles will continue to be based in the Nation’s Capital ensuring a nucleus team remains in Ottawa.</p> <p>This is not a recommendation to implement relocation of existing staff. For greater clarity, this recommendation is for gradual implementation through normal turnover and attrition.</p> <p>A distributed national team gain insights from intimate knowledge of Canada’s regions. Network Office staff housed in branch offices would strengthen personal and professional relationships with branch staff thereby eroding the natural silos which exist in spatially distributed organizations. A distributed Network Office is consistent with a single internal labor market. We will expand on this below.</p> <p>The Network Office should consider delegating parts of its leadership responsibility to branches that have the specialized expertise in various areas through the purchase of management services. For example, the Network Office might contract a branch which has successfully implemented a leading volunteer management database to support separate instances of the same database for other branches.</p> <p>The moniker ‘office’ should be abandoned in description of the ‘Network Office’ or ‘Backbone Office.’ The word ‘office’ should be replaced with the word ‘organization.’ This has the benefit of shifting emphasis on the leased premises in Ottawa (the ‘office’) to the people who together form the ‘backbone organization whether based in Ottawa or elsewhere. This is sympathetic with an organization that embraces remote and hybrid work.</p>
9.	<p><b>Integrate <a href="#">back-office functions</a> in IT, Finance and HR</b></p> <p>Integrate and pool the processes, infrastructure and decision making for all back-office operations in IT, finance, and HR. The Network Affiliation Agreement places the decision rights and leadership responsibility for these activities in the National Team. The National Team should therefore be entrusted with this leadership role.</p> <p>As noted above, providing leadership to integrated processes does not mean centralizing the decision-making or the teams involved in that work in the Nation’s Capital.</p> <p>CPF should quickly implement a requirement for group purchasing and coordinated approaches to sourcing IT applications, infrastructure and other professional services that support back-office operations. Pooling infrastructure and professional services will require time. This process will impact infrastructure or professional services for financial management and accounting, investment management, audit, commercial banking, payment processing services, eCRM (donor, member, volunteer management, do-it-yourself fundraising, and online giving), web content management software, human resources information and payroll systems, office productivity tools, cellular and internet connectivity, and network management and security software to name a few. This represents a massive undertaking which will need to be staged over many years. The point</p>

Recommendation	Description
	<p>here is to quickly limit the ability for each part of the organization to source infrastructure or services independently and to commence the process of rationalization.</p> <p>Implementing IT applications relies on a clear identification of requirements and must start with process mapping (and review where appropriate). In some parts of the CPF Network, many administrative and accounting processes are manual and/or insufficiently segregated (diminishing the strength of internal controls). Defining requirements, automating, and mapping processes are pre-requisites to successful IT implementation.</p> <p>Where possible, IT applications should be selected for their established market leadership (e.g., Microsoft Office for office productivity and collaboration tools, Plooto for electronic payments, Intuit QuickBooks for accounting).</p> <p>Where possible IT applications should be selected to harness the experience of some parts of the CPF Network that have successfully implemented those solutions.</p> <p>All IT applications should be sourced on a subscription basis and be based in the cloud.</p> <p>The National CEO should ensure that the National Team has the right leadership expertise to lead these functions strategically, to plan important transitions, and to empower a more distributed National Team.</p> <p>A budget for the back-office functions should be developed and is likely best funded through a levy applied to the expenditure budget of each branch (charges for such overhead are typically in a range of 6-9%). Note that by shifting those back-office activities from the branches to the Backbone Organization, this will create opportunity for expenditure reduction in the branches (and may create the need for terminations). In total, because of process and other efficiencies, the levy for the pooled back-office functions should be at a lower amount than total current expenditures on inefficient back-office functions.</p>
10.	<p><b>Shift resources from more effective back-office to mission impact.</b></p> <p>On a combined basis, CPF should monitor the share of expenses which are attributed to administrative expenses using consistent and reasonable estimates.</p> <p>As CPF completes the important transformation to optimize the use of human and other resources, resources from administrative functions should be redeployed to increase direct mission impact.</p> <p>Within 3-5 years of the launch of this transformation, on a combined basis, the share of expenses attributed to administrative expenses should fall below the ratio at the beginning of the transformation. Note that it would be reasonable for the ratio of administrative expenses to increase during the period of implementation of the transformation as there will be costs associated with migration and learning to work in new ways.</p>
11.	<p><b>Confirm funders' support and ensure flexibility of funding arrangements.</b></p> <p>Confirm acceptance by Canadian Heritage of the recommendations of its auditors to implement rationalization of back-office functions into the backbone organization.</p> <p>Be vigilant in informing all other funders pro-actively of the plans for transformation. Ensure they understand the aim of such transformation is to boost mission impact.</p> <p>Seek permission from funders to apply some funding to the costs of the transformation.</p>

Recommendation	Description
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**Create a single CPF internal labor market with one employer.**

Currently, each legal entity<sup>22</sup> within the CPF Network serves as an employer for its employees. Many aspects of the employment relationship are already coordinated across the Network with the effect that all permanent CPF employees share a single suite of health and group RRSP plan. As noted earlier, when a branch employee is not performing in a role or acts in ways inconsistent with CPF policy, CPF Canada has obtained sources legal advice and provided financial resources to branches to implement separation agreements. This means that CPF Canada attracts significant risks and responsibilities in matters of employment without being the employer of record.

While most branch boards discharge their responsibility for performance management and succession planning of the most senior staff person accountable to them, some branch boards struggle to implement robust and rigorous processes of oversight of their executive directors. In the past, this has led to situations of crisis and instability in branch staff leadership. Implementing a process to oversee the Executive Director and to ensure appropriate succession planning for that position is a demanding task. The many steps required in the development and approval of performance objectives, learning and development plans and performance reviews can prove to be very burdensome to some board members who are motivated by a desire to impact young people. The challenge present with these responsibilities is magnified when there is an issue of performance with the incumbent or when a vacancy occurs in the role.

There is no legal requirement for branch staff to be employed by its home branch. All branch staff could share CPA Canada as their employer and be on loan through a management services arrangement through one or more branches. In complex commercial organizations where a parent corporation controls many subsidiaries, staff of the subsidiaries are often employees of the parent corporation on loan to the subsidiary. This is normal practice in the business world as it simplifies processes related to human resource management. It also allows those corporations to mitigate the significant risks associated to the employment relationship.

More recently, as staff are being shared across two branches, some employment contracts have been developed that have two entities sharing in the role of employer. This approach is not sound either from the perspective of CPF or that of the employee. What happens if the two entities cannot agree on a decision to terminate the said employee? What if a termination is implemented in a way that honors the rights of the terminated employees? Does this saddle the terminated employee to commence legal action against two employers?

12.	<p><b>All job opportunities are posted and available to anyone within the CPF Network.</b></p> <p>Except where a place-based requirement is associated to a position which limits the geographic scope for such role, remote work arrangements should be made available to provide opportunities for successful candidates independent of their place of residence.</p>
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<sup>22</sup> Note that it is the legal entity (i.e., CPF Nova Scotia or CPF Canada) and not their boards which are party to employment agreements. While the Board supervises executive directors who are directly accountable to the board and the executive directors supervise management staff, all employees in one branch/or on the National Team share the same employer.

Recommendation	Description
	<p>All staff including those who live in communities where CPF does not have an office should be linked to one office.</p> <p>Priority should be given to internal candidates where there are talented individuals ready to grow and learn new roles. At times, it will be incumbent on CPF to provide coaching, training and extensive onboarding supports to accompany internal candidates as they grow in their careers within the CPF Network.</p> <p>The lead staff in each of the CPF offices (typically an executive director) will have the responsibility to ensure that all CPF staff who are assigned to their office as a home base are invited to team meetings and office social events. They will also ensure that remote workers can have access hotelling workplaces when remote workers visit the home office.</p>
13.	<p><b>Implement career mapping and talent management processes.</b></p> <p>The performance management processes should be expanded to integrate career mapping and talent management processes.</p> <p>The career mapping and talent management processes should allow CPF to balance continuity and change in its paid workforce with a deliberate focus on succession planning in all executive and managerial roles.</p> <p>In private with their supervisor, employees should be invited to identify additional special projects or new roles to which they aspire which would contribute to their career progression and growth.</p> <p>Employees should have an opportunity to focus some of their learning opportunities in ways which improves their readiness for special projects or new roles.</p> <p>When employees should be compensated accordingly when they accept expanded responsibilities or new roles.</p> <p>HR should design a confidential process inviting managers to identify star performers to the HR team. Extra effort should be deployed to retain star performers by providing opportunities for learning, career progression and growth.</p> <p>Team-based training opportunities should be developed and/or made available to all CPF managerial staff to equip them to devolve appropriate decision-making to individual performers.</p>
14.	<p><b>CPF must implement a plan to become less top-heavy.</b></p> <p>Management FTEs should account for no more than 33% of all FTEs in the organization in three years from the start of the implementation of this transformation.</p> <p>Because there is little real term growth in the funding available to CPF, this means the management ranks of CPF will need to be re-designed and rationalized through normal attrition. In no way, is this recommendation intended to signal a plan for terminations.</p> <p>Where possible, CPF should introduce the option (as an option only) to those currently in management to work on a part-time basis. This option may prove attractive to some managers who have family responsibilities or are approaching retirement.</p> <p>The current CPF job classification system establishes five broad tiers or staffing levels in its organizational design (i.e., executive director/CEO, director, manager, coordinator, and administrator). Of the five tiers, three are managerial roles and two are individual performers.</p>

Recommendation	Description
	<p>Consideration should be given to creating another individual performer tier between the current manager and coordinator tiers.</p>
<p>15.</p>	<p><b>Transfer employment relationships to CPF Canada.</b></p> <p>CPF Canada should become the employer for all CPF Network employees within three years of the launch of this transformation.</p> <p>Care and caution should be exercised in planning the transfer of employment relationships. This process should be implemented with the advice of employment counsel.</p> <p>Employees to be transferred should receive formal notice well before a transfer were to take effect. They should be encouraged to receive independent advice.</p> <p>Employment transfers should be implemented in ways that protect the tenure, compensation, and broad nature of the roles of the affected employees.</p>
<p>16.</p>	<p><b>Change the accountability of branch executive directors.</b></p> <p>Over the next three years, all branch executive directors should have a primary accountability to the Network CEO and one or more secondary accountabilities to the branch boards for which they have leadership responsibilities. Both accountabilities should be formally enshrined in the employment transfer agreement (see above).</p> <p>No change in title should accompany the change of accountability of branch executive directors except that a branch executive director may be asked to cumulate other responsibilities (i.e., leading a second or more branch(es) or provide leadership to a back-office function concurrent with their role as ED).</p> <p>New appointments to the role of branch executive director should be consistent with this recommendation starting as quickly as possible.</p> <p>The secondary accountability of branch boards should be reflected in several formal ways. Boards should have input on the recruitment process when a vacancy in the role happens. At minimum one Board leader from each branch should be invited by the CEO to conduct final interviews for the appointment of executive directors in their region. Their role in the recruitment will be advisory to the CEO.</p> <p>Annually, the CEO will implement a process to solicit input from branch boards in the development of the performance and development plan of their respective EDs. Final draft of those plans will be validated with board leaders before they are approved by the CEO. Similarly, at the end of each performance cycle, the CEO will invite confidential input of all board members on their performance against plan. At minimum one board leader from each branch will be invited to join the CEO in the performance review.</p> <p>In circumstances where the CEO is contemplating the termination of a branch Executive Director, they will be required to first inform the chair of the respective branch board(s) except if the CEO has good reason to believe that the chair could not protect the confidentiality of this sensitive information.</p> <p>Training and executive coaching should be available to the CEO with a focus on supporting their leadership of a remote team of executives who are accustomed and require a high level of autonomy, as the CEO assumes new responsibility for leadership of all CPF senior managers, they should be relieved of the supervision of individual performers at the frontline.</p>

Recommendation	Description
	<p>Any plans for the succession of the CEO should ensure that an individual with experience in providing leadership to a distributed team of senior managers is recruited to the role.</p>
<p>17.</p>	<p><b>Transform CoED into a Senior Leadership Team.</b></p> <p>Within months of the launch of this transformation process, the CoED should be transformed into a senior leadership team (SLT).</p> <p>The SLT should combine those responsible for the branches and for key back-office functions.</p> <p>A team charter should be developed to guide deliberations and decision-making at the SLT. The team charter should incorporate a set of values important to SLT participants. The team charter should outline that consensus-based decision-making is preferred but not required.</p> <p>The SLT should meet, at minimum, 12-16 times per year, ideally with one or two of those meetings in person.</p> <p>A record of decision of the SLT should be kept.</p> <p>The SLT should ensure that appropriate communications to board members and to staff take place without delay after important decisions.</p> <p>The SLT should be chaired by the CEO.</p>
<p>18.</p>	<p><b>Template employment offers and contract language should be revised to make employment in new entry-level and other roles attractive to those outside CPF.</b></p> <p>Employment offers should eliminate the notion of a probationary period. That notion should be replaced by a description of the steps the employer will take to welcome, onboard, train and otherwise equip new employees to thrive at CPF and in their role. In the rare instances where a new employee is not successful in a role, a termination agreement should be implemented consistent with common law and statutory provisions or with the termination clause in the standard employment contract, if any.</p> <p>Employee should not be hired on short-term contract (except for summer students, interns, etc.) independent of whether grant funding is available for such role for a limited term only. The risk inherent in hiring permanent staff into roles which rely on term-limited funding will be mitigated by the ability to attract better candidates and to retain those serving in those roles until the term-limited funding lapses.</p> <p>Consistent with a strategy that prioritizes internal candidates in all roles, deliberate and pro-active efforts should be made to place employees hired through limited-term funding in positions which enjoy more stable funding. In the rare instances where an employee hired with term-limited funding cannot be moved to a position which enjoy more stable funding, the employee can be terminated in ways consistent with law or with the termination provisions of the employment contract, if any.</p> <p>Benefits should be made available to all employees working more than 24 hours per week except for summer students and interns. Where possible the waiting period for benefits should be reduced or eliminated.</p> <p>Employment offers should describe CPF's commitment to career mapping and talent management and commit to an annual discussion with each employee of their career trajectory within CPF.</p>



## NEXT STEPS

Networks are changing at a frenetic pace.

Rapid improvements in communication technologies have made it possible for organizations to reduce the costs of their back-office functions by pooling those activities to generate economies of scale.

The pandemic provided opportunity to develop new programs which are delivered in hybrid or virtual models. Yet, the lifting of restrictions also reminded all involved at CPF that there continues to be value and relevance to in-person and place-based programs where children and youth come together to interact without electronic devices.

Demographic shifts pose new challenges in Canada's labor market which are readily visible in access to health care and in specialized trades (e.g., the construction industry).

Canada's productivity challenge and decreasing GDP per capita represent pressing challenges for governments which will continue to wrestle with the pressure of increasing expenditures in healthcare and of higher debt servicing costs.

This challenging context demands ingenuity and boldness on the part of CPF if it is to grow levels of impact on young people throughout Canada.

This high-level framework offers some bold pathways for change. It is intended as a backgrounder for discussion about leading practice. The hope is that it will serve to inspire changes in practice in a stepwise and considered way.

The intention is to stimulate reflection about the changes that may be appropriate at this juncture. A robust implementation plan to improve the sharing of paid human resources across the legal boundaries of the Network will require engagement of those who could be affected by the ultimate outcome of such a change process.

# Appendix A

## Canadian Parents for French

### An exploration of leading HR practices in Networked Organizations

#### Interview Participant Conversation Guide

#### INTRODUCTION AND BACKGROUND

I have been retained by Canadian Parent for French – National to guide and facilitate a structured process to optimize collaboration within the CPF Network. That work has already yielded a Network Affiliation Agreement and two discussion papers, one each on transformed approaches for membership and digital fundraising, and the other on chapters and teams. I am now embarking on a final phase of work focused on the sharing of human resources in a networked organizations. Please note that my focus will be on paid and not volunteer human resources.

My role is to serve as a source of independent advice and perspective in this important process.

This guide provides background and is intended to spur private reflections ahead of our confidential conversation.

1. Interview participants have been selected by CPF-National to provide a range of insights and perspectives. Most interview participants have unique perspectives on approaches to share human resources across Branches and/or CPF-National. Your perspective may be as someone in such a role or as one charged with supervising colleagues in such roles.
2. My conversations with you and others are planned via Zoom. All information shared with me is strictly confidential and will be available only to me. No identifying comment or data will be released or published in the findings except for a list of acknowledgements which will appear in the summary findings. Should a Zoom meeting not be favored, our conversation may take place by phone.
3. The semi-structured probes below will be used as a loose guide for our conversation. They are not a script for our conversation. I will no doubt have additional questions that will build on your answers or unearth areas for discussion that I may not have anticipated. These unexpected ‘gold nuggets’ are key to the richness of these conversations.
4. I am prepared to engage with you in either French or in English. You will be invited to let me know your preference when you schedule a time via Calendly.

Thank you for your participation. I look forward to our conversation.

Yves

#### QUESTIONS FOR REFLECTION

1.	Please tell me how long you have been involved with CPF and in what role(s)?
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2.	Thinking of CPF broadly as a network, what leading practices do you observe in sharing staff across branches or across branches and National?
3.	Thinking of CPF broadly as a network, what barriers or obstacles do you see delaying, hampering or preventing efforts to share staff across branches or across branches and National? How can these be overcome?
4.	Are there staff roles that cannot be shared and that should remain separate and not be networked? Why?
5.	Describe the role you hold (or the role you supervise) and its accountability structure? What are the benefits/advantages of your role and its structure? Can you see such roles expanded to other areas?
6.	What are the pitfalls/disadvantages of your role and its structure? How might you remedy those?
7.	As you know, my work is focused on pathways to optimizing collaboration in a networked organization. What the top three things you would do in the next twelve months (assuming you were alone in making the decision) to multiply opportunities to share staff in our networked organization?
8.	Thinking about the broader context for paid work in Canada, what are some of the major forces changing the reality of employment post-pandemic? How are these forces changing expectations of those looking for a job? Again, thinking of the large CPF Network, is CPF equipped to respond to those force and changed expectations?
9.	Thinking of the broad range of human resources activities (e.g., attracting, screening and hiring, supervising and directing, managing talent and performance, establishing equitable pay and benefits for each role, developing and applying HR policies, etc.) what activities might be pooled in the backbone organization to better optimize collaboration in the CPF Network while focusing more resources locals on programming?
10.	Imagine a transformed CPF Network that had all CPF staff ultimately accountable to the CPF National Board of Directors, which delegates the authority of management and implementation to the Network CEO, with the Branch Executive Directors being directly accountable to the Network CEO with dotted-line or indirect accountability to their Branch Board of Directors. Comment on how this might foster or hinder improved collaboration?
11.	Do you have any other comments which I have not solicited in the questions above?



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