



Intervenor Services

The future is in your hands

Best Practices in Human Resources Toolkit

Intervenor Services Human Resources Strategy

Prepared by: ISHRS Best Practices in Human Resources Sub-Committee

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PART ONE: THE STRATEGIC AND PERFORMANCE CONTEXT

OVERVIEW

The Intervenor Services Best Practices in Human Resources Toolkit is the result of a major Human Resources (HR) initiative to develop and implement industry-wide HR programs and tools that support growth, high performance, and professionalism of the sector.

The implementation of the strategy was conducted in partnership with the Ontario Ministry of Community and Social Services (MCSS) and Intervenor Services Sector agencies through sustainability as they modify existing HR programs and develop new strategies and HR programs.

This report provides a strategic framework for best practices in HR, including tools and samples for agencies to consider for their recruitment, onboarding, retention, performance/recognition, and succession planning programs.

BACKGROUND

An Intervenor Services Program Renewal Strategy was launched in 2013 with the goal of addressing challenges and transforming and modernizing the Intervenor Services Sector in Ontario. This initiative was spearheaded by MCSS and the Intervenor Services Sector in collaboration with service providers, individuals who are deafblind, families, researchers, George Brown College, and key partners, such as the Intervenor Organization of Ontario (IOO) and Ontario Developmental Services Human Resource Strategy (DS HR Strategy).

The renewal strategy included the development of the *Integrated Framework for Intervenor Services (2017-2018)*, which brings together the *Intervenor Services Policy Framework (2014 – 2015)*, and the *Interim Operational Guidelines (2014 – 2015)*.

The purpose of the above-mentioned framework is to:

- Set the overall strategic direction of the Intervenor Services Sector;
- Provide written policy and direction;
- Increase program transparency;
- Make informed decisions;
- Develop a funding framework; and
- Implement a renewed Intervenor Services program.

This policy framework applies to MCSS funded Intervenor Services only and is subject to change by MCSS. The framework is based on the Deafblind International Guidelines on *Best Practices for Service Development for Deafblind People*. The following program objectives, principles, and performance guidelines are set out in the framework.

Program Objectives

- To facilitate communication between individuals who are deafblind and their environment using their preferred method of communication to assist them to live as independently as possible;
- To help individuals who are deafblind access information through a variety of communication methods making it possible for them to participate in activities of their choice, connect with other people, and make informed decisions;
- To support individuals who are deafblind to understand, access, coordinate, and organize community-based services that enable them to integrate or re-integrate with the broader community; and
- To provide Intervenor Services in coordination with other Ontario government programs to address the needs of the individual in an effort to improve quality of life.

Program Principles

- **Self-Directed and Responsive:** Intervenor Services will be delivered in a way that empowers and is responsive to the needs and self-directed goals of individuals using these services.
- **Choice:** Individuals who are deafblind will be able to choose which service provider they wish to engage within available resources.
- **Fair and Equitable:** Recognizing that each individual has unique circumstances, a similar level of funding for supports is provided to individuals with similar needs across the province.
- **Accountability:** Service providers are responsible for ensuring that funding is used for its intended purposes and is being managed to meet the needs and goals of the individual.
- **Sustainability:** Services are delivered within available program resources and leverage innovative programs and partnerships with the broader community.
- **Professionalism:** Intervenor Services are delivered in a professional manner by employees who have the expertise and training necessary to respond to the needs of consumers.
- **Family and Community:** Intervenor Services will be delivered in partnership with the appropriate supports of the consumer's broader network of formal and informal supports (family, friends, and community).

The Performance Measurement Framework

The MCSS is developing a Performance Measurement Framework (PMF) for the Intervenor Services Sector to support continuous learning and program improvement as well as to ensure programs are meeting the needs and making a difference in the lives of those accessing the services. The PMF will provide a set of measures and a consistent approach for systematically collecting performance data that will assist the MCSS in evaluating whether efforts to improve

services are working in the ways intended and/or how programs and systems might be improved.

The PMF will be a “living” document that is meant to be updated and revised in consultation with the sector as new ideas and/or practices emerge and services change. It is anticipated that the PMF will be reviewed and, where necessary revised, on an annual basis.

An annual consumer satisfaction survey will inform MCSS about the overall effectiveness of the program, and will be used as a mechanism to monitor progress on the program’s key outcomes.

The Intervenor Services Human Resource Strategy (ISHRS)

The Intervenor Services Human Resource Strategy (ISHRS) Steering Committee was established with a mandate to provide leadership and oversight for the implementation of a province-wide, multi-year HR initiative (2014–2018). The mandate of the Committee was to:

- Provide enriched learning opportunities for intervenors, supervisory personnel, and management;
- Develop sector specific behavioural competencies and related training opportunities;
- Develop and offer innovative and practical HR tools to improve recruitment, onboarding, and retention of qualified intervenors;
- Enhance the overall delivery and quality of services that promote meaningful outcomes for individuals who are deafblind; and
- Introduce marketing and communication approaches to elevate the profile and public awareness of the Intervenor Services Sector.

The ISHRS Steering Committee was co-chaired by both a MCSS and Intervenor Services sector representative. It consisted of four sub-committees with specific mandates that are aligned with the ISHRS’ mandate:

- **Behavioural Competencies Sub-committee** - with a mandate to identify behavioural competencies for key roles within the Intervenor Services Sector;
- **Marketing and Communications Sub-committee** – with a mandate to develop and implement an Awareness and Marketing Campaign to promote awareness, understanding, buy-in, and support for best practices in human resources that result from this project;
- **Education and Training Sub-committee** – with a mandate to identify technical competencies, current training and development opportunities for intervenors, including gap analysis, partnership potential, and improved access to education and training opportunities; and

- **Best Practices in Human Resources Sub-committee** – with a mandate to research and develop this toolkit for the dissemination of HR best practices and tools that support the HR strategy in the areas of: recruitment, onboarding, retention, performance and recognition, and succession planning.

In April 2015, the implementation process began for the ISHRS, which consisted of long-term strategic initiatives to ensure the delivery of high quality services through a competency-based approach that focuses on superior performance. The first major initiative carried out was to work with Hay Group to develop industry-wide behavioural competencies for the roles of intervenor, supervisor, and manager. These competency models were then used by other sub-committees and the Steering Committee to develop HR best practices within the group of Ontario agencies that provide Intervenor Services.

The behavioural competencies provide the framework for integrated HR programs in recruitment, onboarding, retention, performance and recognition, and succession planning.

The Intervenor Services Sector Competency Framework

Competencies are defined as the skills, knowledge, abilities, or personal characteristics that drive superior performance in a job role. There are two types of competencies – *technical* and *behavioural*.

A brief overview of both types of competencies is provided below:

- *Technical* competencies are the knowledge and skills required to do the job – they are what a person needs to know to do the job. Examples of technical competencies include strategies used in providing intervenor services, use of assistive devices and technology, etc. These competencies are often easier to see, train for, and develop; and
- *Behavioural* competencies are the behaviours a person demonstrates in performing the job – they are how an individual approaches their work. Examples of behavioural competencies include acting with integrity, influencing others, being resilient, working collaboratively, etc. These competencies can be harder to see yet are what make the biggest difference in performance.

The Education and Training Sub-committee developed customized technical competencies for the role of an intervenor. The Behavioural Competencies Sub-committee developed customized behavioural competencies for the roles of intervenor, supervisor, and manager.

Both the technical and behavioural competencies were developed and validated through interviews, focus groups, surveys, and consultations with senior management, intervenors, and individuals who are deafblind across Intervenor Services agencies to reflect the unique role of Intervenor Services with members of the deafblind community. They may be used as the basis for recruitment and selection, orientation, training and development, coaching and career

management, performance management, recognition and rewards, succession planning, and all other relevant areas of a strategic HR strategy.

The Intervenor Services Technical Competencies

Definition of Technical Competence

“An intervenor demonstrates technical competence by consistently using the necessary skills, knowledge and experiences to provide Intervenor Services to individuals who are deafblind.” This is done while maintaining the highest level of professionalism.

The Education and Training Sub-committee of the ISHRS was established to identify current training and development opportunities for intervenors, including gap assessment, partnership potential, and improved access to education and training opportunities. As part of the gap analysis, it was determined that a standardized set of technical competencies, geared to adult Intervenor Services, was needed.

In creating the technical competencies, the Education and Training Sub-committee reviewed various documents including: the Canadian Deafblind Association Competency Framework for Intervenor Services for Individuals who are Deafblind and the SKI-HI Institute Competencies for Training Intervenor Services to Work with Children/Students with Deafblindness.

While the technical competencies are applicable to all intervenors, some of the knowledge and skills identified under each technical competency may not apply to all intervenors. Individuals who are deafblind, managers, and agencies may determine which knowledge and skills are appropriate in each situation. It is always preferred that an individual who is deafblind lead any discussion on the intervenor’s role, the assessment process, or feedback.

Purpose

The purpose of the technical competency framework is to identify, for all intervenor service providers, a consistent standard of knowledge and skills necessary for intervenors working with individuals who are deafblind, in alignment with the goals of the ISHRS.

The technical competencies were developed for the following stakeholders:

- Trainers and educators to use as a resource tool for training and professional development programs for intervenors;
- Employers of intervenors to:
 - Assess program delivery;
 - Guide hiring practices;
 - Adequately assess the knowledge and skills of an intervenor as part of a performance development process; and
- Intervenor Services to evaluate their own knowledge and skills.

Technical Competencies for Intervenor Services

1. Understanding Deafblindness
2. Values, Ethics, and Principles of Intervenor Services
3. Strategies Used in Providing Intervenor Services
4. Theories and Practices of Communication
5. Social, Emotional, and Psychological Impact of Deafblindness
6. The Relationship between Deafblindness and Health, Mental Health, and Aging
7. Sensory Systems
8. Orientation and Mobility (O&M)
9. Use of Assistive Devices and Technology

Technical Competency #1: Understanding Deafblindness

To provide effective Intervenor Services, an intervenor must have a comprehensive understanding of theories and practices related to deafblindness.

Technical Competency #1: Understanding Deafblindness	
<i>The intervenor should have knowledge of:</i>	
1.1	Definition of deafblindness
1.2	Terms related to Intervenor Services
1.3	Variety of ways deafblindness can impact an individual
1.4	Causes of deafblindness, age of onset of vision and hearing loss, and the type of degree of loss
1.5	History of the field of deafblindness and Intervenor Services

Technical Competency #2: Values, Ethics, and Principles of Intervenor Services

To provide effective Intervenor Services, an intervenor must demonstrate a thorough understanding of their unique role and the philosophies that guide the delivery of services. Intervenor Services provide an essential service for individuals who are deafblind. Intervenor Services must strictly adhere to a code of ethics and deliver services in a professional manner.

Technical Competency #2: Values, Ethics, and Principles of Intervenor Services	
<i>The intervenor should have knowledge of:</i>	
2.1	The role of an intervenor
2.2	The definition of Intervenor Services
2.3	Philosophy and principles of Intervenor Services
2.4	The Intervenor Organization of Ontario's (IOO) Code of Ethics, and understand its application

Technical Competency #2: Values, Ethics, and Principles of Intervenor Services	
<i>The intervenor should have knowledge of:</i>	
2.5	Roles and responsibilities of an intervenor as part of an effective interdisciplinary team working in a variety of settings
2.6	The theories of empowerment, advocacy, and self-determination
2.7	The theory of self-reflective practice
2.8	Professional boundaries and conflict of interest as it relates to the role of an intervenor
2.9	The rights of the individual who is deafblind
2.10	How to professionally complete a variety of different documents/reports within an agency, including their function, importance, and to whom they are submitted
2.11	Abuse, how to report abuse, the intervenor's role within that, and abuse prevention
2.12	The importance of personal mental health and self-care and how it impacts your ability to provide Intervenor Services
2.13	Informed consent process and how to reach it
<i>The intervenor should have the ability to:</i>	
2.14	Provide Intervenor Services as outlined in the role of the intervenor and the philosophy and principles of Intervenor Services
2.15	Engage the individual in effective interactive communication and provide feedback in order for them to be an active and informed participant
2.16	Provide continuous environmental, visual, tactile, and auditory information
2.17	Plan and prepare for the assignment or activity
2.18	Support the individual's efforts for empowerment, advocacy, and self-determination
2.19	Effectively communicate the role of an intervenor
2.20	Demonstrate self-reflective techniques
2.21	Adhere to the IOO Code of Ethics
2.22	Interact professionally, respectfully, appropriately with a multi-disciplinary team (family, support network, other professionals, paraprofessionals), and the public at large
2.23	Adhere to and maintain professional boundaries
2.24	Demonstrate professionalism by adhering to the IOO's Code of Ethics
2.25	Complete documentation/reports objectively with pertinent, timely, accurate, respectful, and factual information
2.26	Recognize, respond to, and report abuse
2.27	Recognize when personal mental health and wellness is affecting your performance and use effective coping strategies

Technical Competency #3: Strategies Used in Providing Intervenor Services

To provide effective Intervenor Services, intervenors must understand and consistently implement appropriate strategies, which reflect the uniqueness of the individual.

Technical Competency #3: Strategies Used in Providing Intervenor Services	
<i>The intervenor should have knowledge of:</i>	
3.1	Person-centered approach to planning and the philosophy that supports this process
3.2	The importance of responding to the individual's interests
3.3	The importance of responding to interactions initiated by the individual who is deafblind
3.4	The importance of an individual's need for anticipation, motivation, communication, and confirmation and the impact of deafblindness on these needs
3.5	The importance of a responsive (reactive) environments
3.6	Concept development in conjunction with skill development
3.7	The importance of relaying visual/auditory information
3.8	The impact of various environmental factors on the individual
3.9	How change in routines can affect an individual
3.10	How physical change can affect an individual
3.11	Specific adaptations to techniques with individuals who have changing needs
3.12	The need to allow an individual sufficient time to process information, orientate, anticipate, and communicate
3.13	The importance of general conversation, sharing information, and news
3.14	The importance of developing a relationship to establish trust
<i>The intervenor should have the ability to:</i>	
3.15	Consistently demonstrate the "Do With, Not For" philosophy
3.16	Support the individual's goals and objectives by assisting in the design, development, and implementation of activities and experiences
3.17	Provide anticipatory information to the individual using a variety of methods
3.18	Utilize tools and strategies to support concept development, skills, choices, and decision-making
3.19	Relay visual/auditory information
3.20	Assess, adapt, and deal with the environment
3.21	Observe and respond to an individual's changing needs
3.22	Assess the degree of complexity with which a concept should be introduced, relayed, and/or expanded
3.23	Vary the level and intensity of input and ensure that the pace and duration meets the individual's ability to receive and respond

Technical Competency #4: Theories and Practices of Communication

Communication is an integral part of Intervenor Services. In order to be effective in their practice, intervenors must understand the theories of communication and demonstrate their practical application, as it relates to an individual who is deafblind.

Technical Competency #4: Theories and Practices of Communication	
<i>The intervenor should have knowledge of:</i>	
4.1	The impact of deafblindness on communication, interaction, and the development of language
4.2	The role of the intervenor in facilitating the use of receptive and expressive communication and ensuring the understanding of information
4.3	The role of the intervenor as part of a communication team
4.4	Communication theories and practices
4.5	The importance of preparing for an assignment/activity
4.6	Modes of communication and different languages used by individuals who are deafblind
4.7	The linguistics of American Sign Language (ASL) and/or Langue des signes québécoise (LSQ)
4.8	English and/or French language and grammar
4.9	The interpreting process, models, and skills
4.10	How your body, speed, and touch can affect communication
<i>The intervenor should have the ability to:</i>	
4.11	Demonstrate proficiency in English and/or French
4.12	Demonstrate proficiency in the language or communication mode used by an individual
4.13	Voice what the individual is communicating
4.14	Communicate and use language adapted to the level of an individual
4.15	Enhance and expand communications through various mediums and experiences
4.16	Implement methods and strategies for providing information
4.17	Observe and identify an individual's expressive communication
4.18	Interpret the meaning of an individual's communication, relay to others, and respond appropriately
4.19	Encourage expressive communication by an individual
4.20	Recognize, respond, and provide feedback for all attempts at communication
4.21	Shadowing and/or copying sign language

Technical Competency #5: Social, Emotional, and Psychological Impact of Deafblindness

To provide effective Intervenor Services, intervenors need to have an understanding of the social, emotional, and psychological impact of deafblindness, and possess the requisite skills to support individuals.

Technical Competency #5: Social, Emotional, and Psychological Impact of Deafblindness	
<i>The intervenor should have knowledge of:</i>	
5.1	The impact of deafblindness on relationships, sexuality, and social interaction
5.2	The effects of an individual's etiology on their social, psychological, and emotional wellbeing
5.3	The grieving process, and how it relates to an individual who is deafblind, families, social networks, etc.
5.4	Challenging behaviours and their possible precipitating factors
5.5	How isolation affects an individual
5.6	The impact of familial background, upbringing, spirituality, and culture
5.7	What a trusting relationship is, and why it is important
5.8	The importance of a professional working relationship with the family and support circles
<i>The intervenor should have the ability to:</i>	
5.9	Recognize their role in situations related to an individual's social, psychological, and emotional wellbeing
5.10	Support a culture of acceptance, safety, and security that is reliable and consistent
5.11	Support the individual's opportunities for self-determination, self-esteem, and wellbeing
5.12	Implement strategies and protocols for challenging behaviours
5.13	Support social interactions and the development of meaningful relationships
5.14	Establish and maintain a professional working relationship with the family and support circles

Technical Competency #6: The Relationship between Deafblindness and Health, Mental Health, and Aging

To provide effective Intervenor Services, intervenors must demonstrate knowledge of health, mental health, and aging and be aware of implications for an individual who is deafblind.

Technical Competency #6: The Relationship between Deafblindness and Health, Mental Health, and Aging	
<i>The intervenor should have knowledge of:</i>	
6.1	What is health and mental health
6.2	Health conditions, medications, and possible side effects as it relates to the individual you are supporting
6.3	The impact of deafblindness on health
6.4	The impact of an individual being deafblind and medically fragile
6.5	The impact of deafblindness on mental health and wellbeing
6.6	The impact of additional disabilities, diseases, and conditions
6.7	The natural aging process and associated conditions, including its effect on deafblindness
6.8	Specific adaptations to techniques when working with older individuals who are deafblind
<i>The intervenor should have the ability to:</i>	
6.9	Utilize observation skills to recognize that changes could be related to health, mental health, and aging
6.10	Make adaptations appropriate to the environment, medical and physical needs ,and cognitive needs of the individual
6.11	Follow appropriate protocols to meet the individuals' health, mental health, and aging
6.12	Access community resources and services for health, mental health, and aging

Technical Competency #7: Sensory Systems

To provide effective Intervenor Services, intervenors must demonstrate an understanding of the complexity of combined hearing and vision loss and the integration of the sensory systems, in relation to an individual who is deafblind.

Technical Competency #7: Sensory Systems	
<i>The intervenor should have knowledge of:</i>	
7.1	The anatomy and functions of the eye and ear
7.2	The conditions that affect the eye and ear
7.3	Strategies that support the use of residual vision and hearing
7.4	Methods used to test vision and hearing
7.5	The impact of deafblindness on sensory integration and the processing of sensory information
7.6	The importance of the eight senses and the impact on an individual who is deafblind

<i>The intervenor should have the ability to:</i>	
7.7	Support an individual to use residual vision and hearing
7.8	Facilitate an individual's use of other senses to supplement auditory, visual, and tactile information
7.9	Utilize strategies that support the sensory needs of an individual
7.10	Understand the results of audiograms and vision reports and the functional impact on an individual
7.11	Make adaptations for visual and auditory needs
7.12	Understand how an individual integrates their senses and allow sufficient time for information to be processed
7.13	Utilize observational skills to recognize changes in vision and hearing

Technical Competency #8: Orientation and Mobility (O&M)

To provide effective Intervenor Services, intervenors must understand orientation and mobility, and support an individual's use of O&M techniques, strategies, and aids.

Technical Competency #8: Orientation and Mobility (O&M)	
<i>The intervenor should have knowledge of:</i>	
8.1	The impact of deafblindness on movement, spatial awareness, exploration or navigating, and understanding of the environment
8.2	The role of the O&M Specialist
8.3	O&M techniques, aids, and required adaptations
8.4	Technology and tactile cues available to support the O&M process
8.5	The role and function of a guide dog
<i>The intervenor should have the ability to:</i>	
8.6	Adjust to changing environmental factors
8.7	Support and provide sighted guide as recommended by an O&M Specialist and/or by an individual's preferences
8.8	Support the individual who is deafblind in the use of appropriate mobility devices as recommended by an O&M Specialist
8.9	Relay information from the environment
8.10	Develop tactile cues and maps
8.11	Recognize and assess their own physical ability and limitations to provide sighted guide as an O&M technique and make accommodations as needed
8.12	Provide a safe environment for exploration

Technical Competency #9: Use of Assistive Devices and Technology

Assistive devices and technology enhance an individual's ability to communicate and access information. An intervenor must demonstrate an understanding of assistive devices and technology used by, or available to, an individual.

Technical Competency #9: Use of Assistive Devices and Technology	
<i>The intervenor should have knowledge of:</i>	
9.1	Various technical and augmentative devices available to an individual who is deafblind
9.2	Use and maintenance of amplification, cochlear implants, and assistive listening devices, as appropriate
9.3	Use and maintenance of glasses, low vision devices, and prostheses
9.4	Variety of resources and funding sources for assistive devices and technology
9.5	Technology, including new and emerging technology, and its application
<i>The intervenor should have the ability to:</i>	
9.6	Demonstrate effective and efficient use of various technical devices used by an individual who is deafblind
9.7	Assist an individual in utilizing various technical devices
9.8	Research new and emerging technology and share with individuals
9.9	Demonstrate basic computer skills

The Intervenor Services Behavioural Competencies

The Intervenor Services Behavioural Competencies were developed by the ISHRS' Steering Committee, the Behavioural Competencies Sub-committee, and the Hay Group. Valuable input and feedback was sought from the other sub-committees on the project as well as a wide range of other internal and external stakeholders.

What is a Behavioural Competency Model?

The Intervenor Services Behavioural Competency Model was developed for the job family of intervenors, supervisors, and managers. It recognizes that each of these career levels requires a different set of competencies that drive superior/fully effective performance in each role.

Reasons for Behavioural Competencies

There are many reasons for developing a behavioural competency model for the Intervenor Services Sector. An industry wide competency model ensures there is a common framework and common language to:

- Define behavioural expectations;
- Assess current competencies and behaviours demonstrated on-the-job;

- Identify gaps in current behaviours and competencies required for each of the three role levels;
- Provide the basis for discussing performance results, expectations, and accomplishments;
- Provide the basis for career development plans;
- Provide the basis for ongoing learning and development;
- Identify the competencies required for recruitment and selection to each of the three roles; and
- Develop industry wide training and development plans and to provide input into the design of formal training provided by external and internal learning and development stakeholders.

Behavioural Competencies are aligned with Strategic Human Resource Programs

Competencies are used to support several other HR program areas. These include:

- **Recruitment and Selection** – uses competencies and behavioural interview questions based on these competencies to develop interview questions, selection criteria, and factual results to assess the strengths and weakness of each candidate for each role;
- **Onboarding** – uses technical and behavioural competencies to define the orientation and onboarding programs required to socialize new employees to their roles;
- **Performance Management, Recognition, and Feedback** – uses competencies as the basis of assessing how well work is done and the behaviours that lead to success on the job;
- **Training and Development** – the competency assessment provides factual feedback on areas of strength and areas requiring further development through on-the-job learning and formal learning opportunities. The Competency Development Planner tool can be used to identify and prioritize the key competencies for development, which can then be translated into an Individual Development Plan in a performance management process using the Performance Development Tool. This Individual Development Plan will be used to focus training and on-the-job learning on specific competencies to be developed for the employee;
- **Succession Planning** – the competency assessment provides factual feedback on the readiness of current employees to assume future jobs and to manage their own career plans within the agency or external to the agency; and
- **Recognition and Feedback** – the competency assessment and learning and development plans provide opportunities to recognize and reward strong performance, while also allowing the employee to develop new skills and competencies.

Steps in Developing the Competency Model

The Intervenor Services Competency Model was developed in conjunction with Hay Group through the following five steps:

1. Gained an understanding of the context through interviews and documentation review;
2. Job shadowed intervenors to observe how the role was carried out;
3. Conducted focus groups and distributed survey;
4. Analyzed the data and finalized draft behavioural competency models; and
5. Validated the models and finalized based on feedback.

The four clusters of “Be Your Best Self,” “Build Bonds,” “Deliver Excellence,” and “Lead and Engage Others” apply to the job family of all intervenor related roles. Within these four clusters, there are differences in the descriptors that serve to customize the desired behaviours to reflect the specifics of the job level.

The two models are described below:

INTERVENORS

Cluster name	The competencies for <i>Intervenors</i> are focused on ...
Be Your Best Self	Managing and motivating yourself to be the best you can be: <ul style="list-style-type: none"> • Act with Integrity; • Be Flexible; • Commit to Personal Growth and Development; and • Demonstrate Self-Management and Resilience.
Build Bonds	Engaging others and growing and maintaining trusting relationships: <ul style="list-style-type: none"> • Be Emotionally “In Tune;” • Build Trusting Relationships; • Engage, Influence, and Advocate; • Foster Independence and Confidence; and • Work as a Team.
Deliver Excellence	Delivering excellent service and achieving the desired results for consumers, families, and the agency: <ul style="list-style-type: none"> • Demonstrate Creative Problem Solving and Decision Making • Show Passion, Enthusiasm, and Dedication
Lead and Engage Others	Inspiring and growing your team.

The detailed Behavioural Competency Definitions for intervenors are found in the Tools section of this chapter.

SUPERVISORS AND MANAGERS

Cluster name	The competencies for <i>Supervisors and Managers</i> are focused on ...
Be Your Best Self	Managing and motivating yourself to be the best you can be: <ul style="list-style-type: none"> • Act with integrity; • Be flexible; • Commit to personal growth and development; and • Demonstrate self-management and resilience.
Build Bonds	Engaging others and growing and maintaining trusting relationships: <ul style="list-style-type: none"> • Engage, influence, and advocate; and • Work as a team.
Deliver Excellence	Delivering excellent service and achieving the desired results for consumers, families, and the agency: <ul style="list-style-type: none"> • Demonstrate creative problem solving and decision-making; • Demonstrate financial acumen; • Plan and coordinate; and • Show passion, enthusiasm, and dedication.
Lead and Engage Others	<ul style="list-style-type: none"> • Lead and develop others; and • Hold self and others accountable.

The detailed Behavioural Competency Definitions for supervisors and managers are found in the Tools section of this chapter.

Best Practices in Human Resources

This Best Practices in Human Resources Toolkit was developed to address identified challenges within the Intervenor Services Sector and outline recommended HR best practice standards, including tools and samples developed as part of this strategy, for agencies to consider for their recruitment, onboarding, retention, performance/recognition, and succession planning programs. *Below is an illustration of how Part Two of this toolkit is structured for easy reference:*

2.1 Recruitment		2.2 Onboarding		2.3 Retention		2.4 Performance and Recognition		2.5 Succession Planning	
2.1.1	Overview	2.2.1	Overview	2.3.1	Overview	2.4.1	Overview	2.5.1	Overview
2.1.2	Recruitment Issues Faced in the Intervenor Services Sector	2.2.2	Onboarding Issues Faced in the Intervenor Services Sector	2.3.2	Retention Issues Faced in the Intervenor Services Sector	2.4.2	Performance and Recognition Issues Faced in the Intervenor Services Sector	2.5.2	Succession Planning Issues Faced in the Intervenor Services Sector
2.1.3	Why Recruitment Matters (The theory)	2.2.3	Why Training Matters (The theory)	2.3.3	Why Retention Matters (The theory)	2.4.3	Why Performance & Recognition Matters (The theory)	2.5.3	Why Succession Planning matters (The theory)
2.1.4	Steps in the Recruitment and Selection Process	2.2.4	Steps in the Orientation Process	2.3.4	List of options for a Retention Strategy in the Intervenor Services Sector	2.4.4	Performance Management and Recognition	2.5.4	Steps in a Succession Planning Process

2.1	Recruitment	2.2	Onboarding	2.3	Retention	2.4	Performance and Recognition	2.5	Succession Planning
2.1.5	Checklist of items to include in a Recruitment and Selection process	2.2.5	Checklist of items to include in an Orientation process	2.3.5	Reasons for turnover checklist	2.4.5	Checklist of items to consider in a Performance and Recognition program	2.5.5	Checklist of items to include in a Succession Planning process
2.1.6	Tools – Recruitment	2.2.6	Tools - Onboarding	2.3.6	Tools – Retention	2.4.6	Tools – Performance and Recognition	2.5.6	Tools – Succession Planning

The Business Case

The research carried out by the strategy identified significant challenges within the Intervenor Services Sector for the key areas outlined above. These challenges were described in the Hay Group report documenting the development of the behavioural competencies (*see tools section*). Listed below are challenges identified by agencies within the sector:

Service Delivery Challenges faced by Agencies

- Limits to resources that meet the unique needs of consumers both those with congenital and acquired deafblindness;
- Changing demographics;
- Increasing demands for Intervenor Services;
- General lack of awareness of the profession of Intervenor Services;
- Expanding service areas – setting up and providing services in more remote areas;
- Health and mental health issues and challenges faced by individuals with deafblindness;
- An aging population and associated diseases and disorders; and
- Higher expectations from adults with deafblindness, families, and other stakeholders regarding the quality of services provided.

Human Resource Challenges faced by Agencies

- Recruitment and retention of qualified candidates with knowledge of deafblindness;
- Challenges in recruitment and retention of intervenors in rural and remote areas of the province;
- As of 2017, there is only one college offering the Intervenor for Deafblind Persons Program and providing specialized graduates in Intervenor Services;
- Most successful candidates require significant training to be effective on the job;
- Inconsistent training and skill levels across the province;
- Entry level candidates have a lack of understanding of what is required to support individuals with deafblindness;
- Lack of awareness about Intervenor Services as a career choice; and
- Increasing need to professionalize the roles of intervenor, supervisor, and manager within the Intervenor Services sector.

Establishing HR Metrics and Measures

To identify the issues with current strategic HR programs, it is important to understand the numbers. HR metrics pertaining to retention are useful to pinpoint where issues are. The data is useful for comparing internal statistics to statistics from other agencies; to identify strategies to manage retention; to have comparative data to track progress on a year over year basis; and to improve HR programs that help to improve retention rates.

The following list provides examples of HR metrics that may be tracked:

- **Workforce counts** – includes metrics pertaining to numbers of employees;
- **Recruitment and hiring** – includes metrics on vacancies, number of positions filled, internal and external hires, and headcount;
- **Separation and turnover** – includes metrics on terminations (probationary, voluntary, involuntary), and turnover rates;
- **Attendance Management** – includes metrics pertaining to time off;
- **Health and Safety** – includes metrics on health and safety incidents; and
- **Learning and Development** – includes metrics on qualifications and training hours.

The Best Practices in Human Resources Sub-committee has developed a spreadsheet with a range of metrics and measures. It is recommended that each agency review the available metrics and establish processes to track the metrics and measures of most importance to the agency. The HR metrics tool is attached to this toolkit.

Summary

On a longer term basis, the goal of the ISHRS is to ensure a high level of quality service provided while, at the same time, building a highly qualified workforce measuring the behavioural and technical competencies of Intervenor Services at the levels of intervenor, supervisor, and manager. These also contribute to a culture that retains key employees and builds high levels of employee engagement within the agency and the profession. This goal fits within a larger term strategy of continuous improvement in the operational effectiveness of all agencies within the Intervenor Services Sector.

TOOLS – THE STRATEGIC AND PERFORMANCE CONTEXT

- Building Human Resource Capacity: Core Competencies for Ontario Intervenor Services Sector (January 2016);
- HR Metrics for Intervenor Services (November 28, 2017);
- Introduction to Behavioural Competencies;
 - Intervenor Services Behavioural Competency Dictionary (August 2016);
 - Introduction to Behavioural Competencies (PowerPoint) (September 16, 2016); and
- Technical Competencies for Intervenor Services (February 1, 2018).

2.1 RECRUITMENT

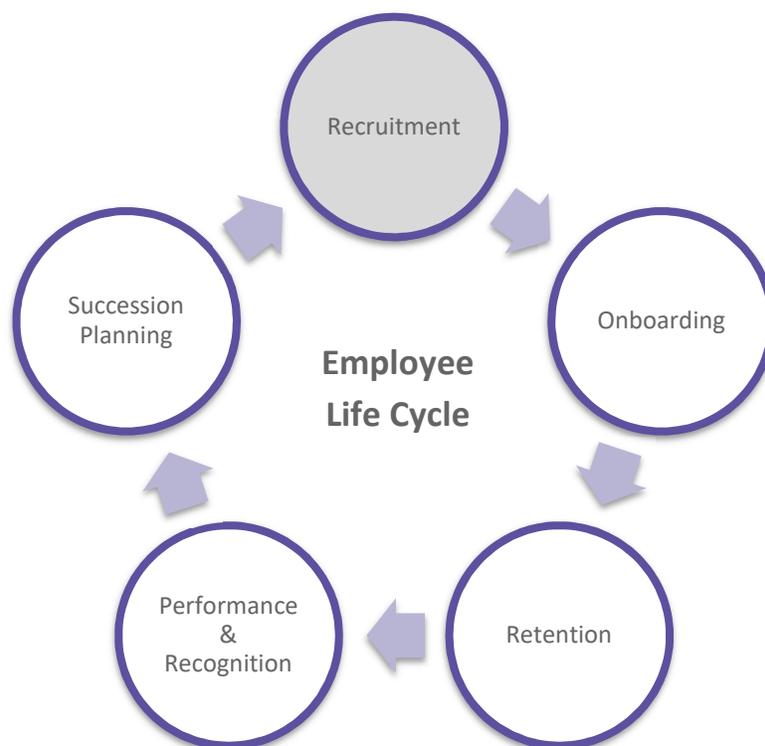


Figure 1.1: Employee Life Cycle

2.1.1 OVERVIEW OF RECRUITMENT

The recruitment and selection process is the first phase in the employee life cycle. The purpose of this first phase is to identify the right candidate with the right knowledge, skills, abilities, and potential to be successful in a role and throughout their career.

It is important to build a pipeline of talent with candidates who are interested in career opportunities within Intervenor Services well before a vacancy occurs. This may be done by establishing relationships with colleges and educational institutions to create awareness of career opportunities early on in their education. Being visible through social media, websites, conferences, open houses, and job boards is vital. Also, connections such as partnerships, relationships with stakeholder groups, and encouraging more volunteerism will provide inside perspectives of the vision, mission, goals, and career opportunities within the agency. It is also prudent to note that there are provincial, national, and international bodies, such as the IOO, DBNO, DBI, CNSDB, etc.

The behavioural and technical competencies developed as part of the ISHRS provide an excellent framework to support the recruitment and selection, performance management, learning and development, and succession planning.

2.1.2 RECRUITMENT ISSUES FACED IN THE INTERVENOR SERVICES SECTOR

The following list of issues were identified through the surveys conducted within the Intervenor Services sector:

- High turnover at the intervenor level (i.e. 75%). Reasons for turnover range from change in residence to finding a new position with an increase in pay to other personal reasons;
- Career opportunities within the Intervenor Services Sector are not well known or understood – more awareness of the intervenor role as a career choice would help in identifying potential candidates and encouraging them to apply for positions;
- The unique role of the intervenor makes the challenge of developing the “fit” between the candidate, individual who is deafblind, and the job extremely important;
- The most common recruitment practices include external job boards and networking. These channels may not reach the right candidates;
- George Brown College is the only educational institution in the province that provides a diploma program in Intervenor for Deafblind Persons Program. The demand for graduates of this program is high while the number of graduates is low. Other common diploma programs include the Developmental Service Worker (DSW) and Social Service Worker (SSW);
- The length of time to fill a vacant job can be long. In the Intervenor Services Sector’s employer survey, 37.5% of agencies reported that it generally takes one to three months to fill a vacancy. 37.5% took four to six months to fill a vacancy; and
- There is a geographic issue when recruiting new intervenors and in matching intervenors with individuals who are deafblind due to geographic locations and rural, sub-rural, and urban centres.

A quick list of possible solutions is provided below and a more comprehensive analysis of the situation and potential solutions is provided in the remainder of this section on Recruitment.

Strategies

- Develop a short term and long term recruitment plan that is aligned with the agency’s strategic plan;
- Customize sample intervenor job posting for agency use (*see tools section*);
- Agencies to send technical and behavioral competencies with job offer;
- Use the Intervenor Services Sector competency framework and behavioural interviewing processes as the basis of the recruitment and selection processes to improve the

selection process and the “fit” between the candidate, the individual who is deafblind, and the position;

- Ensure supervisors, managers, and directors involved in the decision-making process regarding new hires are fully trained in Intervenor Services Sector competency framework and behavioural interviewing processes;
- Ensure compensation and benefits programs are competitive within the external market where the agency competes for talent;
- Maintain statistics pertaining to recruitment sources in generating candidates, acceptance rates of job offers, numbers of employees who complete the probationary period, and the retention rates of new and existing employees. Use this data to inform new HR strategies;
- Expand recruitment sources to include channels that reach the right people with the potential to be well matched to the role of intervenor:
 - A list of social media used by agencies for recruitment include: the organization’s Website, Facebook, Twitter, Indeed, Instagram, and LinkedIn. In addition, word of mouth, staff referrals, and college/university recruitment sites are also used; and
 - For posting on job boards, examples include: local college(s), OASIS, Indeed, Library, other related schools, Intervenor Organization of Ontario (IOO), George Brown College, Charity Village, Local Job Bank, and Human Resources Development Canada Job Bank (HRDC);
- Develop strategies to increase the awareness of the career of intervenor in order to build a pipeline of talent who would be available and interested in career opportunities within the sector. Identify the elements of the intervenor service work that attract candidates to work in the profession;
- Engage in employer branding activities with a marketing approach to increase the awareness within communities of the role of the intervenor and potential career opportunities;
- Develop strong relationships with colleges across the province to increase awareness of career opportunities for intervenors and to encourage the development of courses that are specific to the Intervenor Services Sector; and
- Advertise the profession of intervenor services through recruitment and/or awareness videos.

2.1.3 WHY RECRUITMENT MATTERS

While organizations in all sectors face issues regarding recruitment and selection of key employees with critical skills, the recent survey conducted within the Intervenor Services Sector identified issues pertaining to recruitment, selection, and retention. In particular, there is significant turnover of intervenors within agencies with a larger workforce. Strategies and actions are being considered within the sector to minimize turnover by recruiting and selecting candidates who are capable of being high performing intervenors and by providing them with an opportunity to grow their knowledge and careers.

The process of establishing a potential employment relationship starts well before a new employee begins employment with an agency within the Intervenor Services Sector. The employer must first assess current staffing needs, anticipate future staffing requirements, and identify critical knowledge, skills, abilities, and competencies that must be retained or acquired to ensure appropriate human resources for the future.

Agencies within the Intervenor Services Sector have identified a wide range of recruitment strategies to source and select candidates who are suited for a career within the Intervenor Services Sector. These were taken into consideration when developing the steps in the recruitment and selection process outlined below.

2.1.4 STEPS IN THE RECRUITMENT AND SELECTION PROCESS

This section provides an overview of innovations for the traditional steps in a well-defined recruitment and selection process.

The following 12 steps include both the traditional and more innovative steps in an effective recruitment and selection process. Details pertaining to each step are described through the rest of this section.

1. Identify and Strengthen the Agency's Employment Brand
2. Assess Current and Projected Staffing Needs
3. Understand Employment Legislation
4. Identify Recruitment Channels
5. Make it Easy to Submit a Résumé
6. Screening Résumés
7. Pre-Screening Interview
8. Interviews – In-Person and Behavioural Interviews
9. Realistic Job Preview
10. Pre-Employment Testing
11. Background Checks

12. Making the Selection Decision

Step 1 - Identify and Strengthen the Agency's Employer Brand

An employer brand is the perception that people have regarding an organization's reputation as an employer and whether or not it is seen as an attractive place to work. This perception is often based on subjective criteria and limited perceptions, and it has a significant impact on an agency's ability to attract new candidates.

The term "branding" has traditionally been applied to marketing, but it is increasingly being applied to organizations when attracting and retaining key employees. It means establishing an image or reputation for the agency regarding the employment experience and the benefits of working for a particular agency for the right candidates. The goal is to have high quality candidates attracted to an agency in the Intervenor Services Sector.

Key points are as follows:

- Candidates are attracted to organizations with employer brands that align with their goals and values;
- Examples of employer branding messages include organizations that are known for community involvement and giving back to society; and/or a work place that recognizes and values all employees, encourages learning and development, values diversity, encourages a culture of learning and growth, etc.;
- The process of developing the employer brand involves defining the target audience and developing the reasons why an organization would be attractive to a candidate with an interest in Intervenor Services. These reasons are then incorporated into recruitment initiatives and a careers page on the organization's website;
- Once the brand is identified and established, the next step is to get word out to prospective candidates that your agency is a good place to work;
- To build the brand, you will need to know:
 - How is the organization viewed within the community? On social media? By Stakeholders?
 - Is it considered to be an employer of choice?
 - What do current and former employees say about working with your organization?
- Developing the brand may involve multiple strategies – a consistent messaging in all advertising materials, clear job postings that provide information about the job and the organization in a manner that would appeal to the target audience, a strong social media presence, engagement in community events to provide opportunities for community members to learn more about what your organization does, etc. (*Refer to a sample job posting found in the Tools Section of this Toolkit*);

- It is important that the messaging is also honest and realistic regarding the job responsibilities, work environment, and organizational culture. If the perceptions are inflated or unrealistic, it will not take long for new candidates or existing employees to realize that the realities of the job did not match up to their expectations, which typically results in higher turnover. For these reasons, the agency should build an extra step into the recruitment and selection process called the “realistic job preview” which is described in the steps below; and
- Include career opportunities within the agency’s regular communications such as newsletters, emails, intranet, and conversations with consumers and families, Board members, etc.

Step 2 – Assess Current and Projected Staffing Needs and Review Competencies

To build effective HR recruitment, selection, retention and learning, and development programs, the agency needs to understand current and projected staffing requirements. Key elements are to:

- Conduct a staffing assessment that identifies the current gap in knowledge, skills, and competencies in the organization’s workforce both now and in the future;
- Review job descriptions to assess the knowledge, skills, abilities, and competencies required (*see tools section for a sample job description*);
- Speak with leaders of the agency and any stakeholder with a perspective of the longer term requirements of the agency;
- Review the strategic plan and future direction of the agency;
- Assess the level of knowledge, skills, abilities; and competencies of current employees, which may be through the competency assessment process using the new intervenor competency framework, performance assessments, and self-assessment questionnaires; and
- Identify the knowledge, skills, abilities, and competency gap by comparing the current levels with the future required levels.

Assess staffing needs by reviewing turnover rates in the organization and the industry and by reviewing retirement plans for the future. If the strategic plan identifies that there will be an increased demand for services provided by your agency, consider this as an important element of the projected staffing needs.

Step 3 – Understand Employment Legislation

When assessing staffing needs and in carrying out the steps in the recruitment and selection process, it is important to be fully aware of HR legislation such as the Human Rights Code, Accessibility for Ontarians with Disabilities Act, Occupational Health and Safety Act, Employment Standards Act, and any other relevant legislation. As part of their orientation,

provide managers/supervisors training so they comply when conducting the recruitment and selection process to ensure there are no intentional or unintentional biases in any of these steps.

Step 4 – Identify Recruitment Channels

There are many potential recruitment channels to identify potential candidates, including job boards, postings, links with community groups, relationships with schools, social media, websites, and others. In addition, there are opportunities to build brand awareness of the agency on a broader level, which will assist in drawing candidates when vacancies occur. Examples of recruitment channels and opportunities to build potential talent pools of strong potential candidates are described below.

Build Relationships with Colleges and Participate in Career Fairs

A significant number of intervenors are hired from the programs offered through Ontario colleges. There are several opportunities to build awareness of agencies in the Intervenor Services Sector by:

- Establishing relationships with colleges and high schools to speak about the agency and employment opportunities;
- Encouraging colleges to offer specialized courses as part of a social services program;
- In rural areas, building relationships with local students who move away to large centres for their education, and then wish to return to their local area after graduation;
- Developing co-op relationships with high schools and colleges whereby students have placements with an agency to job shadow and carry out a role that is defined by the school and the agency;
- Encouraging volunteer work for high school students needing to obtain community hours; and
- Considering working with a local college to make use of field placements with an Intervenor Services agency as part of the coursework required to graduate.

Use Social Media

Social media, such as LinkedIn, Facebook, Twitter, Indeed, and Instagram, are commonly used within the Intervenor Services Sector for recruitment and selection. In addition to websites and professional network sites, some suggestions are to:

- Use the branding strategy to develop an appropriate social media strategy;
- Use people search criteria of LinkedIn to find passive job seekers;
- Use Facebook and Twitter to post current and future events at your agency and to promote your employer brand;
- Post job openings on Facebook – and ask employees to share amongst their networks; and

- Use the recruitment video developed as part of the ISHRS initiative located on the DBNO website. Recommendation would be to use the longer version for partner websites and run it in the background at career fairs and shorter version on social media.

Recruitment videos have been created as part of the strategy with a wide variety of audiences in mind and show intervenors on-the-job sharing their thoughts on what it means to work in this profession (see tools section). Although the two examples featured in the video may focus on specific areas of the profession, the intention is to build awareness to the possibilities available through this career and not to focus on any one communication method or particular group of individuals who are deafblind. This video can be used to present an idea of what might be included in pursuing a path as an intervenor and should be viewed in the context of the important behavioural and technical competencies required for intervenors.

The videos can be used in any materials created for recruitment, including community presentations, Chamber of Commerce presentations, career fairs, job interviews, and when engaging with potential candidates or recruiters as part of the hiring process.

The videos are fully accessible and are available in the following formats: captioned in English and French, in ASL and LSQ, and in descriptive video. All versions of the videos are available on www.deafblindnetworkontario.com.

It is strongly recommended that every agency posts these videos on their websites and includes a link to the Deafblind Network of Ontario's website page that features the videos (www.deafblindnetworkontario.com). When showing the videos in the community, it is recommended to use the full version that includes the ASL/LSQ and captioning together to ensure that it is accessible to your audience.

Use the Agency's Website

Develop web pages to promote the employer brand and to post jobs. Ensure the website is accessible and easy to navigate including on smart phones. Establish links on the website whereby visitors to the general website have an opportunity to click on a link that takes them to the careers webpage where the job postings are located.

Develop Employee Referral Programs

Referrals from existing employees is a popular method to identify new candidates who may not otherwise hear about an agency and to create a pipeline of potential talent before a vacancy occurs. Update any current employee referral program or develop a new one. Learn from other agencies that have strong employee referral programs – what have they done to make them successful?

Build Relationships at Conferences

Set up booths at conferences, community events, fundraisers, etc. to expose people to careers in the Intervenor Services Sector.

Hold an Open House

Set up open houses for individuals who are deafblind, family members, volunteers, and targeted members of the public to encourage a higher visibility of the agency and to encourage those interested in career opportunities to learn more about the agency as a prospective employer.

Build a Volunteer Program

Develop volunteer programs to encourage students and career changers to work as volunteers to support existing intervenors and to allow them to job shadow to learn more about the role and working environments.

Use Blogs

Blogs are becoming more common on a range of topics related to specific groups and interests. They help to get the word out about what your agency is doing and can also be a way to build an employer brand.

Use Job Boards

Job boards are one of the most common methods of generating candidates within the Intervenor Services Sector. They are a low cost and highly effective tool.

For posting on job boards, examples include: local colleges/universities, OASIS, Indeed, local university library, other related schools, Intervenor Organization of Ontario (IOO), George Brown College, Charity Village, local job bank, Human Resources Development Canada Job Bank (HRDC): <http://www.jobbank.gc.ca>.

Job Postings

Place job postings on a range of job boards. *(See sample Job Posting in the Tools Section)*

Advertisements

Place advertisements in the types of publications that would reach prospective candidates with an interest in working with individuals who are deafblind.

Tap into the Market of Career Changers

The Ontario Government has established programs with local not-for-profit centres that deliver specialized programs to individuals who are unemployed in specific geographic areas. These programs may provide funding for courses required to obtain employment in a new career area.

Relationships can be established with career counsellors to explain the knowledge, skills, and competencies required to be an intervenor and the training required to make a transition to an entry level intervenor position.

Step 5 – Make it Easy to Submit a Résumé

Make the application process as easy as possible – passive job seekers may not have a high enough level of interest in changing employers or may not have the time to invest in applying for a job in a process that is too cumbersome and time consuming. Use technology to make it easy to upload résumés and apply for positions.

Step 6 – Screening Résumés

This step involves pre-screening résumés and employment applications to differentiate between employees who meet the basic requirements of the job and to screen out candidates who lack the required skills and competencies for the position.

When screening résumés, it is important to identify essential and desirable knowledge, skills, and abilities required using the behavioural and technical competencies outlined in this toolkit. Human Rights legislation requires that selection criteria be based on job related factors and qualifications for a job. Therefore, it is important that the individual(s) responsible for screening résumés and conducting interviews have training in Human Rights legislation as it pertains to hiring employees and how to avoid practices that may appear to be discriminatory.

Technology can reduce the amount of time required to screen résumés. There are application tracking software programs that can support the screening candidates.

Add questions that applicants must answer when submitting résumés such as whether they are legally entitled to work in Canada and/or if they are willing to obtain a vulnerable sector check, etc.

Step 7 – Pre-Screening Interview

An initial screening process gives an opportunity to carry out a preliminary interview to assess whether there is a potential fit between the requirements of the job and the expectations of the candidates. During the preliminary interview, the manager or HR professional can determine whether or not the candidate has the basic knowledge, skills, training, and experience required. It can save time and effort for both the organization and the candidate. It is recommended that a screening interview script be developed with a list of questions that may be asked of all candidates. Then, after the pre-screening interview, both parties can decide whether this employment opportunity can be further pursued through an in-person interview.

Step 8 – Interviews –Behavioural-Based Interviews

The goal of the behavioural-based interview is to assess the candidate’s competency level, their job-related knowledge, their experience, and the degree to which the candidate will be successful in the role and within the culture of the organization.

A structured interview format will help to ensure fairness and consistency in the information gathered and how that information will be used to assess the knowledge, skills, abilities, competencies, and future abilities of each candidate. A Behavioural-Based Interview Guide was developed to help with this process that ties back to behavioural competencies. This guide can be found in the Tools Section of this Toolkit.

Panel interviews include more than one interviewer – generally the direct manager, higher level manager, and possibly another internal manager and/or HR. Typically, panel members plan questions based on their area of expertise and divide them equally so each will have an opportunity to ask the questions in the interview. This gives the candidate the opportunity to meet with several representatives of the organization at the same time, while allowing the interview panel to observe how well the candidate interacts with the key stakeholders of the position.

Agencies participating in the implementation of the competency framework will receive training, tools, and samples to support the implementation of behavioural-based interviewing and selection within their agency.

Step 9 – Realistic Job Preview

This step in the recruitment process would be used to demonstrate the day-to-day realities of a job with the agency and to communicate the agency’s vision, mission, core values, culture, and working conditions.

For new candidates with no real exposure to the agency, a realistic job preview may involve the initial step of spending time as a volunteer with an intervenor to observe the role and working environment. The candidate should receive a realistic perspective of what it is like to work with the agency before accepting the job offer. This step would help to lower the probability of turnover if candidates understand more about the realities of the role before accepting the job offer and, after a few months on the job, discovering that the position was not what they thought it would be.

At this point in the selection process, there should be two to three candidates who fully meet the qualifications required for the job and who show the most potential to be successful in the job. Steps 11 through 16 would be options only for those candidates where a job offer is being considered. These steps would help to further define the best candidate for the role.

Step 10 – Pre-Employment Testing

The purpose of employee testing is to help the employer predict how well the employee will perform on the job. Important information can also be compiled to assess the degree of learning and development the employee requires on the job.

Any pre-employment testing must meet the requirements of Human Rights and any other employment legislation that may apply. HR professionals must ensure that the steps in the selection process, including pre-employment testing, are job related, reliable, valid, consistent, legal, and cost-effective.

Step 11 – Background Checks

The role of the intervenor is a position of trust and, as such, requires that candidates pass a range of background checks. The agency's risk management process also requires there be due diligence in HR processes and in the qualifications and performance of employees in an agency. Examples of background checks are:

- Vulnerable sector reference check;
- Driver's abstract;
- Valid drivers' license;
- Education checks of qualifications; and
- Reference checks.

Step 12 - Making the Selection Decision

A list of strengths and areas requiring development should be established for each candidate and a job offer made. This offer would be discussed first. Then, a formal offer letter should be provided to the candidate that describes the terms and conditions of the job offer and the work relationship.

When a candidate accepts the job offer, the next phase in the employment relationship is to prepare the candidate for the role, including the onboarding and orientation processes.

2.1.5 CHECKLIST OF ITEMS TO INCLUDE IN THE RECRUITMENT AND SELECTION PROCESS

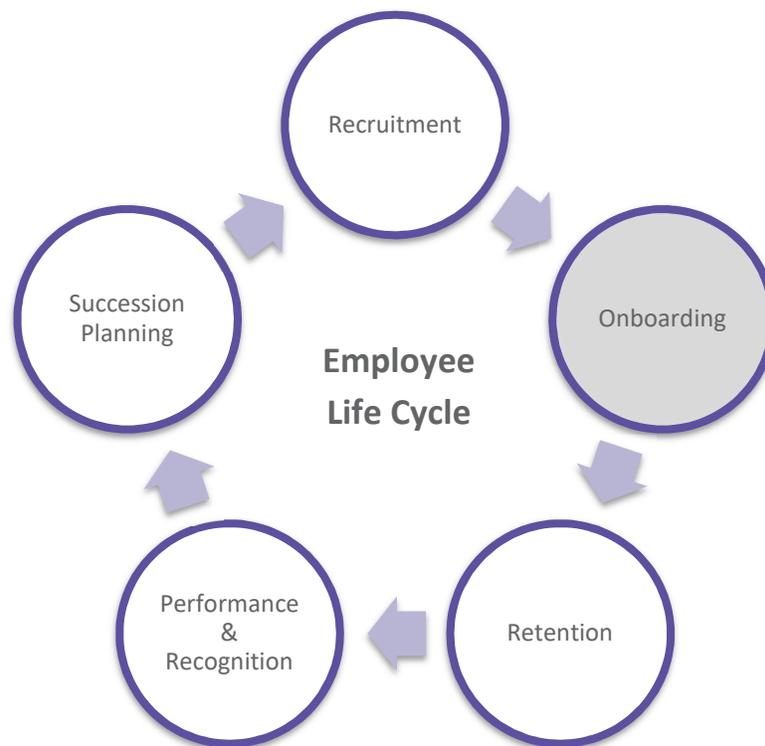
- Identify and strengthen the agency's employment brand;
- Assess current and projected staffing needs;
- Identify recruitment channels;
- Make it easy to submit a résumé;
- Screening résumés;
- Telephone pre-screening interview;
- Social media review;

- Interviews – In-person and structured behavioural interviews;
- Realistic job preview;
- Pre-employment testing;
- Background checks; and
- Making the selection decision.

2.1.6 TOOLS - RECRUITMENT

- Recruitment/Awareness Videos for Intervenor Services (2018);
- Sign-in for CEO/ED & HR Professionals: Behaviour Based Interview Guide – Intervenor (January 11, 2017);
- Sign-in for CEO/ED & HR Professionals: Behaviour Based Interview Guide – Supervisor (January 11, 2017);
- Sign-in for CEO/ED & HR Professionals: Behaviour Based Interview Guide – Manager (November 23, 2016);
- Sample Job Description – Intervenor (February 1, 2018); and
- Sample Job Posting – Intervenor (November 28, 2017).

2.2 ONBOARDING



2.2.1 OVERVIEW OF ONBOARDING

The onboarding process is a natural second step within the employee life cycle. After undergoing a careful process to identify the “right” candidate for the “right” job, the onboarding process ensures the new employee receives appropriate orientation and socialization to launch that employee into their new career and the new organization with as much support as possible. Following the onboarding phase, new employees undergo ongoing learning and development, retention, performance management, and succession planning activities.

Employee onboarding combines processes that assimilate new employees into the culture (socialization) and work (orientation) of an organization. More specifically, they include the processes required to communicate and orient the employee to the consumer/family members, organizational and departmental policies and procedures, job expectations, organizational vision, mission and values, manuals, forms, legislation, and a range of other activities.

2.2.2 ONBOARDING ISSUES FACED IN THE INTERVENOR SERVICES SECTOR

The following list of issues were identified through the surveys conducted within the Intervenor Services sector.

- New intervenors who do not have the George Brown College diploma require additional training and orientation to develop the appropriate knowledge and skills for the intervenor role. Some Agencies have responded to this by developing in-depth orientation and onboarding programs; and
- The probationary period is an important step in determining whether there is a good “fit” between the intervenor’s knowledge, skills, and competencies and the requirements of the consumers they will support. New employees who do not have the depth of knowledge and expertise in the role of intervenor may find that it is not what they were expecting, which could lead to increased turnover.

Strategies

Many agencies surveyed provide robust onboarding programs that include a wide range of topics such as relevant legislation, policies and procedures, agency policies, health and safety, Workplace Hazardous Materials Information System (WHMIS), job shadowing, controlled acts, emergency procedures, tours of houses, communication training, specialized skills training, training in medications, intervenor methods and techniques, check-in training, and requirements. Below are some strategies that address the issues outlined in the previous section and enhance what onboarding practices are already in existence at the different Intervenor Services agencies. These include:

- Agencies with strong onboarding and orientation programs and practices share their learnings to support the development of industry wide practices in the Intervenor Services Sector;
- The recommendation that the recruitment process consists of a “realistic job preview” where the candidate is fully aware of as many aspects of the role as possible before accepting the offer of employment. This could reduce unrealistic expectations that may occur for the candidate as a new hire, which are often a key reason for turnover during the probationary period or first year of employment; and
- The recommendation that free on-line government training sites pertaining to Accessibility for Ontarians with Disabilities Act (AODA), health and safety, and other training be incorporated into onboarding and orientation programs when available.

The following section provides a more comprehensive overview of why onboarding matters, suggested steps in the onboarding process, and a checklist of items to include in the onboarding process.

2.2.3 WHY ONBOARDING MATTERS

Typical orientation processes cover the first few days of employment and may include the more immediate items, such as providing an overview of policies, procedures; receiving tours of facilities and the work environment; completing new employee documentation; meeting peers, managers, clients, and families; and completing other activities.

The notion of onboarding is more comprehensive and typically covers the first few months of employment. Onboarding activities are designed to socialize the employee into the work environment with a goal of ensuring new employees are able to operate at a higher performance level at a faster rate than if the new employee was left to learn the job through trial and error. The goal of a more in-depth onboarding process is to ensure that the employee is integrated into the workforce at a faster pace, achieves performance successes earlier, and, therefore, feels more engaged in the work, their career, and with the employer.

One important way to do this is to conduct Behavioural-Based Interviews and use the results of that process to develop an Individual Development Plan that outlines goals for the new employee to achieve the first year on the job and tie this back to their performance development. The first step for this process at the onboarding stage would be to have the employee and their supervisor each complete a Competency Assessment Questionnaire and then meet to have a subsequent discussion utilizing a Competency Discussion Planner (see Tools Section).

Part of orientation should be to orientate new staff to the Behavioural & Technical Competencies developed as part of this strategy which will lead to a better understanding when conducting questionnaires and discussions. This starts the new employee thinking about not only what is required but how they can become superior performers when taking on this role. This then highlights the importance for them to see examples of superior performance in others and seek mentorship from them as they learn and grow. This is the foundation for a more comprehensive and effective orientation process to enhance existing onboarding practices.

The benefits of an effective onboarding and orientation program are significant to the individual who is deafblind, the new employee, and the agency. Most importantly, they help to improve the quality of delivery of services to the individual who is deafblind, which in turn improves the relationship between the intervenor and the individual supported. They ensure the new employee feels confident in their career decision and feels welcomed, which creates a sense of commitment to the job and to the agency. They ensure new employees have the knowledge, skills, abilities, and competencies that are essential for high performance in the job. They provide an opportunity to introduce the intervenor competencies to the new employee, which provide clear behavioural descriptions of the behaviours that will lead to successful on

the job performance. They ensure new employees achieve successes in the job as quickly as possible and are more engaged in the work. All of this improves the quality of delivery of services to the individual who is deafblind.

A well-developed onboarding and orientation program can be supported by checklists of items that are included in various stages. Having a checklist of items with a required sign off as they are addressed helps to ensure all items are addressed. This is also a good risk management strategy for the agency if there are any issues that arise pertaining to the safety of the individual who is deafblind. A signed checklist of items covered during the orientation and onboarding process may be helpful in addressing complaints or issues that may arise.

Typical onboarding activities may include providing more structure in training and learning opportunities that are necessary to acquire the knowledge, skills, and abilities that are essential in achieving successful performance of the job. In addition, the supervisor/manager should provide the appropriate level of coaching and supervision that is geared to the learning requirements of the new employee. Some agencies assign a peer “buddy” as a go-to person to assist the new employee in the learning process.

Orientation and onboarding are critical components of an effective retention strategy. Research has consistently shown that employees who participate in a well-structured onboarding program have a significantly higher retention rate and demonstrate higher performance at earlier stages in the role than employees who do not attend an orientation program.

Benefits of Onboarding Programs

The following list provides examples of the benefits of onboarding programs for the individual who is deafblind, the new employee, and the agency:

- Ensures new employees have the knowledge, skills, abilities, and competencies that are essential for high performance in the job;
- Provides an opportunity to introduce the intervenor competencies to the new employee, which provide clear descriptions of the behaviours that will lead to successful on-the-job performance;
- Ensures new employees achieve successes in the job as quickly as possible and are more engaged in the work;
- Improves performance of the individual, and ultimately, the agency;
- Reduces turnover amongst new employees who resign before the end of the probationary period and on a longer term basis;
- Improves the quality of delivery of services to individuals who are deafblind, which, in turn, improves the relationship between the intervenor and individuals who are deafblind;

- Ensures the new employee feels confident in their career decision and feels welcomed, which creates a sense of commitment to the job and to the agency;
- Reduces employee anxiety about starting a new job;
- Helps to build loyalty and engagement in the work and the organization;
- Lowers turnover rates and increases commitment and retention rates of key employees;
- Sets the foundation for longer term success for the employee;
- Minimizes the risk of poor performance or employees making mistakes due to a lack of training or knowledge of legal requirements of the agency when providing services to clients;
- Explains work processes and how to get things done;
- Explains work norms and behaviour expected on the job;
- Establishes performance expectations and performance standards; and
- Socializes the new employee into the work unit.

2.2.4 STEPS IN THE ONBOARDING PROCESS

After the job offer has been accepted and offer letter has been signed, there is a seamless flow from the recruitment process to the next phase of the employment relationship. The checklists below provide the typical processes that occur prior to the start date for the new employee, the first day of employment, the first month of employment, and the first three months of employment.

The tools provided to support this section provide detailed examples of components to consider when developing or improving an agency's onboarding and orientation processes.

Before the start date

- Ensure the offer letter has been signed and accepted by the successful candidate;
- Send information pertaining to benefits, agency information, any processes pertaining to requirement of the job, and steps that the employee must complete prior to starting work, such as providing evidence of education, driver's abstract, etc.;
- Arrange for tools, equipment, computer/printer, computer privileges, work station, telephone, password set up, access to building, parking passes, and any other logistical element that needs to be set up for the employee;
- Send an email to other employees introducing the new employee and their role;
- Arrange for an experienced employee to be the "buddy" to the new employee to provide assistance on day-to-day questions that the employee may have. Provide the buddy with the name, title, role, start date, and orientation plan for the new employee;
- The supervisor should contact the employee by telephone or email a few days before the first date of employment to confirm the start date, time, contact information for the

supervisor, driving and parking instructions, security and reception information, dress code information, and any other practical information; and

- Develop a checklist of onboarding activities that must be completed on the first day, first week, first month, and first three months on the job.

First Day

- The supervisor should greet the employee on the first day at reception or where appropriate;
- Show the employee to their work environment, if applicable;
- Provide basic information that follows the checklist of items to cover;
- Provide a tour of facilities, washrooms, photocopier, fax machine, printer, kitchen, mailroom, entrances and exit to the building, and any other location the employee needs to be aware of;
- Arrange for lunch with peers on the first day (if possible);
- Introduce the new employee to peers, supervisors, individuals who are deafblind, and other stakeholders who they will be dealing with on the job;
- Complete documentation for payroll and benefits and obtain signatures for policies and procedure documents;
- Discuss the hours of work, code of conduct, and work behaviours required for the job;
- Provide the agency's vision, mission, culture, etc.;
- Introduce the new employee to their buddy/mentor and clarify the roles of the buddy/mentor and supervisor;
- Explain pay procedures and when pay will be deposited; and
- Ensure the employee is set up on the computer system, telephone and voice mail system, email, and has access to software and computer drives that are necessary to carry out the work.

First Week

- Provide more detail and reinforce information provided on the first day;
- Follow the checklist of items that need to be covered during the first week and obtain sign-offs as appropriate;
- If not already discussed in prior steps, ensure that the employee receives (and signs where appropriate) all formal policies, procedures, checklists, intranet access, and any other necessary information;
- Continue to introduce the new employee to clients, peers, supervisors, and the stakeholders they will be dealing with on the job;
- Provide copies of job descriptions, intervenor competencies, and/or agency specific competencies;

- Explain performance standards and what is expected of the job;
- Address learning and development issues;
- Arrange for health and safety training, van safety, wheelchair safety, lift training, etc.; and
- Answer questions and address concerns the new employee may have.

First Month and First Three Months

- Provide more detail and reinforce information provided in earlier phases;
- Follow the checklist of items that need to be covered during the first month and first three months and obtain sign-offs as appropriate;
- Arrange for regular check-ins with the supervisor/manager and the “buddy” assigned to the job;
- Address learning and development issues;
- Discuss ongoing learning and development plan; and
- Answer questions and address concerns the new employee may have.

Probationary Review

The first formal probationary review for a job is after the employee has undergone the learning and development required on the first three months on the job and has had an opportunity to demonstrate whether they are meeting performance requirements of the job and the agency. The most common probationary period is three months within the majority of agencies.

2.2.5 CHECKLIST OF ITEMS TO INCLUDE IN THE ONBOARDING PROCESS

The following items are typically included in a general orientation program that is designed for all employees at all levels:

- Mission, vision, values of the agency;
- History of the agency;
- Organizational chart;
- Job description and competency profile;
- Tour of work areas and facilities that are appropriate for the role;
- Policies and procedures for all employees;
- Complete documents pertaining to the offer letter, tax forms, benefits, payroll, and employee file documentation;
- Meeting with supervisor, manager, employees, and clients;
- Accessibility for Ontarians with Disabilities Act (AODA);
- Health and safety training; and
- Performance expectations.

Checklist with Examples of Topics for Orientation/Onboarding of Intervenor, Supervisors, and Managers

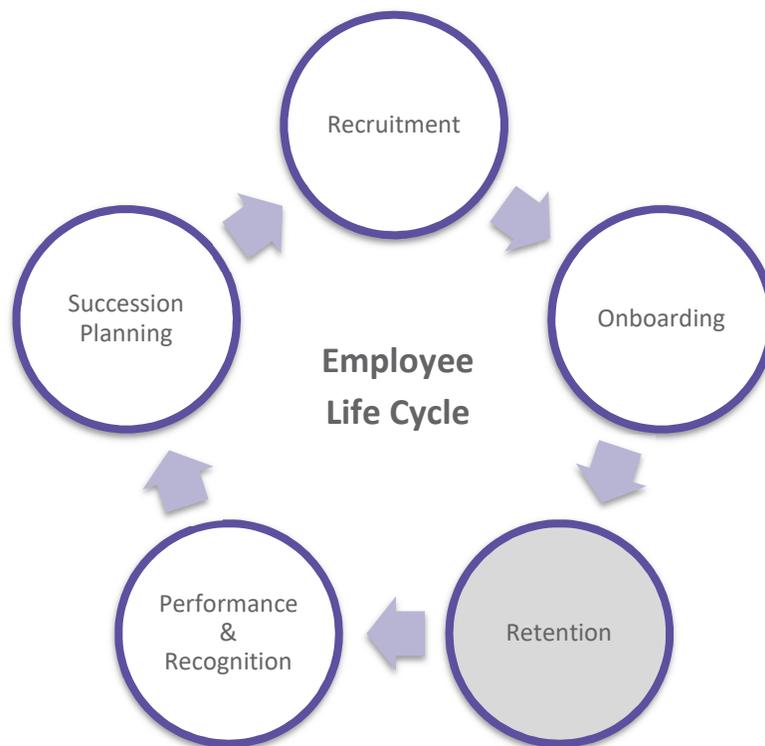
In addition to the items above, the following list provides examples of elements that are typically included in an onboarding program for new employees at the intervenor, supervisor, and manager level. The specific training may depend on the individuals who are deafblind and their requirements.

- Legislation pertaining to the agency;
- Behavioural & Technical Competencies specific to the intervenor, supervisor, and manager level;
- Emergency procedures;
- Agency policies and procedures;
- Controlled acts;
- First Aid/CPR;
- Administering medication and documentation;
- Job methods and techniques;
- Mental health first aid;
- Policies pertaining to abuse;
- WHMIS;
- Fire safety and fire prevention;
- Fire extinguisher training;
- Non-Violent Crisis Intervention (NVC) training;
- BM and inhalation;
- Touch training;
- Sign language training;
- Signing Exact English (SEE);
- Total Communication Curriculum;
- Calendar systems;
- Oral Intervening;
- LSQ sign language training;
- Orientation and mobility training;
- Simulation training;
- Sighted guide training;
- Emergency Intervenor Services training;
- Understanding and preventing abuse;
- Alternative communication; and
- Nutrition for diabetics.

2.2.6 TOOLS - ONBOARDING

- Behavioural Competency Assessment Questionnaire – Intervenor (September 2016);
- Behavioural Competency Assessment Questionnaire – Supervisor (September 2016);
- Behavioural Competency Assessment Questionnaire – Manager (September 2016); and
- Competency Development Planner (September 16, 2016).

2.3. RETENTION



2.3.1 OVERVIEW OF RETENTION

The retention of high performing employees with specialized skills, abilities, knowledge, and experience is critical to the success of any agency in the Intervenor Services Sector. There are a significant number of tangible and intangible costs that occur when high performing employees leave and when agencies experience unhealthy turnover. In particular, the turnover of intervenors has been identified as an issue for many organizations within the Intervenor Services sector.

Investments were made in the development of industry-wide behavioural competencies for employees at the intervenor, supervisor, and manager levels within the Intervenor Services sector. These competencies provide an excellent framework to support recruitment and selection, performance management, retention, learning and development, succession planning, and all other HR processes.

2.3.2 RETENTION ISSUES FACED IN THE INTERVENOR SERVICES SECTOR

The following list of issues were identified through the surveys and reports recently carried out within the Intervenor Services sector. A quick list of possible solutions is provided in the section below the “issues,” and a more comprehensive analysis of the situation and potential solutions is provided in the remainder of this section on Retention.

- In the Best Practices for HR Survey “Building the Foundation” Results, 100% of respondents felt that wages and benefits is the top recruitment and retention challenge within Intervenor Services. Other options available but not selected as top recruitment challenges include: competition with school boards, lack of qualified candidates, shift work, or location of agencies;
- In the survey, over half of the respondents indicated that the most common minimal educational requirement for the role of intervenor is a two-year college diploma in a related field such as developmental social work, social service workers, and personal support work. This is followed by a combination of related personal and working experience at 11%, and a high school diploma at 20%. Only 6% of respondents require the George Brown College Intervenor for Deafblind Persons Program Diploma, which reflects the reality that only a small number of graduates are generated each year;
- There is a geographic issue when recruiting new intervenors and in matching intervenors with clients due to geographic challenges associated with rural, sub-rural, and urban centres;
- Due to budget limitations, more training is provided to full-time regular employees than to part-time employees in some agencies;
- Only three Transfer Payment Agencies (TPA’s) responding to the service provider questionnaire have a Mentorship Program for intervenors. Of these, only two have a formal mentorship program;
- While training is an important retention strategy, issues raised regarding training included: the need for travel time and the costs associated with it, balancing work and family demands, scheduling conflicts, working other jobs, scheduling may be difficult, shift work can impact the ability to attend training, cost of training, and having other professionals available for the individual who is deafblind in order for the intervenor to participate in training. In particular, for those employees in remote locations, it is difficult to take the time and incur the costs of travelling; and
- Some employees feel the cost of taking additional training that is not paid for by the agency is too high and they do not have the disposable income to pay them. Childcare and travel to the location of the learning event are other barriers.

Strategies

- Maintain statistics pertaining to retention, especially demographics pertaining to retirement. Develop strategies to manage retirement in the agency (i.e. succession planning);
- Develop new employee engagement surveys to develop statistics that identify the degree of job satisfaction, employee engagement, and other key elements/issues pertaining to the employment relationship;
- Use learning and development as a retention strategy as well as an on-the-job learning opportunity;
- Provide training that broadens the knowledge, skills, and abilities of existing intervenors, including casual employees, to ensure they feel they have the appropriate training to deal with individuals with specific requirements and needs;
- Intervenors reported that they like to receive ongoing refresher training and building professional relationships through conferences, symposiums, workshops, and other learning events. Recommend that these opportunities continue to be used for learning, but since travel and cost were also identified as barriers to learning, it is recommended that other lower cost training opportunities be provided through online learning;
- The opportunity for learning and development for new and long service intervenors should be a key element of a retention strategy and a succession management strategy;
- Examples of ongoing learning and development opportunities for new employees and refreshers for current employees include: training in Non-Violent Crisis Intervention (NVCI), First Aid/CPR, WHMIS, AODA, medication training, TOUCH training, ASL skill training, SEE training, oral intervening, sign language courses, Total Communication Curriculum (TCC), work life balance, managing training, Certified Congenital Deafblind Specialist (CCDBS) Level 1 and Level 2, Acquired Deafblind training, training on lifts and falls, professionalism, training on sensory integration and sensory input, mental health related to aging in the Deafblind community, intervening in medical settings and with clients who are physically fragile, information training courses pertaining to individual conditions/illnesses/diseases clients may have, teambuilding, time management, conflict resolution, technology, training on advocating for clients within the community, training in Braille, advanced ASL skills/certification, dealing with challenging behaviours, training in autism, effective communication, interpersonal skills, etc. Other possible workshops include grief, compassion fatigue, healthy eating/nutrition, and stress management;
- Review your agencies compensation and benefits program for competitiveness within the context of other retention strategies (e.g. compensation surveys);

- Develop a “grow from within” talent management strategy whereby the potential to be an effective intervenor as assessed by the use of the Intervenor Services sector Intervenor Competencies and Behavioural Interviewing. Then, use more effective on-the-job learning and subject matter learning to provide the technical knowledge required to be an intervenor;
- Recommend that part-time employees receive full training and that they be considered as candidates for full-time roles that may become available;
- Use online, distance, and simulation learning opportunities;
- Improve communication between leaders and employees to improve the peer-peer and supervisor-subordinate relationships and to create a feeling of inclusion within the agencies through a range of channels, such as in person discussions/feedback, email, voice mail, meetings, conferences, internal newsletters, committees, social media, and other communication channels; and
- Develop coaching and mentoring skills in supervisors and managers and encourage leaders to provide ongoing feedback regarding performance results and other information pertaining to the agency; agencies can customize the sample performance development tool (*see tools section*).

2.3.3 WHY RETENTION MATTERS

Not all types of turnover are considered negative. Healthy turnover is actually good for an agency – new ideas can be brought in and poor performance or poor fit to the culture, job, and/or individuals who are deafblind can be addressed. The focus of turnover strategies must be on unhealthy turnover – which is the turnover of high performing employees.

Within healthy turnover, voluntary and involuntary: Voluntary turnover is the type of turnover that is initiated by the employee for a range of reasons. Involuntary turnover occurs when the agency initiates the termination for reasons related to the agency or for poor performance. Turnover due to poor performance can be managed by improving orientation, onboarding, leadership competencies, and performance management programs. Retention initiatives are put in place to lower or minimize voluntary and involuntary employee turnover.

Issues with Turnover

The goal of retention strategies is to deal with unhealthy turnover and to retain high performing employees through strategies pertaining to learning and development, ensuring competitive rewards, providing a healthy work-life balance, developing strong and effective managers and leaders, encouraging a strong attachment to the agency through a strong and healthy agency brand, or recognition within the Intervenor Services sector. Turnover of high performing employees represents significant cost to the agency. Examples of costs of losing high performing employees can be significant:

- Disruption with the client relationship;
- Loss of morale amongst other intervenors;
- Loss of productivity associated with the time required to hire the replacement and having the new employee learn the job;
- Costs of training;
- Higher workloads for other employees;
- Loss of a significant investment in training;
- Costs of recruiting replacements can be high;
- Increased demands on managers time to recruit, select, orient, and train a replacement; and
- Cost of losing intellectual knowledge pertaining to the agency.

Reasons for Turnover

The following list of examples is typical reasons for employees leaving organizations:

- Poor or ineffective management and/or leadership (micromanaging, poor communication, unrealistic expectations, unfair managers, etc.);
- Conflicts with managers or other employees;
- Work load issues have not been addressed – burnout;
- Lack of work-life balance due to inflexible hours of work;
- Compensation issues – perception that salary and/or benefits are inadequate;
- Perceptions of pay inequities between employees;
- Poor match between employee skills and the requirements of the job;
- Perceptions of unfair work environment or treatment;
- Better career opportunities or lack of career opportunities;
- Lack of growth opportunities within the agency;
- Conflicts with agency's values and mission;
- Lack of recognition or appreciation for work;
- Relocation to another geographic location;
- Low job satisfaction;
- Long commutes from home to the work environment;
- Family demands; and
- The reputation of the agency as an employer.

2.3.4 STEPS IN ESTABLISHING RETENTION STRATEGIES

When considering employee retention strategies, it is important to consider the employees' point of view as well as the employer's point of view. The following provides examples of retention strategies that may help to retain key employees.

Step 1 - Develop targeted recruitment strategies

Develop targeted recruitment strategies to improve the fit between the knowledge, skills, and competencies of new hires and job requirements as outlined in the Recruitment section. This includes a range of initiatives, such as ensuring the branding of the agency draws the right candidates; the postings of job vacancies reach the appropriate candidate pools; the interviewing and selection processes can identify the right candidates; and that new hires have a realistic understanding of what the requirements of the job are.

Step 2 - Identify methods to improve the fit between the intervenor and the role

There are intrinsic rewards that flow from the relationship between the intervenor and the individual who is deafblind that are important elements of engagement. A sample of these intrinsic rewards was compiled through feedback received from the intervenor survey.

Step 3 - Improve new hire orientation programs

This is addressed in the Onboarding section.

Step 4 - Develop mentorship programs

A mentor is generally a high performing employee who teaches and gives advice to a less experienced employee in day-to-day situational experiential situations on the job. However, mentors are not supervisors. An effective mentor-mentee relationship can benefit both parties. For new employees, they help to learn the ropes and become more effective performers at a faster rate. They are also a critical element of a succession planning process for intervenors wishing to progress into supervisory and managerial roles. In these cases, the employee may be mentored by an experienced manager in learning leadership skills, while at the same time, serving as a mentor to new employees. The experience of being a mentor provides the long term employee with the opportunity to improve their leadership competencies. This on-the-job learning is an excellent leadership development strategy.

Step 5 - Improve the agency's leadership skills

The supervisor and leadership of the agency are critical elements of an effective retention strategy. All supervisors and leaders should be selected, developed, and assessed based on their leadership and managerial competencies. The succession planning process must identify candidates who have potential to move into leadership roles.

Step 6 - Improve performance management processes

Provide employees with opportunities to develop knowledge, skills, and competencies through performance management programs, learning and development, and mentorship. The performance management process should include formal and informal communication methods to provide feedback on individual performance results and day-to-day opportunities to recognize good performance and opportunities for further learning. The supervisor may need to adapt their management approach to the personality and requirements of each

individual employee – a “one size fits all” feedback strategy may work for some employees but not for all. Employees want to receive recognition and feedback for good work as well as opportunities to learn.

Step 7 – Review turnover statistics

Identify the items that contribute to turnover that are inherent in the intervenor role. For example, turnover may be due to burnout, stress, work-life/balance issues, poor fit between the intervenor and an individual who is deafblind, leadership issues, misunderstanding the role, inflexible work arrangements, lack of learning and development opportunities, and a wide range of other issues. Gather information pertaining to reasons for leaving and then develop specific strategies to address these issues.

Step 8 – Review rewards and recognition programs

Review the compensation and benefits package to ensure it is competitive within the group of organizations where the agency competes for talent. Recognize individual and team achievements by acknowledging them in meetings and/or emails.

What are the employment prospects/outlook for this profession?

Intervenors can earn a salary of between \$41,405.00 - \$46,540.00 (*results from Deafblind 2013 Custom Salary Survey; eight TPAs*).

Step 9 – Improve communication in the workplace

Communication strategies include broader communications about what is going in the industry and the agency at both a high level and a level that affect each employee. Employees want to know what is happening and the information needs to come from the appropriate person. Information regarding the broader industry and agency strategy should come from top leaders, while information pertaining to individual employees should come from the manager. If information is provided in a clear manner that anticipates and addresses the fears and concerns of employees, there is less potential for rumours and speculation.

Step 10 - Consider work-life balance for employees while ensuring support for individuals who are being served

With an increasing diverse workforce where employees have personal responsibilities for children, aging parents, and other personal commitments, the challenges they face in balancing work and personal commitments may be a significant contribution to turnover. If employees have control over their work schedules, it is easier to balance these pressures and they are more likely to be more productive at work. Types of flexible work arrangements include:

- **Permanent part-time** – A permanent part-time schedule instead of 37.5 or a 40-hour work week. The benefit of permanent part-time arrangements is that the employee may be eligible for pro-rated benefits; and

- **Compressed work week** - In this type of work arrangement, the employee would work a full time regular number of hours per week but over four days instead of five days. For example, the employee may work four ten hour days instead of five eight hour days in a 40-hour work week.

Step 11 - Develop strategies to increase professionalism of the intervenor role

- Use the intervenor competencies as the basis of a recruitment and selection processes and ongoing development;
- Consider developing training programs that combine academic knowledge through course work and practical experience gained through on-the-job learning opportunities as intervenors felt that having well developed communication skills would help in increasing the professionalism of the role (e.g. ASL and advanced ASL training);
- Having a policy where the agency pays for job related training, including the time spent on training programs;
- Promote the training in and adherence to Code of Ethics:
 - Intervenor Code of Ethics (most common);
 - Developmental Service Worker (DSW);
 - Social Service Worker (SSW);
 - Association of Visual Language Interpreters Canada (AVLIC) Visual Language Interpreters Code of Ethics;
 - Ontario Code of Ethics;
 - Interpreter Code of Ethics; and
 - Agency specific Code of Ethics;
- Encourage employees to become members of professional associations, the most common of which is the Intervenor Organization of Ontario (IOO). Other associations used less frequently are Sense UK, Association of Visual Language Interpreters of Canada (AVLIC), Deafblind International (DBI), Canadian National Society of the Deafblind (CNSDB), Deafblind Association of Toronto (DBAT), and College of Nursing.

Step 12 - Provide ongoing training

- Other training through on-the-job training opportunities;
- Allow casual employees to take part in training provided to full time employees; and
- Use more on-line, distance, and simulation education opportunities.

Step 13 - Develop mentorship programs

- Develop formal or informal mentorship programs to encourage the development of skills and competencies and to prepare a pipeline of employees for promotional opportunities.

Step 14 - Develop wellness programs

- Develop wellness programs, such as nutrition, fitness, weight management, smoking cessation, work-life balance, stress management, and a range of other programs that are designed to improve the health and well-being of employees.

Step 15 - Develop exit interview processes

Conduct exit interviews with employees who are resigning. Examples of the scope of information that could be asked are as follows:

What caused you to start looking for a new job in the first place?

- Why have you decided to leave the organization?
- Have you shared your concerns with anyone in the organization prior to deciding to leave?
- What are the reasons for leaving (e.g., pay, work-life balance, leadership, better career opportunities, family, career change, closer to home, etc.)?

Relationship with manager/supervisor

- The quality of supervision is important to most people at work. How was your relationship with your manager?
- Did your manager recognize your achievements, provide constructive feedback, and provide opportunities to learn and grow?
- What could your supervisor do to improve their management style and skill?
- What are your views about management and leadership generally in the organization?

The job

- What did you like most about your job?
- What did you dislike about your job? What would you change about your job?
- Was the workload manageable?
- Do you feel you had the resources and support necessary to accomplish your job? If not, what was missing?
- Were your job responsibilities described correctly during the interview process and orientation?
- Do you feel you had access to appropriate training and development programs?

Performance

- Did you have clear goals and know what was expected of you in your job?
- Did you receive adequate feedback about your day-to-day performance and in the performance development planning process?
- Did you clearly understand and feel a part of the accomplishment of the organization's mission and goals?

- Describe your experience of the organization’s commitment to quality and customer service.

The work environment

- Did supervisors and managers care about you and help you accomplish your personal and professional development and career goals?
- Was the orientation and onboarding appropriate for your job?
- How would you describe the work environment? What improvements can be made?
- What would you recommend to help us create a better workplace?
- Do the policies and procedures of the organization help create a well-managed, consistent, and fair workplace in which expectations can be achieved?

The culture

- Do senior leaders communicate the vision and longer term direction of the organization?
- Do leaders clearly communicate decisions and how they affect your work?
- Describe the qualities and characteristics of the person who is most likely to succeed in this organization.
- What are the key qualities and skills we should seek in your replacement?

Compensation, recognition, and rewards

- Do you have any recommendations regarding compensation, benefits, and other reward and recognition efforts?
- What would make you consider working for this organization again in the future?
- Would you recommend the organization as a good place to work to your friends and family?
- Can you offer any other comments that will enable us to understand why you are leaving, how we can improve, and what we can do to become a better organization?

Step 16 - Develop “stay interview” processes

Since the information gained through exit interviews focuses on employees who are leaving, it can only be used to improve the working environment for employees who remain.

Stay interviews are a simple way to minimize or prevent turnover and to retain high performance employees by having a dialogue with them to understand how satisfied they are in the current job and agency – what motivates them, what frustrates them, and what can be done by the agency to improve the job and working environment. They are used to identify and address issues that can potentially lead to turnover before they become issues. They help understand and address work and cultural issues that are affecting larger numbers of employees. However, this creates the expectation that the feedback provided will be acted

upon and the issues addressed. For example, if an employee is experiencing difficulties in work-life balance, the supervisor can understand and address the issue by changing the work schedule or developing some other strategy that meets with the agency's commitment to deliver services and the employees need for flexibility when managing their work-life balance issues.

The timing of stay interviews can be during day-to-day processes, such as performance reviews, orientation, part of regular communications with employees, as part of creating a learning and development plan for an employee, or as simple as a conversation over coffee or lunch. The discussion may not be labelled a "stay" interview, but the purpose of the meeting is to reduce turnover and to find solutions for high performing employees to want to stay with the organization.

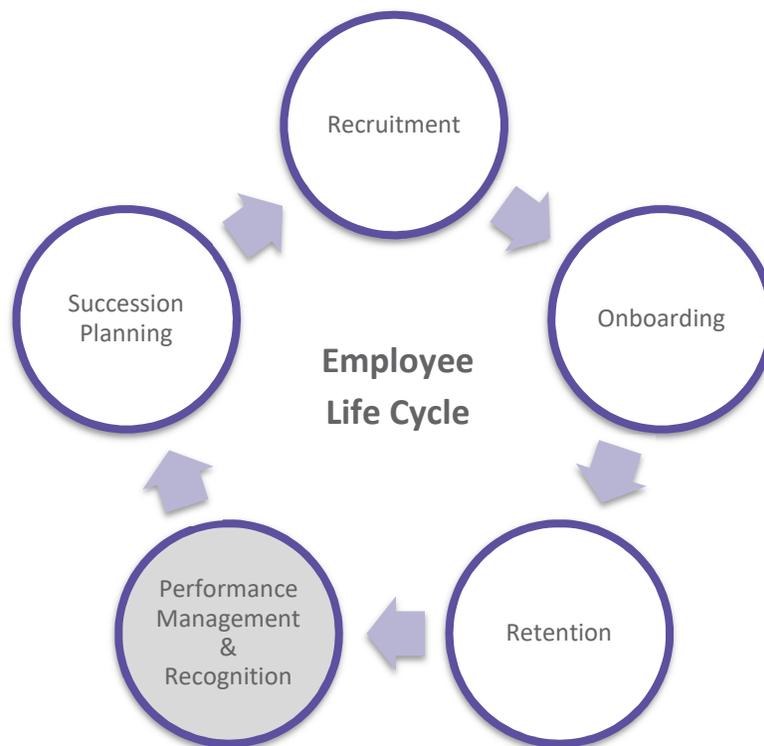
2.3.5 CHECKLIST OF ITEMS TO CONSIDER IN A RETENTION PROGRAM

- Understand the issues and track retention rates by compiling statistical data;
- Develop targeted recruitment strategies that attract and retain the "right" people;
- Improve onboarding and new hire orientation programs to increase the rate of integration into the workplace and to improve employee engagement;
- Develop mentorship opportunities;
- Improve leadership skills in the agency;
- Improve performance management processes and tools;
- Identify issues that contribute to high turnover of high performing employees in key roles;
- Review compensation and benefits programs to ensure they are competitive and allow the agency to compete within the external market place and to retain high performing employees;
- Implement strategies that help employees manage their work-life balance issues;
- Develop strategies to increase professionalism in the intervenor role;
- Provide ongoing training and learning and development opportunities;
- Develop and manage exit interview processes to track reasons for turnover and to act on this information where possible and appropriate; and
- Develop "stay interview" processes whereby supervisors and managers maintain awareness of issues facing employees before they seek employment elsewhere.

2.3.6 TOOLS - RETENTION

- Coaching for Behavioural Competencies;
 - Coaching for Behavioural Competencies (PowerPoint) (September 2016);
 - Competencies Discussion Planner (August 2016); and
- Coaching Resources for Behavioural Competencies (February 1, 2018).

2.4 PERFORMANCE MANAGEMENT AND RECOGNITION



2.4.1 OVERVIEW OF PERFORMANCE AND RECOGNITION

The Performance and Recognition phase of the employee life cycle recognizes the investment in human capital that has been made through effective recruitment, selection, orientation, onboarding, and training programs. Performance management and recognition programs are the next step in the employee life cycle to further develop the knowledge, skills, abilities, and competencies of the employee.

This section focuses on the Intervenor Services Sector behavioural competency model as the foundation of an effective talent management strategy. It also addresses the linkages between the competency model and the need to refine an agency's existing performance management program or to take this opportunity to develop a new comprehensive performance management programs.

2.4.2 PERFORMANCE AND RECOGNITION ISSUES FACED IN THE INTERVENOR SERVICES SECTOR

The following list of issues were identified through the surveys conducted within the Intervenor Services Sector:

- While some agencies have developed their own performance management tools and competency programs, many do not have such programs;
- In the past, standardized behavioural and technical competencies and performance expectations did not exist for the role of intervenor, supervisor, and manager;
- As the notion of behavioural competencies is new within the Intervenor Services Sector, seven of 13 respondents to the Service Provider Survey, who are using DS behavioural competencies, would need to update their performance management programs for intervenors, supervisors, and managers to incorporate the new competency framework and tools;
- Those agencies that do not have performance management and competency programs in place will need to develop new processes;
- The Service Provider Survey indicated that the main strategies for recognition include a performance development plan and provide ongoing professional development opportunities;
- Becoming certified and maintaining certification is something that needs to be recognized as it is also an opportunity to enrich the experience with consumers as intervenors learn new and innovated strategies and skills; and
- There are budget limitations on the types of recognition that can be provided.

Strategies

This is a list of possible strategies for solutions to issues related to performance management and recognition:

- Performance management programs provide important tools to define, measure, and assess performance results at the organization and individual levels. The implementation of the Intervenor Services Competency model will provide a significant opportunity to enhance performance at all levels, while also improving talent management processes associated with recruitment, selection, onboarding, performance, recognition, learning and development, and succession planning;
- Training is a form of recognition and can be recognized through the performance management process as well as through improved on-the-job experience

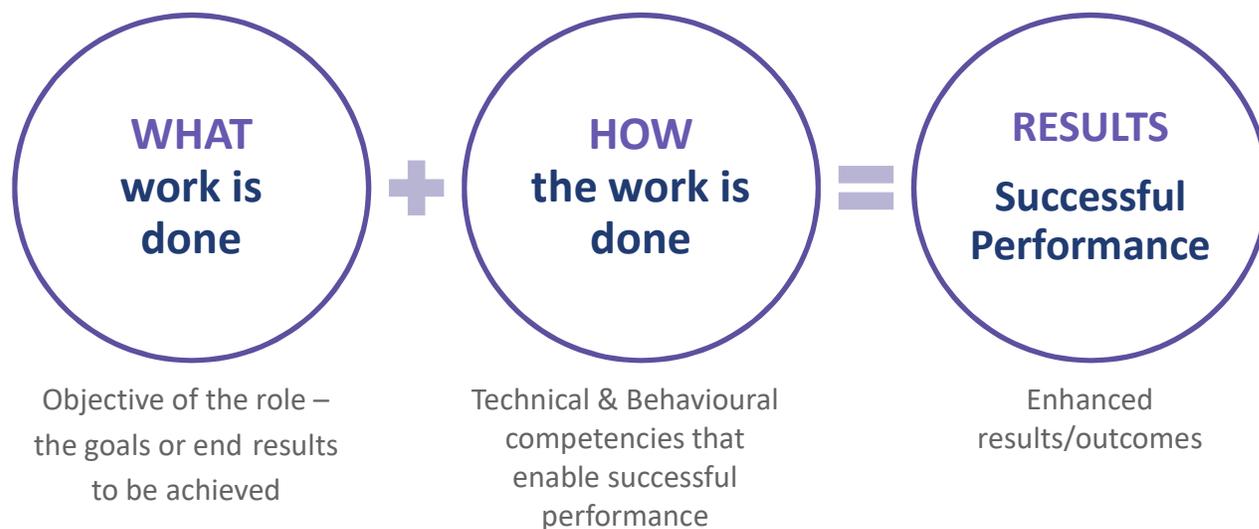
- Review the current performance management program to revitalize the program with the new competencies and tools or to take this opportunity to develop a new performance management program. The tools section contains a sample performance development tool that can assist agencies in this task;
- The Intervenor Services Sector Behavioural Competencies are specific to the Intervenor Services job family and will provide an industry standard.
 - Agencies that have aligned their competency programs with performance management forms will need to update the forms to incorporate the new competencies; and
 - Existing competency models may continue for employees not included in the intervenor, supervisor, and manager competency program.
- Provide training for managers and employees in their roles in the application of the competency model;
- Provide leadership training to managers to build knowledge and skills in coaching and supporting intervenors in the development of competencies (*e.g. coaching for Behavioural Competencies; see tools section*);
- Agencies will need to develop a project plan to implement the new competencies for intervenors, supervisors, and managers. This plan will include the requirement to train managers and employees to ensure there is a clear understanding of the competency model, including completion of the Competency Assessment Questionnaire including a formal review of the competencies that are already demonstrated and those requiring further development for each individual employee;
- The competency development plans can be incorporated into the goal setting and soft skill development areas of the performance development tool;
- Agencies may use this as an opportunity to improve or develop existing performance management programs;
- Agencies are encouraged to set a standard for employee competence; a suggestion is to set a standard that employees are competent in at least 75% of the behavioural competencies;
- Recommend assessing employees on at least six out of the 11 Behavioural Competencies;
- Recommend scheduling regular supervision meetings to review progress;
- Recommend employees complete the Behavioural Competency Assessment Questionnaire (BCAQ) self-assessment prior to performance reviews (*see tools section*);
- For recognition, discuss professional development opportunities within the context of their role;

- A mentorship program can provide these learning and development opportunities for the mentor and the mentee. This can be used as a recognition and succession management strategy to develop leadership skills for the experienced intervenor and for the new intervenor to acquire new knowledge from a seasoned and highly experienced employee; and
- Agencies can develop low cost recognition programs, such as letters recognizing performance and/or long service, suggestion programs, thank you cards, service awards, sharing positive feedback individually and in meetings, Employee of the Year recognition, draws, workshops, symposiums, and other recognition approaches. As behavioural competencies are introduced, consider recognizing behavioural competencies in action as part of these recognition strategies to instill understanding of how to identify superior performance from employee to employee as well as from direct supervisor/manager.

The above are good examples of how to improve retention, morale, and career development. Agencies will have access to tools that might be helpful as they introduce or enhance some of these recognition and performance management strategies.

2.4.3 WHY PERFORMANCE AND RECOGNITION MATTER

Performance is measured at the individual and organizational level. A performance management process measures what work is to be done; how the work is done; and the expected results that must be achieved. In a performance management process, the what is defined by establishing standards of performance, goals, and results to be achieved. The how is defined by a competency framework consisting of technical and behavioural competencies. A competency is defined as being any skill, knowledge, behaviour, or other personal characteristic that is essential to perform the job and that differentiates outstanding performance from typical performance. Competencies are what outstanding performers do more often, in more situations, and with better results than typical performers. Technical competencies include knowledge of processes, policies, and procedures as these comprise the professional body of knowledge that are necessary for top performance. While technical competencies are necessary for top performance, they are not sufficient on their own. The other type of competencies that differentiate top performers is behavioural competencies and may include personal characteristics, such as values, traits, and motives.



2.4.4 STEPS FOR IMPROVING PERFORMANCE MANAGEMENT AND RECOGNITION IN THE INTERVENOR SERVICES SECTOR

The implementation of the new Intervenor Behavioural Competency Model provides an opportunity for agencies to incorporate the model into existing performance management programs. At the very least, the competency definitions will need to be incorporated into existing agency performance development tools. However, the introduction of the new competencies may provide an opportunity to improve and/or revitalize existing programs by incorporating other improvements in addition to the new competency definitions. Alternatively, for agencies with no performance management or ineffective performance management programs, this may be the opportunity to develop a new performance management process.

1. Performance Guidelines

Performance guidelines are useful to supplement training programs in performance management. Examples of performance guidelines will be provided in this section.

2. Improve Performance Development Tools

A typical performance development tool consists of the following key sections:

- a. Incumbent information – name, title, date, name and title of supervisor/manager;
- b. Results section – includes goal setting and/or establishment of performance standards;
- c. Competencies section – includes overall assessment of competencies and identification of competencies requiring development;
- d. Overall rating – provides an overall rating of the overall performance of the employee;
- e. Individual development plan – employee and manager develop a training and development plan to develop competencies, skills, abilities, and knowledge; and

f. Signature section – employee and supervisor/manager signature.

A sample performance development tool is included in this report (*see tools section*). These provide reference documents to agencies as they develop or revitalize their performance management forms.

3. Progressive Discipline

A performance management process typically includes a progressive discipline process and associated documentation.

4. Upward Feedback

An upward feedback process provides useful feedback to support leadership development programs. In these programs, employees are asked to provide anonymous feedback regarding the direct supervisor or manager's leadership skills in relation to the Intervenor Services Sector Competency Framework. It should be noted that there are several criteria that are essential considerations in the decision to use an upward feedback process. First, the culture must be open and have a high level of trust. Employees provide feedback on an anonymous basis with no way of linking their individual responses to the employee. The questions should contain primarily quantitative information that can be summarized and reported in an aggregate basis. The number of employees providing feedback must be sufficient so that confidentiality is assured; a minimum of five direct reports is ideal. All direct reports should be invited to participate and participation should be voluntary. The results must be used in a positive, developmental manner to support the leadership development plan.

The tools section contains an example of a Performance Development Tool for the role of intervenor. An agency is free to customize the form to meet its internal operational requirements. The form may be modified to reflect other jobs within the agency. The agency is also able to determine its own standards, limits, and possible weightings regarding goals and expectation and the competency assessments in the performance management process. It is recommended that agencies use the sample performance development tool after employees are introduced to and become familiar with behavioural competencies, and only once employees are performing at a level that can be appropriately assessed.

2.4.5 CHECKLIST OF ITEMS TO CONSIDER FOR A RECOGNITION PROGRAM

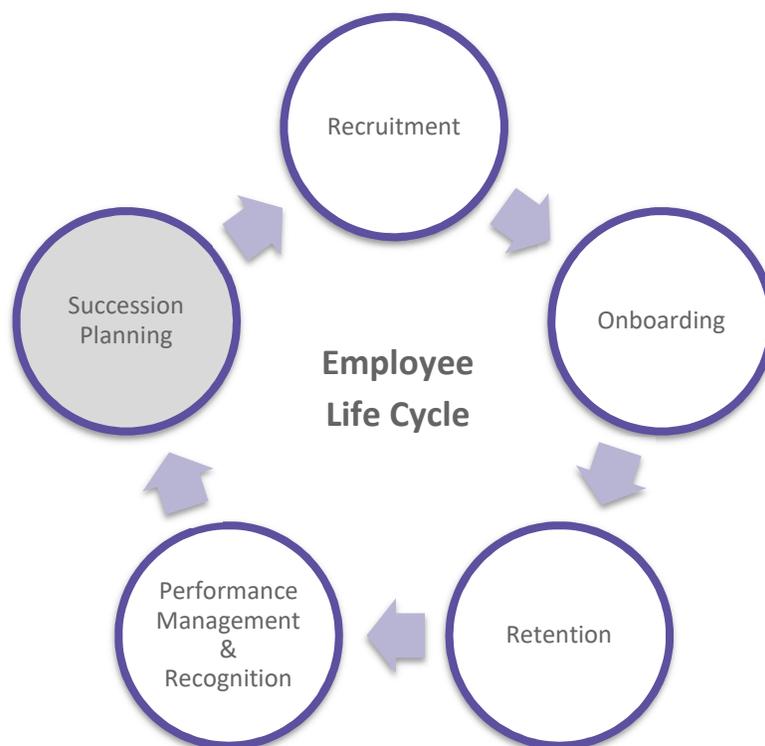
- Email from management recognizing individual events that represent performance that goes above and beyond;
- Ensure that the type of recognition reflects how the employee prefers to be recognized;
- Suggestion programs – where employees are encouraged to make suggestions on how to improve operations. Provide feedback to the employee on how these ideas are being considered by the leadership team;
- Thank you cards/emails/notes/comments in meetings or one on one discussions;

- Investigate the use of discount/perk programs with external providers – such as fitness centres or cell phone companies that provide special rates for employees;
- Service awards;
- Recognition box;
- Share positive feedback at staff meetings;
- Employee award process – Employee of the Year – with a special ceremony;
- Incorporate recognition into fundraising programs – for example, a draw for the chance for a day off; and
- Reward high performance with opportunities for learning and development, projects, additional training, conferences, meetings, and/or symposiums.

2.4.6 TOOLS - PERFORMANCE AND RECOGNITION

- Introduction to Behavioural Competencies;
 - Intervenor Services Behavioural Competency Dictionary (August 2016);
 - Introduction to Behavioural Competencies (PowerPoint) (September 16, 2016);
- Technical Competencies for Intervenor Services (February 1, 2018);
- Performance Development Tool – Intervenor (November 28, 2017);
- Behavioural Competency Assessment Questionnaire – Intervenor (September 2016);
- Behavioural Competency Assessment Questionnaire – Supervisor (September 2016);
- Behavioural Competency Assessment Questionnaire – Manager (September 2016);
- Competency Development Planner (September 16, 2016);
- Coaching for Behavioural Competencies;
 - Coaching for Behavioural Competencies (PowerPoint) (September 2016); and
 - Competencies Discussion Planner (August 2016).

2.5 SUCCESSION PLANNING



2.5.1 OVERVIEW OF SUCCESSION PLANNING

The Succession Planning phase of the employee life cycle recognizes the investment that has been made in developing competencies and preparing employees for their career progression. Succession planning programs benefit both the employee and the organization. They ensure managerial and leadership candidates bring the required supervisory, managerial, and leadership skills and competencies that will ensure the success of the agency in carrying out its vision, mission, and strategic objectives.

Investments have been made in the development of sector-wide behavioural competencies for the positions of intervenor, supervisor, and manager within Intervenor Services. These competencies provide an excellent framework to support the succession planning processes that build the pipeline of talent for future roles.

Succession planning is as important to small organizations as it is for large, complex organizations.

2.5.2 SUCCESSION PLANNING ISSUES FACED IN THE INTERVENOR SERVICES SECTOR

The following list of issues were identified through the surveys conducted within the Intervenor Services Sector:

- Only half of the 13 participating agencies that completed the survey for Intervenor Service Providers engage in succession planning with the most common role included in succession planning being program management, Executive Director/CEOs and HR management;
- Reasons for not engaging in succession planning include a low turnover rate, a smaller agency, and a lack of promotional opportunities;
- 58% of respondents indicated that they do not have succession planning opportunities for intervenors; and
- Only three of the TPAs responding to the service provide questionnaire have a mentorship program for intervenors. Of these, only two have a formal mentorship program.

A quick list of possible solutions is provided below and a more comprehensive analysis of the situation and potential solutions is provided in the remainder of this section on Succession Planning.

Strategies

- Ensure agency commitment to using the Intervenor Service Sector Competencies to support a succession management strategy;
- Integrate the succession planning program with other talent management processes;
- Identify key positions for the agency – including both critical skills and leadership roles;
- Assess current and future leadership potential by aligning succession planning with the performance management and Intervenor Services Sector competency models;
- Use individual development plans developed through the performance management process as important information to identify potential successors for critical roles of the agency;
- Assess the degree to which a “grow from within” or “hire from outside the agency” would be required to fill roles. The ideal strategy is a “grow from within” due to the highly specialized body of knowledge required for leadership roles within the Intervenor Services Sector, however, this may not be possible or practical;
- A succession planning process would also support a recognition strategy when high performing employees are identified as participants in the process, which supports a “grow from within” strategy;
- Recommend that career paths be identified for intervenors, supervisors, and managers, which may include rotations through other roles such as health and safety, training, HR, finance, scheduling, facilitators, and other roles;

- Include learning opportunities such as job shadowing, mentoring, online learning, simulation learning, distance education, and formal training as opportunities to learn new skills; and
- Monitor and evaluate the results of the succession planning process and develop continuous improvement strategies for ensuring future success using feedback and metrics.

2.5.3 WHY SUCCESSION PLANNING MATTERS

Succession planning is a HR process that focuses on building a pipeline of talent for future key positions and for highly skilled jobs in agencies. It includes processes that identify critical jobs, with the skills, knowledge, and competencies that are essential for the success of the agency. It ensures there are employees who are being groomed and prepared to take on these roles.

Succession planning must be integrated with a broader talent management strategy.

- **Succession planning** is a strategic planning exercise that seeks to ensure that an organization has a pool of highly skilled and talented employees available and ready to step into senior leadership and other critical roles should the need arise.
- **Talent management** is a documented process for developing high potential employees for positions for which they have an interest and are well suited. This process ensures the “right” employee is ready to assume the “right” roles at the “right” time.
- The rate of change caused by external and internal pressures and trends is unprecedented and will continue. Rather than showing any signs of slowing down, the rate of change is constantly increasing.
- **Changing demographics.** Changing demographics are creating intense competition for talent and specific knowledge. In particular, the retiring baby boomer generation and tight talent market creates a situation where there are shortages of talent with specific knowledge and competencies. Succession planning processes support retention strategies for existing employees with potential to progress within the organization. They prepare potential employees from the next generation to be qualified to progress into the key roles. The potential leadership challenges are further intensified by the fact that many organizations have taken a “wait and see” approach to talent management for the future and so are unprepared for the future turnover. These organizations will be looking to attract new employees from other organizations since they are not spending the time or energy in preparing their own employees. They will be looking to “buy” talent from other organizations. This will create additional supply/demand challenges in recruiting for jobs of strategic importance.

- **Leadership roles are increasingly complex and demanding.** As the external environment becomes more complex and performance demands intensify for key leadership roles, more is expected of leaders. The new leadership skills require a strong intellectual ability to deal with complex and ambiguous information and a wider scope of decision making within more uncertain internal and external environments. The knowledge and skills required of leaders in the past are not enough to deal with unforeseen demands of the future – future leaders require new leadership skills and competencies. These competencies have been defined in the Intervenor Supervisor and Manager Competency profiles.
- **Identifying skill gaps and training needs.** As the skills and competencies for key roles for future jobs evolve, the succession planning helps to ensure there will be talent available for the roles. Succession planning programs help to ensure talent is available in the event of sudden or unanticipated turnover at the managerial and leadership levels.
- **Retaining institutional knowledge.** The knowledge and skills required for leadership skills within the deafblind agencies is very specific and, due to the small size of many organizations, there may be fewer career opportunities within a particular agency. Talent will come from promotions of current employees within the agency or by hiring from other agencies within the Intervenor Services Sector. The learning curve for critical positions is reduced when knowledge of the agency gained through on-the-job learning is passed from one generation of employees to the next while both generations are still working as it can decrease the need for future formal training to recreate knowledge that leaves the organization due to turnover.

The business case for investing in succession planning

Examples of benefits from this investment are as follows:

- Ensures a pipeline of talent available for future vacancies that bring the right knowledge, skills, and competencies;
- Creates an environment that promotes employee engagement and retention;
- Matches the agency's needs with employee's developmental goals and interests;
- Provides a more structured process for career planning and career management;
- Provides valuable information for developing individual development plans by identifying skill gaps and training needs, which can be used to develop potential candidates and to improve retention of current employees;
- Avoids extended and costly vacancies in key positions and ensures the stability of the agency's operations; and
- Develops a diverse workforce by considering the future mix of knowledge and skill levels for the agency as a whole.

2.5.4 STEPS IN A SUCCESSION PLANNING PROCESS

1. Identify strategic plan and strategic priorities – where is the organization going in the future?

- What are the external factors that influence the strategic plan?
- What does the agency need to succeed at in order to be successful in the future?
- How are changing demographics in the Ontario population going to affect current and future programs?
- What programs will be critical for the future? Which programs will be discontinued or downsized?
- What are future funding arrangements – what programs are growing? Declining? Are funds increasing or decreasing?
- What are the changing needs of clients?
- What staffing levels will be needed in the future?
- What knowledge, skills, and abilities are critical within the Intervenor Services Sector?

2. Develop a framework to support the agency's succession planning process

- Identify the key positions and employees identified as successors to key roles and their current state of readiness; and
- Ensure the framework aligns with the Behavioural Competencies.

3. Establish present and future leadership roles and competencies required to achieve the strategic priorities

- What current jobs will be needed in the future? What knowledge and skills are required?
- What jobs are highly specialized to the Intervenor Services Sector?
- What are the learning curves for the jobs – longer (many years) or shorter?
- Can candidates be prepared for future jobs by being rotated through a range of jobs within the agency to acquire knowledge of operational elements of the agency?
- What jobs will be phased out in the future?
- What new jobs will be needed in the future? What knowledge and skills are required?

4. Conducting talent reviews of existing employees

An internal talent review will help to identify high potential candidates for recommendations for lateral transfers, promotions, and developmental plans. These involve the following considerations:

- What are the managerial and leadership jobs for the agency now and in the future?
- Which employees are available for promotion into these jobs if the job were vacant?
- What is the profile of candidates, including history of performance reviews and accomplishments, experience, education, knowledge, skills, competencies, etc.?

- Which employees are available for promotion into these jobs if the job were to be available in one to five years?

5. Evaluate the strengths, weaknesses, and readiness for succession in key employees for future roles

Once potential candidates for potential future jobs have been identified, the next step is to prepare an individual development plan. This individual development plan will require a competency assessment of the candidate in relation to supervisory and managerial skills required for the higher level job.

This information may come from:

- An employee/candidate self-assessment in relation to the supervisory or managerial competencies;
- The Executive Director's assessment of the employee/candidate's competencies in relation to the competency definitions;
- Feedback from peers, direct reports, clients, and other relevant stakeholders; and
- Existing performance review information.

6. Developing an individual development plan for key employees to develop competencies for future roles and to ensure these employees are retained with the organization.

The Individual Development Plan should be included in the performance management process. This tool can be used once your agency has implemented the competencies. There may be a transition period between when agencies implement the competencies and when agencies can realistically evaluate employees on the competencies. The Performance Development Tool includes the following elements:

- Name, title of the employee covered in the development plan, and the manager accountable for the plan, dated, and with signatures;
- Technical Competencies to be developed;
- Behavioural Competencies to be developed;
- New performance goals;
- Key strengths and developmental needs (using the competency profile);
- Action steps for the next year, including developmental activities such as training, on-the-job learning opportunities, mentoring, self-development, etc.; and
- Target dates and timelines for completion.

7. Identify critical jobs that do not have talent available to fill them in the future

- These are positions where the agency would be at significant risk if the current incumbent left. The agency may need to develop a plan on how to transition knowledge to existing employees, restructure the job, create cross training opportunities, backfill the position, or create other strategies on how that position could be filled in the future.

8. Plan for critical jobs that cannot be filled internally

- If these strategies are not enough, the agency may need to consider a recruitment strategy or strategy on cross training with other agencies. These types of roles create the opportunity to bring new and different talent and ways of thinking into the organization.

Checklist of barriers to succession planning programs that need to be overcome

- Limited promotional opportunities within an agency;
- Lack of support by the Board and/or senior leadership;
- Concerns that jobs may be at risk;
- Organizations that function with silo thinking and behaviours;
- Lack of information sharing within the agency;
- Ineffective performance management programs;
- Challenges in measuring behavioural performance using the competency program;
- Ineffective feedback processes where employees do not receive feedback on what they need to do to develop competencies;
- Senior managers and leaders do not have the time to provide the appropriate level of coaching and mentoring;
- Lack of documentation of the succession planning process;
- Resistance for change;
- Managers and leaders are not held accountable; and
- Lack of experience and understanding of how succession planning works.

2.5.5 CHECKLIST OF ITEMS TO INCLUDE IN A SUCCESSION PLANNING PROCESS

Create the right culture

- A high performance culture with an atmosphere of trust and confidence;
- Open and honest communication and feedback;
- A culture of personal responsibility; and
- Willingness to embrace new ideas.

Align succession management with the agency's strategic planning processes

- Succession management is aligned with the agency's strategic plan, vision, mission, and values;
- Ensure managers and leaders receive the training they require to develop succession planning programs;
- Ensure the Board and agency leadership demonstrate buy-in and high level visible commitment to succession management; and

- Build the right HR programs to ensure leaders and employees are committed to being part of the succession planning initiatives and take the steps necessary to learn new competencies and behaviours.

Create a learning environment

- Ensure the right employees are selected for development;
- Ensure the agency's culture supports learning and development and the transfer of knowledge;
- Ensure succession planning is based on specific knowledge, skills, and competencies in the Intervenor Competency framework with developmental activities tailored to the learning that is required;
- Use lateral transfers as valuable learning opportunities to develop specific knowledge and competencies; and
- Provide learning opportunities such as mentoring, cross training, job enlargement, coaching, job shadowing, formal and informal feedback from multiple stakeholders, and ongoing communication.

2.5.6 TOOLS - SUCCESSION PLANNING

Please note: The succession planning tools are included with permissions from the DS HR Strategy.

- DS HR Strategy: Succession Planning Master Sheet;
- DS HR Strategy: Planning for a Talent Management and Succession Planning Guide (PowerPoint); and
- DS HR Strategy: A Guide to Talent Management and Succession Planning for Board of Directors in the Developmental Services Sector.

OVERVIEW OF TOOLS

The Strategic and Performance Management Context

- Building Human Resource Capacity: Core Competencies for Ontario Intervenor Services Sector (January 2016);
- HR Metrics for Intervenor Services (November 28, 2017);
- Introduction to Behavioural Competencies;
 - Intervenor Services Behavioural Competency Dictionary (August 2016);
 - Introduction to Behavioural Competencies (PowerPoint) (September 16, 2016); and
- Technical Competencies for Intervenor Services (February 1, 2018).

Recruitment

- Recruitment/Awareness Videos for Intervenor Services (2018);
- Sign-in for CEO/ED & HR Professionals: Behaviour Based Interview Guide – Intervenor (January 11, 2017);
- Sign-in for CEO/ED & HR Professionals: Behaviour Based Interview Guide – Supervisor (January 11, 2017);
- Sign-in for CEO/ED & HR Professionals: Behaviour Based Interview Guide – Manager (November 23, 2016);
- Sample Job Description – Intervenor (February 1, 2018); and
- Sample Job Posting – Intervenor (November 28, 2017).

Onboarding

- Behavioural Competency Assessment Questionnaire – Intervenor (September 2016);
- Behavioural Competency Assessment Questionnaire – Supervisor (September 2016);
- Behavioural Competency Assessment Questionnaire – Manager (September 2016); and
- Competency Development Planner (September 16, 2016).

Retention

- Coaching for Behavioural Competencies;
 - Coaching for Behavioural Competencies (PowerPoint) (September 2016);
 - Competencies Discussion Planner (August 2016); and
- Coaching Resources for Behavioural Competencies (February 1, 2018).

Performance and Recognition

- Introduction to Behavioural Competencies;
 - Intervenor Services Behavioural Competency Dictionary (August 2016);
 - Introduction to Behavioural Competencies (PowerPoint) (September 16, 2016);
- Technical Competencies for Intervenor Services (February 1, 2018);

- Performance Development Tool – Intervenor (November 28, 2017);
- Behavioural Competency Assessment Questionnaire – Intervenor (September 2016);
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Succession Planning

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- DS HR Strategy: A Guide to Talent Management and Succession Planning for Board of Directors in the Developmental Services Sector.

Other Documents

Please note: The following documents were produced by the ISHRS but are not referenced within the Best Practices HR Toolkit:

- ISHRS Fact Sheet (2017 – 2018);
- Behavioural Competencies Implementation Guide (March 2017);
- Sign in for ISHRS Behavioural Competencies Trainers: Introduction to Behavioural Competencies PowerPoint – Facilitators Guide (2016 – 2017);
- Introduction to Behavioural Competencies – Matching Game Cards, Matching Game Worksheet, Matching Game Scoring Key (2016 – 2017);
- Coaching for Behavioural Competencies PowerPoint – Facilitator’s Guide (2016 – 2017);
- Technical Competencies Training Resource Guide (February 1, 2018);
- Intervenor Training Research Forum Analysis: Inventory of Training (2016 – 2017);
- Intervenor Training Gap Analysis (2017 – 2018);
- Marketing and Communications Strategy (2017 – 2018);
- Glossary of Terms (2017 – 2018);
- ISHRS Quarterly Newsletters (2015 – 2018); and
- Meeting Minutes (2014 – 2018).