

Competency Modeling for Strategic Leadership of Social Services Organizations

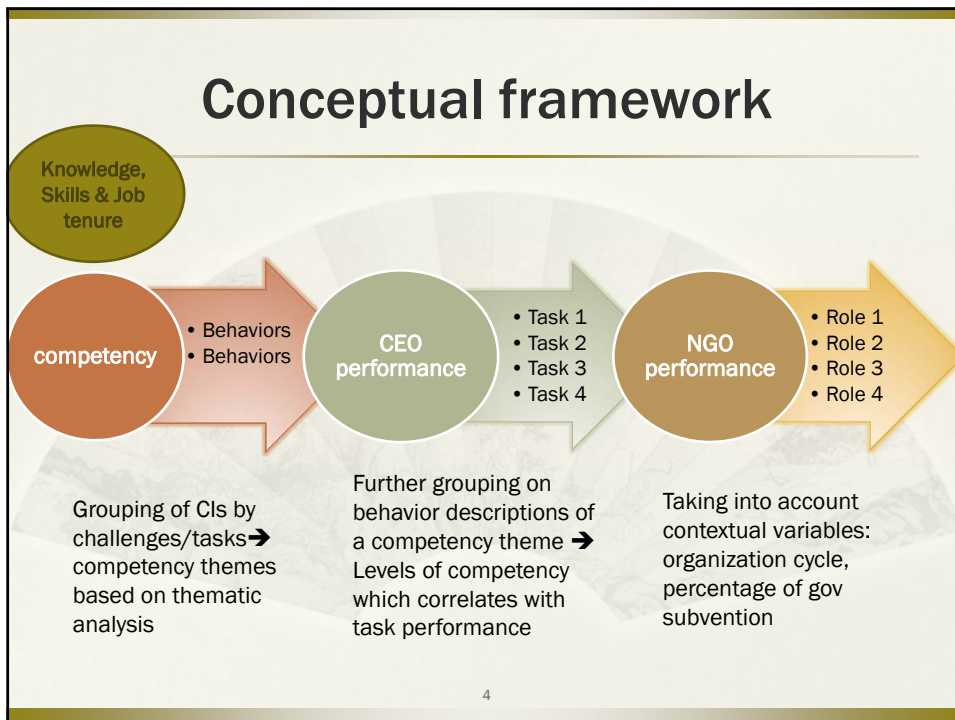
Progress Report
19 Apr 2013

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Agenda

- * **Introduction**
 - * The Three Projects
 - * Research Conceptual framework
- * **Research progress**
- * **Interim findings**
 - * Stakeholder interviews
 - * Selected CEO BEIs
- * **Way forward**

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What does a NGO CEO do? (Job Ads 2012)

- * Agency 1 (~600 staff, annual turnover HK\$0.13B): to provide overall management, planning initiatives, strategic directions, fund raising drives and support to the governance:
 - * **Work closely** with the Committees and staff teams in establishing, developing and implementing strategies and action plan related to the development and management of the agency's services.
 - * **Provide leadership, vision, funding and management** to the agency and various operation units.
 - * Initiate fund raising drives in accomplishing agreed fund raising targets, including regular/recurrent and ad hoc requirements, for the development of services and businesses in accordance with the Society's adopted vision and mission.
 - * Act as an interface at senior levels and external parties.
 - * **Drive the organizational performance** in line with the strategic plan to achieve operational excellence.
- * Agency 2 (~500 staff, annual turnover HK\$0.11B): to provide leadership in strategic planning, service development, and establishing strong links with the government, the public and private sectors, the academia and other professional bodies
 - * Reporting to the Board of Directors, the Chief Executive, as the administrative and service head of the agency
 - * Overseeing more than 480 multi-disciplinary staff members,
 - * Oversee all aspects of the services, administration, financial and human resources management.

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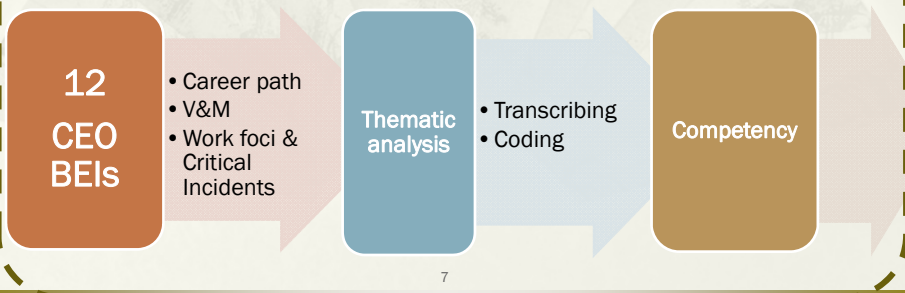
Project Progress



Research progress (Project 1)

Social service organizations with annual budget > 50M

10 Stakeholder Interviews:
Challenges facing today and future's social services NGOs



Interim Findings

Stakeholders' opinions of future (3-5 years) NGO challenges:

- * **Organizational management**
 - * Develop management skills and knowledge among staff
 - * Governance and accountability issues
 - * Organization positioning
 - * Succession planning
 - * Changing organization structure (from traditional structures to more flexible; structure needs to match NGO services)
- * **Resources management**
 - * Insufficient/diminishing government resources
 - * Increasing competition between NGOs for resources
 - * Maintain healthy financial budget
 - * HR challenge: How to maintain HR stability, retain talent and resolve contradictions between management and staff
- * **Collaborative capacity**
 - * Engagement of multiple stakeholders
 - * Need to view civil society as a whole – focus on community engagement (this is more of an opportunity rather than challenge)
 - * Need to develop cross-cutting solutions in order to solve complex problems (social innovation)
- * **Dealing with external environment**
 - * Unpredictable and changing external (economic/social/political) environment
 - * Ageing population
- * **Advocacy**
 - * Politicization of social issues
 - * Managing client expectations in advocacy work

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Competency clusters

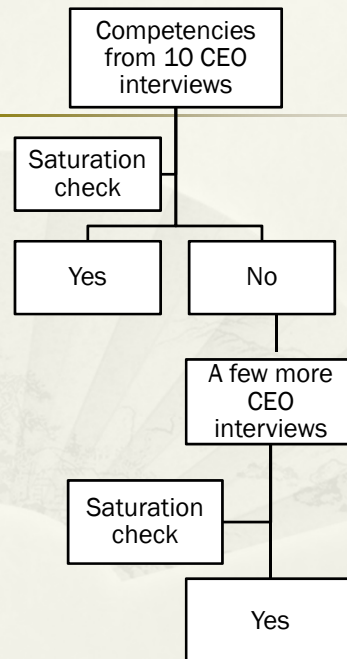
Results based on 8 CEO interviews, 28 critical incidents, 287 behavioral descriptions



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Way Forward

- * Use grounded theory approach to collect and analyze data until saturation
- * Create competency dictionary which includes competency name, definition and levels
- * Validate competencies with secondary data



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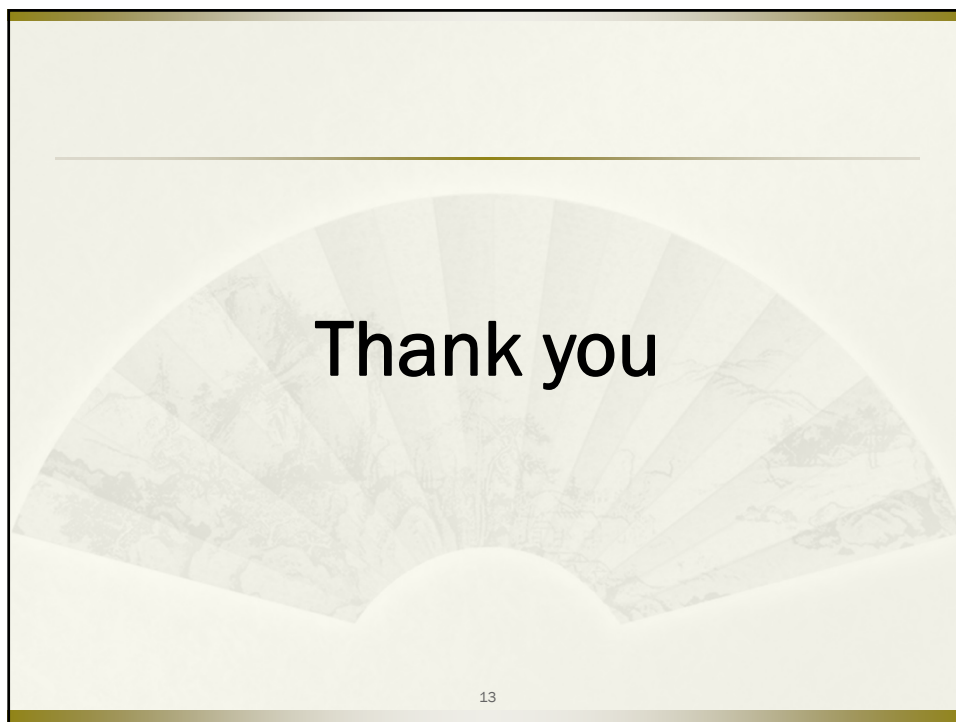
Dictionary (Sample) & Levels of Competencies

Generic Competencies for Managerial Staff

3.2 **Resource Management:** The ability to explore new resources and manage available resources cost-effectively in meeting agency's objectives with quality results. It includes the exploration and development of resources to maximize service outcome.

Level III	Level II	Level I
<ul style="list-style-type: none"> • Takes personal responsibility and initiative to pool in new resources innovatively or redeploys existing resources to meet the business goals of the agency as and when required • Reviews, plans and deploys resources strategically to meet current and future needs of the services • Takes initiative to analyze new approaches of generating additional resources and encourages staff to engender creative ideas • Reviews key policies and procedures strategically to support cost effectiveness and future development of the agency 	<ul style="list-style-type: none"> • Is responsible for and eager to make effective use of allocated resources; seeks and identifies ways of cost saving • Plans and deploys manpower and resources flexibly among service units to achieve agency objectives and ensure optimal utilization • Is able to identify funding bodies and get their support for agency programs, projects and service development • Initiates and reviews policies and procedures regularly to maximize resources utilization 	<ul style="list-style-type: none"> • Is able to identify various resource needs and prioritize them; makes recommendations and seeks approval on both monetary and people resources • Devises action plans and makes appropriate use of available resources to meet operational requirements • Is able to identify funding bodies and get support for specific programs • Provides feedback for the work process to facilitate maximization of resource utilization

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Capacity Building Framework for NGO Leaders



Competency Building