SociaLink
Tūhono Pāpori
Building a Thriving Social Sector | Western Bay of Plenty

Report on Training and Workforce Development Needs for the Social and Community Sector in the Western Bay of Plenty

DECEMBER 2022

SociaLink was established in 2012 at the request of the social and community sector in the western Bay of Plenty to support and empower the work of community organisations.

Our vision is "a resourced, skilled and cohesive for-purpose sector enabling communities to flourish".

Our purpose is "building capability, confidence, sustainability and voice of community organisations in the Western Bay of Plenty."

We deliver a range of services, including:
- Professional development
- Advice on all aspects of the operations of community organisations
- Support in enabling community organisations to work together to achieve great impact on social issues
- Work with community organisations to improve their ability to effectively utilise internal and external data
- Encourage people to volunteer and support organisations to attract and retain volunteers
- Operate The Kollective, a co-working space for community organisations
- Give a voice to the sector on issues of relevance to community organisations

Acknowledgements

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Executive Summary

The training and needs assessment

SociaLink undertook a training and needs assessment (TNA) with organisations in the social and community sectors in the Western Bay of Plenty during November 2022, funded by Tauranga City Council. The aim was to identify training needs to inform SociaLink's delivery of learning opportunities and to gain a better understanding of training and workforce development issues for the social, iwi and community sector on which SociaLink could take further action.

The TNA involved an online survey (55 responses) and five focus groups with participants from 24 organisations in the following sub-sectors: Māori and Pasifika; disability; social services; mental health addictions and neurodiversity, and management/other local peak bodies. Both the survey and focus groups were directed to CEO/managers, team leaders or training coordinators because of their role and perspective in identifying organisational and staff training and development needs. The TNA also included an environmental scan of relevant workforce development issues and stocktakes of relevant training, including professional development, certificates, diplomas and degrees.

The TNA objective was successfully met in understanding the sector training needs, with some clear priorities emerging at an organisational level and for staff and volunteers.

The sector in the Western Bay of Plenty

The not-for-profit sector covers iwi organisations, charities, incorporated societies, social enterprises and Māori land trusts working in a wide range of areas from community development, family/whānau, children, young and older people, health, alcohol related or family harm, disability, food and housing security, environmental groups, sporting organisations and the arts.

As an example of its size, according to Charities Services' information there are at least 377 registered charities based in the Western Bay of Plenty working in these areas, 54% (202) of which indicate they are run entirely by volunteers. The remainder have up to 2,400 part and full time staff. There is an average of 1,563 voluntary hours spent weekly across all the charities.

Broad workforce and training issues and challenges affecting the sector

The health and social sectors are seen as fundamental to the health and wellbeing of communities in Aotearoa New Zealand, according to regional workforce development research. It is also a large source of employment in most regions, employing around 10 - 11 percent of the general workforce, including in the Bay of Plenty (the health workforce forms most of this). Demand for health and social services will grow, driven by the growth in the aging population, regional population growth and increase in need for mental health services.

Workforce development and upskilling are affected by several broader contextual factors according to several published reviews. Traditionally the not-for-profit sector has made up for reduced remuneration with flexibility of working, workplace culture and the ability to make a positive impact on wider society. However, as the government and commercial sector are now

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increasingly also offering these benefits, along with higher remuneration, the not-for-profit sector no longer is seen to have this advantage. The cost of living and changes to the way people work due to Covid 19 have also contributed to employees changing work and leaving the not-for-profit sector. The sector is also considered to not invest sufficiently in workforce training and development.

These findings were echoed in the focus group discussions and survey responses: undertaking sufficient investment in providing staff learning and development was a common challenge. Respondents generally agreed that if overall funding was tight, then the training budget would be the first to go. The exception was one organisation which protected the training budget because it believed it was important to strategically invest in its staff.

The role of training and development was discussed in the context of staff retention, and organisations advised that they were more likely to lose staff because of better pay offers in other sectors rather than lack of training opportunities.

Regarding volunteers, some organisations found it difficult enough to attract and retain volunteers, never mind then asking them to undertake necessary training to do the role. In many cases, unpaid volunteer training was delivered 'on the job.'

Training priorities for organisations and workforces

The priorities are based on feedback from the focus groups and surveys.

Understanding Te Ao Māori and Te Tiriti o Waitangi
It was seen as important for providers and their staff to have relationships with hapū and iwi and to understand Te Ao Māori and Te Tiriti o Waitangi in order to effectively engage with tamariki, rangatahi and whānau.

Increasing cultural competence
A need was identified for greater organisational cultural competence in working with the growing number of people from culturally and linguistically diverse communities (CALD).

Governance and management
Training in governance was commonly raised, including ongoing development of Trustees and Board Members particularly around their legal responsibilities and the differences between governance and management. Opportunities for training in operational and team management were highlighted as well.

Staff mental wellbeing
Helping staff with self-care and resilience was seen as a top priority as was safety of teams and volunteers and training in mental health first aid.

Other training and workforce development needs and opportunities

The outcome of the stocktakes of available training identified that some of the training being requested is already available but organisations may not be aware of it, or it is not delivered when an organisation needs it. Collation of available relevant training in one place on SociaLink's website will make it easier for local organisations to access training and development opportunities.

Participants in the TNA highlighted the importance of valuing staff and volunteers, especially given the challenges facing the sector and had several ideas and suggestions for other not for profit organisations to use in order to support recruitment and retention and a positive workforce culture. SociaLink will review these and plan further action as appropriate.

Training

SociaLink will liaise with training and development providers and provide sector feedback on needs and discuss gaps in training and development. With greater emphasis on vocational education through workforce development councils, apprenticeship learning and regional workforce development plans, SociaLink has a role in liaising with those agencies about the sector's needs and challenges.

Organisations had to be innovative about what training they could offer and how to deliver it at the least cost. A number of innovative ideas came from both the focus groups and the survey group that involve sharing of resources, information and broader collaboration between not for profit organisations. A number of these ideas could be facilitated by SociaLink.

In terms of broader funding, oganisational and workforce development and training matters, the TNA highlighted a range of initiatives and concerns such as regional workforce development plans, pay equity issues for the not for profit sector and demographic (eg aging population) and social trends (eg changes in volunteering). These are all part of the context to sector recruitment, retention and delivery of services and programmes in the western Bay of Plenty. The not for profit sector is a significant and essential contributor to the wellbeing of the diverse people and communities in this region and addressing its workforce and organisational training and development needs will require an ongoing focus and engagement within and on behalf of the sector.

Introduction

The not for profit sector in the western Bay of Plenty delivers a large range of services and programmes to local communities through its organisational capabilities and the skills and knowledge of its staff and volunteers.

It covers iwi organisations, charities, incorporated societies, social enterprises and Māori land trusts. Their work covers a large range of community needs from community and marae development; support of whānau, children, young and older people; advice and expertise on reducing alcohol and drug related harm, family violence, and a broad range of health related concerns. Organisations and their staff and volunteers provide education, religious and pastoral care, run services or support life goals for people with disabilities, provide advice and options on income, food and housing security, run progammes on international aid, are engaged in environmental and climate issues or are focused on fostering participation in sport, recreation and the arts.

The sector is a significant and essential contributor to the wellbeing of the diverse people and communities in the region. There are at least 377 registered charities covering the areas listed above and more, that are based in the Western Bay of Plenty.[1] Between them, 46% or 175 have approximately 2,400 part and full-time staff. Fifty four percent (202) indicate they are run entirely by volunteers. There is an average of 1,563 voluntary hours spent weekly across all the charities.

Supporting and enhancing the capability of sector organisations in working with their communities of interest is a key role of SociaLink as the peak umbrella body for the social and community sectors in the WBOP.[2]

To support its planning and development in this area SociaLink approached Tauranga City Council for funding to undertake a training needs assessment in 2022, to:
1. Better understand and identify current and future training needs to inform planning and development for SociaLink's own service delivery and advocacy on behalf of the sector and its workforce; and
2. Consider ways to address training needs and the gaps; and
3. Provide information for the sector and other organisations/stakeholders that deliver training or professional development to the social and community sector.

Parameters of the TNA
In scoping what the TNA would cover the following were noted:

o Training needs are affected by broader workforce and sector development trends and issues at regional and national level. These are also considered in this assessment as integral to local sector planning, development and effectiveness.

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[1] Source is Charities Services Register, Department of Internal Affairs. Figures are based on the latest annual returns of registered charities lodged with Charities Services and with a postcode in the WBOP. Some charities are also incorporated societies.

[2] The Social Sector Innovation Western Bay of Plenty Charitable Trust (SociaLink) was established in 2012 following discussions with local social agencies. The sector sought a vehicle to facilitate capability building within the sector, to provide a collective social sector voice and become more connected to and valued in community and regional decision making. Its principles of practice are giving form to Te Tiriti o Waitangi, social justice and equity.

- Tertiary education providers offer a range of vocational and academic education at certificate, diploma and degree level applicable to the varied vocational roles and skills required in the broad social and community sectors. We decided collating information about these providers and opportunities on behalf of the local sector would help it to access to training and capability building. SociaLink itself does not intend to develop as a tertiary training provider.

- We decided to focus this piece of work on the views and experience of CEOs, managers, team leaders, and training coordinators because they are responsible for addressing staff and volunteer training and development needs. This approach complements SociaLink's focus on providing capability building to support the operations of organisations.

Overview of the report

Part 1 reviews contextual and bigger picture issues affecting the for-purpose sector, including workforce development research undertaken in regions throughout Aotearoa New Zealand as well as from national reviews and research of the social, iwi and community sector.

Part 2 summarises local sector views on training and workforce development needs, challenges and suggestions from the research SociaLink conducted through a series of focus groups and a survey.

Part 3 provides a brief overview of training and workforce development providers available to local organisations, staff and volunteers, reflecting a larger stocktake currently being collated.

In Part 4 we draw the findings together and identify some recommendations for future activity that SociaLink can provide, lead or encourage.

PART 1: Summary of workforce and related issues affecting social and community sector

This section provides an overview of current and future trends affecting the not for profit organisations and their workforces involved in the social, iwi, health and community sectors throughout Aotearoa-New Zealand. It draws on published reports and literature. The first section summarises recent Workforce Plans developed by Regional Skills Leadership Groups (RSLG) throughout the country[3] More information is available in Appendix I.

RSLG Regional Workforce Plans, Observations and Issues

- o The health and social assistance sector is seen as fundamental to the health and wellbeing of people throughout the country. It is a large source of employment in most regions, providing around 10-11 percent of the general workforce.
- o Demand for health and social services will grow, driven by the growth in the aging population, regional population growth and increase in need for mental health services.
- o The health and social service workforce is aging, with insufficient replacement numbers.
- o Stressful factors in the workforce include increased workload, technology demands and increasing complexity of health conditions.
- o Wellbeing of the health and social service workforce is important and is supported by flexible working arrangements. Many employees are contracted to work part time which may mean the workforce is under-utilised.
- o There is a lack of school leavers studying health, and more so amongst Māori school leavers.
- o Employers don't always make the most of the skills, knowledge and experience of groups at greater risk of poor employment outcomes, especially people with disabilities, former refugees, recent migrants and ethnic communities.
- o Micro-credentialing would help support training and career opportunities for the unregulated or kaiāwhina workforce (healthcare assistants, disability support, aged care workers, technicians, orderlies). Experienced kaiāwhina are in high demand but access to training and upskilling can be limited.
- o Traditional student placement models are under pressure and struggle to keep up with demand. There is a need for more skilled and experienced staff to train/mentor new people.

The Bay of Plenty Regional Workforce Development Plan is underpinned by adhering to Te Tiriti relationships and co leading a Mā te Māori, Mō te Māori approach, to enable whanau, hapu, iwi and hapori to develop the potential solutions for their advancement.[4] The Plan's initial focus is on seasonality in the horticulture and forestry sectors, technology (digital connection) education

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[3] The Government established permanent future focused independent Regional Skills Leadership Groups (RSLGs) in August 2021 to identify and support better ways of meeting the future skills and workforce needs of Aotearoa New Zealand's regions and cities. They are supported by the Ministry of Business, Innovation and Employment. Members include regional industry leaders, economic development agencies, iwi/Māori, worker, community and government representatives.

[4] Bay of Plenty Regional Skills Leadership Group. Bay of Plenty Workforce Plan 2022, July 2022

and training, climate change impacts and resilience to disruption The Plan did note the health and social assistance sector is growing but only 4% of Bay of Plenty school leavers go on to study health, and three percent of Māori. A September 2022 update noted that it was a challenge to get rangatahi into the health workforce, including aged care, observing there was a 'huge need to grow the workforce but no youth friendly on ramp.' [5]

Underfunding of the Social Service sector

Research by Martin Jenkins in 2019[6] noted the social service sector was underfunded by over $600 million, with the consequences being underpaid and overworked staff, difficulties in attracting and retaining staff and a growing wage gap.

Increase in the loss of staff due to cost of living and impact of Covid 19

Not-for-profit (NFP) organisations in a 2022 survey reported an increase in staff leaving due to personal choice or lifestyle changes, probably as a result of Covid 19 and the cost of living pressures.[7]

NFPs losing their 'feel good while working' advantage in recruitment and retention

Traditionally NFPs have made up for reduced remuneration with flexibility of working, workplace culture and the ability to make a positive impact on wider society. However, as the government and commercial sector are increasingly now offering these benefits, along with higher remuneration, the not-for-profit sector no longer has this as an advantage.[8] The cost of living is also a further impact.

Lack of NFP investment in workforce development and training

Underfunding contributes to lack of investment in this area, coupled with expectations in the sector and public perceptions of charities that money should go to the front-line or mission serving.[9]

Issues affecting specific social and community sector workforces

Difficulty in filling social work vacancies has been reported due to lack of suitable registered candidates/skill shortages and funding shortfalls to pay them[10]. The impact included high workload and work stress, reduction or changes in services available to clients and high waiting lists for services.

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[5] Bay of Plenty Regional Skills Leadership Group. Bay of Plenty local insights report: September 2022
[6] Martin Jenkins (2019). Social Service System: The Funding Gap and How to Bridge it
https://sspa.org.nz/information/funding-gap
[7] Grant Thornton (2022): Here for GOOD? Not for Profit Sector Report.
[8] David Crosbie The value of working in the charities sector, Probono Australia.
https://probonoaustralia.com.au/news/2022/06/the-value-of-working-in-the-charities-sector/
[9] Wenzel, R and others The Learning for Purpose Researching the Social Return on Education and Training in the Australian-Not-for-Profit Sector, University of Western Australia
[10] Social Workers Registration Board/Kahui Whakamana Tauwhiro Survey January 2022

In the mental health and addiction workforce similar issues have been noted.[11] Skills shortage and competition for workers raised concerns about the long-term sustainability of NGO services, the wellbeing of their workforce and effectiveness of services. Support workers in the field wanted more practical training, access to quality supervision and more career pathways.[12]

Lack of a support worker qualification, need for organisational support to attend training, lack of basic orientation to roles and gaps in training, including practical engagement skills and working with diverse cultures are other issues that have been raised.

According to mental health, addictions and disability workforce development provider Te Pou o te Whakaaro Nui, leaders and managers in the mental health, addictions and disability sectors want clear guidance on supervision, practical training and centralised solutions like training directories. They noted current qualifications were not meeting practice needs and there were gaps in training such as practical engagement skills, boundaries and ethics and building resilience.

Pay Equity Initiatives and Challenges

Recent government and union initiatives have led to pay equity settlements and funding in the social work arena. Government-contracted community and iwi social workers will receive a pay rise to bring them in line with government-paid Oranga Tamariki social workers as well as contribute to professional development and supervision costs.[13] Frontline community health care workers will also get funding to improve pay rates through changes to their contracts with Te Whatu Ora – Health New Zealand and Ta Aka Whai Ora – the Māori Health Authority.[14]

While overdue, there are challenges for the sector in implementing pay equity that have been identified:[15]

- o Pay equity outcomes will be unsustainable for providers without government funding.
- o Pay equity for social workers may result in internal workplace pay inequity e.g. social workers being paid more than their managers.
- o Funding pay equity for a portion of a workforce risks instability for service delivery.
- o Estimating funding will require accurate modelling of workforce costs.

Implications for social and community sectors in the WBOP

The same as organisations around the country, WBOP organisations carrying out their service delivery are affected by the factors noted above. They compete with for profit or government agencies for staff, the sector has an aging workforce and increasing service demand, its

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[11] Te Pou o te Whakaaro Nui (2018) NGO adult mental health and addiction workforce 2018 survey of secondary care health services, Auckland: Te Pou o te Whakaaro Nui

[12] Te Pou o te Whakaaro Nui (2022), Support Worker development priorities, September

[13] Pay equity extended to thousands more social workers, Hon Carmel Sepuloni, Hon Jan Tinetti, Government press release, 24 November 2022

[14] Government takes action on pay parity for healthcare workers, Hon Andrew Little, Government press release, 28 November 2022

[15] Social Wellbeing Agency (2021) Implementing pay equity for social services. Understanding the challenges for government funded social services

organisations face the same requirements of needing to be well run to achieve their purpose, negotiating pay equity requirements, changes in volunteering and gaps in skills and training needs. Organisations' ability to successfully navigate these factors will be enhanced by proactive investment in staff and/or volunteer training and development as well as through providing satisfying, culturally supportive and safe workplaces.

PART 2: Western Bay of Plenty sector views on training and development needs and challenges

SociaLink organised focus groups and an online survey to help find out what the local social, iwi and community sectors considered were their organisational training and development needs and priorities, as well as what challenges they faced regarding recruitment, retention and training of staff and volunteers.

Focus Groups

Focus groups were arranged to provide an opportunity for more in depth discussion about training and workforce development needs and issues. Five focus groups were held for Māori and Pasifika; Disability; Social Services; Mental Health, Addictions and Neurodiverse and one on Management. Invitations were sent by email to managers and other senior members of 60 organisations identified by SociaLink staff as having a focus and purpose in those areas. The focus groups were scheduled for late November 2022. A total of twenty-three people agreed to participate (40%) and of those, 16 were able to attend the groups (27%). In addition, three people unable to attend a focus group sent in written information by email and one participated in a zoom interview. All focus groups were asked the same questions and there was time allowed for qualitative input and to explore their comments in some depth. Notes were taken at each focus group, thematically analysed and collated into one combined focus group report.

Survey

A link to an online survey was sent out in mid-November SociaLink's newsletter database of 1,768 individuals, inviting chief executive officers, managers, team leaders and training coordinators to complete it. It included questions in relation to organisational development and on staff and volunteer/helper training and development. As an incentive to complete the survey five grocery vouchers were offered. Fifty-five responses were received from 49 organisations (four organisations had more than one respondent). Three people who attended the focus groups also completed the survey.

Survey respondents were from organisations involved in iwi development; education; health; local government; older people; children, young people; the environment; whānau family parent services; community development; church support services; disability; housing; multicultural support; sports; family harm; social services and advocacy. They ranged from being entirely voluntary (four organisations) to having over 20 staff (seven organisations). Twenty-six organisations of the 49 have approximately 600 volunteers between them.

The feedback from the survey is obviously not from a representative sample of the social and community sectors. Respondents to the survey were self-selecting. Nevertheless, the feedback from both the survey and the focus groups provides a useful indication of what are perceived to be the main training and workforce development issues affecting organisations and their staff and volunteers.

In the report below the feedback from the focus groups and online survey results have been combined and grouped into themes. Verbatim comments are used to illustrate the findings. Organisational development needs are considered, followed by staff professional development and training. Feedback from the sector is then provided on challenges relating to recruitment and retention and their suggestions for addressing some of these.

Organisational training and development needs

Several training priorities emerged from both the focus groups and survey responses.

1. Greater understanding of Te Ao Māori and Te Tiriti o Waitangi

The most common priority for both focus groups and the online survey respondents was a very strong training need identified in cultural competency, including a focus on understanding of Te Ao Māori and understanding and implementing Te Tiriti o Waitangi for boards and staff. It was noted government contracting agencies wanted evidence of training in understanding and applying formal Tiriti concepts. Cultural competency supervision was thought difficult to find and expensive.

The call for more training and engagement may also reflect a growing acknowledgement that in addition to having staff with strong cultural competency to be able to effectively engage and work with tamariki, rangatahi and whānau, the organisation needs to also consider how engaged they are in Te Ao Māori, for example, relationships with local hapū and iwi, how they recognise the partnership between Māori and non-Māori and more.

Respondents' comments from the survey and focus groups included:

> *Te Tiriti o Waitangi training for culturally diverse communities. Decolonisation, so we know who we are.*

> *Training in the principles of Te Ao Māori and Mātauranga Māori Development on Māori owned land.*

> *Cultural awareness, what does it mean and what does it look like operationally.*

> *Cultural competency is an ongoing thing, it needs to be continual.*

2. Cultural competency for diverse ethnic and other communities

Another common theme was the need for community organisations to also demonstrate cultural competence in working with people from cultures other than Māori and Pākehā New Zealanders. This was considered ongoing development, and not covered or 'ticked off' by a one-off training event.

One survey respondent observed local community/social sector organisations in the Western Bay of Plenty needed to build their cultural competency to improve access for and engagement with a growing number of people from culturally and linguistically diverse communities (CALD). This included, but was not limited to, having access to translated materials and interpreting support.

We are hearing consistently from multi-ethnic forum participants that there is a significant need for community/social sector organisations to build cultural competency for working with culturally and linguistically diverse communities, as this is affecting access to local services, and as these communities are growing. We are also hearing there is a need for increased support with translated materials/ interpreting support for community organisations and services to engage with CALD communities so they can connect with their support services.

It was difficult for immigrants to understand the government systems in New Zealand, such as dealing with organisations like district health boards, MSD and local government.

It was noted they found it difficult to get into the sector they were qualified for in their home country and often had to retrain or take lower paying jobs. Their skills and training needed to be more valued, including the value that that people from different cultures could bring to the running and governance of organisations.

Comments were also made about the need for more general cultural diversity training for managers in workplaces.

Inclusive leadership training from managers. Supporting inclusive workplaces for diverse volunteers/staff.

A particularly apt observation about this is from the CEO of Social Service Providers Aotearoa, Dr Claire Achmed in the NZ Council of Christian Social Services Workforce Guide.[16]

"In our Aoteraoa New Zealand context, these teams (multidisciplinary teams e.g. advocates, educator, kaimahi, counsellors, kaimahi taiohi, housing support workers) are at their strongest when they also reflect the bicultural and multicultural nature of our country, and have the cultural confidence and capability to work in culturally supportive and responsive ways."

There was some indication in the focus groups that available training on cultural competency was not readily known about or considered too expensive. It was also suggested that funders be asked to subsidise this for organisations through SociaLink.

3. Governance

The need for training in governance and differences between governance and management was another theme from the focus groups and surveys.

Getting the best out of your Board - how to support them to add value.

Finding Trustees who have skills and willingness to participate

Trustee training that is cost effective Free

Governance Training

Training, advice and support in running effective meetings was suggested; taking into account that many people may not have had the opportunity to learn this.

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[16] Wilson, M. Hurst, N Taylor, R (2022) The Workforce Guide. NZ Council of Christian Services

Understanding meeting etiquette, use of meeting protocols, emphasizing responsibility for confidentiality and how to be a good chair, identify what is happening in the meeting and how to get a good outcome.

Being an efficient Secretary of a Board and the tools to make it successful e.g. BoardPro

Succession and strategic planning were also mentioned as topics.

4. Other topics related to managing organisations

a) Funding and financial matters

For those who completed the survey there was a lot of interest in how to attract donors and sponsorship and securing government funding, which may reflect that there was a specific question about this in the survey while the focus groups were more open-ended.

A funding workshop was suggested for ethnic communities.

Improved financial literacy and knowledge in terms of budgeting, and reading financial accounts was another suggestion, including for non-financial managers.

b) Operational management

Support for managers to organise their priorities efficiently was suggested. Managers could be stepping up internally into the role and might need some tools to help.

Basic time management training for managers - maybe a half day with some simple effective tools - not too expensive so we can put them all through it.

Time and project management. Operational planning and operationalising strategic plans

Assistance with information technology, information systems and marketing were also common themes and included effective use of social media and websites. Support was also identified for policy and procedures, quality improvement tools and health safety. There was also mention of reporting requirements for Charities and Incorporated Societies, succession planning, and understanding the Privacy Act.

Evaluation of small initiatives, pilots, services; defining and evaluating outcomes was also mentioned.

c) Managing teams

Several topics relating to managing teams were identified in both the survey and focus groups. These included help for first-time managers on what they need to know when employing staff, performance appraisals and effective feedback and evaluation.

Effective communication, teamwork

How to manage staff and be a competent leader

Health and safety, contractual obligations, how to handle staff who are not performing/being problematic.

Performance appraisals and finding out how others do it.

Some thought training and support around staff employment and team building would be valuable.

Like many organisations, we have had high staff turnover. Building a new team is a great opportunity to build a new culture. We intend to maximise this and are actively looking for suitable events and training.

Engaging, managing and supporting a younger workforce needed particular focus and needed to be treated as an investment.

d) Safety of teams

More advice and support on keeping staff and volunteers safe and having techniques with handling challenging customers or clients was suggested in the survey.

Dealing with challenging customers for our volunteers.

Keeping you and your teams safe as a community provider with the increased complexity and risk profiles of people seeking support. Especially when Govt agencies are not always upfront about individuals' risk when attempting to refer people to NGOs. Professional management of customer/client relationship

This included promoting effective client/customer service relationships, boundary and ethical issues, writing case notes and reporting.

Customer service internally and externally.

Also suggested was training access for administrative staff including a programme tailored for receptionists and front-of-house staff. It was suggested to create an administrator group for the social sector so that they can network, learn from each other and share resources.

e) Working with software

For some organisations help with sorting out IT systems, basic computer skills, Canva, Excel use, using Google, training and collaborating online were mentioned.

Information Systems: where to get advice on what are the best IT tools and software to use for the team to operate successfully.

Managing Outlook - inbox and calendars.

Google Account management and integration.

While not an area of strong interest in the survey/focus groups, an area that has been identified in a national not-for-profit sector report as a common weakness for not-for-profits is a lack of investment into cyber security, which is predicted to increasingly become a risk for businesses and community organisations.[17]

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[17] Thornton, G (2022) Here for Good? Not-for-Profit sector report. Grant Thornton New Zealand

Staff professional development needs

a) Mental wellbeing and self-care

A common theme in focus groups and the survey was support in fostering staff or team mental wellbeing and self-care, no doubt reflecting what has been a stressful few years.

Wellbeing at work: Self-care strategies for challenging times. Running effective meetings. Managing remote (or working from home) staff and teams.

Supporting wellbeing and mental health of the team and myself.

Employee Assistance Programmes (EAP) were another way organisations tried to support their staff, with one respondent suggesting it could be an area to look into in relation to improving sector access.

b) Continuing Professional Education

Fifty eight percent (of 43 survey respondents) said they would like more education/training to be available which would allow workers to earn continuing professional education points required for ongoing professional registration.

Thirty nine percent (17) said they did not know, or it was not applicable to their situation.

We are wanting to ourselves implement micro-credentialing (for our staff, volunteers, clients/community and health professionals) very soon and would love some collaboration on this – can we connect about it?

Could apply to our counsellors.

c) Training on specific topics or intervention techniques

Mental health first aid related training to help clients who felt suicidal was suggested in the focus group for disability providers.

The survey asked if there was specific training in intervention techniques that would be helpful to have more access to. There were only a few responses to this:

o Community development (six respondents)
o Child welfare protection and abuse (four).
o Trauma therapy (five)
o Cognitive Behavioural Training (four)
o De-escalation techniques (four.

Workforce (paid and unpaid) development and training issues

Focus groups discussed training and development needs and challenges, including with staff and volunteer helpers.

a)   Recruitment and retention of staff

Recruiting and keeping staff was an issue for many organisations that participated in the focus groups. There were issues common to what was identified in Part 1 of this report.

Offering market pay rates was identified as key to attracting and retaining staff, although some organisations struggled to be able to do this. Even those organisations with strong investment in training and development recorded having lost staff to other sectors because they could not match their salary expectations. There was consensus that community organisations really need to pay market rates to keep their staff, but this was not always possible. Even those who could match another sector salary were sometimes faced with counterbids because the other sector would offer even more for a qualified scarce resource (such as health workers).

Reputation as being a good employer was felt to be a key strength to attract staff and volunteers, together with the ability to be flexible and contemporary. Being able to meet the needs of what staff are looking for are important, particularly when competing with other sectors.

Often it was not just salary that led people to leave. There are many and varied reasons. Some of these related to seeking more flexible working conditions, family commitments, career development, lack of leadership opportunities and moving cities. It was also thought those motivated staff with good qualifications/ experience get overworked and then leave - this was perceived to be because of poor management.

Focus group participants said they struggled to recruit staff to deliver mental health services, (also noted in Part 1 as a national issue). They said many organisations trained staff to Level 4 qualifications in Mental Health and once they were qualified, they left. While they might remain in the sector, it could be frustrating to invest in staff for them to then leave for better paying jobs. Managers noted that while the sector appreciates people who have lived experience, the more senior generations tended to have a lack of IT skills, making their online study for qualifications more difficult.

Local managers and training coordinators observed it was difficult for new immigrants to get into the sector they are qualified for in their home country. Often, they retrain or take lower paying jobs. It was suggested that the sector needed to improve its engagement with this group.

High staff turnover had several consequences including costs and lags in service as new staff were recruited and trained. It was also unsettling for clients who formed relationships with staff to have them moving on to another job. Overall, focus group participants thought it was better to pay a reasonable salary and keep staff for longer. Having said that, they also noted organisations are restrained by the contracts that they hold, which could also create pay inequities across their staff.

b) Suggestions for helping recruit and retain staff

Participants in the focus groups said employers needed to also look at what else they can offer - flexible working conditions, career and study development, a strong, healthy, positive organisational culture and if possible, some perks such as gym membership, income protection insurance, annual health check and/or allowance.

In working situations where it is hard to recruit staff and volunteers, for example in mental health, it was thought organisations could use creative ways to attract people through the assets that they already have. For example, Māori organisations have meaningful names and stories that sit behind their name that could be emphasized. Sharing the vision, values and points of difference of any organisation, in a way that is not full of jargon, but that talks to the heart. It was thought organisational culture can be a key draw card for workers where their values align with those of the organisation.

Suggestions to aid retention discussed in the focus groups included the following.

- o Staff bonuses in recognition of cost of living rises.
- o Pay staff a full-time wage for a four-day week (productivity was considered to be the same as a five day week)
- o Reduced hours in the summer.
- o Flexibility in work hours.
- o Provide supervision.
- o Being mindful of team culture and inclusivity.
- o Develop great team meetings with food, fun and atmosphere.
- o Gym or similar membership.
- o Some vehicle use if it doesn't breach fringe benefits tax.
- o Pay for Income protection insurance.
- o Have a Well-equipped kitchen.
- o Pay for an annual health check.
- o Annual allowance for any health-related activity (gym membership, health events, sports equipment or clothing). One organisation pays $150 per annum.
- o Employee Assistance Programmes (EAP) are a service some organisations offer or would like to offer to their staff. There is an annual subscription and a service cost when used. It was suggested this could be a shared service to save on costs.

c) Issues with access to training

With two exceptions, all focus group attendees said staff access to training and studying for qualifications has many challenges, mostly related to the amount of funding available.

Of the 42 survey respondents who answered a question on training challenges, 57% (24) said major ones were budgeting sufficient funding for training and development, workload issues and having time to undertake training. Other factors were staff motivation, transport and time costs in attending training, expensive training, organisations not paying for training, concern about funders' expectations regarding spending money on training and lack of knowledge about training availability.

Comments included:

Budget, workload. Getting the team motivated.

Time and money. I also wonder about expectations of funders, are they going to be happy funding us to be doing this kind of stuff, which is not delivery of funding outcomes?

Financial constraints, limited resources (human) to ensure delivery of services is not negatively affected.

All organisations who participated in the focus groups had a budget for training and development, even if it was minimal. With one exception, participants agreed this budget line was in jeopardy if the budget was tight. If the budget was reduced, then the organisational service delivery essentials were identified and the 'nice-to-have' training would be dropped.

It was acknowledged that some professional development was non-negotiable for health staff to meet their professional body accountabilities. Having said that, participants from smaller organisations said sometimes staff paid for some training themselves because the budget was just so lean.

For small organisations with few staff, and sometimes only one paid staff member, it was difficult to release them from their duties to undertake training. Also, many staff worked part-time which meant training time ate into work availability.

Training was given a low priority in some organisations' plans. In some organisations some senior staff were seen to be 'gatekeeping' and keeping new people from accessing training which caused some tensions and turnover.

Targeting the training for the audience was considered important for engagement. Focus group participants said younger staff wanted age- specific training that engaged them. They can feel put down by people in the room with more life experience.

One organisation said it strongly protected its significant training budget at all costs. Meeting the goals of the annual plan through performance management was a high priority to increase staff satisfaction, aid staff retention and meet and exceed organisational goals. The investment in staff performance was deliberate and planned.

The training budget was available to anyone within its workforce. It used a work-based apprenticeship model which is currently funded through work-based training provider Careerforce (it was noted that ongoing education sector vocational reforms might change this in future). It also has several staff going through Level 4 Health and Wellbeing programmes within the streams of disability, mental health or aged care.

The organisation thought the move to an apprenticeship model has not been as effective as previous courses, so staff were utilising online courses, which while not ideal, resulted in what it considered to be better educated and trained staff.

d) Volunteer recruitment, retention and management

Many of the comments and challenges identified in the focus groups about staff training also applied to unpaid volunteers. The status of being unpaid and changing trends in volunteering impacted on volunteer management. Comments were made about the difficulty delivering

training to volunteers, health and safety requirements and recruiting and retaining volunteers.

Unpaid volunteers? No training, minor just on-the-job information.

Meeting the H&S needs (of volunteers) and how much time do you invest in someone who will only turn up once or twice.

The red tape to employ a volunteer is a real minefield. Everything is designed for large organisations.

Many volunteer were considered to be motivated by doing hands-on work and were not always interested in getting involved in the business itself, or the training and networking events that supported it. In many cases, unpaid volunteer training was delivered 'on the job'.

Younger volunteers tended to want to work in short bursts as opposed to volunteering for the long-term. This created compliance problems when trying to instill good health and safety practices. It can also be a large investment of time for volunteers who only turn up once or twice.

It was hard for some groups to get their volunteers all together at one time for training. However, group training where volunteers are at different skill/experience levels was challenging as some got a bit bored. Those volunteers who needed the training most were difficult to engage to even attend the training.

The 'red tape' to employ a volunteer was felt to be a minefield as a lot of the legislation and

information was thought to be designed for larger organisations. Some organisations found it difficult enough to attract and retain volunteers, never mind then asking them to undertake necessary training to do the role. They often lost younger volunteers because they weren't prepared to undergo the training.

There are opportunities to recruit migrant volunteers, but they can be unfamiliar with the concept of volunteering. It was thought the sector needed to find a way to better engage with this group.

e) Innovative approaches to training and development for organisations

The following suggestions are from existing practice and some ideas on how the not-for- profit sector could be more innovative in their approach to training and development.

o An online platform where organisations can ask each other for help, for example advice on how to go about doing something or sharing written resources. It could include a 'trade' where organisations could ask for something and offer a service in return at the same time. The SociaLink website was suggested as a good base for this.

o Create spaces or forums where people can talk about transferring knowledge and education.

o A speed dating event for Trustees and organisations with the Institute of Directors.

o Larger organisations could offer smaller NFPs a couple of places in their workshops, or a more tuakana/teina model where the larger organisations support smaller organisations.

o Partner with another organisation to run specialised training on particular needs.

o Ask Tauranga Business Chamber to offer a couple of places on their training programmes for the not-for-profit sector. This could be free or at a discounted rate.

o Running a not for profit Business After 5 showcasing several organisations at once.

o Networking with the Tauranga Business Chamber members.

o Provide Exult's Tonic newsletter contents page in digital form to find back information articles easily, through topic search.

o Create a networking and sharing forum for Volunteer Coordinators.

f) Suggestions for staff training and development

The following were also mentioned during focus groups.

o Identify an inexpensive way for not for profits to tap into one of the workplace personality programmes such as Clifton strengths system, that identifies a person's personality type, strengths and preferences.

o Offer a different professional development topic (maybe in a series), same day each month, attend in person or by Zoom.

o Introduce one training topic per staff meeting, even if it is something simple to illustrate how important it is to the big picture to get the operations right, such as how to process receipts, how to complete time sheets etc.

o "Lend an Expert" where an organisation offers one of their staff to another organisation for a short period of training; this might be something commercial businesses may like to do as their contribution to social good.

o Taking on interns if their work and supervision requirements can be met.

o Before bringing in experts from outside, identify local talent and expertise.

o Support those staff who are studying for a qualification with study time, or work flexibility. Encourage them to see that they are gaining experience through work and access to information to use in their study.

g) Suggestions on other useful support

It would be useful to have more training available in Tauranga rather than travelling to other cities according to many survey respondents (although it was noted that some specialist training would be hard to replicate in Tauranga,such as CPR for Trainers).

Similarly, taking training to the smaller centres of Te Puke and Katikati would meet with approval.

Facilitated networking events and regular leaders/managers' forums were also suggested. This included a suggestion to have targeted networking with other organisations in the same sector.

One survey respondent suggested:

> *Forums for Kaupapa Māori NGOs, as we navigate a range of sectors, and have similar challenges.*

There was also some support for short-term, hands-on help with improving efficiency with organisational and administrative tasks such as organising computer folders, collecting data and basic IT support. This is something that SociaLink has investigated and is proposing to implement a pilot in 2024, based on its work with smaller organisations struggling to do these tasks.

One person suggested:

> *Maybe a list of accountants who are willing to help small local charities, happy to pay fees (just seems like most accountants won't take on new clients).*

Online training was suggested because of Covid and time saving considerations and could beneficially use a variety of formats to support adult learning.

> *Training online please. A variety of formats e.g. webinars, self-directed online learning, blended learning using best modern principles of adult learning. Would be interested in a conversation about collaborating about recording training. Our vision is NCEA micro-credentials but perhaps as an intermediate step we could collaborate on something 'in-house'.*

PART 3: Training and development providers

As mentioned in Section 2, Socialink has commenced stocktakes of workforce development, education and training providers and courses relevant to the social, iwi and community sector to understand the current availability of training and development opportunities and identify training gaps. This includes providers of organisational training (all levels) and professional development for those in mid-career.

Stocktake focus areas are:

- Awhi te Rito – a compilation of providers and courses that teach te reo Māori, Te Tiriti o Waitangi, tikanga and mātauranga Māori to assist Māori workers and more broadly all workers in the iwi social and community sectors (see Part 2)

- National Education, Training and Workforce Development Providers qualifications and courses - including those offered by local tertiary education providers Te Wānanga O Aotearoa, 17th Avenue Campus; Toi-Ohomai, Windermere Campus and Tauranga campus of Waikato University

- Regional Training and Development Providers – a snapshot of non-credentialled professional development available in all aspects of the operations of a community organisation.

The stocktakes will feed into a centralised place on SociaLink's website of relevant training and development, although a challenge in compiling a stocktake is the broad scope, ongoing changes in what training is delivered by providers and keeping them up to date.

Below is a brief outline of the stocktakes and some of the organisations and resources identified to date.

Awhi te Rito - Māori cultural training stocktake

Awhi te Rito is the Māori training provider stocktake currently being developed by SociaLink. It is a collection of training providers throughout New Zealand delivering cultural competency inclusive of te reo Māori, Te Tiriti o Waitangi and academia programmes from certification to PhD within the social sector.

Awhi te Rito provides a range of courses for beginners to more advanced training with several methodologies of delivery throughout the country. The stocktake takes a comprehensive approach to workforce development for the social and community spheres and focuses on the interconnectedness to wellbeing that is underpinned by Māori philosophies.

Accessing Māori cultural capability and capacity, when needed, is important for connecting with and transmitting cultural practices and cultural knowledge. The data within the stocktake confirms that people of all ages working within the sector can access or connect with Te Ao Māori relatively easily.

Cultural competency must also take into consideration the non-academia pillars of Te Ao Māori:

- o Whānaungatanga – developing vibrant communities
- o Rangatiratanga – enhancing leadership and participation
- o Manaakitanga – improve quality of life
- o Wairuatanga – promote distinctive identity
- o Kaitiakitanga – ensure sustainable futures.

An example: Whānaungatanga is about attaining and maintaining relationships; enabling kin and communities to strengthen ties between one another. Relationships and connections with collectives are especially important to Māori and their sense of wellbeing. Community connections promote information and communication flows that build and maintain social networks. Strong connections and networks contribute to vibrant, innovative and prosperous communities.

Wāhine Māori (Māori women) are more likely to access and connect with Te Ao Māori than tāne Māori (Māori men). Over 66.3 percent of Māori throughout NZ found it very easy or easy to find cultural support, such as someone to help with attendance at a tangi, speaking at a hui or blessing a taonga.[18] A greater proportion of Māori aged 35-44 reported that they find it very easy or easy to find someone to help with cultural practices.

The high-tech era is fueling and will continue to grow the demand for a workforce with social sector qualifications. Māori graduating will help to meet the increase in industry demands and develop more employment and enterprise opportunities for Māori and the sector.

The landscape of training development is continually moving and changing with the need to keep abreast with the demands of the training standards required in the industry. This is no exception for the social sector. It requires consistent monitoring and updating; however, we will make provision for the social sector community to access this training resource via our website.

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[18] The Māori Report for Tāmaki Makaurau, 2016; Independent Māori Statutory Board, www.imsb.maori.nz

Awhi Te Rito
Maori Stocktake

Awhi Rito - the leaves that embrace the centre shoot.

Metaphorically, the harakeke plant represents the family. The centre shoot is the child (te rito – centre). It is surrounded by (awhi te rito, parents) as protection. The outside leaves represent the grandparents and ancestors.
This analogy helps to explain the concept of Te Ao Māori training with a Māori-centered approach to developing the sector's cultural competency and capabilities to work with whānau Māori/hāpori.
Te Ao Māori - Matauranga Māori is a contemporary term referring to Māori knowledge, Māori ways of knowing and associated practice.
Hāpori Māori - Maori communities, share their knowledge and practices in a more holistic and interconnected approach, with no exception to the Social Sector.
Whakarongo ake ki te tangi o te manu....this stocktake listens and responds to the call, we have made a collective response to this stocktake, inclusive of Health & Social Services, Education & Housing. Although we are in the early stages of this stocktake and research, we must work at all levels to educate and encourage our future to engage in education and career choices. It's an ambitious goal that will take a concerted effort to get there and develop the workforce into equitable participation of Māori in these higher-paid industries and positions across the economic spectrum. But, also open the opportunities to upskill all the community to grasp Te Ao Maori learnings. This can only benefit and support the work of us all.

Te Tiriti o Waitangi - 100%
100+ Education Groups & Kaiako delivering ToW training. All Māori courses have a component of the Treaty within its content.

Te Reo Rangatira - Tikanga - 80%
Language and Practices, from beginners to advanced
Delivery: Kanohi & Wānanga/Private

Matauranga - Te Ao Māori - 70%
Education - Intermediate to Advance
Delivery: Whare Wānanga/Private

Hauora - Rātonga Pāpori - 90%
Health & Social Service - Beginners to Advance:
Delivery: Campus/Online/Wānanga

Papakāinga - 10%
Housing Development
Delivery: Local Council,Māori Land Court, Private

Methodology: Online research, inhouse experience, hui

Cultural and diversity competency training

There are a number of providers or sources of cultural competency training for health related organisations and practitioners wanting to improve their understanding and abilities in working with people from different cultures, sometimes referred to as Culturally and Linguistically Diverse (CALD) clients or communities. For example service providers with Ministry of Health contracts can access training courses provided through eCALD, https://www.ecald.com/ which offers a range of face to face and online courses for both caring CALD patients from Asian, Middle Eastern and African backgrounds, as well as for working in culturally diverse workplaces. eCALD is based at the Institute for Innovation and Improvement Te Whatu Ora-Health Waitemata.

LeVa runs the national Pasifika cultural competency training programme for health and disability services. Courses are free and available to non-Pacific health and disability workers employed at a Ministry of Health funded service. https://www.leva.co.nz/ It is based in Manukau city.

The Ministry of Ethnic Communities has developed a course called Intercultural Capability E-learning and other resources available at https://www.ethniccommunities.govt.nz/resources-2/intercultural-capability/.

SociaLink is investigating what options are available for organisations without a Ministry of Health contract to access similar CALD training.

Diversity Works, https://diversityworksnz.org.nz/ , provides online and in person workshops to help New Zealand workplaces on their engagement with diversity and inclusion and has a range of other resources and programmes including professional accreditation.

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Other training and development providers and resources relevant to the social, iwi and community sectors

a) **Toitū te Waiora Workforce Development Council (WDC)** www.toitutewaiora.nz

Toitū te Waiora is the new WDC for the Community, Health, Education and Social Services sectors. The role of WDCs is to ensure the vocation education system meets industry needs and gives a stronger voice to Māori business and development. It sets standards, develops qualifications and helps shape the curriculum of vocation education.

b) **Careerforce** https://www.careerforce.org.nz/

Careerforce is the Industry Training Organisation (ITO) for the health and wellbeing sectors: aged support, disability support, healthcare services, home and residential services, social and community services, mental health and addiction support and youth work. Its purpose is enabling the workforce to enhance people's health and wellbeing. It is a business division of the Work Based Learning subsidiary of Te Pūkenga NZ Institute of Skills and Technology (which has merged the 16 Institutes of Technology and Polytechnics and 9 Industry Training Organisations).

c) **Te Pūkenga – the New Zealand Institute of Skills and Technology** Te Pūkenga

Te Pūkenga - The New Zealand Institute of Skills and Technology, provides a vocational training and qualifications directory (Levels 1- 10) that can be searched by subject, location, and training provider, level and whether available on campus or online.

d) **Te Pou** https://www.tepou.co.nz/

Te Pou is a national workforce centre for mental health, addiction and disability. It is part of the Wise Group and works alongside mental health and addiction services and disability organisations to understand their priorities and workforce challenges. This includes DHBs, NGOs, government agencies, education providers and other workforce centres.

e) **Professional Development**

There are a wide range of training providers that deliver professional development specific to not for profits. Examples include:

o   Exult - www.exult.co.nz
o   Lead – Centre for Not for Profit Governance - www.lead.org.nz
o   Tick for Governance – micro credentialled online course – Community Networks Aotearoa www.communitynetworksaotearoa.org.nz/tick-for-governance
o   Community Governance - https://communitygovernance.org.nz/
o   Grow - www.grow.co.nz
o   Compass - www.compass.ac.nz
o   Mentoring Foundation - https://www.mentoringfoundation.org.nz/

PART 4: Conclusions and recommendations

At a big-picture level, the demand for social and community services is expected to grow, the workforce is aging, the community sector is underfunded and is struggling to recruit sufficient staff.

Workforce development and training plays an integral role in influencing and being influenced by these 'big picture' factors. For example, the amount of funding that organisations have available for workforce development is impacted by being a part of an underfunded sector, yet workforce development can help attract and retain staff.

At a broader level, not-for-profit organisations tend to focus on using funding for front-line delivery, partly driven by achieving their purpose and also due to perceived public expectations that funding shouldn't be spent on 'back office' tasks. Many local organisations reported the training and development budget is the first to go. However, investment in and ring-fencing budgets for workforce development is increasingly seen as vital for increasing effectiveness, for staff, volunteer and management morale and for recruitment and retention.

Possibly more emphasis needs to be placed on communicating the value of workforce development to the sector (budget constraints aside) and that there are many ways that have been articulated during this TNA which could support organisations to invest in their people.

A likely factor driving the strong identification of cultural competency in this TNA is growing government expectations that social service providers be connected to their local hapū and iwi and staff to have strong cultural competencies. This expectation is in response to the inequitable health, social and educational outcomes for Māori who, as a result, are disproportionately higher users of social, iwi, community and social services. This need will certainly inform the professional development SociaLink provides, but we also hope to influence other training providers in delivering training in this area. As mentioned in the previous section, SociaLink is also currently undertaking a stocktake, Awhi te Rito of training available in Te Ao Māori, tikanga, te reo Māori and Te Tiriti o Waitangi.

Training in governance for those in governance roles has been a long-standing need, partly due to the turnover of Trustees in community organisations. Recent initiatives such as the Tick for Governance micro credentialled course and the national community governance initiative, including mentoring for trustees, goes some way to address this. Other ideas that could be considered, as one organisation in a focus group noted, is whether paying trustees would result in a stronger expectation that Trustees are knowledgeable, competent and committed to their role, something that has been raised several times over the years. Some countries require Trustees to have a qualification to be able to take on a governance role, something SociaLink could investigate further with relevant national bodies.

Another factor in the findings is that people are unaware of what training is available. Several times people in the focus groups or participants in the survey identified a training need or gap due to being unaware that training was available. SociaLink intends through its website and other communication to make available information about relevant training and workforce development organisations and opportunities.

In terms of broader funding, oganisational and workforce development and training matters, the TNA highlighted a range of initiatives and concerns such as regional workforce development plans, pay equity issues for the not for profit sector and demographic (eg aging population) and social trends (eg changes in volunteering). These are all part of the context to sector recruitment, retention and delivery of services and programmes in the western Bay of Plenty. The not for profit sector is a significant and essential contributor to the wellbeing of the diverse people and communities in this region and addressing its workforce and organisational training and development needs will require an ongoing focus and engagement within and on behalf of the sector.

Recommendations

1. SociaLink draws on the training needs assessment responses to inform the training and workforce development initiatives that it will deliver from 2023.

2. SociaLink provides the sector with feedback on organisational and workforce training needs; and discusses gaps in training and development with training providers and other relevant organisations and stakeholders to help identify ways forward in meeting needs, for example in cultural competency.

3. SociaLink's website and other communication channels will include information about existing relevant training opportunities for the social and community sector.

4. Approach the Chamber of Commerce about:
   a. offering places on their training programmes for not-for-profit organisations at a discounted rate and to
   b. gauge interest in piloting a 'lend an expert' initiative to ask businesses if they may be prepared to lend a hand to a for-purpose organisation as part of their commitment to social responsibility. SociaLink could do a call out for tasks that NFP organisations need that require some expertise, and these could be posted to interested businesses through the Chamber of Commerce.

5. Facilitate the trial of different types of networking opportunities for the sector:
   a. Organise targeted networking groups or events with the aim of transferring knowledge and sharing ideas, such as Volunteer Managers Network.
   b. Fora for sub sectors within the social and community sector such as Kaupapa
   c. Māori providers.
   d. Hold events such as Business after 5 (BA5) – similar to that offered by the Chamber of Commerce - so that organisations get to meet each other and find ways to collaborate.

6. Investigate an online platform where organisations can ask each other for help at the time they need it. That could be advice, a trade of skills or services, and partnering to deliver workshops or specialised training.

7. Run a networking meeting inviting Careerforce to explain and discuss its training options and support for employers and employees in 2023.

8. Investigate creating a network for administration/front-of-house staff in the social sector so they can network, learn from each other and share resources.

9. Pilot a shared services in 2024 to make available an advanced administrative person to work with organisations on tasks such as file management, database management, basic IT etc.

10. Advocate for social workers and other professions not covered by pay equity settlements (ie social workers and others not funded by government contracts).

11. Instigate a networking forum for Managers of volunteers.

12. With greater emphasis on vocational education through workforce development councils, apprenticeship learning and regional workforce development plans, SociaLink will liaise with relevant regional and national agencies about the sector's needs and challenges.

APPENDIX I

Big picture issues affecting sector

This section looks at current and future trends affecting the community and social sector either regionally and/or nationally, some of which have implications for organisational and workforce development and training.

Information from regional workforce development plans

Regional workforce development plans provide an indication of how the health and social assistance sector is viewed in terms of contribution and workforce development needs.[19]

There are 15 regional workforce development plans including one for the Bay of Plenty. They vary in the importance they give to the healthcare and social assistance sector, (one of the 12 industrial groups by which GDP is measured.)

Their information and perspectives provide useful information for SociaLink in its planning on demographic, social and economic trends that will affect the makeup and work of the sector.

Some plans identify the health care and social assistance sector as an area requiring specific regional focus (Otago; Manawatu), while others such as the Bay of Plenty Regional Workforce Plan have emphasised workforce development needs in commercial industries such as construction and infrastructure, agriculture/farming, horticulture, transport, energy, forestry and tourism.

Issues affecting health and social assistance sector identified in the regional workforce development plans

The following points were made in plans that mentioned the role of the health and social assistance sector. Several of these points are applicable to the Bay of Plenty. There may be some opportunities for SociaLink to have more input into future iterations of the regional plan. The regions in brackets refer to those plans mentioning these issues.

- The health and social assistance sector is fundamental to the health and wellbeing of people in the region and there is a need to be responsive to local health needs and quality of life, including for people thinking of moving to the region (s) (Otago, Te Tai Tokerau, Waikato, Nelson Marlborough, Canterbury).

- The sector is a large source of employment in the region (Otago 10.6 percent of workforce; Te Tai Tokerau 12 percent; Waikato 11 percent, Canterbury 11 percent) and expected to grow (Manawatu Whanganui, Nelson-Marlborough, Te Tai Poutini West Coast, Canterbury).

- Demand for health and social services will grow. A key driver is growth in the aging population growth, movement into regions (Otago, Te Tai Tokerau, Waikato, Canterbury) and need for mental health services (Canterbury).

- The health and social service workforce is aging (both regulated and unregulated workers) with insufficient numbers coming in to replace them (Nelson Marlborough).

- Factors causing stress on the workforce include increasing pressures and demands such as

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[19] In 2020, 15 Regional Skills Leadership Groups (RSLGs) were created across Aotearoa New Zealand to identify and support better ways of meeting future skills and workforce needs in our regions and cities as part of the Reform of Vocational Education initiatives. They have recently published their first regional workforce plans.

technology advancements and increasing complexity of health conditions (Manawatu-Whanganui, Canterbury).

- The wellbeing of the health and social service workforce is important (Waikato, Canterbury).

- Flexible work arrangements are critical to getting people engaged in the workforce. This includes working from home, working during school hours, job sharing and flexible start and finish times. There are current and long-standing skill shortages in aged care. Despite this a lot of employees are not contracted to work full time or are only working 32 hours a week, which may mean the workforce is not fully utilised. Employment is usually on a four days on/four days off model which can be a barrier for people who require childcare. (Nelson Marlborough).

- There is a lack of school leavers studying health and even more so among Māori school leavers, and there is a need to increase the number of young people trained (Bay of Plenty, Canterbury).

- Employers don't always make the most of skills, knowledge and experience of groups at greater risk of poor employment outcomes, especially people who are disabled, former refugees, recent migrants and ethnic communities. These groups could be included more in workforce development initiatives. (Nelson Marlborough).

- Need to Increase mental health training and service delivery. There is a shortage of qualified and specialised staff to match the populations' needs. (Waikato, Canterbury).

- Lack of staff in the disability sector to service community needs (Hawke's Bay).

- Create ongoing training and career opportunities for the unregulated or kaiāwhina workforce (healthcare assistants, disability support, aged care workers, technicians, orderlies) through micro-credential development, to support primary health response capacity and learning of new skills. Micro-credentialing was used to upskill church and community leaders to deliver Covid 19 and flu vaccinations by the Hawke's Bay DHB. (Waikato, Hawkes Bay, Manawatu-Whanganui).

- Experienced kaiāwhina are in high demand. However, there is limited training provision to ensure that regular upskilling takes place. This is especially true in the smaller districts where access is further limited by fewer local courses, requiring travel to larger cities. (Manawatu Whanganui).

- Iwi Healthcare providers are at the cutting edge of successful delivery of primary health care services. Much of this can be attributed to their application of a Te Ao Māori skill set within their workforce. This approach to training and professional development has the potential to add value across all health services. (Manawatu Whanganui).

- There are great existing programmes, such as Hauora (Māori Health) Training, which often require employers to release their kaimahi for extended periods. This is not always possible but could be partially mitigated by having more localised training provisions. Solutions by the community, for the community, are important. Training should align with the requirements of the community and address the needs of Māori. (Manawatu- Whanganui).

- Traditional student placement models are under pressure and struggle to keep up with demand. There is a need for more skilled and experienced staff to train/mentor new people. (Canterbury).

- Concerns about cultural competence (Canterbury).

General issues affecting workforce recruitment and retention

Historical labour force factors as well as more recent impacts from Covid 19, and rising costs of living are affecting New Zealand's general economy and workforce, including the general not-for-profit sector. This section reviews some of these issues

Underfunding

In 2019, Social Service Providers Aotearoa (SSPA) commissioned research from Martin Jenkins that helped to identify the impact underfunding can have. This research was commissioned independently of the Government, with agencies having different views on the degree that underfunding exists, and the extent of impacts, although the general conclusion was that the social sector is underfunded by about $600 million per year.

Examples of impacts of underfunding identified by Martin Jenkins[20] include:

- Providers are not funded for the basics: Current funding arrangements generally do not cover basic running costs and do not allow them to invest in their sustainability.

- The community and provider workforce is underpaid and overworked: It is getting harder to attract and retain staff with a growing wage gap with the public sector.[21]

- Providers are struggling to make ends meet and providers will stretch themselves to fulfil their 'duty of care' and meet community needs, rather than turning people away. They endeavour to make ends meet through heavy reliance on additional philanthropic funding, public donations, and other funding strategies.

Increase in the loss of staff due to cost of living and impact of Covid 19

- A recent survey of NFPs by Grant Thornton recorded an increase in the loss of team members to personal choice or change in lifestyle, from 4 percent of respondents stating this in the previous survey to 25 percent of 174 respondents. This was likely reflecting people's reassessment of personal goals and values during the pandemic. [22]

- Cost of living pressures were also noted by respondents as contributing to staff losses.

NFPs losing their 'feel good while working' advantage

- The survey identified that retaining talent was a significant issue (45 percent compared to 12 percent in the previous 2015 survey). Attracting new team members and funding remuneration are among the biggest challenges in this area.

- A consequence of changing working conditions and cost of living issues meant the NFP sector could not rely on employees' passion for a cause or wanting to contribute to 'doing good' would make up for shortfalls in remuneration to full market levels.

- In a tight labour market, NFP employees were more likely to demand market salaries, with the loss of good people to the commercial or government sector.

- Traditionally NFPs have made up for reduced remuneration with flexibility of working, workplace

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[20] MartinJenkins (2019). Social Service System: The Funding Gap and How to Bridge it.
https://sspa.org.nz/information/funding-gap
[21] Partly as a result of the Martin Jenkins report, in November 2022 pay equity has been successfully achieved for social workers which is to be funded by Government.
[22] Grant Thornton (2022): Here for GOOD? Not for Profit Sector Report.

culture and the ability to make a positive impact on wider society. However, as the government or commercial sector are now offering these benefits, along with higher remuneration, the not-for-profit sector no longer has this advantage. [23]

- Underfunding means pay rates are not the same as for government sectors. There is inconsistent annual adjustment for inflation in funding and no security of ongoing funding.[24]

- Most not-for-profits do not have many of the standard tools to attract and retain staff, such as high salaries, performance bonuses, insurances and large personal development budgets.[25]

Government and other initiatives on pay equity in the social sector

- In October 2022 the Government approved a pay equity settlement and funding to address a pay equity claim against five representative iwi and community social service organisations which had taken the action with the support of the Public Service Association three years ago.[26] The settlement provides parity for community social workers in the five employer organisations with the pay rates of Oranga Tamariki social workers and is seen as a first key step to addressing both the significant gender pay gap and the gap between government and not for profit sector pay rates.[27] In late November 2022 this settlement was extended to all social workers in non-Government organisations and included contributing to professional development and supervision costs.

- The work to extend the benefits of the settlement to the people in social work roles in the wider sector is being led by Te Kawa Mataaho/The Public Service Commission. It has designed a Framework for Oversight and support of pay equity claims in the Funded Sector (The Funded Framework).

- A claim has also been raised by the PSA on behalf of clerical and administration workers in social and community settings in public services and 1,500 unique job titles. It is anticipated that a similar claim would follow for funded services.

- The Funded Sector refers to any private, non-government organisation or community-based organisation receiving taxpayer funds to deliver services on behalf of the government. It is made up of over 4,000 predominantly small to medium-sized service providers delivering health, education and social services.

- A Cabinet paper on the framework noted key features of the funded sector were: That the majority of these organisations are not-for-profit organisations, meaning there is no ability to accumulate surpluses for profit, distribution to shareholders, members or staff.

- For most organisations in the Funded sector, a significant majority of their income is from Government contracts.

- Funded sector contracts are often based around bulk, contributory or output-based funding models. Many organisations thereby rely on independent (non-Government) revenue streams

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[23] David Crosbie, The value of working in the charities sector, Probono Australia
 https://probonoaustralia.com.au/news/2022/06/the-value-of-working-in-the-charities-sector/

[24] Pru Etcheverry, We need to place more value on the not for profit sector, August 01, 2022, Stuff

[25] Pru Etcheverry, We need to place more value on the not for profit sector, August 01, 2022, Stuff

[26] The five providers are Barnados, Wellington Sexual Abuse HELP, Christchurch Methodist Mission, Stand for Children and Ngāpuhi Iwi.

[27] Social Service Providers Aotearoa media release 'Pay equity settlement recognises undervaluation of community social workers'. 25 October 2022

such as fundraising, philanthropy or commercial enterprises to supplement Government funding to deliver contracted services.[28]

Lack of NFP investment in workforce development and training

-   More emphasis needs to be put into developing the capabilities of employees by the not-for-profit sector which needs to be valued and invested in much more, according to Etcheverry.[29]

-   Etcheverry suggested funding, including from donations, is expected to go to the front line or the mission. Not-for-profits are not expected to invest in infrastructure and visionary technologies to the extent that businesses would. It is less tolerated. Maintaining high-quality data protection, communication through websites and evidence of impact come under operational administrative costs.

-   Australian research evaluating the impact of training and development activities in their not-for-profit sector confirmed anecdotal evidence that the sector often preferred to put limited resources into serving clients rather than developing the capabilities of their employees.[30]

-   The Australian research findings indicated that only 58 percent of the NFP sector employees undertook training in the study year, and 33 percent of sector senior executives had no designated budget for their own professional development. Those in small organisations often funded professional development themselves.

Barriers to staff completing training

An employer survey undertaken by Aotearoa New Zealand's social service and community sector training provider Careerforce[31] asked them to select the top three barriers to their staff completing training: These were 'not enough time (18 percent of the 441 respondents said this), lack of employee motivation (15.5 percent) and lack of employee commitment (14 percent). These were followed by lack of confidence (9.4 percent), poor literacy skills (8 percent) and poor digital/technology skills (7 percent).

The top three most significant challenges or changes facing their organisation over the next 12 months (in 2021) in terms of training needs were insufficient funding or staff resources (14.8 percent); organisational growth (14 percent) and lack of staff/potential employees (12.4 percent). These were followed by changes in training delivery (12.2 percent); changes to service models (8.2 percent) and changes requiring different skills from staff (7.5 percent).

Most employers expected their training requirements to either increase (45 percent) or stay the same over the next 12 months (41 percent).

Future opportunities

-   NFPs will need to think carefully about their employer brand and what they need to do to effectively compete for people with the knowledge, skills and experience they need.

-   NFPs should consider putting a talent management strategy in place to identify, strengthen and retain key leaders.

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[28] Cabinet Paper Framework for the Oversight and Support of Funded Sector Pay Equity Claims

[29] Pru Etcheverry, We need to place more value on the not for profit sector, August 01, 2022, Stuff

[30] Wenzel, R and others The Learning for Purpose Researching the Social Return on Education and Training in the Australian-Not-for-Profit Sector, University of Western Australia

[31] 2020 Careerforce Annual Employer Survey, Findings and Actions, June 2021

- Reward and recognition are clearly linked to wider strategic and operational plans, recognising that to be effective, these plans need to be clearly communicated throughout the organisation.

- What can NFPs offer to potential candidates that sets them apart from other organisations, as well as considering if there are novel ways, they can fund fair remuneration to retain key members or attract new staff.