

## Charity Organisation: Case Study

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Over the last few decades, charities have shaken off their worthy, well-meaning image and now operate along the same lines as any corporate organisation. There are some differences, of course, but fundamentally the issues are the same, and HR is no exception. Our work with one particular charity presents a great example of how recruitment and retention have risen up the company agenda in equal measure. Far from being mutually exclusive issues, the two are intrinsically linked, as the outcome of our work highlighted.

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### The Charity

Employing just under 2,000 people, the charity turns over around £20 million each year. In size and scale, at least, it can be likened to the social services department of a large London borough. Its 40-strong HR team covers strategy, training, policies and practice, staffing matters, and organisational review and design.

Even despite its apparent scale, the organisation's resources are spread thin, with more projects and potential beneficiaries worthy of its attention than it could feasibly hope to service. **"There is a different kind of cost consciousness when it come to spending money,"** admits the charity's HR Director, **"You have a large sense of moral duty to your donors for one thing."** As such, the charity has to constantly exercise exceptional judgment, investing in and setting up projects that demonstrate good practice and make a real difference. Attracting and retaining the right talent is central to the smooth running and success of the business and its cause.



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## Wanted: Exceptional People

The charity relies upon attracting exceptional people who will bring a constant stream of new ideas and innovative ways of working to the table. **“We need people who enjoy change and who are exploring the boundaries all the time, so we need to attract a particular type of talented person.”** As if that weren't a tough enough brief, the person specification doesn't end there. The charity thrives best with creative and flexible people who are happy to work in diverse situations and with people from a wide variety of backgrounds and circumstances. Until recently, recruitment was regarded as a line management function, but, in a concerted bid to attract the best talent, improve early engagement, and reduce unwanted turnover, HR have taken a more involved approach recently.



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## Recognising The Importance Of Retention



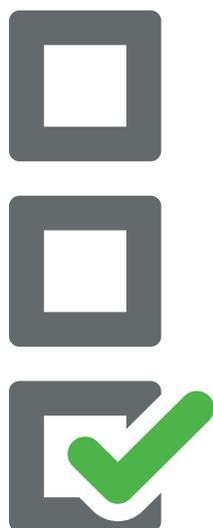
In an industry in which rigorous pre-hire checks and thorough training must be carried out, lead times can be lengthy for getting workers from the point of hire to the point of productivity. The charity's HR Director believes that retaining staff is the result of having highly motivated, value driven employees who feel they are getting a fair deal. As a result of conversation with [great{with}talent](#) she admits that the organisation has started to think as much about retention as it does about recruitment.

However, there are very unique differences that impact on recruitment and retention for this particular organisation, as determined by its mission. Talented staff are positively encouraged to take up secondments to other organisations whose purpose and cause align closely with that of the charity's. This is a double-edged sword – whilst thinking 'beyond the business' in this way directly supports the organisational aims, it can occasionally have a mission critical operational impact on headcount.

Other challenges are more obvious. Fundraisers, who make up a large proportion of the organisation's headcount, are typically young, mobile and relatively junior, which makes tracking and understanding resignation triggers challenging.

## An Objective View of Retention

“That’s how we got involved with [great{with}talent](#),” says the HR Director, “We wanted to understand what might cause people to leave at the wrong point. It is important to track turnover rates, in different age groups and tenures of staff, quite carefully. We try to make a distinction between turnover that we think is OK and what isn’t.”



The charity used [great{with}talent's](#) new joiner questionnaire, [OnBoarder](#), to examine how well people were greeted and inducted into the organisation. This involved a review of their recruitment experience, including how well they feel equipped to perform in the role following initial induction. Crucially, their engagement levels as a new starter were also measured; if new hires aren't engaged early on, there is a strong chance they will leave early. Measuring engagement levels during those first few months presents a golden opportunity to avoid unwanted loss of new talent. And, in order to gain equally valuable leaver feedback, the organisation adopted [great{with}talent's](#) exit questionnaire, [LastOpinion](#) to drill down into important insight about people's reasons for leaving. The online nature of both tools worked particularly well, with people tending to be more honest than they would have been in past face-to-face conversations, resulting in a much clearer picture of the real issues at play. Furthermore, those taking part in the questionnaires commented that the range of questions really made them think, and encouraged them to give feedback in a way they perhaps would not have considered in a traditional feedback interview.

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## Insight & Outcomes

The first batch of results from the exit interviews highlighted a difference between the organisation's assumptions and the reality. There was a belief that people were leaving once they had got the training under their belts, for higher salaries elsewhere. However, when asked to rank what was important to them, although money was an issue, training and development, together with 'being heard' were rated higher.

“When asked to rate their affinity with the cause, it was very, very high but I guess we should have expected that people want to work for the charity for reasons other than money,” admits the HR Director. “The survey has helped us to spot this. It will help us develop methods that will deal with retention issues. We are in the process of developing strategies such as greater flexibility, which I think will be of interest to people. We have been able to identify what the issues are and to see where we aren't doing so well, in a way that is neutral for people. [great{with}talent's](#) independence is an important factor, too.”

Other outcomes from our work with the charity have proven pivotal to change. For example, [OnBoarder](#) results have led to a complete review of how people are settled into the organisation. One of the crucial findings from our combined work with new joiners and leavers was that those people who leave the charity typically make that decision incredibly early. **“Getting those early weeks right is something we need to work on”**, conceded the HR Director. On the basis of these findings, a new induction is being tested and employees are being surveyed to see if the changes made have an impact on engagement levels.

We worked closely with the charity to help them to identify ways to encourage people to stay. Our findings highlighted three important areas of focus; communication, inclusion and

flexibility. Training and development is crucial for a business such as this, however, as the HR Director recognises, **“the need to tell staff about our successes ... cannot be underestimated. It helps generate a sense of pride in working for our organisation.”** With this in mind, improved internal communication has become just one element of the charity’s new retention strategy. When asked by [great{with}talent](#) what most made them want to stay with the charity, most people had cited the approach to flexibility, together with training and development. This insight enabled the HR function to address the changes that matter most to their people, by creating a working environment and culture that fits in with people’s real lives and respects family life.

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