



UNIVERSITY OF
TORONTO

Report on the Review of the University of Toronto's Organizational Development & Learning Centre (ODLC)

August 2017

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Section 1: Executive Summary

Mandate

The mandate of the Organizational Development and Learning Centre Review Committee is to gather input on employee satisfaction with the current services delivered, to conduct a needs assessment and to document the approaches being taken by peer institutions. The Committee will provide a report with recommendations to the VP, HR & Equity. See Appendix 1: Terms of Reference.

Executive Summary

This document provides a summary of the internal and external reviews that were conducted by the Organizational Development and Learning Centre (ODLC) Review Committee (Committee). The Committee reviewed the ODLC's services and identified strengths and areas for development. In addition, it reviewed how other peer institutions and organizations provide related services to their communities in order to identify best practices.

Conclusion

The ODLC has consistently provided a broad range of quality training and development courses, programs and activities including career and work-life coaching for approximately 25% of its target employees. However, as this review demonstrates, there is the need to further develop the ODLC organizational structure, competencies and its core services to align it with the University's staff training and development needs and to ensure its services remain relevant in order to increase the participation rates of the employee groups that utilize its services. Furthermore, when compared to some private and public-sector organizations surveyed during the course of the review that are considered exemplar training and development institutions by the Review Committee, the Committee recognized an opportunity to make the following recommendations for both the ODLC service delivery as well as the scope and focus of the learning, development, and work-life program offerings.

Review Committee Recommendations

The following short and long-term recommendations are presented with further explanation on page 9.

Short-term Goals

Recommendation #1

Broadly advertise ODLC offerings / new initiatives and ensure equity of offerings across all campuses.

Recommendation #2

Ensure continuous learning and staff development is identified as a top priority for the University by reinforcing the role managers have in supporting and facilitating staff participation in ODLC programs.

Recommendation #3

Offer diverse learning delivery methods to address individual learning styles, multi-generational expectations, and time constraints relevant to all employee groups.

Recommendation #4

ODLC should provide required training about compliance with laws and regulations at all staff levels including but not limited to Privacy (FIPPA, PHIPPA), Equity, Human Rights, and Accessibility (AODA), etc.

Long-term Goals

Recommendation #5

Develop an organizational staff competency-model that is aligned with the University's strategic vision and business/operational requirements.

Recommendation #6

Develop a career development program that supports all employee groups in their career growth and provides readily accessible information and development opportunities for career progression.

Recommendation #7

Implement an enterprise-wide learning management system and employee portal accessible to all.

Recommendation #8

Broaden senior leadership development.

Recommendation #9

Develop an emerging leaders program.

Recommendation #10

ODLC should develop a formal mandate, mission and strategic plan that is aligned with the training and development needs of the University's employee groups.

Recommendation #11

ODLC should develop and maintain meaningful qualitative and quantitative metrics for measuring performance and that informs planning and decision making about the various service delivery methods, curriculum content and staff development needs.

Methodology

The **internal review** involved an assessment of ODLC services, organizational structure, finances, and administration. It included interviews with former and current ODLC management and staff individually as well as the HR/ODLC representatives at UTSC and UTM. Three separate focus group meetings were held with the following employee groups: Confidentials/PM1-2, PM3-5; PM6-9; and PM8-9. Further information meetings were held with Ms. Jane Harrison, Director of the Office of Vice-Provost, Faculty & Academic Life; Ms. Jean Robertson, lead on the USW reclassification project; Sandra Carnegie-Douglas, Anti-Racism & Cultural Diversity Officer; Allison Burgess, Sexual & Gender Diversity Officer; and the Connections & Conversations Steering Committee. The Committee also received unsolicited written and verbal input from other University staff.

The **external review** assessed peer institutions', and private sector organizations', learning and development program offerings. This included other Canadian research-intensive universities, two American universities, Canadian colleges, and private sector organizations, such as financial institutions, consulting firms, and health care/public service organizations. Information about learning and

development programs were obtained through the institutions' respective websites and, in some cases, interviews with current employees. These offerings were compared to the ODLC catalogue to determine how the University measured up relative to these peer institutions.

The following limitations are noted for both the internal and external reviews:

- Some focus group survey questions were not addressed in some discussions due to time constraints;
- The external review of some organizations was limited to information that was available online;
- In the case of interviews, there were some instances of confidentiality constraints

Target Audience of ODLC

The target audience of ODLC services are full-time Professional Managerial (PM), Confidentials (C), United Steel Workers (USW) staff, and some CUPE employee groups, totalling approximately 5,000 employees.

Financial Resources

In fiscal 2017, the ODLC's net Operating Budget was approximately \$1,262,000 and incurred approximately \$1,175,000 of actual net expenditures. The largest expenditures comprise compensation costs for ODLC staff (approximately \$1,013,000) and external consultant fees (approximately \$110,000). External consultants are used extensively in the delivery of in-person courses and have decreased significantly since fiscal 2015.

In addition to its Operating Budget, the ODLC administers three (3) central staff development funds: Conference Fund (CF), Professional Development Fund (PD) and the Education Assistance Fund (EA) totalling approximately \$367,000 annually. The purpose of these funds is to assist departments with offsetting the costs of Research Assistants (CF) and administrative staff (PD) attendance at conferences as well as tuition costs for courses taken at other post-secondary institutions (EA). These funds are in addition to the central tuition fee waiver fund administered by Total Rewards that assists employees with tuition costs to a maximum of \$500 per course for eligible employees enrolled in U of T credit type courses.

The PD and EA fund budgets in 2017 totalled approximately \$242,000 of which approximately \$129,000 was expended for approximately 400 applications. The CF was initiated during fiscal 2017 without a budget and for which approximately \$20,000 was expended for 21 applications. The fiscal 2018 budget for the CF is \$125,000. It was noted in the Focus Group meetings that awareness of these funds is limited, perhaps because, as noted by the Committee, they are not advertised on the ODLC website but rather included in the list of Forms on the VPHR & E website.

Observations/Findings

Current Strengths

The University of Toronto has consistently been recognized as one of Canada's top 100 employers. In 2017 alone, UofT received the following workplace awards¹:

- Canada's Top 100 Employers (2017)
- Canada's Top Family-Friendly Employers (2017)
- Top Employers for Canadians Over 40 (2017)
- Greater Toronto's Top Employers (2017)
- Canada's Best Diversity Employers (2017)

These rankings consider a number of factors such as:

- Physical workplace;
- Work atmosphere and communications;
- Financial benefits and compensation;
- Health and family-friendly benefits;
- Vacation and personal time-off;
- Employee engagement and performance;
- Training and skills development; and
- Community involvement

With respect to training and skills development, UofT received an "A" rating. Two specific programs that stand out are the Rose Patten Leadership program and the Managers Academy. Focus group² responses also highlighted the following notable ODLC programs/services:

- Managers Academy
- Career counselling
- Mentorship program
- Business Management Leadership Program (BMLP)

Regarding Canada's Top 100 Employers award the report (Table 1 p. 22) noted that "Comparatively speaking, while UofT scored well, there is room for improvement as it relates to learning and development in the areas of workplace training and to a larger degree, **leadership development**".

¹ <http://content.eluta.ca/top-employer-university-of-toronto>

² Focus group C/PM 1-5 and HR&E

Gaps

A December 2015 Conference Board of Canada Learning and Development Outlook Report³ found that:

Organizations with strong learning cultures invest more in their learning and development and are realizing greater returns for their investment. Overall, they are guided by strong leadership that places a high priority on employee engagement and communication. As a result, these organizations are better positioned to anticipate the changing requirements of their workforce. And, overall, they have superior employee performance, higher levels of customer satisfaction, and provide higher quality products and services to their customers compared with their competitors.

While the University recognizes the value of learning and development programs, there are significant gaps in the alignment of content and delivery with the overall organizational vision. Based on internal and external findings, the Committee identified areas for improvement in the following categories of training and development:

- Organizational and individual competencies;
- Career development pathways;
- Emerging talent identification;
- Leadership development;
- Integrated learning and performance management system;
- Lack of utilization of UofT's internal expertise for course delivery.
- Lack of ODLC awareness.

³ Hall, Colin, and Simon Cotsman. Learning as a Lever for Performance: Learning and Development Outlook—13th Edition. Ottawa: The Conference Board of Canada, 2015

Challenges

The University faces unique challenges in the implementation of learning and development initiatives:

- Tri-campus
 - The University is comprised of three geographically separate campuses which affects accessibility to the in-person program/course offerings.
- Unionized environment
 - USW employees do not participate in performance reviews thereby limiting how their roles align to organizational competencies and performance management processes. This limitation affects opportunities to learn about personal and individual career options thereby impacting the development of the University's human capital.
 - Information regarding ODLC offerings is disseminated unevenly across employee groups and campuses. Furthermore, there is no indication of consistent managerial support for all employee groups.
- Curriculum
 - The breadth and types of course offerings suggest that the ODLC course curriculum lacks focus and direction and that ODLC programming is likely trying to be too many things to too many people. This was apparent from the Committee's efforts in navigating the ODLC website.
- Decentralized
 - UofT requires a centralized approach to developing a set of core competencies for all employees that align with the University's mandate and strategic vision.
- Multi-generational
 - Valent Inc., a Canadian content creation firm, is quoted in a 2016 Canadian Government Executive report⁴ on HR trends that, "...employers are encouraged to build up their technology capabilities. More employers are accommodating a generation of digital natives, millennials, and generation Z workers. This cohort of workers relies heavily on technology but also seeks face-to-face collaboration in the workplace."
 - Millennial employees are defined as those born in years 1980 – 1995 according to the ODLC Millennial Focus Group Survey conducted in 2016 to identify this cohort's expectations of the ODLC. The results indicate that this group has a high demand for "Leadership" training and education. However, as noted in the 'Curriculum Development and Delivery' section of this report, courses offered under the Leadership category were among the lowest number of each of the course category offerings.
- Inclusivity
 - U of T is committed to inclusiveness but that is not clearly evident in ODLC offerings (e.g., limited focus on equity issues and support for unionized workers).

Exemplar Institutions

The review identified exemplar organizations with comprehensive programs that address the aforementioned institutional challenges. They are Canadian financial institutions, the University of Michigan, University of Calgary, and the Ontario Public Service. Some examples of how these organizations excel in these areas are as follows:

- Organizational and employee competencies

⁴ <http://canadiangovernmentexecutive.ca/trends-in-human-resources-to-watch-in-2017/>

- **University of Michigan** – Their university-wide organizational competency model is “aligned and supportive of the university’s mission and values and complementary to functional/technical competencies that are organization and/or profession specific”.⁵
- **University of Calgary** – Modeled after the University of Michigan, the University of Calgary developed a core competency framework that reflects, “...the values of the University community, and defines the skills, knowledge, learning, and behaviours which are critical to achieving the University's Eyes High Strategic Goals”⁶, and these are not the same competencies that are assessed for performance management purposes.
- Career planning
 - **Scotiabank** – Comprehensive job profiles provide employees with a clear understanding of the attributes that they are required in order to succeed in their next pursuit.
 - **University of Michigan** – The Career Path Navigator provides guidance in career planning by indicating how the employee’s current position relates to other positions/classifications. Employees can review and compare positions, career changes, and see career moves made by other staff members.
 - **University of Calgary** – Building on the U of Michigan model for career development, U of Calgary has developed the UNavigate Career Development Program which is a web-based, transparent resource available to all employees to facilitate the planning of their career trajectories and personal competencies.
- Emerging talent identification
 - **Bank of Montreal** – Talent Advisory Network which focuses on coaching, development planning, and retention initiatives for emerging leaders.
 - **TD Bank** – Build for the Future program ensures a strong talent pool of candidates among management-level employees for future executive leadership positions.
- Leadership development
 - **Ontario Public Service** – Role of the Manager initiative which clearly defines the roles and responsibilities of managers and supports leadership development across the organization
- Integrated learning and performance management system
 - **Royal Bank** – Enterprise-wide, online talent management system.
- Supported learning culture
 - **University of Michigan** – Staff development philosophy: To enhance the ability of staff members to contribute to their departments and to provide career satisfaction for productive employees; they are committed to supporting ongoing staff development for any staff member⁷.
 - **Bank of Montreal** – Recognized by *Training*⁸ magazine for unique learning programs, internal accreditation programs, and commitment to employee development.

⁵ <https://hr.umich.edu/working-u-m/professional-development/u-m-organizational-competencies>

⁶ <http://www.ucalgary.ca/hr/maps/employee-information/core-competencies>

⁷ <https://hr.umich.edu/about-uhr/staff-development-philosophy>

⁸ <https://www.bmo.com/bmo/files/images/7/1/2007EngagingEmployeesEN.pdf> (page 4)

Emerging Trends

The 2017 Deloitte Global Human Capital Trends⁹ report surveyed over 10,000 business and HR leaders across 140 countries, including over 300 from Canada. Of the emerging HR trends cited, the following align with the UofT internal and external review findings as they relate to our priority areas and gaps:

- **The revolution of performance management** – Performance tools to better cater to employee growth; systems which measure and manage performance with regular and ongoing feedback.
- **The evolving market for learning** – Evolution of how we think about ‘learning’ – expectation of more dynamic and self-directed learning.
- **Merging HR tools and team management** – Moving away from tools specifically designed to help HR, towards those which help employees work more effectively. Systems designed to help employees find their next position within the company, then identify the training resources relevant to obtaining that role.
- **Digital HR: self-service, AI and robotic process automation** – Aided by technology, HR can focus on employee journey maps and experiences by automating the processes for employee career development and job transitions.

Role of Technology

Another significant finding that emerged was the critical role technology plays in learning, development and organizational success. The 2017 Accenture Strategy¹⁰ report on technology and performance management found that:

Through analytics and machine learning, a new generation of workforce technologies is helping leaders guide workers in a timelier way—and helping people take a more active role in managing their own performance and careers. New tools and apps help people readily find learning sources and mentors, supporting just-in-time skill building, collaboration and real-time feedback. Technology-enabled performance management is far more comprehensive and holistic. It’s focused on maximizing people development, improving the performance of individuals and the entire organization.

Modern technology allows an organization to quickly and efficiently implement best practices and encourage organizational and employee agility. Exemplar institutions were found to employ end-to-end learning systems like SAP’s Success Factors that support the entire lifecycle of an employee such as recruiting, compliance training, skill acquisition, and leadership and career development. The Accenture report (2017) found that, “The right technologies can provide broader, deeper and more personal insights and then equip leaders —and individuals—to take informed, intelligent action.”¹¹

⁹ <https://www2.deloitte.com/ca/en/pages/human-capital/articles/hc-trends-2017.html>

¹⁰ https://www.accenture.com/t20170419T015553__w_/us-en/_acnmedia/PDF-44/Accenture-Strategy-WotF-Technology-Reinvents-Performance-Management-POV.pdf (page 3)

¹¹ https://www.accenture.com/t20170419T015553__w_/us-en/_acnmedia/PDF-44/Accenture-Strategy-WotF-Technology-Reinvents-Performance-Management-POV.pdf (page 9)

Explanation of Recommendations

Recommendations for Short-term goals

Recommendation #1: Broadly advertise ODLC offerings / new initiatives and ensure equity of offerings across all campuses

- UofT Human Resources & Equity 2015 Annual Report¹² features new initiatives under the Leadership and Career Development umbrella which, anecdotally, do not seem to be well-known
- The University is comprised of three campuses which are geographically located in the central, east, and west ends of the city which affects accessibility to program/course offerings. Accessibility is also affected by varying peak times of business among the campuses.
- Curriculum planning would benefit from broader consultations across the University as well as externally to allow the ODLC to remain relevant.
- A review of the ODLC organizational structure should be undertaken to ensure that it is sufficiently and appropriately staffed for the effective delivery of training and development services that meet the needs of the University community. Any changes to the existing structure and service delivery model should contemplate the leveraging of the full breadth of skills from its current complement of staff resources for maximum effectiveness.
- The UTSC and UTM campuses would benefit from an ODLC Champion to ensure a cohesive service is offered and the needs of the employees are being met and determined in a systematic fashion.

Recommendation #2: Ensure continuous learning and staff development is identified as a top priority for the University by reinforcing the role managers have in supporting and facilitating staff participation in ODLC programs.

- Opportunities for learning and development were found to be lacking as focus group members indicated that there was not, "...enough assistance to help staff, and bring staff up to date with technology and relate to core competencies"¹³. Further, "some managers don't encourage staff development because they don't want the staff to leave the department"¹⁴.
- TD Bank: Build for the Future is a "program for executives that emphasizes the role of leaders in building talent for the future ...the CEO makes it a priority to attend and spends time answering questions about TD's business and talent strategies, culture and values"¹⁵

¹² <http://reports.hrandequity.utoronto.ca/hre/hre2015/leadership-development/>

¹³ HR&E focus group

¹⁴ HR&E focus group

¹⁵ <https://www.td.com/corporate-responsibility/crr-2010/employees/create-opportunities/leadership-development-index.jsp>

Recommendation #3: Offer diverse learning delivery methods to address individual learning styles, multi-generational expectations, and time constraints relevant to all employee groups.

- Focus groups found ODLC technology to be dated and stated, “Poor quality of technology distracts from the content”¹⁶. Further, they felt “trainers are not expert in the areas”¹⁷.
- In addition to traditional learning (i.e., in-class/instructor-led) 2017 HR technology trends include:
 - Micro-learning – 90-120-second video courses
 - Gamification – identifying the elements of videos games that make them entertaining and motivating and applying them in a non-game learning environment
 - Mobile – learning management systems that support mobile devices for content delivery
 - Adaptive – shift from “one-size-fits-all” to delivery of material based on individuals’ preferences and input

Recommendation #4: ODLC should provide training about required compliance with laws and regulations at all staff levels, including but not limited to Privacy (FIPPA, PHIPPA), Equity, Human Rights, and Accessibility (AODA), etc.

- Provide mandatory University wide onboarding orientation that includes information about legislative requirements including, but not limited to:
 - Privacy legislation (FIPPA, PHIPA)
 - Environmental health and safety – EHS
 - Accessibility for Ontarians with Disabilities Act – AODA
 - Equity, diversity and human rights training

Recommendations for Long-term goals

Recommendation #5: Develop an organizational staff competency-model that is aligned with the University’s strategic vision and business/operational requirements.

- Recurring theme in focus groups in multiple categories commented on the lack of awareness and training of core and organizational competencies that apply to all positions within the University
- **University of Michigan** – University-wide organizational competency model “aligned with and supportive of the university’s mission and values, and complementary to functional/technical competencies that are organization and/or profession specific”¹⁸.
- **Bank of Montreal** – Recognized by Training¹⁹ magazine for unique learning programs, internal accreditation programs, and commitment to employee development.

¹⁶ C/PM 1-5 focus group

¹⁷ HR&E focus group

¹⁸ <https://hr.umich.edu/working-u-m/professional-development/u-m-organizational-competencies>

¹⁹ <https://www.bmo.com/bmo/files/images/7/1/2007EngagingEmployeesEN.pdf> (page 4)

Recommendation #6: Develop a career development program that supports all employee groups in their career growth and provides readily accessible information regarding the requirements for career progression

- Focus group members found while they were encouraged to actively consider their career development plan, it “...depends on individual managers so need to make it a cultural change to encourage managers”²⁰. They also stated that, “Supervisors in unions do not have a lot of training offered”²¹.
- **Scotiabank** – Comprehensive job profiles provide employees with a clear understanding of the attributes they require to succeed in their next pursuit.
- **University of Michigan** – Career Path Navigator provides guidance in career planning by indicating how the employee’s current position relates to other positions/classifications. Employees can review and compare positions, career changes, and see career moves made by other staff members.
- **University of Calgary** – Building on the U of Michigan model for career development, U of Calgary has developed the UNavigate Career Development Program which is a web-based, transparent resource available to all employees to facilitate the planning of their career trajectories and personal competencies.

Recommendation #7: Implement an enterprise-wide learning management system and employee portal accessible to all.

- Exemplar institutions were found to employ end-to-end learning systems like SAP’s Success Factors that support the entire lifecycle of an employee such as recruiting, compliance training, skill acquisition, and career development.
- University of Michigan and U of Calgary both stressed the importance of transparency in job opportunities, learning resources and career planning accessible to all employees.

Recommendation # 8: Broaden senior leadership development

- Focus groups indicated a lack of mobility and learning and development at senior management levels.
- An additional challenge is that, “...the more senior you get the harder it is to attend technical training as it changes from when you started your career. Senior staff (should) not be with junior staff for training as it’s a different need.”²²
- With respect to career progression, several groups asked, “What is the career path at PM9 level?”
- **University of Waterloo** – Leadership Foundations program provides experienced supervisors, managers, assistant/associate directors with ongoing foundation of leadership learning and development.
- **Harvard University** – Harvard Leadership Development Program²³ is, “...designed specifically for different segments of our talented workforce -- support staff, individual contributors, supervisors, mid- to senior-level managers and university executives, addressing the leadership development needs of each group.”

²⁰ HR&E focus group

²¹ C/PM 1-5 focus group

²² PM 8-9 focus group

²³ <https://hr.fas.harvard.edu/cwd-harvard-leadership-development-programs-hldp>

Recommendation #9: Develop an emerging leaders program.

- UofT currently does not have an emerging talent program that identifies, trains, and develops high-potential employees.
- **Bank of Montreal** – Talent Advisory Network which focuses on coaching, development planning, and retention initiatives for emerging leaders.
- **TD Bank** – Build for the Future program ensures a strong talent pool of candidates among management-level employees for future executive leadership positions.

Recommendation #10: ODLC to develop a formal mandate, mission and strategic plan that is aligned with the training and development needs of the University’s employee groups.

- Develop the formal mandate, mission, strategic direction to include the recommendations of this committee and guide future activities (include what they are doing well currently).
- A formal mission/mandate statement and strategic plan is essential for clarity of the purpose of the ODLC.
- Programs and services need to be aligned with the formal mission/mandate statement and multi-year strategic planning.
- Most of the external institutions who were found to provide effective professional development services included their intents in formal mission/mandate and/or strategic planning e.g., University of Michigan Strategic Plan Update 2016 includes the [Vision Statement](#)²⁴.

Recommendation #11: ODLC should develop and maintain meaningful qualitative and quantitative metrics for measuring performance and that informs planning and decision making about the various service delivery methods, curriculum content and staff development needs.

- Develop an effective process for collecting both qualitative and quantitative metrics for all ODLC activities.
- Purposefully track metrics that reflect the impact of ongoing program activities is essential for accountability and guidance in program development.

²⁴ <https://hr.umich.edu/sites/default/files/strategic-plan-2011-2016.pdf>

Section 2: Market Consultation

Background

The ODLC provides resources, tools, and consultative services to help employees maximize their personal and professional potential. In order to assist employees in the reinforcement or acquisition of skills, the ODLC delivers training and/or development in a variety of formats in the following broad categories:

- Personal well-being
- Career development
- Workplace training
- Leadership development
- Managerial development
- Technology training
- Certification

ODLC Vision, Mission, Objectives, Strategic Planning and Performance Measures (KPIs)

The ODLC does *not* have a formally stated vision, mission, or objectives. The former Executive Director of ODLC described its Mission as to:

- Promote internal learning and development for U of T employees on all three campuses
- Focus on soft skills and management skills development as well as career and personal development by providing a course curriculum and services that does not replicate the School of Continuing Studies course offerings
- Provide customized team training and development
- Provide individual career counselling/coaching
- Provide individual and group work-life counselling/coaching
- Provide logistics planning/promotion/registration for ODLC courses and programs, as well as other University functions and programs.

When discussing the mission and objectives with ODLC staff, their views aligned for the most part with those stated by the former Executive Director.

There are no pre-established KPIs for performance measurement and assessment of the effectiveness of the programming and the operation. Rather, performance is measured primarily by the feedback obtained through the use of surveys emailed to participants at the completion of a course. The feedback, which is primarily qualitative, is not logged or maintained in a database. There is no concentrated effort in place to develop and maintain a database of quantitative data that could be used to inform strategic and operational planning. Currently, the accountability for the function is established by way of an Annual Training Report (Report) that is produced by the Executive Director of ODLC for the VPHR&E. Amongst other things, the Report identifies the number of participants by course category, as well as the number of course sessions held during the year as measures of the ODLC performance.

ODLC does not undertake annual or multiyear strategic planning. Such planning would assist with ensuring that the unit's services remain relevant and aligned with the demographics and development needs of the University's administrative staff workforce.

Internal Consultation

Three separate focus group meetings were held with specific employee groups (Confidentials/PM1-2, and PM3-5; PM 6-9; PM8-9) soliciting feedback on the University's learning and development programs. Further information meetings were held with Jane Harrison, Vice-Provost, Faculty & Academic Life (teleconference), Jean Robertson, lead on the USW reclassification project; Sandra Carnegie-Douglas, Anti-Racism & Cultural Diversity Officer; Allison Burgess, Sexual & Gender Diversity Officer; and the Connections & Conversations Steering Committee.

The focus groups and consultations provided valuable insight and identified specific priority areas to be addressed (see Appendix 2: PM 8-9 Review and Appendix 3: Aggregate of Input from Focus Groups and Other Discussions) including:

- Career Development
 - Identify career mobility challenges for senior level staff
 - Desire for more training in strategic management for senior leaders
 - Ensure structural supports are in place for employee career development (i.e., tool to track career progress, training, manage personal profile)
 - Specify the core competencies as they relate to a role, performance, etc.
 - Orientation/Onboarding input needs to be strategic and relevant to the broader university culture
 - Mentorship is valuable and needs to be made available more broadly for both mentors and mentees
- Applicability
 - Identify and clearly state UofT's strategic vision and develop organizational competencies that are in alignment with the vision and goals of the University
 - Provide managers and employees with position descriptions that specifically relate role and responsibility with the relevant competencies
 - Expand leadership and core competency training to more employee groups
 - Utilize the expertise of UofT faculty and staff as opposed to hiring external instructors who are not necessarily familiar with the University environment or culture
 - External offerings are being taken advantage of outside ODLC including but not limited to:
 - Rotman HR two-week intensive program (costly despite the UofT employee price)
 - Queens University courses (industrial relations)
 - External courses for strategic planning in the public and educational sector (intensive timeframe allows for immersion in the learning, beneficial to information retention)
 - York University (mediation and negotiation)
 - Registrar's Office at UofT has a Professional Development day (would like this type of PD program to be extended to other job roles)
 - Annual Leadership and Orientation for Academic Administrators at UofT

- Leadership Education and Development Program (LEAD) at UTSC
 - Advancement College at UofT
 - Provide a clear pathway of courses for obtaining a particular skill set
 - Need for integrating equity/diversity issues across the ODLC curriculum
- Accessibility and support
 - Lack of awareness of ODLC offerings
 - Recognize the scheduling challenges of a tri-campus institution and ensure accessibility by taking into account distance, on-site offerings and peak times of business for each campus
 - Ensure managers see the value of learning and development and provide them with the necessary tools to develop an employee’s professional growth and career path
- Technology
 - Implement a tool that records and suggests training in addition to identifying required training as it relates to the current or desired roles
 - Mixed support for blended or online courses; depends on course learning objective
 - In-person is viewed as best for most
- Knowledge sharing and implementation
 - Provide consistent onboarding and orientation fundamentals and refresher courses for employees who are returning from a leave
 - Provide managers with the ability to track employee skill acquisition
 - Networking was viewed as helpful not only in connecting with others but as an expectation of specific demographic groups such as “Millennials”

During the meetings, in each priority area, some mention was made of access to, training for, or support of organizational competencies. Learning and development that is consistent and aligned with roles and functions across campuses and departments has a number of benefits - to name a few:

- Clear understanding and expectations of role, responsibilities, and job standards;
- Career development pathway;
- Provides a framework for performance management and compliance;
- Allows employees to be proactive by learning new/additional skills that have been identified as valuable by the University;
- Assist in the recruitment process by ensuring candidates have the required competencies; and
- Aids in succession planning

External Consultation

The Committee also explored peer institutions’ learning and development programs. This included other Canadian research-intensive universities, two American universities, Canadian colleges, and private sector organizations such as financial institutions, consulting firms, and health care/public service organizations. Information about learning and development programs was obtained through the respective websites and in some cases, interviews with current employees. Although some sites within the institutions’ websites were inaccessible due to confidentiality issues, generally speaking, these organizations provided sufficient details regarding their programs and the types of opportunities available to employees. These offerings were compared to UofT’s ODLC catalogue to determine how we fare relative to these peer institutions and identify best practices and opportunities of modification or expansion of ODLC services.

Jocelyn Spurr, a member of the **University of Calgary** Talent Development Team, was interviewed regarding their career development program. A 2015 report found that employees were frustrated at being “stuck” in their jobs and felt they lacked career mobility opportunities. As the lead for the [UNavigate Career Development Program](#), Jocelyn was tasked with exploring best practices in career development. After considerable research, the [University of Michigan](#) was identified as an exemplar institution with respect to their learning/development and career programs.

The Wall Street Journal and Times Higher Education ranks the **University of Michigan** as the # 1 public university in the U.S.²⁵ They have been nationally recognized for work/life effectiveness (WorldatWork)²⁶ and have award winning career development practices (College and University Professional Association for Human Resources). As it relates to the ODLC review, the University of Michigan has a well-developed Leadership Development Program. They clearly state the University’s organizational competencies and more specifically, the core competencies for management and professionals. According to their website²⁷:

In May 2007, a model for U-M organizational competencies was approved by the Associate Vice President for Human Resources. The primary goals for this U-M-wide model were to create a tool that would be aligned and supportive of the university’s mission and values and complementary to functional/technical competencies that are organization and/or profession specific.

Organizational competencies are defined as the skills, knowledge, abilities, and behaviors that support effective stewardship of the University of Michigan’s mission, vision, values, and resources. U-M organizational competencies are the clusters of behaviors that employees are expected to exhibit in order to be successful in the organization as a whole, as well as behaviors that reinforce common organizational culture.

Management and professional competency tables provide a description of the behaviours and skills sets required at each level of development. The levels progress from “Level 1” which reflects the minimum expectations to “Level 5” where the individual has achieved an advanced level of competency.

There are additional tools to assist employees such as the Course Selection Tool and the Course Catalogue. The Course Selection Tool helps employees choose courses that are the best match for their skill level. This is achieved by asking questions related to the eight University organizational competencies in order to determine the individual’s current proficiency. The course catalogue indicates the competencies addressed by each course and the level of proficiency that can be expected at the course conclusion.

Similarly, the **University of Calgary** identifies potential career paths with job profiles and descriptions based on the competencies required in each job. A master spreadsheet lists every job at the university and includes where and how each job is classified. Through this spreadsheet, employees can drill down to sample competency-based job description. The **University of Michigan** takes this one step further in that the spreadsheet allows the employee to drill down to get the job profile and includes information

²⁵ <https://hr.umich.edu/benefits-wellness>

²⁶ <https://hr.umich.edu/>

²⁷ <https://hr.umich.edu/working-u-m/professional-development/u-m-organizational-competencies>

on how to search the spreadsheet in order to begin networking opportunities. See Appendix 4: Post-Secondary Institutional Review.

The focus group meetings and external research indicate that UofT could benefit from developing and disseminating enterprise-wide organizational competencies. While competencies are factored into performance reviews for Confidentials and PMs, they are not broadly identified. Further, as USW employee groups do not participate in performance reviews, it is unclear whether the competencies required for USW positions are known or even applicable across employee groups.

- a) **Career advancement/planning support** was reported to be a priority issue in several universities especially for non-management staff – and for the younger staff - but none of the universities felt they are doing it well. The focus of career planning and development, and succession planning seems to be on the development of leaders; very little was reported specific to non-management or unionized staff except for individualized counselling upon request.

Interestingly, in at least two universities (UBC and McGill) there appeared to be a nascent culture shift away from locking staff into stable positions for 20-30 years to a focus on retraining, the development of employees, and then “letting them go” (internally and/or externally) consistent with the human capital development mission/mandate of universities. But, the high cost of training new employees for specific positions was acknowledged.

Only the University of Michigan and the University of Calgary reported comprehensive models of career planning that include all employee classifications (see discussion above and Appendix 4).

- b) **Generic competencies** were considered important for all positions and are used to some extent but must be embedded in role specific functional skills; competencies were used primarily for performance review purposes and workshops related to specific competencies which were generally generic unless arranged for a specific department. Generic transferrable /cross institutional competencies were seen as required for all positions (see University of Michigan model above). In performance management/evaluation, the UBC and University of Calgary were shifting way from evaluation of deficits in competencies, to building on the strengths of employees (abilities based model).
- c) **Succession planning** seems to be focused on developing management staff as future leaders.

Market Consultation: Supporting Data

In November 2016, the University of Toronto made the “Canada’s Top 100 Employers” list for the tenth time. One of the survey criteria relates to training and skills development. Other examples of institutions that rate well in this area are:

- Bank of Canada
- Bank of Montreal
- CIBC
- Sunnybrook Health Sciences Centre
- TD Bank
- University of British Columbia
- University of Calgary

These institutions had the following in common with respect to training and skills development:

- All had at minimum career planning services and some also had an online employee skills inventory
- All had in-house training initiatives
- All had tuition subsidies

Some of the highlights of these organizations (including the U of T) are as follow:

Table 1: Institutional Offerings Highlights

Organization	Career Development Highlights	L&D Highlights	Unique L&D Offerings
Bank of Canada	<ul style="list-style-type: none"> • in-house career planning services • online employee skills inventory 	<ul style="list-style-type: none"> • mentoring • in-house training • online training • leadership training • paid internships • subsidies for professional accreditation 	<ul style="list-style-type: none"> • external development opportunities in the form of exchanges with other central banks and international finance organizations • leadership development program (2 to 6-day offsite program) • regular employment with full benefits for qualified PhD candidates (versus previous 3-year term program) • second language training (French and English)
Bank of Montreal	<ul style="list-style-type: none"> • in-house career planning services 	<ul style="list-style-type: none"> • apprenticeship/skilled trades programs • mentoring • in-house training • online training • leadership training • paid internships • subsidies for professional accreditation 	<ul style="list-style-type: none"> • recognized for unique learning programs, internal accreditation programs and commitment to employee development • Talent Advisory Network - focus on coaching, development planning and retention initiatives for emerging leaders. The Talent Advisory Network is part of BMO’s overall talent strategy, which has four key priorities: talent mindset and accountability, talent assessment, career

Organization	Career Development Highlights	L&D Highlights	Unique L&D Offerings
			management practice, diversity and inclusion
CIBC	<ul style="list-style-type: none"> • in-house career planning services 	<ul style="list-style-type: none"> • apprenticeship/skilled trades programs • mentoring • in-house training • online training • leadership training • paid internships • subsidies for professional accreditation 	<ul style="list-style-type: none"> • job-shadowing program, leadership development program (for all new executives) • Financial Services Leadership Program developed in partnership with York University's Schulich School of Business • financial bonuses for course completions range from \$500 to \$2,500 and may be paid out as bonuses or through automatic salary increases • the CIBC Women in Financial Services Scholarship program (over \$1.5 million to fund 48 scholarships in partnership with the Rotman School of Management and the Richard Ivey School of Business)
Sunnybrook	<ul style="list-style-type: none"> • in-house career planning services 	<ul style="list-style-type: none"> • apprenticeship/skilled trades programs • mentoring • in-house training • online training • leadership training • paid internships • subsidies for professional accreditation 	<ul style="list-style-type: none"> • Leadership Institute, an onsite training facility that provides specialized leadership training programs for senior-level employees in medical, administrative or middle management positions
TD Bank	<ul style="list-style-type: none"> • in-house career planning services • online employee skills inventory 	<ul style="list-style-type: none"> • mentoring • in-house training • online training • leadership training • paid internships • subsidies for professional accreditation 	<ul style="list-style-type: none"> • invested over \$59 million in training support last year (translates to over \$1,049 per full-time employee, averaging 3.3 training days) • partnered with the University of Toronto's Rotman School of Management as the lead sponsor of the "Back to Work Program", a 2-year rotational work program available to women who have left the workforce for at least five years • extensive leadership development programs • education flex time program • three paid study leave days each year

Organization	Career Development Highlights	L&D Highlights	Unique L&D Offerings
UBC	<ul style="list-style-type: none"> • in-house career planning services, online employee skills inventory • career advancement is the number one concern of employees 	<ul style="list-style-type: none"> • in-house training • online training • leadership training • tuition subsidies • individual counselling • coaching teams 	<ul style="list-style-type: none"> • Managing@UBC Program – self-directed program open to managerial and professional staff with direct reports designed support the responsibility they hold for employee performance and engagement and achievement of unit goals • Focus in on “asset based model” of employee development (i.e., building on existing strengths) and purposefully NOT on evaluation of deficits in competencies • Philosophy/culture shift is to “train them and let them go”- across the university or externally which is seen as part of the university mission (i.e., development of human capital)
U Calgary	<ul style="list-style-type: none"> • in-house career planning services • online employee skills inventory • employees were frustrated with lack of career mobility • created U Navigate program (modified version of U of Michigan) • Spread sheet lists EVERY job at the university, where and how each is classified sample competency-based job descriptions for career 	<ul style="list-style-type: none"> • in-house training • online training • leadership training • tuition subsidies 	<ul style="list-style-type: none"> • Enterprise Learning for all employees and specific modules for managers; programs and workshops focusing on five key areas: onboarding, fundamental, professional development, management fundamentals, management development, leadership development • Philosophy of “help them grow and watch them go”

Organization	Career Development Highlights	L&D Highlights	Unique L&D Offerings
	development planning		
UofT	<ul style="list-style-type: none"> • in-house career planning services, online employee skills inventory • Use competencies only for performance evaluations for Professional Managers (PM) employees; Not used for unionized staff – have a concurrent and independent project in progress • Focus is on individual counselling – identify the employee’s strengths, interests and potential paths 	<ul style="list-style-type: none"> • apprenticeship/skilled trades programs • mentoring • in-house training • online training • leadership training • paid internships • subsidies for professional accreditation 	<ul style="list-style-type: none"> • Rose Patten Leadership Program • Managers Academy, a 4-day intensive program for PM3-6 designed to provide new managers with the tools and ongoing resources they need to develop themselves and their teams

Source: <http://www.canadastop100.com/national>

Comparatively speaking, while UofT scored well, there is room for improvement as it relates to learning and development in the areas of workplace training and to a larger degree, **leadership development**.

Organizations that have excellent leadership development programs are financial institutions. A November 2016 Canadian Bankers Association report²⁸ states that:

Canada's banks are leaders in professional development. As part of their commitment to continuous learning, banks offer employees an array of educational programs through traditional and electronic channels. Courses vary from bank to bank, but may include sales and service, risk, ethics, corporate values, information technology, and management and leadership skills.

Research for the ODLC report bears this out. Across the board, financial institutions offered some kind of training, program, or initiative in all categories. Four out of five of the Canadian banks reviewed offered managerial and **leadership programs**. The same four banks also had some form of emerging leaders or talent identification program in place. The external review also identified a number of organizations that offer learning and development programs that target specific roles and functions.

All the financial and a majority of the health care institutions also made use of technology in program delivery in the form of online learning, webinars, podcasts, learning and training electronic repositories, etc. Many of the online systems include applications that allow users to register, track, and manage their training and professional development. This ability to track, record, and suggest courses was raised in the focus groups as an area in which UofT is lacking.

Another point raised in the review was the perceived value of learning and development programs and how they can benefit the organization. One responder indicated that ODLC's "Managers Academy" provided valuable experience and resulted in improvements in staff performance." However, in response to the question, "What do you see as the 'issues of the day' with respect to the delivery of professional development support?", the response was that a "Chunk of society is not willing to invest". Senior management must support and foster a learning culture in order to move a learning and development initiative forward.

From the Conference Board of Canada report²⁹, Donna Burnett-Vachon, Associate Director, Leadership and Human Resources Research states that:

... organizations with strong learning cultures tend to realize better business results. Those who invest more in learning and development are the organizations that are being rewarded with higher levels of employee performance, customer satisfaction, and quality products and services compared to their competition.

As indicated by the external review, a strong learning environment ensures a deep talent pool of engaged employees.

²⁸ http://www.cba.ca/Assets/CBA/Files/Article%20Category/PDF/bkg_employment_en.pdf

²⁹ http://www.conferenceboard.ca/press/newsrelease/14-02-25/canadian_organizations_spending_more_on_staff_training_a_step_in_the_right_direction.aspx

Market Consultation: Best Practices

Wellness

- Emotional
- Financial
- Physical

Culture

- Work life balance
- Community engagement
- Employment equity
- Staff forums
- Diversity and inclusivity training
- Workplace harassment and violence training
 - anonymous reporting hotline

Recruiting

- McGill: Behavioural Competencies – attract, retain, develop, and recognize best talent
- BMO: Talent Advisory Network – coaching, development planning and retention initiatives for emerging leaders
- Trainer/mentor led onboarding that extends beyond initial orientation
- Identifying priority groups (e.g., women, minorities, new immigrants, persons with disabilities, aboriginal and indigenous peoples, LGBTQ) and developing recruitment and training initiatives accordingly
 - Unbiased resume submissions

Core Competencies

- Mandatory leadership orientation and training
- Learning programs targeting specific roles and functions
 - University of Michigan Leadership Development Program
 - TD: Learning maps for different roles/functions across the bank
 - TD: Build for the Future program
 - New managers foundations workshops
- Internal accreditation programs
- Core curriculum learning programs
 - CIBC: Track Your Growth – online learning system that keeps track of your training and allows you to register, manage and track your courses
- Training to understand how best to manage intergenerational teams
- Collaboration with other customized/certification programs or learning institutions
 - McGill: LEAN – Six Sigma
 - videoconferencing or distance learning

Emerging Leaders

- Targeted management skills training and workshops
 - McGill: Leadership Development Program: 3 streams – supervisors, change agents, student affairs professionals
 - McMaster: training for those new to supervisory / management role focusing on leading & creating engaged teams
 - TD: Accelerated Learning Pipeline – programs for various in-demand roles
- Executive level leadership programs
 - McMaster: training for experienced managers & leaders focusing on strategic excellence
 - TD: Pipeline Program – ensure a strong talent pool of candidates among management-level employees for future executive leadership positions
- Functional area leadership network meetings

Career Development

- Performance management
- Career coaching and workshops
- Internal career fairs
- Internal networking events and forums
 - McMaster: internal professional development conference
- Role-targeted courses based on specific careers
 - UAlberta: Pathways Learning Series: strengthen your talents by choosing your own path to enhancing and advancing your career
 - Scotiabank: job profiles that provide employees with a clear understanding of the attributes they require to succeed in their next pursuit
- Mentoring programs
- Job shadowing

Technology

- Enterprise-wide learning management system
- Blended learning programs

Who Was Consulted

Also see Appendix 5: Report on Phone Interviews on Career Planning and Competencies

Canadian Research-Intensive Universities

- McGill University – website review / interview
- McMaster University – website review / interview
- Queen's University – website review / interview
- Université de Montréal – website review
- Université Laval – website review
- University of Alberta – website review / interview
- University of British Columbia – website review / interview
- University of Calgary – website review / interview
- University of Ottawa – website review
- University of Toronto – website review / interview
 - ODLC website and interviews
- University of Waterloo – website review
- Western University – website review / interview
- Royal Roads University interview only

American Universities

- University of Michigan – website review / LisaAnn Throne, U-M LPD Project Coordinator, Rob Sober, HR Dept., Learning Specialist and Curriculum Lead
- Harvard University – website review (Harvard Leadership Development Program)
- **Canadian Colleges** Conestoga – website review
- Fanshawe – website review
- George Brown – website review
- Humber – website review
- Mohawk – website review

Private Sector

- Financial Institutions
 - BMO – website review / personal contact (manager)
 - CIBC – website review / personal contact (manager)
 - RBC – website review
 - Scotia – website review / personal contact (manager)
 - TD – website review
- Consulting Firms
 - Boston Consulting Group – website review
 - McKinsey & Company – website review
- Health care
 - CAMH – website review / Lisa Duggan, Manager, Organizational Development
 - Mount Sinai Hospital – website review
 - Ontario Hospital Association – website review
 - St. Michael's Hospital – website review / personal contact (manager)
 - Trillium Credit Valley – website review / personal contact (manager)
 - University Health Network – website review

- Other
 - Ontario Public Service – website review
 - Halton Region – website review / Beth Allen, Leadership Development Program Manager

The chronology of the review committees' activities is depicted in Figure 20.

Section 3: Technology Review

Technology

In order to facilitate a successful training and development program, it is essential that the University invest in technology that is designed to support an enterprise-wide initiative. As stated by a focus group member, “poor quality of technology distracts from the content”³⁰ and ODLC technology was found to be dated. Without the proper tools for managers and employees alike, an organizational learning and development program is unlikely to be successful.

A learning management system that has been successfully implemented in some of the exemplar organizations is the SAP SuccessFactors Learning Management System. SuccessFactors is an end-to-end suite of HR applications; a next-generation enterprise HR system that is designed for the cloud. This open content HR solution supports the entire lifecycle of an employee and allows the employee to drive the learning experience. The key strengths are:

- Modern – delivers any modality or methodology of training anytime
- Personal – personalized learning path
- Measurable – assessable learning results

A January 2016 University of Calgary report³¹ on trends in leadership learning and development, states that:

Employees are now expected to be “cross functional” professionals, taking on new areas of responsibility and helping drive the sustainability of the company. Therefore, professionals are looking for learning opportunities that can get their skills up to speed quickly and efficiently. Programs that are two-day, in-class formats are still popular; however blended learning programs, programs which are partially online and in class, are also very appealing to professionals.

Updated technology and a robust learning management system would address many of the challenges related to working in a tri-campus, decentralized, and multi-generational institution by:

- Improving organizational and employee agility;
- Encouraging employee engagement;
- Automating compliance training;
- Delivering customized blended learning programs; and
- Providing quantifiable learning results.

³⁰ C/PM 1-5 focus group

³¹ <https://haskayne.ucalgary.ca/the-executive-connection/trends-leadership-learning-and-development>

Administrative Management System – ODLC Training Record and Internal System Organization

The training record can be accessed by the individual employee through the ODLC website using the personnel number and birth date as login credentials, refer to Figure 1. The training record will display all ODLC courses taken for the selected time period and their status of completion, refer to Figure 2. The training record accesses the data through the Administrative Management System (AMS). AMS uses the SAP software currently supported by the University of Toronto Information Technology Services. Focus group and ODLC staff feedback indicate that there is a general unawareness of the Training Record and how to access it.

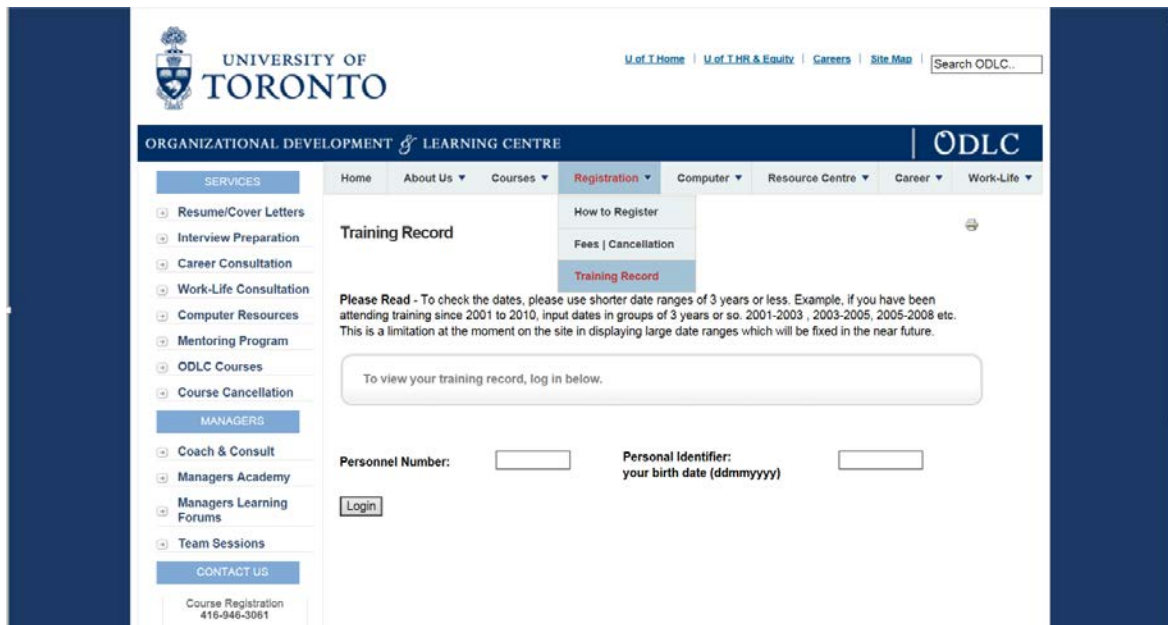


Figure 1: Training Record Log-in

Source: HR&E website

View Registration(s)/Training Record

Enter the period to be reviewed (dd.mm.yyyy) and click the View button.

Attendee ID: [REDACTED]

Courses/Events from: 14.06.2016 to: 14.06.2018

Bookings for [REDACTED]					
Name	Start	End	Location	Start/End Times	Status
ODLC-Understanding the University Govern	05.06.2017	05.06.2017	Governing Council Chambers	1:00pm-4:00pm	Completed
ODLC-Yoga with Steven	07.04.2017	07.04.2017	Activities Room - Hart House	12:00pm-1:00pm	Completed
IGNITE YOUR SPIRITUALITY	24.03.2017	24.03.2017	215 Huron Street, 6th floor, Rm 610	12:00pm-1:00pm	Completed
IGNITE YOUR NUTRITION	27.02.2017	27.02.2017	215 Huron Street, 6th floor, Rm 610	12:00pm-1:00pm	Completed
RIS:Reporting Basics	23.02.2017	23.02.2017	256 McCaul Street - First Floor, Rm 103	09:00am-12:00pm	Completed
Mindfulness Meditation Classes	21.02.2017	21.02.2017	569 Spadina Ave, Rm 307	12:10pm-12:55pm	Completed
Mindfulness Meditation Classes	14.02.2017	14.02.2017	569 Spadina Ave, Rm 307	12:10pm-12:55pm	Completed
ODLC-Orientation	07.02.2017	07.02.2017	41 Willcocks St, Main Floor Dining Rm	09:00am-12:00pm	Completed
FIS:WS-Managing Travel Expenses	06.02.2017	06.02.2017	256 McCaul Street - First Floor, Rm 103	1:30pm-3:30pm	Completed
Authentic expression, personal Presence	01.02.2017	01.02.2017	215 Huron Street, 6th floor, Rm 610	1:00pm-4:00pm	Completed
HRIS:AMS Overview HR 7-100	27.01.2017	27.01.2017	256 McCaul Street - First Floor, Rm 103	1:00pm-3:30pm	Completed
FIS:SC-Overview	26.01.2017	26.01.2017	256 McCaul Street - First Floor, Rm 103	1:30pm-4:30pm	Completed
IGNITE YOUR FITNESS	24.01.2017	24.01.2017	215 Huron Street, 6th floor, Rm 610	12:00pm-1:30pm	Completed

Logout end Return to ODLC Site

Top

Figure 2: Training Record Course List

Source: HR&E website

From a managerial perspective, the organizational unit and its data as set up in AMS are difficult to manage. The Course Guide folder organization used by ODLC cannot be intuitively correlated to ODLC's annual report produced for the VPHR&E. Refer to Appendix 6: AMS Organization – ODLC Course Categories. Financial information (e.g., course instructor invoices) is not consistently linked to the applicable course category as per the ODLC website or SAP course folders which renders automated financial analysis or measurement of course performance difficult. The use of a uniform method of organization and category definition would be an operational improvement. Refer to Appendix 7: Course Mapping – Course Categories for an illustration of how the course categories are mapped from the website to SAP and to the Annual Training Report.

A future concern is the redevelopment of the website and its technical compatibility with the AMS training record. The platform for the new website must be compatible with the current version of AMS in order to ensure that the training records can be accessed by users of the ODLC.

Section 4: ODLC Operations & Resources Review

Summary of Observations

The following significant observations were noted during the internal review of the ODLC:

- i. Lack of a formal documented Vision and Mandate
- ii. Lack of annual or multi-year Strategic/Operational Planning
- iii. Lack of established Key Performance Indicators (KPI's)
- iv. Low number of Leadership course offerings, relative to other categories of course offerings and no clear definition of what constitutes each of the course categories
- v. UTSC has instituted its own leadership program LEAD, outside the ODLC
- vi. Course capacity is under-utilized; approximately 1/3 of available seats at ODLC St. George training room were vacant on a yearly basis
- vii. Challenges exist for acquiring available space for sessions at UTSC and UTM
- viii. Fairly even distribution of organizational units are represented
- ix. Participation at 25% of target customers (PM and USWA Employees)
- x. The UTM campus is not proportionality represented in course attendance
 - UTM does not offer the equivalent breadth of courses as its comparably sized counterpart UTSC is
 - UTM lacks an ODLC champion
- xi. Slight consistently decreasing trend in the number of applicants from the outside campuses for the three central development funds
- xii. Overall low level of awareness of three development funds
- xiii. The website navigation and course descriptions are well suited for individuals already familiar with the ODLC services
 - Further confirmed by the PM/C focus groups
- xiv. Free training provided by Lynda.com and Homewood not apparent on the website
 - Not well known as validated by focus groups
- xv. ODLC folder organization in the AMS system is convoluted
- xvi. A one-to-one correlation of course categories between the different ODLC produced reports, website, and AMS setup does not exist
- xvii. Consultant fees have decreased over the past three years due to:
 - Low cost initiatives have been employed by UTSC staff and ODLC Career and Work-Life staff for their respective offerings
 - Primary cost saver: use of internal resources
- xviii. Lack of broader consultation in ODLC program planning
 - All consulted in this review expressed a desire to be involved

Review Objectives and Scope

An analysis of the ODLC was performed to determine the scope of its operations and services. The objective was to determine what programs and services the ODLC offers, how the ODLC is being used, by whom, and what key performance indicators (KPIs) if any are used to measure its performance.

The data used in the course of this review include the period:

- January 1, 2014 to April 30, 2017

All data obtained and/or used in this part of the review were unaudited and unverified. The data are assumed to be complete and accurate as provided by the ODLC and others including data obtained from the University's SAP system (FIS and HRIS).

The scope of this segment includes the review of ODLC's:

- i. Vision, mission, objectives and performance measures
- ii. Staff complement and training facilities
- iii. Stakeholders and customers
- iv. Curriculum development and delivery systems
- v. Branding and marketing
- vi. Financial resources and administration

Resources – Staff Complement and Training Facilities

Staff Complement

The ODLC staff complement (7.0 FTE) comprises the:

- Executive Director
- Manager (vacant)
- Career Coordinator
- Career and Work-Life Consultant
- Three administrative staff

In addition, HR Representatives from UTSC (.3FTE and .15FTE) and UTM (up to .3FTE) campuses assist with ODLC activities on their respective campus.

For the organizational chart of the ODLC, refer to Appendix 8: Organizational Chart.

At the time of this review, the ODLC staff comprised 6.0FTE including the Interim Executive Director.

ODLC Consultations

During the course of the Review, consultations were held with all ODLC staff from St. George as well as the HR representatives responsible for ODLC programming at the UTM and UTSC campuses. The interviews took place during the period of March 28, 2017 to May 30, 2017 (Figure 20) and were conducted on an individual basis. All ODLC portfolio staff were asked the same scripted questions to provide comparative responses, with the exception of the former Executive Director with whom two unscripted discussions took place concerning the overview of the ODLC. See Appendix 9: ODLC Staff Questionnaire.

The following ODLC and HR Employees were interviewed in the course of the Review:

- Former Executive Director ODLC
- Career and Work-Life Consultant
- Career Services Coordinator
- Learning Resource and Web Coordinator
- Information Officer and Office Assistant
- HR Administrator at ODLC
- Senior HR Consultant and Staff Development Coordinator at UTSC
- Human Resources Advisor at UTSC
- Human Resources Services Manager at UTSC
- Human Resources Administrator at UTM
- Family Programs and Services Director (unsolicited)

According to some of the ODLC staff, there exists a plethora of underutilized skills and talents within the ODLC team which could be used to streamline administrative work, as well as, enhance the level and quality of services provided by the ODLC.

Collective Responses

All interviews were conducted confidentially. The full list of observations for the sum of the interviews are included as Appendix 10: ODLC Staff Questionnaire – Summary. The following are the pertinent themes stemming from the interviews:

- Existence of an informal and non-systematic planning process
- Significant overlap in work responsibilities of staff
- Existence of untapped/underutilized skills and competencies of ODLC staff
- Lack of effective use of technology in training and administration
- Lack of ODLC brand promotion and marketing
- Lack of support for personal and professional ODLC staff development opportunities

ODLC Administration

The three administrative staff indicated that their job responsibilities comprise:

- Website administration
- Graphics creation
- Course and event registration and maintenance of employee training records
- Course and event logistical planning including hospitality and materials
- Financial administration for operations
- Financial administration of three development funds
- List serv. maintenance and advertising
- Special projects
- Client requests
- General administration
- Reception services
- Computer course facilitation

While the administrative staff responsibilities are clearly delineated in their Position Descriptions, there does exist some overlap of roles and responsibilities which serves well as backups to each other in the event of absences due to their cross training and the team approach to the administration of the unit.

Career and Work-Life Counselling/Coaching

The ODLC provides confidential individual consultations for staff with the Career Coordinator (.9 FTE) or the Career and Work-Life Consultant (.4 FTE). In addition, career transition services are provided consistent with the collective agreements of the respective unions.

The Coordinator and Consultant also plan the career and work-life courses and services offered at ODLC. Focus group attendees participating in this review expressed their support for maintaining this ODLC service. The utilization of the services are demonstrated below with the number of sessions held by each of the Coordinator and Consultant from 2014 to 2016 in Table 2.

Table 2: Service Type

Year	Service Types					Cancellations	Total
	CC1	CC2	CTS	DCC	FWA		
2016							
Consultant	90	133	0	0	8	15	216
Coordinator	110	143	130	37	0	26	394
2015							
Consultant	76	129	15	0	10	7	223
Coordinator	115	183	150	44	0	58	434
2014							
Consultant	83	108	0	0	3	12	182
Coordinator	171	166	88	50	0	34	441

Source: AMS extract – Service Type

Legend: CC1 – New career client

CC2 – Returning client

CTS – Career Transition Client

DCC – Dual Career Client

FWA – Client seeking Flexible Work Arrangements assistance

This demonstrates a highly dedicated effort of both time and personnel resources to the work-life and career services at ODLC.

Training Facilities

ODLC sessions are hosted on all three campuses, with the majority of sessions occurring at the St. George campus as seen in Figure 3³². On St. George, the ODLC maintains training Room 610 equipped for in-person training with a seating capacity of up to 45 people. In addition, there is a computer resources training room used for HR Hiring process testing, tutorial labs for staff, one-on-one training and to administer webinars (Room 606 capacity – 7, if used as a meeting space capacity – up to 25). This resource room is being repurposed for another department during the summer of 2017. There are 3 breakout rooms for meetings or small group training (Room 626 – capacity 12, Room 628 capacity – 6,

³² When UTM and UTSC staff travel to the St. George for training, it is at the discretion of the session participants' department to reimburse employees.

Room 636 capacity – 8). Room 628 is being converted to office space during the summer of 2017. In addition to the ODLC rooms, the ODLC shares the use of two rooms at 256 McCaul Street with a total capacity of 52 people.

Access to available and suitable space is a challenge at both UTSC and UTM when hosting ODLC sessions. Neither campus has a dedicated space. Courses not meeting the required minimum of 15 registrants are often cancelled up to five business days or less in advance of the session depending on the facilitator’s requirements. Exceptions are made for UTM on occasion when there are fewer than 15 registrants. UTSC books space on campus when they plan their annual course curriculum whereas UTM uses an ad-hoc approach to finding and booking space on a “just-in-time” basis.

With reference to Figure 3, the UTM campus is an under serviced location for on-site ODLC courses representing approximately 65 of all on-site course offerings. That is if course locations are to be considered proportionate to the size of the respective employee group, then approximately 12.5% of ODLC sessions should be held annually at the UTM campus.

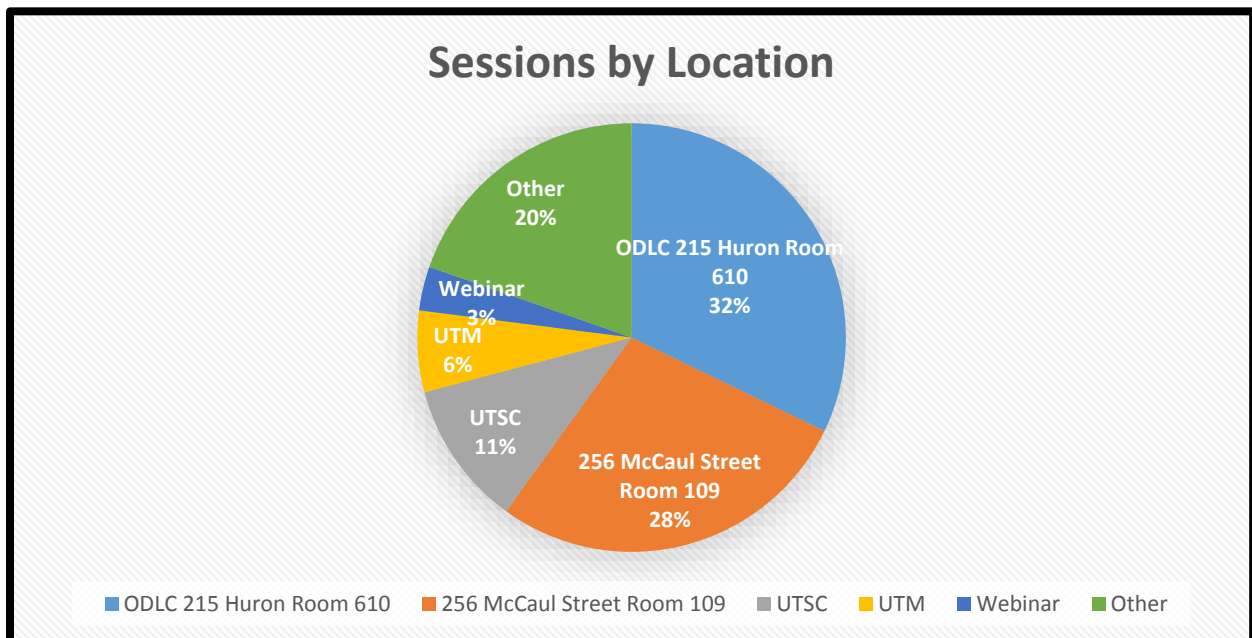


Figure 3: Sessions by Location

Source: Data from January 1, 2014 to March 28, 2017. Note: “Other” includes primarily St. George campus locations; downtown and unmarked locations included (e.g., Afternoon Session as location).

Course capacity is under-utilized at the ODLC St. George training Room 610 with approximately 1/3 of the available seats being vacant throughout the year, refer to Figure 4.

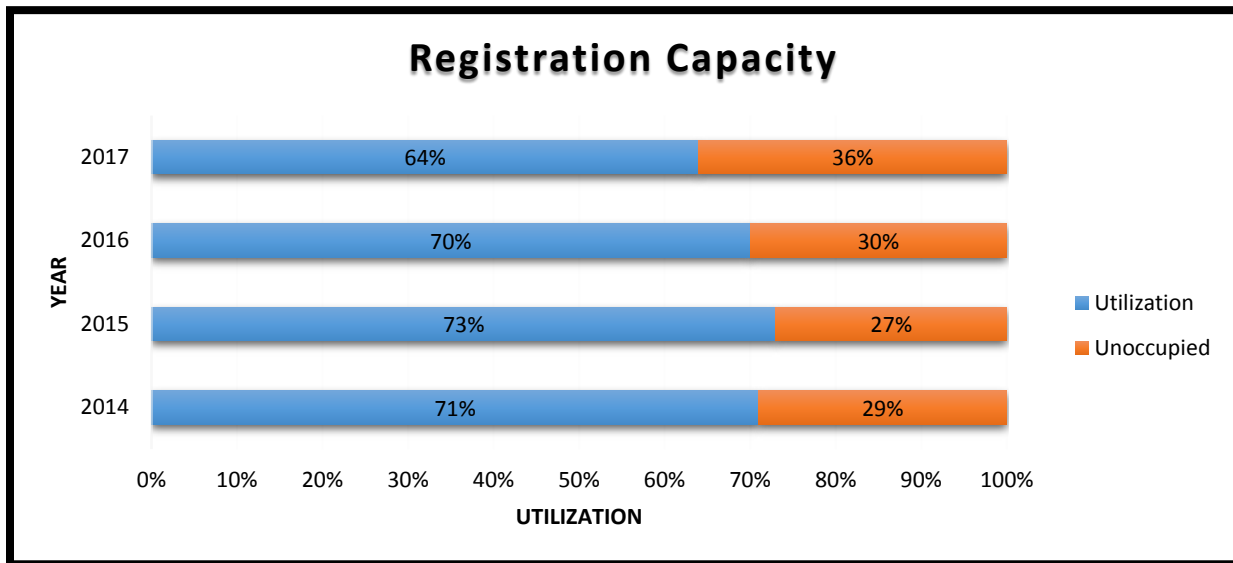


Figure 4: Registration Capacity (seats available)

Source: Data from January 1, 2014 to March 28, 2017, graphed by calendar year.

A combination of circumstances as listed are attributed to the under-utilization of available seats during a session:

- Lack of awareness of the course
- Lack of applicability or interest in the subject
- Lack of support from the employee’s direct supervisor
- Time constraints
- Courses not offered at the time of need for users
- Travel impediment from outside campuses

The training space at the ODLC is also utilized by multiple groups at no cost. For a full list of groups for this purpose and the ODLC over the past three years refer to Appendix 11: ODLC Facility as a Space.

Stakeholders and Customers

The ODLC serves a wide-ranging community of stakeholders and customers. The key-stakeholders for the ODLC are as follows:

- Human Resources
- Employees (frontline roles: PMs, Confidential, Unions)
- Managers (PMs, Confidential, Unions)
- Chairs and Deans
- UTSC
- UTM

The main employee groups the ODLC services comprise:

- PM Employees
- Confidentials
- USWA Employees

ODLC serves these employee groups across the St. George, UTSC and UTM campuses. All ODLC courses, services and programs are made available to all employees. It is important to note that the ODLC courses over the past three years have been predominately attended by the United Steel Workers and Professional Managerial employee groups, making these two groups the dominate users.

Figure 5 displays a comparative of all employee groups with at least one employee attending an ODLC course over the period of January 1, 2014 to March 28, 2017. Of this primary group of approximately 5,000 employees, approximately 1,300 (25%) represents unique users within the primary groups that utilize the ODLC courses each year.

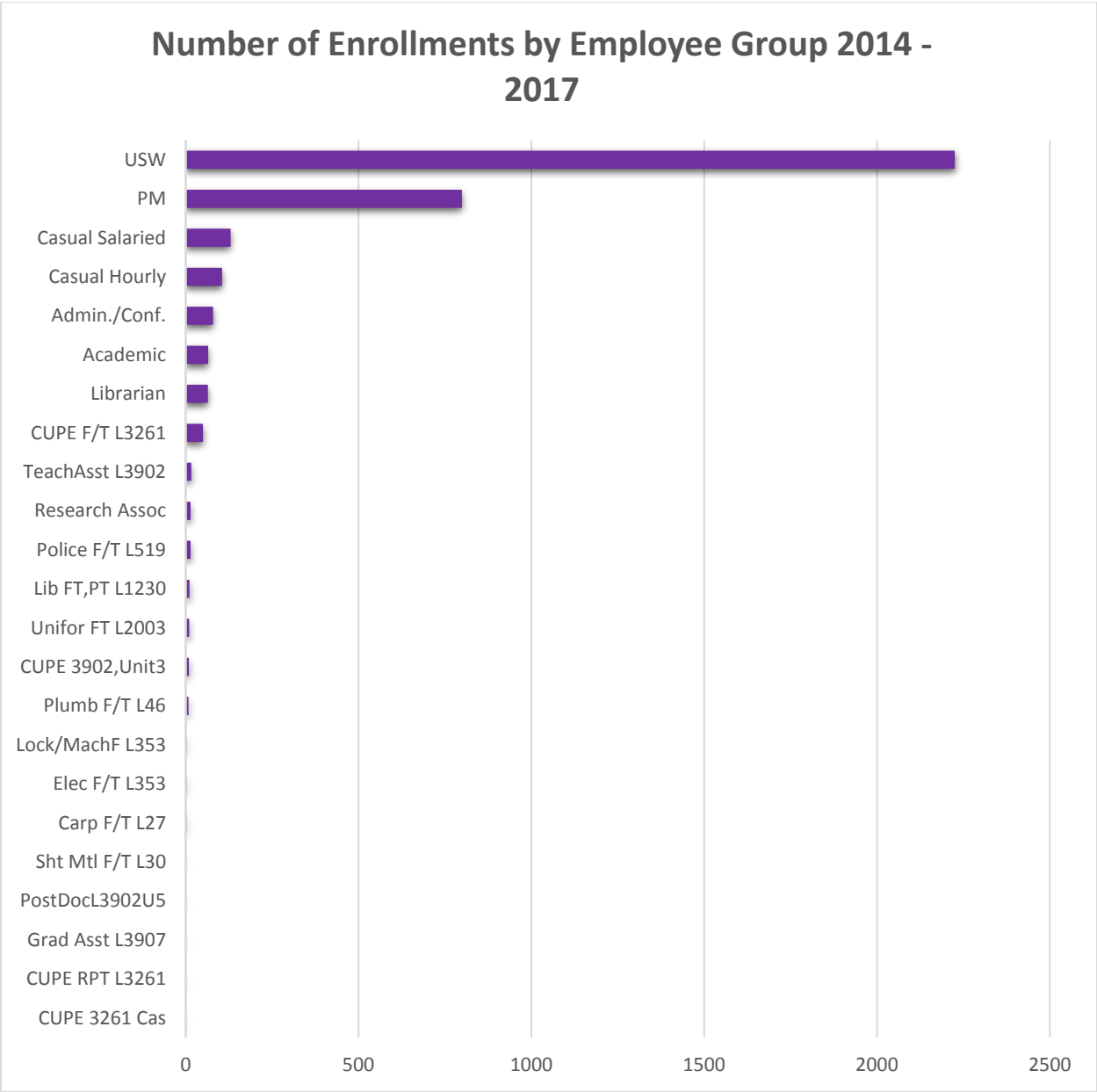


Figure 5: ODLC Enrollments of Course Offerings over the Past Three Years by Employee Group

Source: The attendees of ODLC’s course offerings over the past three years by employee group.

**Employee groups listed below Plumb F/T L46 contain at least one enrollment.*

There is a fairly even enrollment distribution of organizational units represented as demonstrated by Figure 6. No single or small cluster of organizational units dominates attendance at the ODLC courses however Human Resources personnel representing approximately 5% is the largest user group.

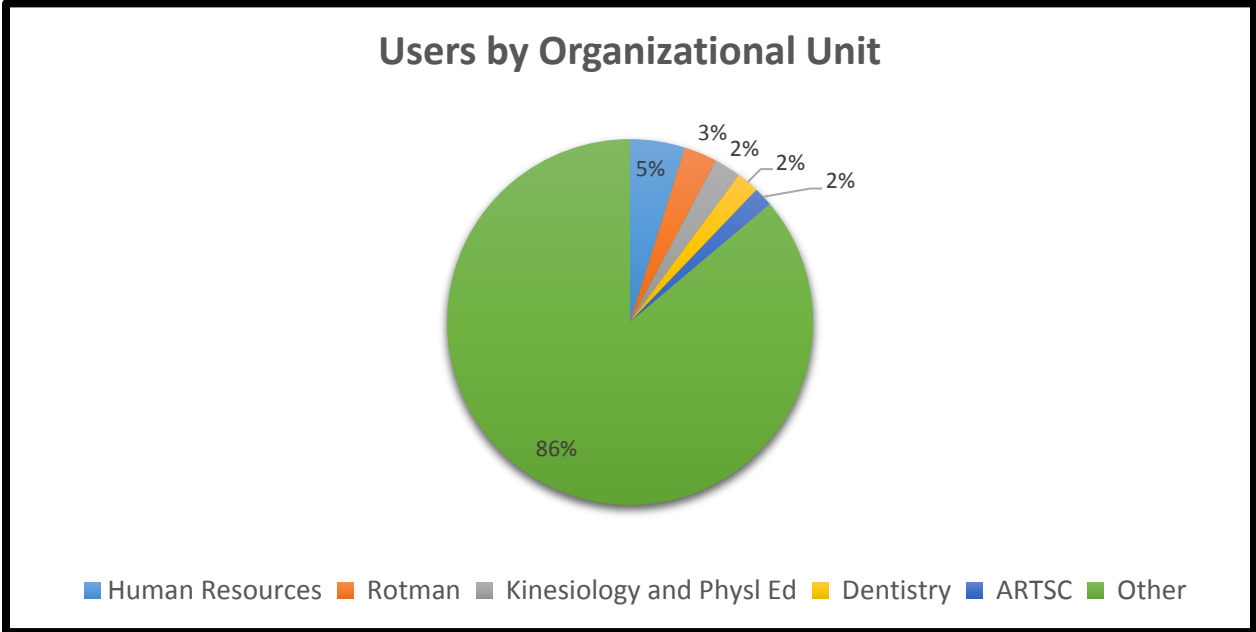


Figure 6: Users by Organizational Unit
Source: Data from January 1, 2014 to March 28, 2017

The average age of employees enrolled in the four main course categories (Professional, Work Life, Leadership, and Career) ranges from 41 to 49 years of age, as shown in Figure 7. Roughly 21% – 31% of participants are of the Millennial Generation as noted in Table 3. Millennial employees are defined as those born in years 1980 – 1995 according to the ODLC Millennial Focus Group Survey conducted in 2016 to identify their expectations of the ODLC. The results indicate that this group has a high demand for “Leadership” training and education. However as noted in the ‘Curriculum Development and Delivery’ section of this report, courses offered under the Leadership category were among the lowest of each of the course category offerings, refer to Figure 8.

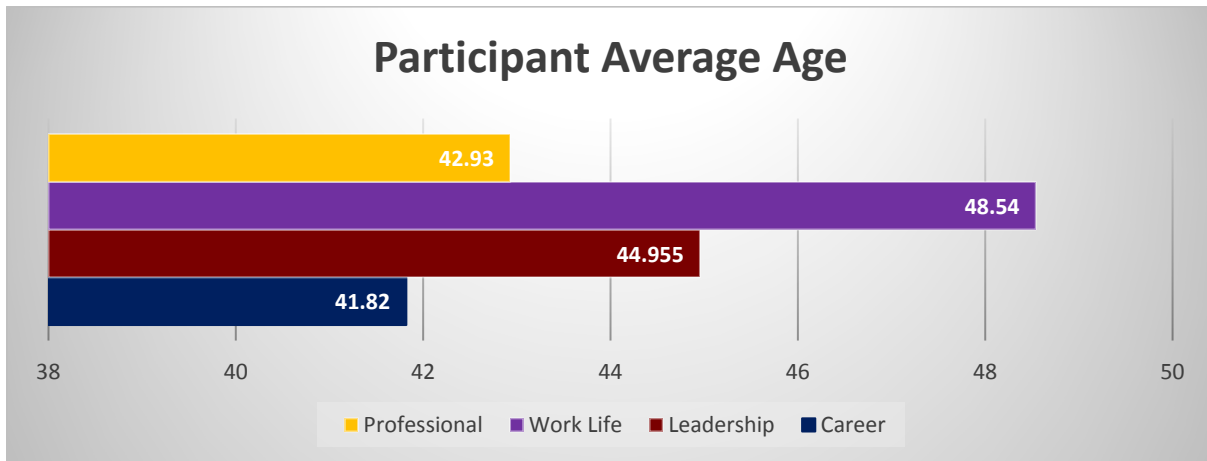


Figure 7: Participants’ Average Age

Source: Data from January 1, 2014 to March 28, 2017

Table 3: Millennial Participation

	Professional	Work/Life	Leadership	Career
Absolute Number of Millennials Participated	1643	1221	770	448
Percentage of Millennials in Category	32.96%	21.19%	20.78%	36.72%

Source: AMS extract – Millennial Participation

Curriculum Development and Delivery Systems

A review of the Learning Curriculum, ODLC Website, and SAP System noted the following:

Learning Curriculum

Planning of the ODLC offerings for the year is performed during a one-day internal meeting of ODLC management with limited input from the Career Coordinator and Career and Work-Life Consultant. No front-line staff input is solicited or broader consultations with the University or institutional peer groups including UTSC and UTM are conducted. Even though surveys are conducted after each course for feedback from participants the surveys are not formally used in the planning exercise.

The review of the curriculum for 2016-2017 indicates that course offerings are organized under four distinct categories: Leadership, Communication, Professional, and Career. The relevance of the course within its category classification is not always intuitive, (refer to the Brand and Marketing Awareness section of this report). Each category has some overlap to other categorical groups when viewing courses included within. In addition, the breadth and types of course offerings indicate that the ODLC course curriculum lacks focus and direction and likely is trying to be too many things to too many people. This was apparent from the Committee's efforts in navigating the website during the course of the review.

The four course categories (Leadership, Communication, Professional, and Career) are also included within the Work-Life (WLB) and Webinars which are separate categories of their own. With reference to Figure 8, the courses classified within Career and Leadership have below average number of offerings. It is noted as well that Webinars may include courses that would be classified under other categories if the courses were held in-person.

For a list of courses in the Curriculum, refer to Appendix 12: Courses by Category. The categories listed correspond to those of Appendix 7: Course Mapping under the heading Training Events Statistics – SAP Extract.

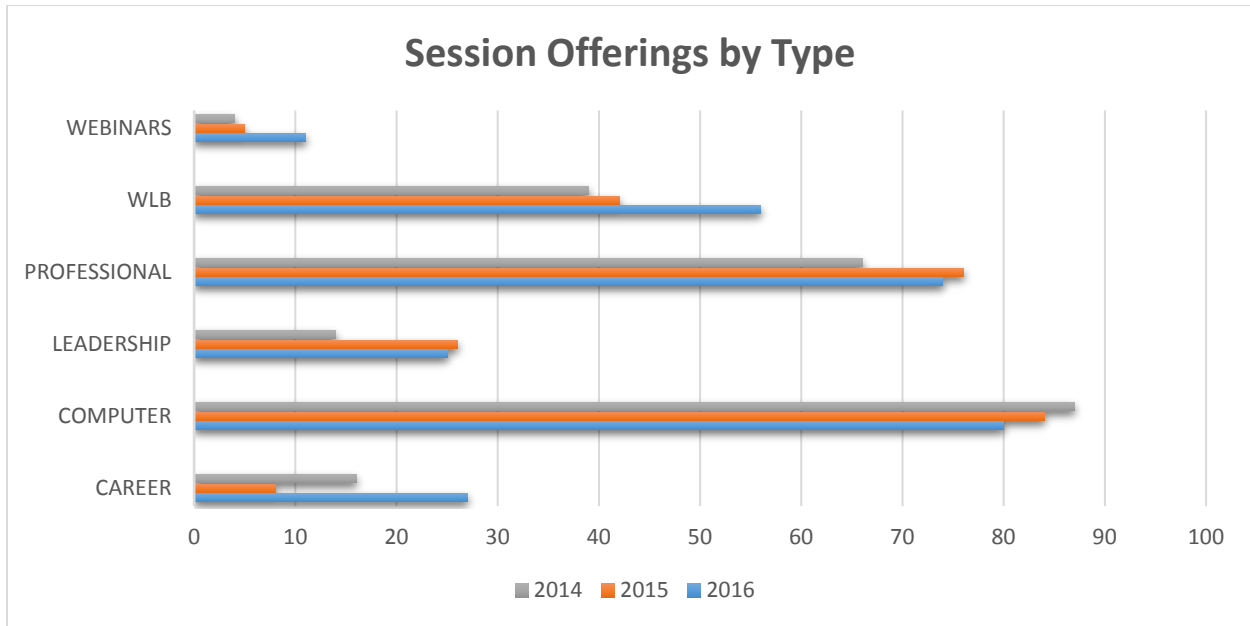


Figure 8: Session Offerings by Type

Source: Data from January 1, 2014 to March 28, 2017, graphed by calendar year.

Mentoring Programs

The UTSC campus has created its own mentorship program for Leadership Education and Development (LEAD) program. This annual program is in its third cohort with 13 paired mentor/mentees. This is independent of the Rose Patten Leadership Program (RPLP).

The RPLP is a mentorship program developed by the ODLC at St. George for all three campuses. The RPLP consists of two streams: Leadership which is designed for mentees in levels PM 4 – 6, 1AP, pay bands 15 – 19, and the Learning stream for mentees in levels PM 1 – 3, C3, pay bands 11 – 14. The participation for the past three years is as follows in Table 4:

Table 4: Mentoring Program Enrollment

Year	Leadership	Learning
2017	15 pairs (began with 16)	17 pairs +1 mentee (began 18 pairs)
2016	14 pairs (began with 17)	18 pairs (began with 19)
2015	17 pairs	17 pairs

Source: AMS extract – Mentoring program enrollment

Course Delivery

Program delivery methods include but are not limited to the following:

- In person courses using low/no cost internal faculty and staff instructors or paid external consultants.
- Webinars
- Online resources – website information
- Learning Lab – used by Human Resources for employee hire testing
- Podcasts online
- Career community – online resource
- Mentorship program

- Career and work-life individual consultations
- Homewood EFAP provided courses
- Lynda.com – online computer courses

The main delivery system of course content, services, and resources is in person at the ODL facility as well as at 256 McCaul Street.

External Consultant Course Facilitators

ODLC uses a number of external consultants to facilitate in person course delivery. According to the former Executive Director external consultants are used due to the lack of interest from internal instructors or subject matter experts in leading staff development sessions. As a result, a significant amount of the ODL operating budget is spent on consultants although as noted in Figure 9 the amount spent has been decreasing since 2015. A standard contract is in place for use with external consultants. Refer to Appendix 13: Contract Template for a copy of the 2016-2017 contract.

For a listing of courses provided by internal facilitators, refer to Appendix 14: Internally Instructed Course List. For courses where external consultants are contracted, refer to Appendix 15: Externally Instructed Course List.

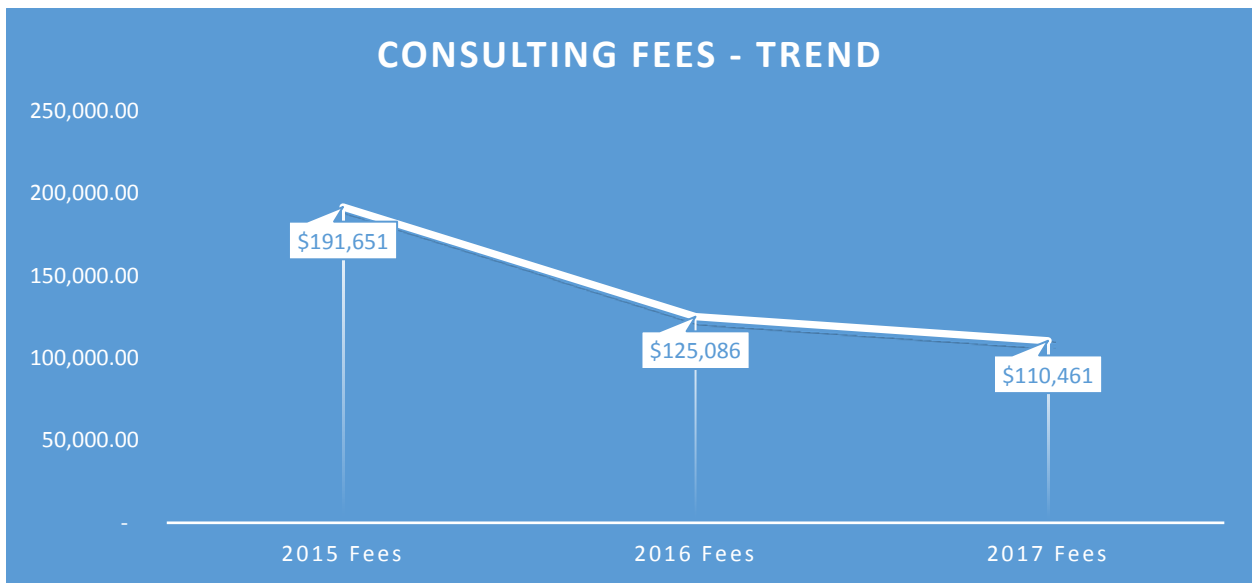


Figure 9: Consulting Fees Paid – Trend

Source: AMS extract – Consulting Fees Trend from 2015 – 2017

The number of course offerings has remained relatively steady over the three-year period reviewed, refer to Figure 8. Career and Work/Life offerings have been gradually adopting a low-cost model using volunteer internal resources at the University. Faculty and staff may offer their services by volunteering, or receive remuneration through payroll, and/or gratitude gift cards. Several successful initiatives partnering with the Hart House Fitness Centre and the Goldring Centre have been at no cost to the OLDC.

Course Cancellations

Cancellations of ODLC offered courses over the past three and a half years remain low, refer to Figure 10 and Table 5. Note the 2017 calendar year contained the first three months of data in this analysis. The rate of cancellations of sessions put on by the ODLC is trending upward. The cancellation policy requires courses to meet a minimum of fifteen employees at UTSC and UTM, and eighteen employees for courses held at St. George registered to hold the session. Employees who cancel within less than three working days of the course start date are subject to a cancellation fee charged to their department.

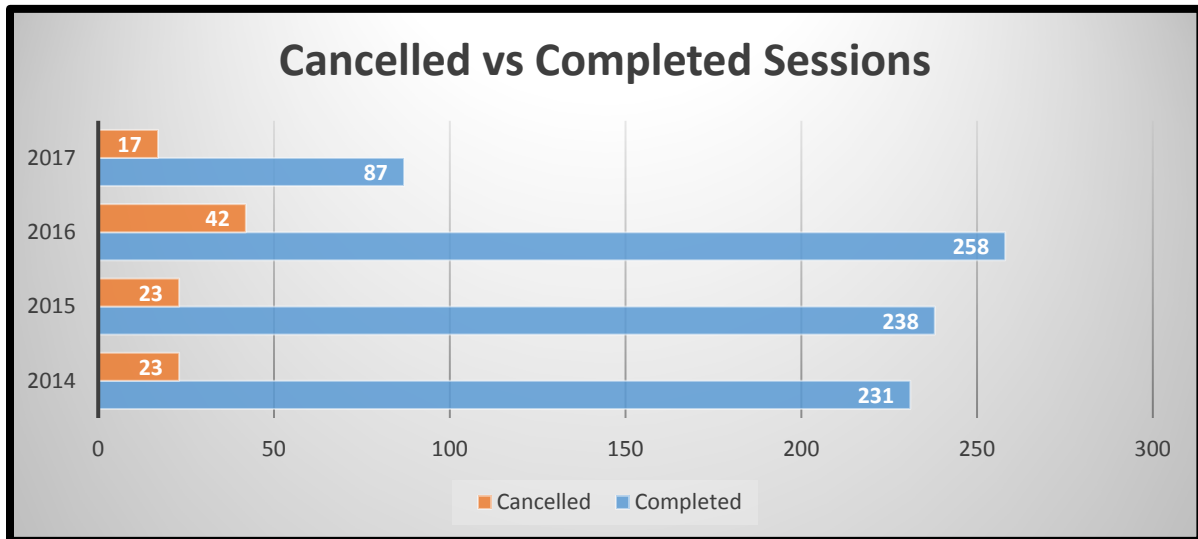


Figure 10: Cancelled vs. Completed Sessions

Source: Data from January 1, 2014 to March 28, 2017, graphed by calendar year

Table 5: Cancellations as a Percentage of Completed Sessions

	2017	2016	2015	2014
Cancellations as a Percentage of completed Sessions	16.34%	16.28%	8.8%	9%

Source: Data from January 1, 2014 to March 28, 2017, analyzed by calendar year

Course Duration

The average duration in hours for each course provided by the ODLC has been declining over the period of 2014 to 2017, refer to Figure 11. Sessions offered by the ODLC are marginally shorter moving forward.

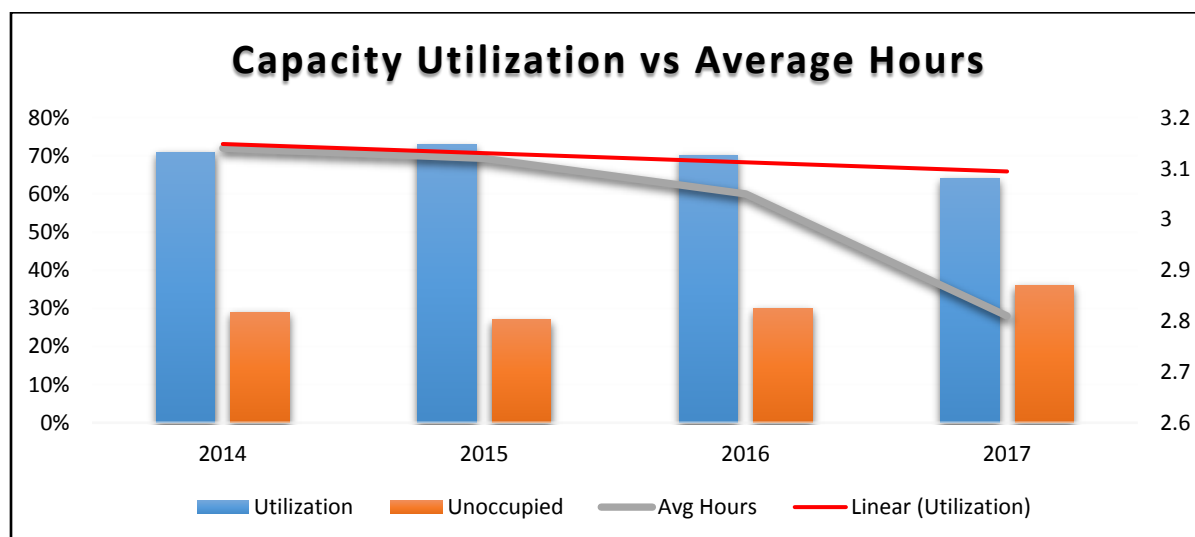


Figure 11: Capacity Utilization vs. Average Hours

Source: Data from January 1, 2014 to March 28, 2017, graphed by calendar year

According to the former Executive Director, shorter courses were implemented in an attempt to increase enrollment. However, course participation as measured by room capacity has decreased.

Brand Awareness and Marketing

The ODLC engages approximately 25% of the target employee groups or stated another way, approximately 1,300 of the total 5,000 employees. The challenge faced by the ODLC deals with how to reach and engage the remaining 75%. Marketing efforts aimed at increasing awareness of the ODLC services and offerings is done mainly by:

- Listserv emails
- The ODLC Website
- Word of mouth
- Quarterly university-wide new employee orientation hosted by Human Resources

UTSC advertises the ODLC courses and services being offered at the UTSC campus on their Human Resources website. UTSC tracks employee attendance for each course, and maintain two listservs for their staff and faculty to encourage registration. A periodic survey of training and development needs for the UTSC staff is conducted online by UTSC Human Resources.

The UTM campus provides a link to the ODLC website and redistributes ODLC listserv emails.

Website

The website navigation and course descriptions are well suited for individual's familiar with the ODLC services. For those unfamiliar, our observations noted that there appears to be a "disconnect" between the course categories and how the courses are presented in the public facing documents. For course definition and course calendar on the ODLC website, the following screenshots are presented. The ODLC website address is: <http://www.odlc.utoronto.ca/>.

Featured in Figure 12 is the home page of the ODLC website. Offerings are listed on the left hand and top of page menus.

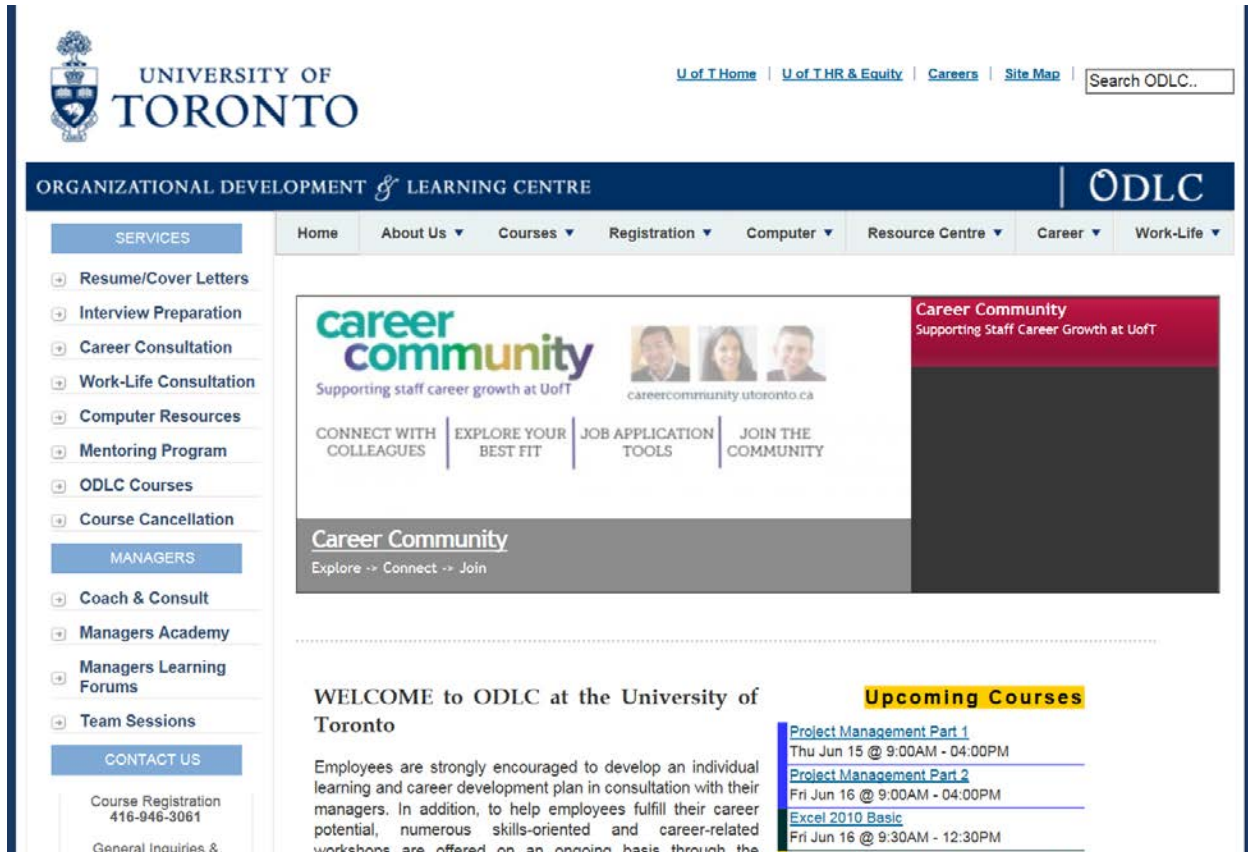


Figure 12: ODLC Homepage

Source: HR&E website

The ODLC website categorizes courses into eight categories: Business, Leadership, Communication, Work/Life, Productivity, Student Life, UTM and UTSC. The two campuses UTM and UTSC include courses from each of the first six categories. Figure 13 captures the definitions of each of the course categories offered at ODLC. Refer to the Appendix 7: Course Mapping for the grouping of courses from the website's eight to the Annual Training report of four categories.

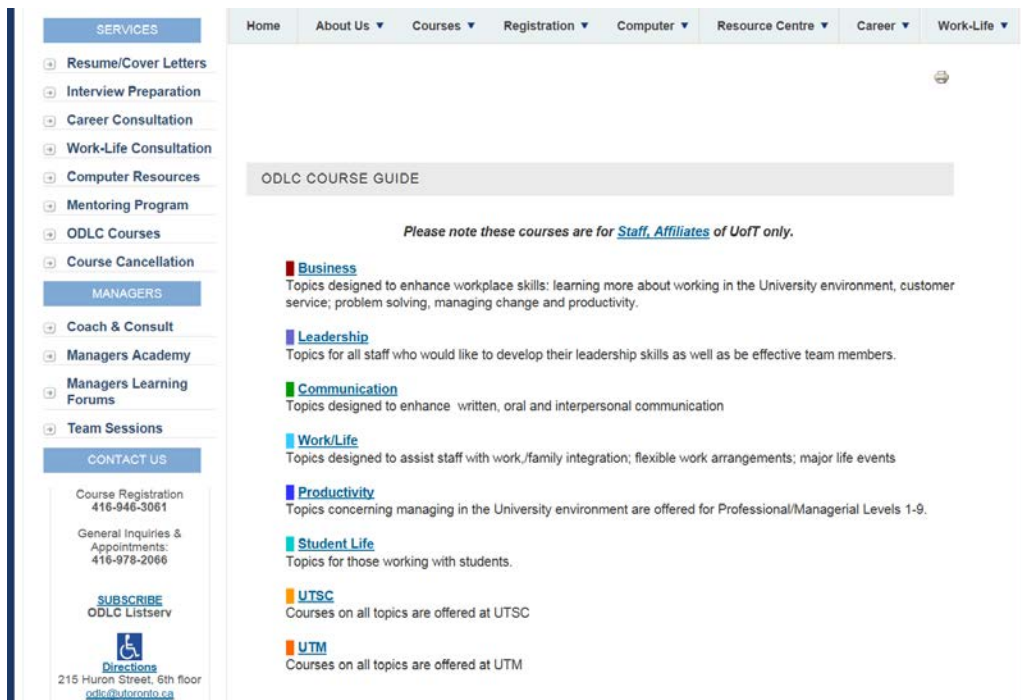


Figure 13: ODLC Course Guide

Source: HR&E website

The course calendar is featured in Figure 14 and provides the user with the ability to search courses by dates and filter by course topic.



Figure 14: ODLC Course Availability / Search and Filter

Source: HR&E website

To navigate the ODLC website requires an investment of time on the part of the user to determine which course category will include the desired training. As noted during the focus group discussions, the website is difficult to navigate and locate the desired information. Services utilized by ODLC involving the University’s Employee & Family Assistance Program (EFAP) provider Homewood such as webinars, and Lynda.com a computer online training service do not provide statistical usage reports to ODLC. The Review Committee could not intuitively locate the Homewood webinars and Lynda.com links prior to being informed by ODLC staff that the services were offered. Many focus group participants were unaware of these services being offered.

Google Analytics are used by the Website Coordinator to view website traffic information. Figure 15 showcases the ODLC website traffic over a three year period from January 2014 to January 2017. Website traffic has remained relatively steady on average. Pageviews and Unique Pageviews are defined as follows.

Pageviews:

- Upper bound of 50,000 on left axis
- Total times any page is viewed by anyone

Unique Pageviews:

- Upper bound of 30,000 on right axis
- Total times a page is viewed each session
 - Multiple views of the same page are counted as one view



Figure 15: ODLC Website Traffic Analytics

Source: Google analytics

On average visitors to the website spend one minute on visited sections. The predominate pages visited are:

- AMS course guide (SAP system – FIS, HRIS, RIS AMS)
- Computer course guide (Microsoft suite of products)
- Resume and cover letter information
- Mentoring
- ODLC staff
- Training Record
- Course Calendar

Section 5: Financial Analysis

Financial Resources – Operating Budget

In fiscal 2017 the ODLC had a net operating budget of \$1,262,241 and \$1,175,212 of actual net expenditures.

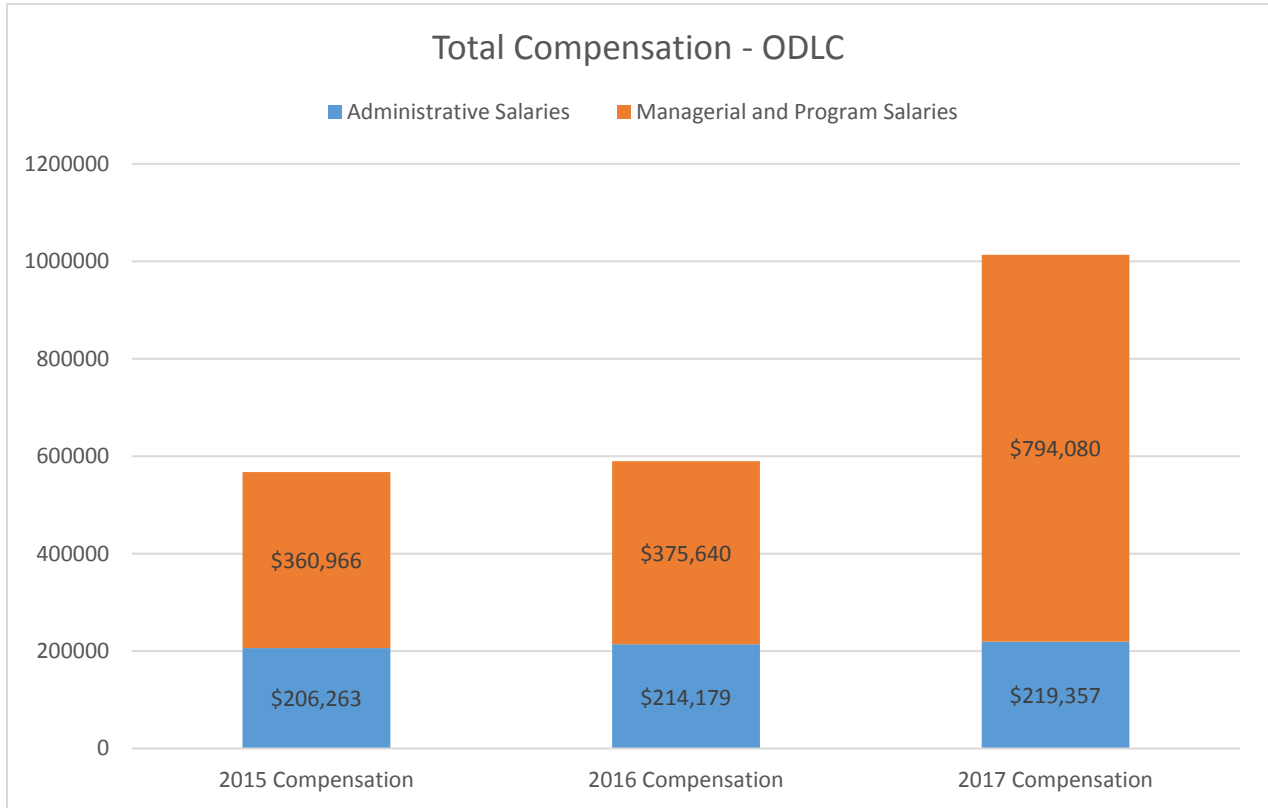


Figure 16: Total Compensation³³

Source: AMS extract – Total Compensation

With reference to Figure 16, Fiscal 2017 total compensation totaling \$1,013,437 increased 72% over fiscal 2016 due to the realignment of compensation expenses for the former Executive Director and the Director of Family Care that were previously included in the compensation budget of the VPHR&E Fund Centre. Also of note is that the former Manager retired in Fiscal 2017 for which the position is currently vacant and the former Executive Director retired during the course of this review.

³³ Total compensation includes Salaries and Benefits for ODLC staff only.

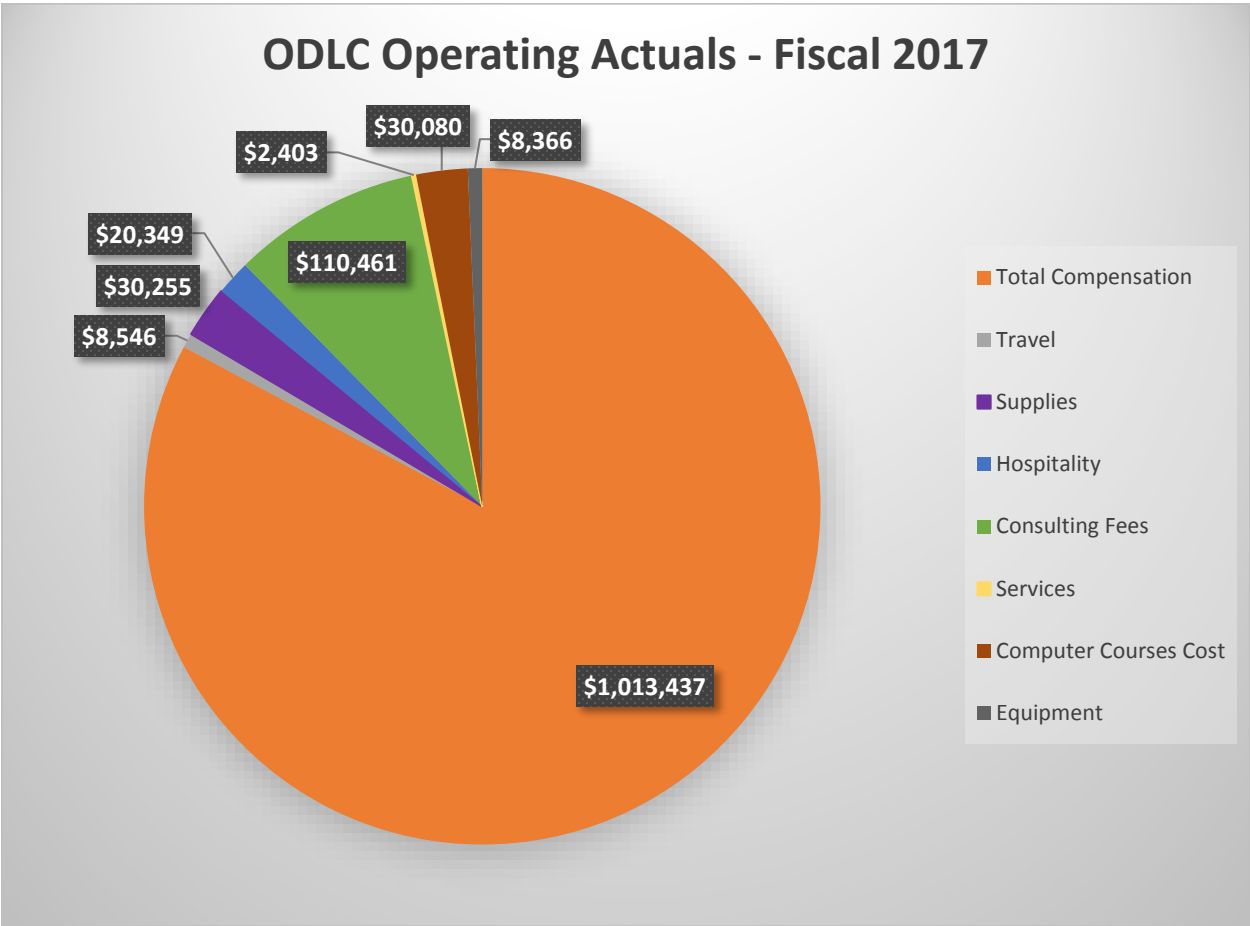


Figure 17: ODLC Operating Actuals

Source: Fiscal 2017 Operating Actuals

As noted in Figure 17, external Consultant Fees are the second largest expenditure after ‘Total Compensation’ and as noted previously in Figure 9 is at a 3-year low.

Each campus provides hospitality services from their own budgets for courses/events occurring on their respective campus.

Travel includes both employee travel required for professional development, which is almost exclusively ODLC management and counsellors and occasional visitor travel (external providers for ODLC offerings, found in 2017 only).

Facilitated computer training sessions open to all U of T employees. The cost of these computer courses is fully recovered by the fee charged to departments. For 2017 the internal recoveries totaled \$43,397.

Financial Resources – Three Development Funds

The ODLC manages three central funds to support staff pursuing their career development: the Conference fund, Professional Development fund, and Educational Assistance fund. These are separate from the tuition waiver benefits offered by Human resources for courses taken at the University. The three funds are not directly promoted on the ODLC website, but are found on the Human Resources and Equity website as part of the employee benefits. The three focus groups consulted in this review had a mixed level of awareness of the purpose and availability of these funds. The three funds for fiscal 2017 end were utilized by only 8.5% of the OLDC targeted users.

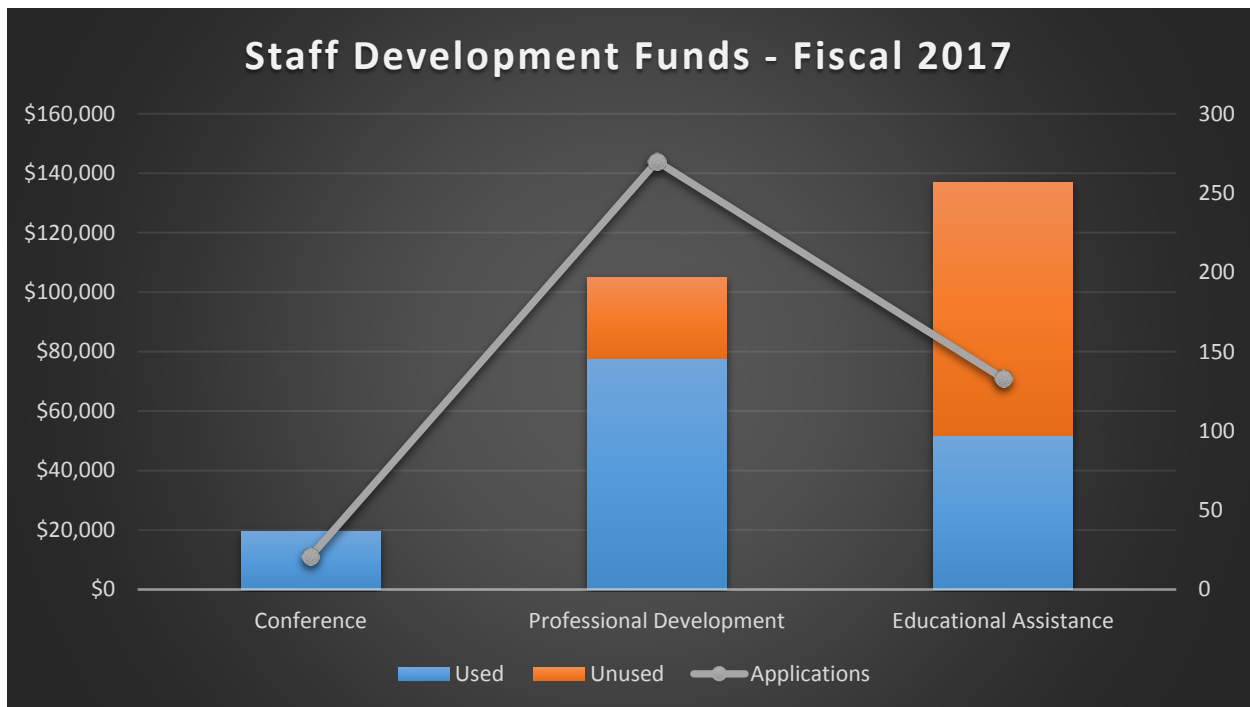


Figure 18: Staff Development Funds – Fiscal 2017

Source: AMS extract – Staff Development Funds for Fiscal 2017

Figure 18 plots the utilization of budgeted fiscal 2017 dollars for each fund along the left axis. The total number of applications for each fund is plotted on a secondary axis on the right.

Use of the funds overall is fairly consistent over the past three years with full utilization of the Professional Development and Educational Assistance funds not being achieved during that period. The Conference Fund was initiated in Fiscal 2017 without a budget assigned until Fiscal 2018.

Of the total funds utilized during Fiscal 2017 approximately 17.5% of the applications were submitted by repeat applicants who had previously accessed the funds. Employees in this group often submitted multiple applications.

The Funds are described below.

Conference Fund

- 2018 Budget \$125,000
- 2017 Actual \$19,588
- Purpose: To assist departments in offsetting the costs of sending appointed Research Associates (R.A.) to conferences.
- Eligibility: Reimbursement is at a maximum of \$1000 per fiscal year per R.A. to cover conference registration, hotel and travel.

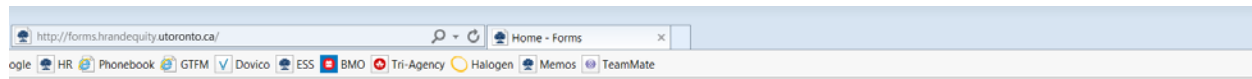
Professional Development Fund

- 2017 Budget \$105,000
- 2017 Actual \$77,696
- Purpose: Assist departments in offsetting associated costs of sending appointed staff to conferences, workshops, and seminars.
- Eligibility:
 - PM/Confidential employees: 60% cost of registration up to a maximum of \$500 per event.
 - Unionized employees: 60% cost of registration up to a maximum of \$300 per event.

Educational Assistance Fund

- 2017 Budget \$137,000
- 2017 Actual \$51,734
- Purpose: Assist all appointed staff in covering costs of tuition for courses taken on a part-time basis outside of the U of T at accredited post-secondary institutions.
- Eligibility: Covers 50% cost of tuition costs for courses.

The Professional Development, Educational Assistance and Conference funds are included on the Human Resources & Equity website in the benefits section under forms as indicated at Figure 19. The ODLC website does not have the forms advertised directly on it. As noted in the focus groups, there is a mixed level of awareness of the existence of the three funds.



Education & Professional Development

The Educational Assistance Policy provides employees with the opportunity to further their formal and informal education outside of the University of Toronto. Educational assistance can be used for credit and non-credited courses at a recognized postsecondary institution external to U of T.

Activities covered by the Professional Development Fund are offered outside the University and include:

- Workshops and seminars of up to three (3) days' duration
- Conferences of up to one (1) week in length.

If you have any questions regarding an application, please call 416.978.6496.

Applications & Guidelines for Educational Assistance / Professional Development:

- [Application & Guidelines for Faculty, Librarians & Unionized Staff \(PDF, 38 kB\)](#)
- [Application & Guidelines for Professional & Managerial and Confidential Staff \(PDF, 38 kB\)](#)
- [Research Associates / Senior Research Associates Conference Fund Application Form \(PDF, 69 kB\)](#)

Educational Benefits for Dependants:

- [Scholarship Program for Dependants of Faculty, Librarians, Professional / Managers & Research Associates](#)
- [Tuition Waiver Form for Dependants of Active, Retired or Deceased Staff \(PDF, 38 kB\)](#)

Faculty & Staff Tuition Waiver Request Forms:

- [CAW Staff Tuition Waiver Request Form \(PDF, 164 kB\)](#)
- [Confidential Staff Tuition Waiver Request Form \(PDF, 162 kB\)](#)
- [CUPE 1230 Staff Tuition Waiver Request Form \(PDF, 164 kB\)](#)
- [CUPE 2484 Staff Tuition Waiver Request Form \(PDF, 163 kB\)](#)
- [CUPE 3261 Staff Tuition Waiver Request Form \(PDF, 164 kB\)](#)

Figure 19: Staff Development Funds

Source: HR&E website

Section 6: Data Gathering & Analysis

Data Gathering and Analysis

The following sources of data and information was utilized in the course of the internal review of ODLC.

Data and Methodology

- Data is unaudited
- Data extracts for financial analyses from Administrative Management System (AMS)
 - Financial Information System (FIS) reports
 - Fund Centre reports
 - Payroll Distribution report
- Data provided by the ODLC staff
 - Annual Training Report
 - Course feedback surveys
 - Raw data extracts from EASI team
 - Raw data compilations from ODLC staff
- ODLC website exploration
- Focus groups of Professional Managerial and Confidential employees

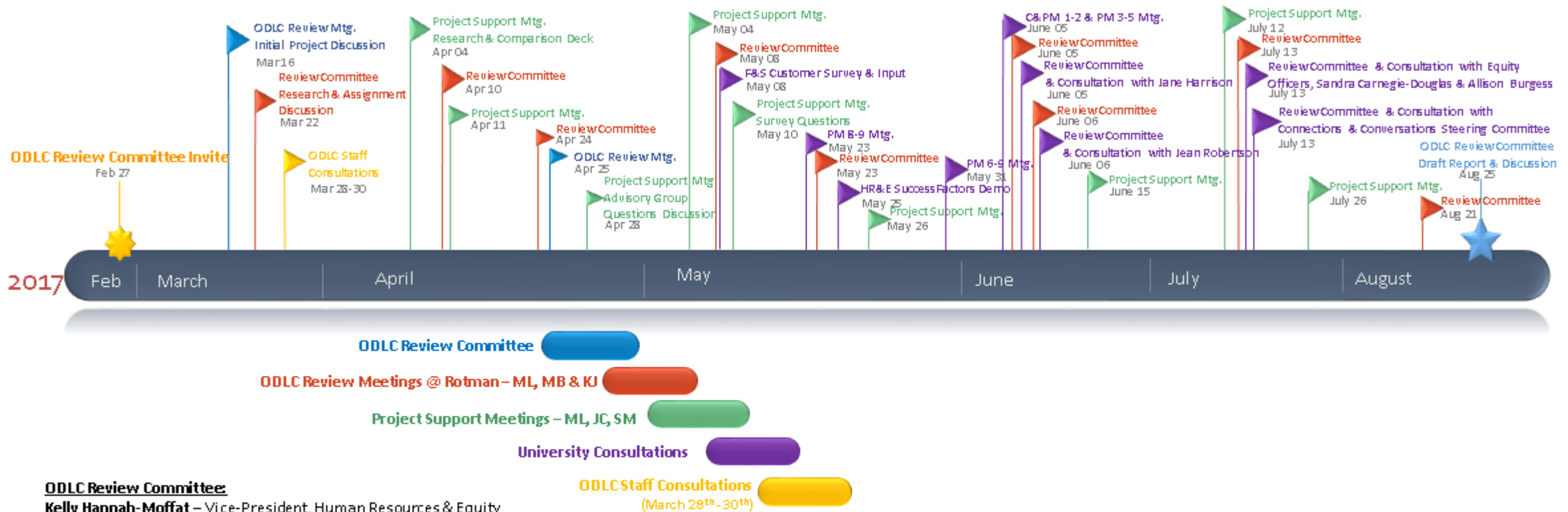
Interviews were conducted with the ODLC Executive Director and portfolio staff at all three campuses.

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ODLC Project Chronology



ODLCC Review Committee:

- Kelly Hannah-Moffat** – Vice-President, Human Resources & Equity
- Erin Jackson** – Executive Director, Integrated HR (iHR), Division of HR & Equity
- Rosalyn Figov** – Director, Operations & Finance, HR & Equity
- Mark Britt** – Director, Internal Audit
- Dr. Katharine Janzen** – Coordinator, M.Ed. in Higher Education Leadership Cohorts, OISE
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- Susan McNaught** – Executive Assistant to CAO - Joseph L. Rotman School of Management
- Kristine Tkachenko** – Senior Auditor, Internal Audit



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ODLC Report Attachments

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