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HR Case Study

INTRODUCTION



Since day one, WE has been an organization driven by cause. No matter how small we started or how big we've become, our drive to create impact around the world has been the fuel in the engine that sustains our entire organization.

From our early days in 1995 as a group of 12-year-old volunteers working out of a family basement in Thornhill, Ontario, to what we've become today—a 1,000-person strong organization with a charity operating on four continents and a social enterprise that sells socially conscious retail products and experiences to fund the charity—our dedication to cause has never wavered.

Our primary focus as an organization has always been, and always will be, creating impact. It's the North Star that guides us in everything we do.

We've realized over the years it takes more than just the fuel of our team's shared dedication to cause to create a big impact around the world. The engine of every organization is its people.

We decided to produce this human resources-focused Case Study because we know there are people out there trying to build social purpose organizations who may be questioning themselves in the same ways we did over the years. *How do we manage the constant tension between choosing to invest finite resources directly into service programs for beneficiaries versus investing those resources to build infrastructures and systems for employees? What are the right investments to make at each stage of our growth? How can we always strive to better take care of our team members?*

At times—many times—we felt like we were in over our heads. When we began our journey as a “startup” non-profit there was no search engine to type in key words for tips on creating a successful charitable organization. The statistics were, and continue to be, daunting: According to one study, over 35 percent of non-profits cease to exist within 10 years of their founding, and that number rises to over 50 percent after 20 years.

Human resources is a particularly challenging function for charities and social enterprises because they are inherently under-resourced. They are mission-driven entities, powered by cause and employee dedication, yet often operating on meagre budgets. Their very nature often creates burnout among passionate and over-worked staff. Survival can be a struggle.

Like many non-profits, we started out as a purely volunteer organization, so every dollar went directly to our cause of helping free child slaves from forced labor in far-away countries, and our mission of empowering youth to make a difference to a cause of their own choice, in their own communities. Initially, it never occurred to us to redirect funds into administering our growing charity.

It's not an easy decision to divert funds from a non-profit's ultimate cause—every dollar raised is so precious—and put it into sustaining and growing your organization. Our co-founders struggled emotionally with this moral dilemma, and to this day they have never taken a penny of salary from Free The Children or WE Charity.

But in order to grow and scale, a non-profit is like just like any other organization or company. It has to invest in itself—in its people and in its infrastructure—in order to sustain itself and grow its impact. We are proud to foster diversity among our workforce, with women holding 77 percent of our leadership positions. And in anonymous third-party surveys, 90 percent of staff say they are connected to our organization's mission and 96 percent believe we are making a difference in the world.

We're sharing our story, in part, because the definitive startup manual for non-profits has yet to be written. Not that we have all the answers, and this isn't meant to be a comprehensive human resources guide, but by sharing our story, we hope to share our intentions, stumbles, failures, learnings and pursuit of continuous improvement. This document is meant to inspire others to join us in striving to keep getting better, keep building and strengthening their organizations, and investing in their people—all toward expanding their own impact in the world.

As we made our way forward, we had many questions and were grateful for the ability to reach out to incredible mentors for their guidance and willingness to serve as our sounding boards. And while we've had stumbles along the way, we've always done our best to learn from mistakes and never repeat them. In our daily work to create impact for the international communities we serve and in our commitment to our staff, who are so integral to everything we do, we are always striving to be better. We hope that other social purpose organizations, as you chart your own path, can learn from our mistakes and also find reassurance that you're probably doing better than you think, no matter where you are in your journey.

In many academic disciplines, and especially in business school, case studies are powerful tools for gaining insight from an organization as it's coming to terms with, and solving, a particular challenge. We've broken our story into five distinct phases. Each represents a specific time in our 23-year history, hallmarked by a key theme and the human resources challenges unique to that period of growth. From our first phase of "100 Percent Volunteer-Driven Activism" to our current period of "Continuous Improvement," we hope that younger organizations can recognize themselves in one or more of the phases; both to be reassured that they're on the right track and to be able to anticipate what's likely coming next.

It's our hope that this case study will benefit our peers as we explore the unique challenges faced by non-profit and social enterprise organizations. We know what it's like to be driven by the mission to do good, above all else.

As we've said, cause is the fuel, people are your engine. The best way—the only way—to fulfil your mission is through your people. Take care of them and your organization will flourish, and your impact will scale.



A handwritten signature in black ink, appearing to read "Russ McLeod".

Russ McLeod
*Executive Director,
ME to WE*



A handwritten signature in black ink, appearing to read "Dalal Al-Waheidi".

Dalal Al-Waheidi
*Incoming Executive Director,
WE Charity*

100 Percent Volunteer-Driven Activism (1995–2003)

We launched Free The Children in 1995 with limited assets: A dozen kids sitting around a suburban kitchen table with a fax machine and a Commodore 64 computer, making posters to raise awareness about child labor on the other side of the world.

We were young social activists working out of the family home of WE co-founders Marc and Craig Kielburger. In an extraordinary act of generosity, the Kielburger parents donated the use of their home to the fledging charity, and the parents moved into the grandfather's home. Young people lived and worked at the Kielburger home. Staff were volunteers and interns who happily worked for pizza instead of pay. Legend has it that so much pizza was consumed in those days that boxes would often be stacked like Lego bricks up to the ceiling.

Volunteers often worked until 2 or 3 a.m., writing newsletters, stuffing envelopes, packing health kits or discussing strategy for the next campaign before breaking out sleeping bags.

And that was fine. We were young idealists; activism was all we knew. Each day was some variation of breakfast, work, work, bathroom break, work, work, eat (hopefully), sleep. And then repeat again the next day.

Those who showed up to volunteer were drawn by a shared mission and stayed because of dedication to the cause. Early success was created through hard work, teamwork and self-sacrifice. These were not casual volunteers with nothing better to do. These were hard-core activists determined to make a difference. Any free time we had, and there wasn't much of it, was spent going to protests against companies or governments we felt weren't doing enough to protect kids.

Exhausted, staff would crash on the floor for a few hours in sleeping bags. When we got tired of wearing the same four T-shirts for months at a time, on laundry day we'd trade them for someone else's four T-shirts. New wardrobe!

Young people heard about this fledging charity in different corners of the country, and they started their own chapters. Erin Blanding was one of them.

As an undergraduate student at Mount Allison University in Sackville, New Brunswick, Erin raised funds toward a WE school-building project in Kenya by selling hot dogs (including a vegetarian option) outside the campus pub on Saturday nights. Erin went on to join the staff at WE and now, 14 years after that campus fundraiser, she is the organization's Head of Global Innovation and Development.

When most of the early members were still in high school, Free The Children hired its first employee, an executive director. The charity also launched its first social enterprise (before they knew the term "social enterprise") to pay the executive director's salary, selling the book Craig wrote about his trip to South Asia and raising funds.

But it was a constant struggle to keep up with paying even that single salary. At one point, Free The Children was down to its last \$16 in the bank.

Despite meager resources, the organization was attracting lots of attention. Everything changed when Oprah Winfrey discovered the Kielburgers. She invited Craig, at age 16, to appear on an episode of her daytime television show that featured young people making a positive difference in the world. During the show, Oprah committed to building 100 schools with WE. And with that generous commitment, Oprah changed the trajectory of the organization. She provided infrastructure and expertise that we previously couldn't afford—for one, the capacity to hire engineers (our school buildings have since survived earthquakes in Haiti and China).

We took on the responsibility of monitoring and evaluating the schools. That meant we built our own capacity rather than funding others to do the work for us. We started the process of becoming a more skilled, more business-like operation. While most social purpose organizations fail in the first couple of years, the Oprah effect turbocharged ours.

Those hired in the early years, many with freshly minted university degrees, joined for minimum wage and worked around the clock. To have a formal human resources function was a pipe dream at that time.

Eventually, other university graduates sought out the organization. Russ McLeod, now the Executive Director of ME to WE Social Enterprises, was hired as the organization's first business grad, in large part (he thinks) because he showed up to his interview with an actual resume. Russ earned \$16,000 a year and was expected to help out with whatever was needed while applying his business smarts. In addition to his salary, Russ negotiated for room and board to be included. That amounted to a sleeping bag, a mattress and space on the floor of a room he shared with two others on staff. "It was an amazing time. You've got to remember that none of us had families at this point. Pay didn't matter. It was all about the cause," he says.

WE Charity's Incoming Executive Director Dalal Al-Waheidi joined Free The Children in 2002, having earned a bachelor's

degree in international development and political science as an international student at nearby Trent University. Her academic background, paired with real-world experience monitoring development work in Ecuador, made her a clear fit for the organization's growing International Projects department. Hired first as a co-ordinator and becoming one of our first official staff members, Dalal quickly moved into a director role. She recalls very late nights fueled by her deep commitment to the empowerment of women and youth—and occasional power naps on the office couch.

As more staff were hired, working out of the Kielburger family home was no longer sustainable. We moved into rented offices in

downtown Toronto that had no phone system—just a single line. No receptionist and no cellphones, either. There were fights to access the donated computers. With no defined roles and no structured work hours, everyone worked on everything.

Despite that breakneck dedication, we soon learned that hard-core activism on its own wasn't all that effective. The governments and companies we protested didn't worry too much about a small troop of high schoolers and recent university graduates. At times, it was hard to get people to take us seriously.

KEY INDICATORS

During this start-up phase, WE grew from its founding in 1995 and an all-volunteer workforce to hiring its first paid employee in 2000, to 12 staff in 2003.

Milestones

- ✓ A group of justice-seeking 12-year-old activists establish Free The Children.
- ✓ Launch of summer youth conferences (which would become Take Action Camp).
- ✓ First youth trips to Kenya, India, Nicaragua, Thailand, Ecuador, Arizona and Mexico.
- ✓ School-building begins in in Nicaragua, Kenya and Ecuador.
- ✓ Development work begins in Haiti, India, Tanzania, rural China and Ghana.
- ✓ First speaking tour: Embracing Cultures.

You know your non-profit is in Phase 1 when...

- ✓ Volunteers and/or board members do much of the work.
- ✓ All staff and volunteers perform virtually the same functions; it's about getting the job done. Period.
- ✓ Long hours and hard work are driven by a unified dedication to cause—not by salary or conventional HR benefits.
- ✓ Workspaces are unstructured; desks and phone lines may not even exist.

Support for employees

- ✓ Free pizza and Kraft Dinner fuel long hours.
- ✓ Slowly begin to hire employees with outside experience to support the organization's growth.
- ✓ New staff quickly make strong connections to co-workers. The feeling of being with "their people" keeps the team going through tough challenges.

WHY I AM WE

"I started volunteering with WE in high school and joined the early staff in 2000. Some of our projects in Haiti were among the first Oprah had invested in, and I split my time between Canada and Haiti. I was very touched by the plight of urban street youth; there are so many street kids. Haiti has more orphans than any other country in the Western Hemisphere. Colleagues helped me raise enough money to open a drop-in center for street kids and, soon, we had 200 street kids coming to us. Some came with gunshot wounds or suspected HIV. We let them sleep on the carpet, gave them facilities to wash their clothes by hand and a stove they could cook on. Some were hardly younger than me—yet I became a mother figure to them, and they called me "Mummy." One of the boys had a daughter who would have been three-and-a-half or four at the time. He eventually made the decision to go back to the streets, saying the one responsible thing he could do would be to leave the little girl with me. That's how I became a mother at 21."

Erin Barton

Hired: 2000

Now: Chief Development Officer, Partnerships

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"In those early years, we hired and looked for people who were searching for a calling—a job, but more than that, a way to make meaningful change. We were driven entirely by the mission. And the relationships pulled us through times of challenge. It was about getting to work alongside your favorite people every day. We all grew up together and, years later, we would stand side-by-side at weddings, funerals and all of life's various chapters."

Kim Plewes

Hired: 2005

Now: Senior Advisor, Executive Office

Partnership Learnings (2004–2009)

Like so many early social purpose organizations, we worked and grew at breakneck speed, without a clear plan on how to do it, but a driving vision that youth had a voice and could make a difference.

We were organizing speaking tours in schools across North America and running frequent workshops to teach kids how to take action on the issues they cared about. We helped run Youth in Action clubs and coached numerous students to fulfill their community service requirement before high school graduation.

Inevitably at the end of these sessions, kids would line up to talk to us and ask questions. Russ recalls, “There would always be three or four of those kids who didn’t want to leave. They were so happy to learn that there were people just like them—highly passionate—but slightly depressed that not everyone shared their vision. We needed an event for all of those kids across North America, and that’s how WE day was born.”

The first WE Day, an event to celebrate the power of youth to create positive change and, importantly, *to make caring cool*, was planned for October 19, 2007, at Toronto’s Ricoh Coliseum.

Putting on such a big event came with proportionally big costs, and that created a dilemma to solve. We didn’t want to use our precious funding dollars to pay for things like arena rentals and audiovisual equipment, and we certainly weren’t going to make school kids pay an entry fee. So, we looked to companies and other organizations that would partner with us to cover the costs.

That was a big turning point for us. We had been a powerful novelty for our first few years—children advocating for other children—and we could direct media attention to almost any issue. But at our core purpose—freeing children from forced labor—we were failing. We realized that we had to go back to the drawing board with our theory of change and the experience of getting WE Day off the ground made us begin to examine a new way of creating impact. Yes, demonstrating outside a company’s headquarters could generate awareness-raising media coverage for a day; but what if we worked *with*

large organizations to effect change from the inside out? We learned that we could influence real impact by being selective about who we partnered with. If a company wanted to be part of WE Day, *they* had to meet our standards for social impact. It was a powerful motivator.

Meanwhile, putting on the arena-sized event took an enormous effort from staff to plan and execute. Sixteen-hour shifts were the norm in the days leading up to the event, and on WE Day itself.

The expansion of WE Day to other cities, along with our organization’s overall rapid growth, had a big impact on our culture, and it put pressures on our organization to create structure and work-life balance.

Russ McLeod, who ran WE Day for five years, says the impact on staff who traveled with the youth-empowerment event would later cause the organization to introduce compensatory measures like working from home, time off in lieu and reduced work weeks during the off-season. “It was so immense. We saw the potential for staff to burn out, so we tried to solve for that.”

Clearly, this was more than a group of “jack of all trades” to handle. HR was becoming more important than ever. We recognized that our people—the engine of everything we do—needed better and more experienced support. We needed to become more professional.

The homegrown talent of the organization transitioned into specialized roles in business development, school relations, PR, marketing and other key operational areas. But they needed assistance from the outside world in the form of highly trained, experienced professionals to manage our rapid growth.

So, we went to market to find seasoned talent—writers, graphic designers and IT experts, to name a few—with focused training and experience. We even hired our first HR manager. It was the right move at the right time.

But we soon started to realize that we were largely onboarding the wrong people.

KEY INDICATORS

During this phase of rapid growth, the organization moved out of the founders' childhood home and into the big city.

Milestones

- ✓ The team comes to see that freeing child slaves alone won't make a lasting difference to the issue of child labor—but tackling the root causes of poverty *could*. Out of this realization, the five-pillar WE Villages approach to sustainable development (then called Adopt a Village) is born in 2004.
- ✓ The first WE Day show is held in Toronto, with the mission of making caring cool. 6,700 students and educators attend.
- ✓ Monthly Global Voices column launches in Canadian newspapers beginning in 2007. The column will be picked up by more than two dozen additional newspapers in coming years.
- ✓ 500th Free The Children-built school opens in 2007.

You know your non-profit is in Phase 2 when...

- ✓ For the first time, structures and processes required for continued growth and success are outside the skill set of founding groups.
- ✓ The organization needs to move away from the “all hands on deck” approach and toward role specialization.

Support for employees

- ✓ We hire our first HR professional, introducing formal people-operations processes.
- ✓ Professional development for all employees.
- ✓ Management staff receive regular one-on-one coaching sessions.
- ✓ Staff housing makes it affordable for new university grads to live and work in Toronto.
- ✓ Health benefits added to staff compensation in 2006.
- ✓ Employee Assistance Program (EAP) introduced in 2008 to offer mental health, wellness and work-life balance services.

WHY I AM WE

“When I joined the organization, there was only a handful of us on the team. Yes, there were lean resources, to the point of working out of a makeshift garage that was converted into an office space. Our job descriptions were wide open and they kept on evolving depending on the opportunity that was in front of us. Whether we had the skills or not, we were the only ones that were there to do it—so we did.”

Renee Hodgkinson
Hired: 2002
Now: China Director

“Growing up in Palestine and Kuwait, power outages and air strikes were an everyday part of my family's life. While I was fortunate to be supported in my wish to pursue an education and work abroad, I saw friends married off or forced to stay home as caregivers. Looking back, I can see these difficult events are what established my commitment to advocating for women and youth, fighting racism and advancing education. When I discovered Free The Children as an international student in Canada, I saw that same deep commitment, and knew immediately I wanted to be an ally to their mission. In my nearly two decades with the organization, I've carved my own path, largely because I pushed to create roles that didn't exist before. I am passionate about diversity at WE and if you look at the number of women in senior leadership positions—77 percent—we are doing very well. It's not enough to want to change the world: We need to make sure that change is representative.”

Dalal Al-Waheidi
Hired: 2002
Now: Incoming Executive Director, WE Charity

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“When the tsunami hit Southeast Asia in December 2004, my role was to visit the region to assess how we could help. Although WE has never been a rapid relief group, we had multiple projects throughout the region, and wanted to selectively deploy resources. Our learnings, failings and carefully considered experiments in the field led to the creation of the WE Villages model. It has been 17 years since I joined the organization and more than a dozen since I came to South Asia to help. The work certainly not always been easy, but it has always been deeply rewarding.”

Lloyd Hanoman
Hired: 2001
Now: South Asia Director, WE Villages

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“Because the mission of WE is important, it attracts and recruits a different kind of person; one who works harder, longer and without the same assumption of financial remuneration as someone who works for a corporation. People who work for non-profits take an enormous amount of pride in where they work and what they do; they are energized by making a difference and they want to see the results. The other side is that mission-driven people can also become more easily disillusioned when their expectations are not met in that regard. However, when people come for the mission, they are generally more likely to forgive mistakes that might happen along the way because they see something larger.”

Dr. David Baum
Organizational Psychologist, Consultant

Growing as Social Entrepreneurs (2009–2014)

It was becoming clearer that the concept of “everything can be achieved through hard work” was no longer practical or sustainable. Staff and leaders working long days provided great on-the-job experience. Organizing an event like WE Day, with no previous event-planning experience and working 16-hour days to pull it off, was a great adrenaline rush for young, impassioned staff. And it came with a big payoff in terms of irreplaceable experience. But none of these efficiently moved us forward as an organization.

We were also facing resource challenges. As WE Charity grew internationally, we struggled to find a sustainable funding source. With more charities competing for fewer donor dollars, we realized we needed a new model to support the long-term charitable goals of WE Charity, as well as crucial behind-the-scenes needs that few wanted to fund, such as administration, research and monitoring and evaluation activities.

That’s when we launched ME to WE, which offers sustainable products and life-changing experiences for consumers to shop, travel and learn. ME to WE helps sustain WE Charity by donating. Proceeds from the sale of those products and experiences to WE Charity, and in other cases, simply absorbs various costs, enabling WE Charity to have an extremely low administration rate (around 10 percent) compared to other Canadian charities.

After adding the social enterprise to our organization family, our impact continued to scale. So, too, did HR demands. Our staff was changing. We were a youth empowerment organization trying to integrate people accustomed to working with governments and corporations.

While we had begun to bring on specialists, we weren’t doing it in the right way. We focused too much on resumes and not enough on what motivated the people behind them. That was a mistake we had to learn from. It was hard for us as activists to understand that not everyone was motivated by the same singular dedication to cause. Not everyone wanted to work hard for sustained periods and do whatever it took to get the job done, whether it was carrying boxes or coming in on a Saturday. That was a wakeup call.

By adding new staff, we were also getting bigger—a lot bigger. By 2014, Population WE had significantly increased, with the number of full-time employees growing to 370 in Canada alone.

According to Robin Dunbar, an Oxford University anthropologist and evolutionary psychologist, communities begin to break down

if they exceed 150 members. As proof, he points to the fact that Hutterites intentionally limit the size of their communities to 150—and, rather than surpassing that number, members will split off to begin a new community.

It turns out 150 is a critical number for start-ups as well. “There is no question that the dynamics of organizations change once they exceed about 150 or so,” Dunbar told the online news platform *Quartz* as part of its examination of why so many companies experience problems when they surpass 150 employees. “When you hit that size, you don’t know each other personally as well,” agrees Dr. David Baum, an organizational psychologist who has consulted with WE for many years.

Small organizations can operate in a more or less democratic fashion, with major decisions made by the group—and that was the WE experience as well when the staff count remained below Dunbar’s Number, as it’s known. “People at WE were very close with each other and they loved each other like family. They treated each other like friends more than like colleagues,” Dr. Baum recalls.

As an organization, we realized we needed to take some steps to address these growth issues. First, we created “core values” to set the tone at work and when recruiting new staff. Among the values were “Commitment and passion,” “Shameless idealism,” “Get the job done. Period” and “Empowering youth to change the world.”

Tightened processes were being rolled out across the organization in recognition of the fact that staff needed support amid the rapid growth and change happening around them.

“It is a double-edged sword, how quickly we’ve grown,” says Alex Meers, director of performance and organizational development within the People Operations and Culture team at WE. “Growing pains are part of the challenges our people will face.” It’s the organization’s job to support staff through the inevitable challenges, both by maturing internal processes and providing the means for staff to acquire the skill sets they need to succeed.

In order to provide needed support and clearer road maps for employees, we both increased levels of management and introduced a rigorous annual planning process. Both of these together allowed us to communicate goals for the year ahead—for the organization as whole, as well as for our teams.

Senior management took on an active role in visioning how each of their own teams would contribute to organization goals, and help individual staff understand how their work ladders up to those goals. And they are closely connected with each of their

team members, providing immediate support, guidance and mentorship when it's needed. You could look at the process as a way of striving to set our own version of Dunbar's Number, wherein each team is a community of just the right size.

All of this was about getting better as an organization—because the better the engine, the greater the impact.

KEY INDICATORS

Rapid growth continues throughout this phase, both in Canada and internationally.

Milestones

- ✓ WE's Adopt a Village (now WE Villages) sustainable development model is creating impact in partnership with communities in eight countries.
- ✓ WE's Baraka Health Clinic begins serving some 30,000 community members in the Maasai Mara. It's one of the only health clinics in the region.
- ✓ Speaking tours and other leadership programming continue to grow, taking issues such as bullying prevention and access to education directly to young people in their schools.
- ✓ Continued growth of WE Day with expansion into 10 new regions annually.
- ✓ ME to WE, the social enterprise arm of the organization, launches in 2009 to provide sustainable funding for the charity side.
- ✓ ME to WE Artisans program is created, providing sustainable economic opportunity for 550 Kenyan women.
- ✓ First ME to WE bricks-and-mortar store opens in Toronto.
- ✓ Take Action Camp, a summer sleep-away camp offering youth leadership and social action programming in Ontario and Arizona, celebrates its 10th anniversary in 2013.

You know your non-profit is in Phase 3 when...

- ✓ Challenges emerge as the number of employees surpass "start-up" size.
- ✓ Professionalization of processes and infrastructure are required to create efficiencies, as increasingly large and sophisticated outside stakeholders demand high-quality results.
- ✓ Staff and organizational growth create tension within the team.

Support for employees

- ✓ Professional and personal growth opportunities allow young staff to "grow up" within the organization.
- ✓ Rigorous new annual planning process gives managers and their teams a framework for

prioritizing and mapping out their work for the year ahead, providing clear expectations and definitions of success.

- ✓ Biennial Staff Trip gives employees from all departments the chance visit ME to WE immersive travel destinations in Kenya, India and Ecuador. While enjoying vacation time, they get to see up close the impact WE has made in developing communities.
- ✓ New staff perks: an extra day off on your birthday (2010) and whole-office shutdown over the winter holiday (2011).
- ✓ The organization's first CRM helps employees work more efficiently and saves labor.

WHY I AM WE

"In my career with WE, I've been able to ride the wave of an organization that has grown quickly. I've learned so much and gained so many opportunities in various roles. As the organization grew, it pushed me to grow, too. I started as an intern and worked my way up through frontline programs and workshops in schools, then moved into management. The reason I'm in HR now is I'm interested in learning how have we grown and become so successful. The answer for me is the people: their values, their skills and the attitudes they bring to their work."

Alex Meers

Hired: 2008

Now: Director of Performance and Organizational Development, People Operations and Culture

"WE was able to weather change because the people-first nature of the organization didn't waver. We never lost focus of why we were here and what impact we were trying to achieve, both in the communities we're partnering with on sustainable development, and with the people we work with locally and internationally. We knew that's what we were working toward and *that* everybody could agree on."

Nora Griffiths

Hired: 2011

Now: Head, ME to WE Trips

Restructuring for the Long Term (2014–2016)

June Callwood was one of Canada's most renowned journalists, authors and social activists, affectionally by some as "Canada's Mother Teresa." Callwood had an unstoppable drive and sense of justice that made her successful in both her writing and social activism careers.

Not long before her death in 2007, Craig Kielburger met with her to seek her advice about building non-profits, growing teams and making a deep impact. It was an amazing opportunity for a young social activist to soak up wisdom from one of Canada's foremost leaders in the field. One piece of advice stood out: She said that creating lasting change is "not a sprint; it's a marathon."

Having been in a full-on sprint around the globe since the early days of our organization, we were starting to understand and appreciate that analogy more and more. We recognized becoming a world-class organization that maximizes its impact is not an overnight process, nor is it an easy one; just like a marathon.

At this point in our history, we had become a complex organization—and the composition of our staff was much different than when we started. We have answered the need for specialized skill sets among our people, we have highly experienced senior leaders and have put them at the helm of our partnerships, marketing and human resources departments.

As we onboarded seasoned people who needed to balance their professional lives with young families at home, the core team who had grown up working for the organization began having families themselves. Always striving to learn and adapt, we realized that we needed to shift the way we operated so employees could meet their family responsibilities as well as their deliverables at work. Staff at all levels started leaving earlier on weekdays and working weekends because the exception rather than the norm. This was an important step in the maturation of the organization.

Another step was to make sure that we formally checked in with employees regularly. So, in 2015, we began conducting annual, anonymous Employee Engagement Surveys.

Also in 2015 we introduced the "Head" level. This provided a strong level of leadership across the organization. Heads serve as mentors, providing training and guidance to our Directors and junior managers. Each Head has at least 10 years of experience in their field and works to ensure that internal communication between junior staff and high levels of leadership, and vice versa, is more fluid and consistent.

In terms of direct compensation, we wanted to make the average salary at WE competitive within the non-profit industry and keep pace with the cost of living. This was particularly important given that most of our employees live and work in major urban centers.

So, we raised salaries and we continue working to make them more competitive.

We realized, too, that it was time to reset our Mission, Vision and Core Values to be inclusive to all staff, as well as to better reflect the direction we were heading.

We offer an employee-assistance program to support our employees' individual mental health, and we support their physical well-being by offering Canadian staff free GoodLife gym memberships (Quebec staff get Energie Cardio; many in the U.S. get 24-Hour Fitness).

We want our staff to grow along with the organization, so we offer employees \$500 a year towards their own continuing education. All employees participate in a "Growth and Success Plan" and junior staff are paired with more senior team members who are acting as mentors and coaches to them.

Because of the high intensity and rigorous demands put on our WE Day teams, we have added many ways to support them during events and help them recover after. We give staff the day off after working an event (not including travel day back), and two days off for double shows. And we let them to work from home if they need more time to bounce back.

As our capacity has grown over the years, we've added more and more WE Day staff to allow team members to rotate through events, so they aren't working every one. And we offer extension travel opportunities for key and desired cities; for example, if a team member wants to holiday in a place like New York after the event, we make it happen. We also block off a full week off in May and another in mid-winter; which is in addition to our organization-wide shutdown period over the Christmas/New Year holidays.

During the execution of WE Day events, we place a high-priority on staff care. We cater meals that have healthy options and meet individuals' particular dietary needs; a physiotherapist travels to events to take care of sore muscles; and we end each season with a "wrap party" to celebrate, kick back and blow off steam.

We believe all of this reflects a maturing of our organization and our leadership itself. We have quite literally grown up with our organization and it's woven into our lives. Some of the original team have a few grey hairs now and many of us have our own kids. As a result, we have a better understanding of the importance of work-life balance.

With the wisdom of our more than two decades of experience, we still have the passion, but we know now that it's the engine, not the fuel that creates the impact. We strive to ensure our engine is being well maintained so it can drive impact for decades to come.

KEY INDICATORS

At this stage, adrenalin, pizza and idealism are no longer enough to take a growing organization where it wants to go next.

Milestones

- ✓ WE Schools partners with the U.S. College Board, launching the ground-breaking AP with WE Service program, which makes service-learning accessible to 15,000+ high schools, with a notice on AP transcripts for college admission.
- ✓ Continued growth of WE Day with expansion into 15 regions.
- ✓ 1,000 Maasai women are empowered by ME to WE Artisans by 2014.
- ✓ ME to WE launches a line of socially conscious school supplies in Canada; expands in to U.S. the following year, in 2015.
- ✓ In 2015, the Kisaruni All-Girls Secondary School, built through the WE Villages program, ranks first out of 112 schools in Kenya's national exam.

You know your non-profit is in Phase 4 when...

- ✓ Leadership reaches the mature understanding that creating impact is a marathon, not a sprint.
- ✓ Senior management is needed to ensure that internal communication between junior staff and high levels of leadership, and vice versa, is more fluid and consistent.
- ✓ Decision-making is decentralized.
- ✓ Succession planning is introduced for all staff processes.

Support for employees

- ✓ First formal employee engagement survey conducted and the organization begins to take proactive HR measures in response to the results.
- ✓ Continued investment in staff compensation; coordinators receive a 28 percent pay increase over three years, starting in 2015.
- ✓ New staff-care measures address the WE Day team's very unique working conditions:
 - ✓ free access to physiotherapy sessions while on the road;
 - ✓ snack stations in-venue stocked with healthy food options;
 - ✓ approved rest days following shows.
- ✓ Professional Development fund, for which all staff can apply after one year of employment, offers \$500 toward outside training.

WHY I AM WE

"The surprising benefit of working at WE is how much skill development is available, and how many internal opportunities there are to work with very experienced individuals: the fact that I'm doing presentations for the executive level or the founder level; the fact that I'm working with some top donors in the organization to plan trips; the fact that I've been able to travel and work with country directors who have incredible experience. WE fosters people's skill sets and moves them into a space where they can make the best impact."

Katie Yigitoz

Hired: 2012

Director, School and Corporate Engagement, ME to WE

"Once we started to do our first US event in 2012, working on WE Day began to mean being constantly available because we were trying to scale the events without being aware of the risks associated for a young staff who were giving it their all. So we started to look at what staff needed to cope—for example, selecting flights based on timing and not only on the lowest price, and formalizing lieu days. By Fall 2017, we began taking a critical look at how to improve the in-venue experience for staff. The event management business for concerts and music festivals is typically 18-hours; we didn't want that for WE Days. One measure we took was to revamp the production schedule: instead of taking rehearsal to 11 pm, we tried to end by 8 pm each night. Now we're at a point where we start our conversations with: 'What is our capacity?' and 'Can we do it well?' and 'How will that impact our team?' This required real buy-in from senior leadership."

Carly Bedini

Hired: 2011

Now: Head, Operations Management, WE Day

Continuous Improvement (2016–Present)

In recent years, our focus has been on continuous improvement. We want to get keep getting better as an employer, as leaders, as people. We don't ever want to stop trying to improve our organization, because we know the better it is, the more impact we can make.

Part of our commitment to continuous improvement is adopting a People First strategy, because we know that we create zero impact without our people. We're still far from perfect in many ways, but it is our aspiration. People are our engine. It doesn't matter how much fuel you add in the form of dedication to cause if the engine isn't being taken care of.

Workplace conditions are a huge part of the employment experience. That's why we were so proud to open the WE Global Learning Center. The WE GLC, as it's known to staff, is housed in a beautiful heritage-certified building in downtown Toronto that has been fully restored to its original 1908 and 1925 design intentions.

Environmentally friendly features and design have been incorporated wherever possible, including carpets made of recycled fishing nets recovered from the ocean floor, and locally built furniture. Inside there are cutting-edge Skype global classrooms in the WE Connectivity Hub, a great place to connect with peers and colleagues across the world, as well as to scale our connection to schools and stakeholders with less reliance on physical travel. Dedicated fiber-optic Internet is hardwired throughout the building, making it easy to stay in touch. And our state-of-the-art film and broadcast studios allow us to broadcast or webcast a live video feed.

The WE GLC also offers Toronto staff yoga, aerobics, wellness and meditation classes on site. It has a fully stocked gym with free weights, elliptical trainers and exercise bikes. There is also a physiotherapy room with a certified physiotherapist available to staff about six months of the year (the therapist travels with the WE Day team the other six months). The WE GLC is fully accessible to all staff and has kitchen areas for meal preparation and socialization.

We have highly experienced senior leaders helming our partnerships, marketing, human resources, strategic planning and technology departments. Their insight and commitment have been integral as we move away from being an organically run organization, to one that has innovative, clear and rigorous processes that help to ensure we stay accountable and on our intended path.

Along the way we've been proud to be recognized in our efforts to make WE an employer of choice, winning several HR-focused awards (Canada's Most Admired Corporate Cultures Award, Notable.ca Canada's Top 5 Charities Run by Young Professionals and one of Canada's Top Employers for Young People).

We are working hard to build on the factors that enabled those awards and continue to improve as an organization and an employer.

Victoria MacDonald, Chief People Officer, joined WE in 2017, and has been a critical to helping us continually improve. She has decades of experience working with industry-leading multinational pharmaceutical companies and Canadian technology-based entrepreneurial firms. She specializes in developing an organization's foundational people-management strategies to facilitate its continued growth.

Before she came on board, we asked Victoria what she felt a world-class organization looks like from an HR perspective. She told us, "It has a rigorous recruiting process that only takes the best. Once employees are in their house—they feel lucky and happy to be there. They are put through a comprehensive onboarding and training process to get them up to speed as soon as possible. They have a job with a career path that's anchored in the mission and value of the organization, and are rewarded and compensated fairly."

We knew that's exactly what we wanted, and we knew Victoria would be integral to getting us there. She is working with the executive team to get them to step back from day-to-day operations, pushing those responsibilities down to the Heads, while they focus on bigger-picture organizational imperatives. Adding Victoria to our executive team was a key milestone in our journey toward continuous improvement. But there have been many others. In recent years we've significantly invested in the HR function and in our people.

WE formed an HR team dedicated to the learning and development of staff, providing sessions on a range of topics including people management and time management, emotional intelligence and much more.

We rewrote all our offer letters to make it clear for employees from day one exactly what their job is and where they fit in the organization. And, starting with their first day at WE, employees take part in a comprehensive, three-day orientation program.

We also offer other benefits that other organizations, not even for-profit companies, can't provide. Employees have the chance

to visit WE's projects overseas: traveling on a staff trip to Kenya, India or Ecuador (all on-the-ground costs are covered by the social enterprise) or optional opportunities to facilitate a group of young people, corporate employees or families who are traveling on ME to WE Trips (with associated costs offset by ME to WE).

As a social-purpose organization, it's not easy for us to compete with the private sector in terms of salary, but we try to bridge the gap with a suite of benefits that we believe is among the best, particularly in the social-purpose sector.

There are also opportunities to interact with and learn from WE's celebrity ambassadors, top executives and renowned leaders who regularly mentor and share their leadership experiences with our staff. Many of these leaders will join our staff for professional development workshops.

And then there's WE Day. Employees get invited to attend WE Day events, staff socials and after-parties. That's an experience that can't easily be duplicated at other organizations.

Our combined organizations of WE Charity and ME to WE continue to grow and now have a combined staff of over 720 full-time employees within Canada, the United States and the United Kingdom. That number jumps to over a 1,000 when we include our contract staff in Kenya, India, Ecuador and elsewhere.

But we haven't just gotten bigger; we believe we are better for having made the decision to strive for a world-class HR infrastructure. WE is committed to continuously improving the employee experience to ensure our people achieve fulfillment, meaning and excellence in their career with us.

Every year we listen to and learn from our employees in order to improve the experience and make our culture even better. Anonymous employee surveys tell us that we have made some significant improvements in key engagement areas. Since 2015, we have seen a 2.85 x improvement in the area of work-life balance, 5.33 x improvement in providing adequate compensation, 1.22 x improvement in overall employee recognition and 1.73 x improvement in the effectiveness of our internal employee communications efforts.

In our most recent engagement survey, 80 percent of WE team members said they see themselves staying with WE for the foreseeable future and 87 percent said they are personally engaged by the work they do; 90 percent of staff say they are connected to our organization's mission and 96 percent believe we are making a difference in the world.

With improving employee engagement results, being selected three times as a Top Employer for Young People, being named as one of Canada's Top 10 Most Admired Corporate Cultures and with a leadership group composed of 77 percent women, we continue to work toward becoming that world-class organization we strive to be.

None of this means we're perfect. No organization is. But we won't stop trying to get better. We know we still have work to do—and, together with what we believe are the best teams in any sector or any organization, anywhere, we are ready for the challenges ahead.

WHY I AM WE

"Because the organization had grown so much, we needed to take a very close look at HR practices. We went back to the very basics, starting at the beginning of the employee life cycle to rewrite the employee offer letter. Then we talked about focusing on two main things with employees: role clarity and setting goals. And we worked on the leadership structure, so that the founders and executives stepped back and became less operational, allowing Head-level managers to lead. The aim was, and is, to create and institute best-in-class people processes—that stuff takes time. What I will say is that I've never worked with finer people. It is a real privilege."

Victoria MacDonald

Hired: 2017

Now: Chief People Officer, People Operations and Culture

"Paying down technical debt is one of the core priorities for the Technology Division in 2018. Technical debt happens when any solution is rushed to market with corners cut and compromises baked in, either due to time and budget constraints or other factors. The trouble with doing this, as with financial debt, is that if no solid repayment path is prepared, the debt can accumulate to a point where the results can be crippling. This scenario is not unique to non-profits, nor is it more likely to happen at a non-profit than at another type of organization. It all depends on the strategic decision-making and long-term planning afforded, which comes with a mixture of experience, focus and discipline. These are all things that WE is actively working on."

Hugh Nettar

Hired: 2016

Now: Director, Technology Division

KEY INDICATORS

While size still matters, working smarter and becoming better are the key goals at this stage.

Milestones

- ✓ The organization is now 1,000 employees strong, internationally.
- ✓ In early 2017, Baraka, WE's medical care facility in Kenya, secures hospital status with the opening of its surgical wing.
- ✓ To date, the WE Villages program has provided 30,000 women with economic self-sufficiency tools.
- ✓ WE Villages sustainable development work expands into a ninth country: Ethiopia.
- ✓ Technology made available through key partnerships now allows for virtual outreach to any community with Internet access—an incredible tool for scaling.
- ✓ To address technology challenges, a Chief Technology Officer is hired, and the number of technology staff increased 200 percent between 2015 and 2018.
- ✓ Since the creation of WE Villages Water pillar, one million people have been provided with improved access to clean water, health care and sanitation.
- ✓ ME to WE launches coffee and Fairtrade award-winning chocolate that empowers women with each purchase.

You know your non-profit is in Phase 5 when...

- ✓ With a proven track record, you'll now be in a position to speak to new hires and existing employees in terms of their career path with the organization.
- ✓ As a social-purpose organization, you'll continue to attract job applicants who are primarily purpose-driven. However, expect salary and benefits to be a regular part of the conversation with potential hires.
- ✓ Internal communications become increasingly important as your organization continues to increase and scale.
- ✓ Staff who have grown up within the organization may not yet have the management skills needed to move complex projects forward and handle human resources issues. The organization identifies and implements training and support for developing managers.
- ✓ You'll look to senior managers with significant external experience, as well as a more sophisticated HR structure, for support.

Support for employees

- ✓ Employee engagement survey results confirm that, for the majority, it's still about the people. Relationships with colleagues continue to be among the most treasured aspects of working for WE.
- ✓ People managers receive mandatory training on how to give effective feedback, assess performance and have tough but important conversations with staff. Aligned on what their work priorities are, staff have the tools to be successful.
- ✓ New headquarters are unveiled in Toronto with dedicated space to serve the community, as well as offices for staff.
 - ✓ The new space addresses challenges identified in the first employee survey of 2015, including: sufficient desk space for staff; a professional meeting place to bring clients.
- ✓ Technology in the new headquarters make it possible to capture and disseminate professional development sessions and share throughout the organization, assisting with staff experience in regional offices.
- ✓ Staff can sign up to mentor young non-profit leaders in the community.
- ✓ Canadian staff are offered free memberships at GoodLife and Energie Cardio fitness centers; many U.S. staff can access free memberships at 24-Hour Fitness facilities.
- ✓ People managers receive mandatory training on how to give effective feedback, assess performance, etc.
- ✓ The organization invests in hiring dedicated internal communications staff. For the first time, there is organization-wide visibility when people join the team or are promoted.
- ✓ Regular town hall sessions give Heads and Directors facetime with Executive leadership. Key communications cascade more easily through teams.
- ✓ Continued investment in staff compensation; co-ordinators receive a 28 percent pay increase over three years, starting in 2015.

CONCLUSION



Unique personal development opportunities, such as the chance to meet Sophie Grégoire Trudeau, an activist and spouse of Canada's Prime Minister (center, in white), are among the many perks WE staff can benefit from.

We get up every morning thinking about impact; it is our number-one priority, always. In our earliest years, we focused on how to create the greatest impact through our development projects. Now we recognize, too, the responsibility we have to create positive impact in the lives of our dedicated staff and their families—because our people are the key to creating long-term impact around the world.

At every step of our journey, we are deeply grateful to our employees, understanding that their contributions of skill, dedication and innovation are what make our mission possible. For them, we are committed to keep learning how to be better; to seek out new ideas; to empower even more youth and adults to create the change they want to see in their communities and around the world; and to create even more impact through our projects.

Our journey from an organization with 12 volunteers working out of a borrowed suburban Toronto home, to one with more than 1,000 employees on four continents, has certainly seen its share of challenges and missteps. We started out as young idealists doing whatever we could to make an impact on people in some of the most disadvantaged parts of the world. When you are that focused on something, you will make mistakes.

We know that you might be reading this from a similar position, trying to change the world for the better while working to balance the demands of running an organization. Our message to you is: *We've been there. We know it's not easy and you will make mistakes. Everyone does.* We did. But we've always tried to learn from them. And it's never deterred us from continuously trying to improve. Dr. David Baum told us, "I don't trust organizations that haven't experienced challenges and failure because those missteps create character, both in an organization and its leadership." Accept that you're not perfect, and embrace setbacks just as you celebrate successes. They are both necessary parts of your growth as a person and an organization.

The teenagers with pizza boxes and unlimited energy have grown into adults with kids of their own and aging parents to care for, along with their pursuit of social justice. With that growth has come some wisdom, but our dedication has never wavered. We still think about these three things: How can we continue to improve, both for the communities we work with and to create sustainable impact around the world? How can we create even more impact? And what can we try to learn from both our challenges and our successes?

We've had more than 2,400 staff in our 20-plus years and we are so thankful for their contributions, their skill, their successes and, above all, their own dedication to expanding WE's impact around the world.

In our most recent Employee Engagement Survey, 80 percent said they see themselves staying with WE for the foreseeable future—and what a bright future of impact we'll create. We know we still have work to do and we will never stop working to improve those results. There are many challenges ahead, but we are optimistic that, with our people working beside us, we are better positioned than ever to make doing good, doable.



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