



HR Trends in BC – Survey Report 2011
June 2011

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Executive Summary

The economic recovery in BC is underway and this year's HR Trends survey shows increasing levels of optimism from BC employers. Continuing on from 2010, the projections for staff and revenue growth are clearly positive and there is some good news with regard to increases in HR budgets. The challenges and opportunities facing HR are shifting to reflect the realities of this new economic phase.

This report is based on an annual survey which was open for late February and early March in 2011. The survey was completed by 704 respondents. This is the fourth time this survey has been deployed and the response allows for longitudinal comparisons.

Based on the data there is an increase in optimism about the economy overall. This means that more organizations are expecting to increase revenue and staff than in previous years.

Leadership remains an ongoing concern for a majority of organizations. There are multiple forces such as retirements and the changing demands of business that are leading to the need for more leaders with different skills.

In keeping with the more optimistic view and a sense that organizations are returning to more stable economic times, organizations are switching their focus from tight management of performance to a more engagement-focused approach. Costs have been a key focus through the latest business phase and this tight financial view has done some damage to the relationships people have with work¹. With a return to more favourable financial conditions organizations are once again faced with retaining people based on trust, rewards and engaging work.

The long term trends which were predicted to have major impacts on the BC workforce prior to the Great Recession have re-surfaced as the challenges to which people are paying most attention. Now that organizations are out of crisis mode the challenge that people are anticipating is being able to secure enough people with the right skills to meet the growth demands of their business.

Aligned to this new view of the future, HR groups appear to be involved in trying to re-organize their own structures and processes to best serve the organization. Fully 67% of HR groups have or will re-structure in the next 12 months. The pressure appears to be on HR to innovate the ways in which it serves the organization to be both more strategic and more efficient.

¹ This is evidenced by the fact that several reports have shown that anywhere from 40-60% of people intend to leave their current employer when it becomes possible.

1. Introduction

In February 2011, BC HRMA conducted its fourth annual survey of HR trends in BC. The aim of this research is to gain an understanding of the current and future plans and challenges facing the HR profession in the province.

The data was gathered through an online survey distributed to BC HRMA members. The survey was open during February and March 2011 and received 704 responses, a comparable number to the 2010 survey (677). The sample group was very similar to previous years. There is a repeating trend for the survey to be completed by larger organizations which have groups of HR staff, whereas smaller organizations do not. The overall sample for BC supports credible results and robust comparison.

This report follows a thematic approach. Key themes that emerge from the data are explained and supported. In addition, the report describes key areas of comparison between 2009, 2010 and 2011 results.

2. Key Themes

The themes which emerged from the survey are described below. Each theme will be addressed in more detail in the following pages of the report.

2.1 Steady Optimism

Organizations appear to be gaining in confidence that the economy has returned to steady growth and will not be hampered by continued crises or shocks. This has led to an increase in the expectation for both revenue and staff growth over the coming year. The projections for increases in staff and revenue are both higher for 2011 than they were for 2010. Some of this optimism has flowed through to HR budgets which are set to increase the most since this survey started in 2008.

Our current era is highly volatile and whilst we are reporting the optimism expressed in the survey, we anticipate that events relating to European government debt levels and the political unrest in the Middle East and North Africa (MENA) may lead to more cautious progress.

2.2 The Leadership Question?

Increasing leadership capability has been indicated as the most important area of focus for HR since 2009. It has also been the area that has received the largest increase in resources since 2009. The consistent nature of this result leads to more questions than answers, such as, is the work being done in this area effective? Or has this area remained a priority because it takes a long time to resolve a gap in leadership capability? Or is staff turnover undermining the work that is being done such that organizations need to keep building and re-building their leadership capability?

Planning for staff succession has joined the top three most important issues this year and has seen a steady increase year on year since 2009. Given that succession is closely linked to leadership capability, this suggests that HR groups are very much focused on securing the future leadership needs of their organizations.

2.3 Refocusing on People

The Great Recession caused many organizations to look at their people through the tough lens of cost and importance. Many organizations have been living through austere times with pay freezes, forced reductions in headcount and very limited additional spend on people. With the return to more favourable economic conditions there is a sense that some of the damage done through the austerity measures needs to be repaired, and that organizations need to re-engage with their recruitment activities in order to achieve their planned growth.

Recruitment / selection and engagement are two areas that will be receiving an increase in resources over the coming year; both of them increasing relative to their 2009 and 2010 positions.

2.4 A Return to Long Term Thinking

With the crisis behind us, HR groups are spending more time on the long term and are starting to re-develop responses to issues that were key topics in 2007 and early 2008. There is increasing concern about the gap between required skills and existing skills and this concern has increased in each of the last 3 years. In parallel to this, organizations are concerned about the aging workforce and are starting to take steps to handle these long term trends.

In 2011 there is a renewed focus on workforce planning and employer branding. Conversely to this, the pre-occupation with US economic performance that has typified BC's business sector, has reduced significantly reflecting the fact that many more organizations are concerned about a more diverse group of global markets.

2.5 All Change

This year we introduced a question relating to whether or not the HR function intended to re-structure itself during the year. Although this is the first set of results the outcome is striking. Fully 62% of respondents are in a function that has either changed and/or intends to change again or in a function that intends to change in the next 12 months. This suggests the Great Recession and subsequent austerity, have led to deep functional reviews within HR groups which are searching for ways to meet increasing expectations with limited budgets, and continue to adapt their service delivery process to the way in which their organization functions.

The propensity to change structure was common across all organizational sectors and it was only in organizations that were projecting a reduction in revenue that there was a slightly higher likelihood that the function had re-organized and would be re-organizing again.

3 Key Themes in Detail

The following is a detailed description of each key theme and the associated information.

3.1 Steady Optimism

Two years after the Great Recession organizations are regaining their confidence that growth will be sustained and that further shocks are not just around the corner. In the areas of staff growth, revenue growth and HR budget growth the overall picture is optimistic. This sense of optimism is conveyed by two factors, the first is that the level of growth projected is the same or greater than 2010, organizations see their fortunes increasing the same amount or slightly faster, and in line with this there is an increased willingness to put budget back into HR activities that support the expected growth.

With regard to staff change the percentage of organizations projecting an increase went from 45% in 2010 to 51% in 2011 (a 13% increase), however at the same time the percentage of organizations projecting a decrease in staff has dropped from 22% in 2010 to 11% in 2011 (a 50% decrease). Similarly when it comes to projections for revenue change the most marked difference is the reduction in those projecting a decrease, which moved from 17% in 2010 to 9% in 2011 (a 47% decrease).

Aligned to this change, more HR budgets are expecting an increase than at any time since this survey started in 2008. The fact that organizations are beginning to put money back into the people side of their business suggests that there is more confidence in building for the future and recognition that properly resourced HR groups are key. This increase may also be an attempt to redress the significant reductions that were experienced in 2009. Despite the increase we still expect HR groups to be operating under extremely tight and challenging budgetary conditions.

Hence we categorize this overall organizational picture as “steady optimism”. The projections are positive; they suggest confidence in the long term and a return to a more realistic investment in people practices. The increases expected are similar to last year and the most significant changes are to the percentages of organizations projecting negative outcomes hence we anticipate steady, rather than rapid growth, and a cautious increase in spending rather than a substantial jump.

All this input has to be reviewed in light of recent global events such as the increased uncertainty about the creditworthiness of several European countries and the impact that continued social and political unrest in the Middle East and North Africa (MENA) may have on the price of oil. Our current era is very volatile and these events have the capacity to significantly reduce or slow down the progress of these projections.

Chart 3.1A: Staff Change - Overall

The chart below shows the percentage of organizations projecting how their staffing levels will change over the next 12 months. The most significant change is the reduction in the percentage of organizations projecting a decrease in staff.

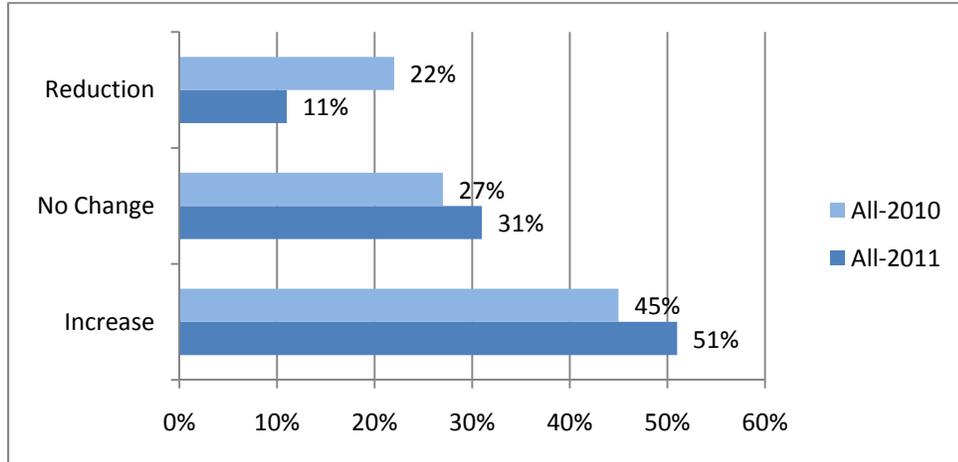


Chart 3.1B: Staff Change - Comparison

The chart below shows the difference in projections between the private sectors and the broad public sector (includes health care, education etc). Overall the private sector is more optimistic and projecting higher growth, however the public sector is also tending generally more to the positive.

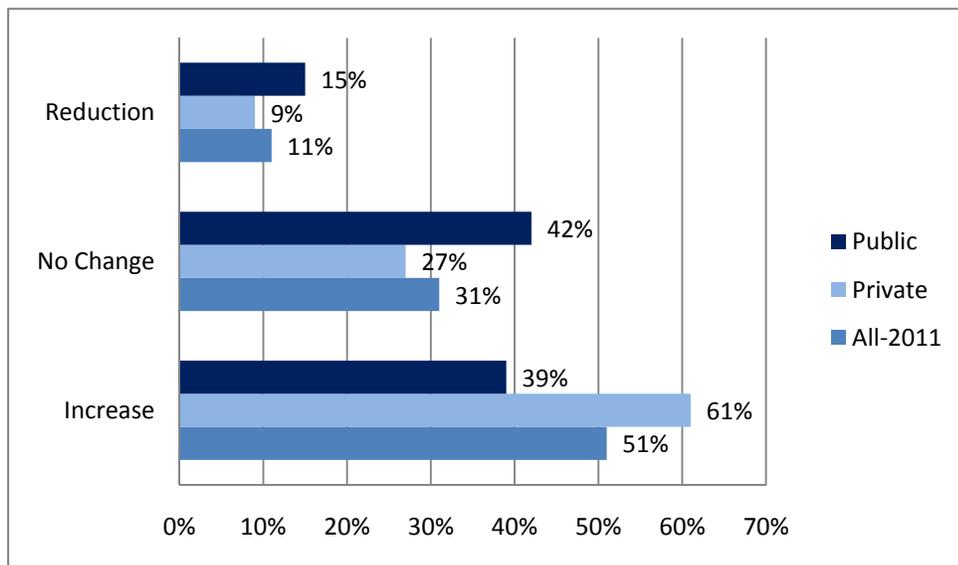


Chart 3.1C: Revenue Change – Overall

The chart below shows projections for how organizational revenues will increase in the next 12 months for both 2011 and 2010. The most significant difference is with regard to the percentage of organizations projecting a reduction in revenue.

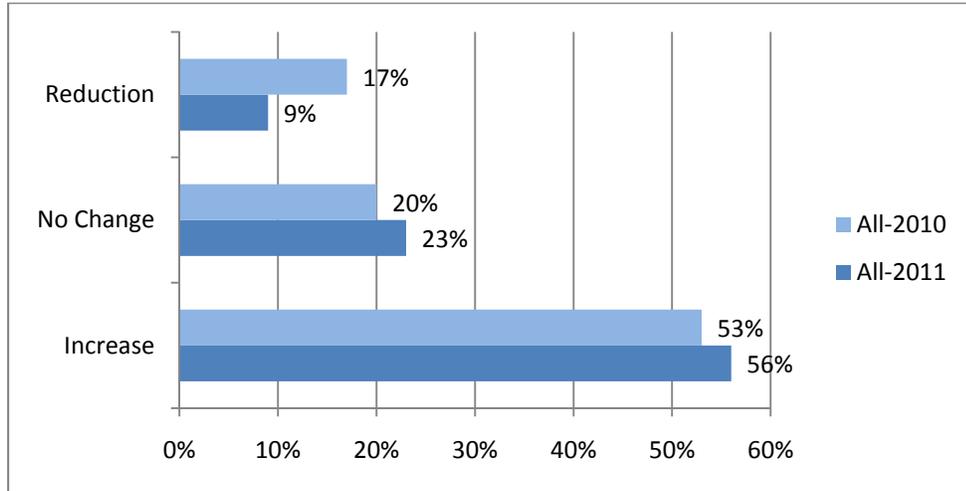


Chart 3.1D: Revenue Change – Comparison

The chart below shows a comparison of the projections for revenue change between the broad public and private sectors. The private sector is considerably more positive about revenue growth than the broad public sector. Compared to 2010 the broad public sector has become considerably more positive. (In 2010 38% of public sector organizations projected a reduction in revenue).

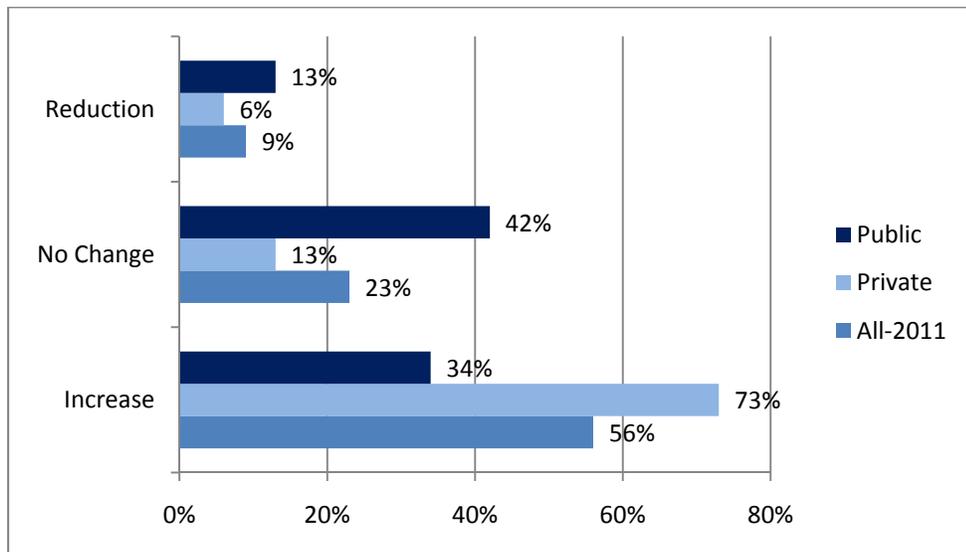
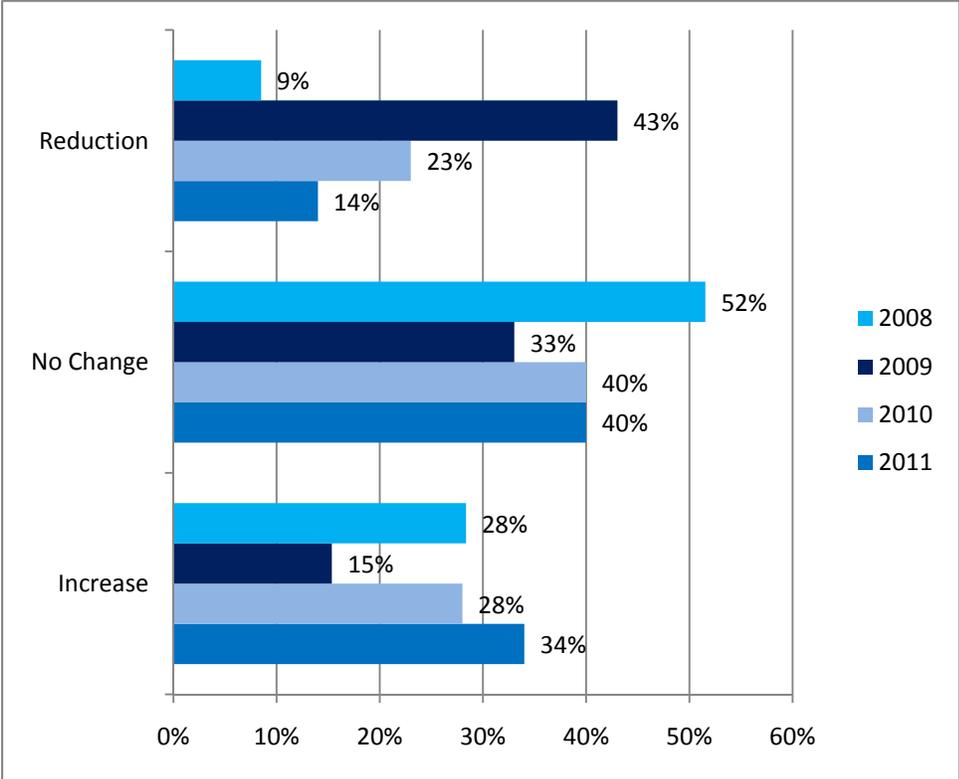


Chart 3.1E HR Budget Change - Longitudinal

The chart below shows how HR budgets have changed over the 4 year history of this survey. Across all 4 years 2011 shows the highest level of projected increase, even greater than in 2008 which was the peak of the talent crunch experienced prior to the Great Recession. The difference in the percentage of organizations projecting a budget reduction is considerable between 2009 and 2011, and is significant between 2010 and 2011.



Note: The length of the bar indicates the percentage of organizations projecting an increase, not the size of the increase. This chart shows that more budgets are increasing rather than budgets are increasing more.

3.2 The Leadership Question?

For the last 3 years of this survey there has been considerable focus on the need to increase organizational leadership capability. This item has been at or close to the top of the list both in terms of things seen as most important and areas that will receive the biggest increase in resources for the last 3 years. Over this time frame the importance of succession planning has been increasing and in 2011 this area has become the third most important area for HR. Hence in 2011, the top 3 most important items are increasing leadership capability, succession planning and increasing employee engagement. (This is shown below in Chart 3.2A).

This result brings forth more questions than answers. The questions come from the fact that we are seeing a sustained focus on developing and securing leadership capability and trying to determine why this is the case. One possible reason for this sustained focus is that leadership capability takes a long time to develop, hence it needs to remain a priority over time. A further view is that organizations are now starting to see and feel the reality of Baby Boomer retirements and therefore more organizations are shifting their focus into this area. The steady increase in the importance of succession planning indicates that this is at least part of the explanation.

Chart 3.2A: Most Important Areas – Comparison '09-'11



A third less comfortable question is whether or not organizations are doing the right things with their resources to develop the leaders they need. For all that has been written and studied in terms of leadership, many theories and practices are still trait or character-based and do not necessarily cover the processes by which leaders discern what the future path of the organization should be, communicate this to others, work to

align the activities of the whole organization behind it and then alter or adapt this process to the changing circumstances of their business environment.

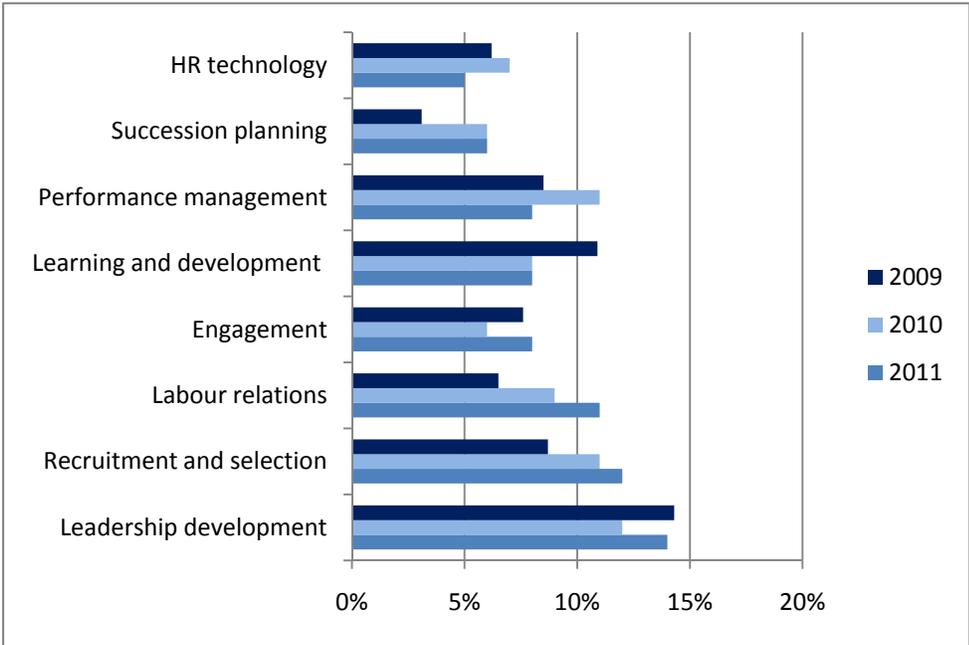
This line of questioning leads to a fourth possible view which is that the demands on leaders and the level of capability required to be successful in our volatile global economy is increasing faster than organizations are able to develop their leaders. So for all the development work that is being undertaken it is not keeping up with the pace of economic complexity and demand. The question then becomes how do we develop leaders faster?

Whether any or all of these are true it suggests that HR functions should take a good look at their leadership development practices, consider closely the specific tangible outcomes that will support their business in the future and then think again about how they support, source, or develop this type of capability within the organization.

This focus on leadership may need to be an enduring and core part of the HR function's organizational contribution, a key part of their strategic support to the organization. As such it is an area of HR practice that will require yet more focus and innovation before a level of mastery is reached.

Chart 3.2B: Largest Increase in Resource – Comparison '09-'11

The chart below shows the top 8 areas for 2011 and the trends in terms of resourcing since 2009. Notably learning and development has seen a decrease in resourcing whilst labour relations and recruitment and selection has seen a steady increase. Leadership development has maintained a high level of resourcing in all 3 years.



3.3 Refocusing on People

The cycle of people impacts that are generated by a recession are well documented. There is a common pattern where economic decline leads to forced lay-offs, which lead to broken trust and increased work pressure, which leads to increased voluntary turnover and absenteeism. As the recovery takes hold organizations return their focus to the need for people and the need for people to contribute based on their own motivation rather than any environmental pressures. This in turn leads to organizations rejuvenating the work they do to establish trust with their workforce and generate the level of performance they require.

The Great Recession was the same and different. One notable feature, which was commented on by BC HRMA, was the number of organizations who responded differently to this economic collapse and responded in ways that would maintain the trust of their staff. However numerous these organizations they were still the minority.

It is apparent from the responses to our 2011 survey that many organizations are now coming out of the tail end of this cycle and looking to re-engage their workforce as well as increase their workforce.

One of the indicators of this change is present in Charts 3.2 A and B above. There has been a shift in focus from performance management to employee engagement. If you look at the data series for each of these areas you will see that they move counter to each other. As subtle as this might seem it is significant in terms of emphasis. Whereas 2010 was a year when individual contribution came under close scrutiny, 2011 is a year where organizations are more inclined to build goodwill by focusing on employees delivering a great contribution through their own motivation rather than any tight management process.

The second area which suggests that organizations are returning their attention to the people side of their business is the steady increase in the importance given to recruitment and selection. At the peak of the talent crunch of 2008 this item was the top priority for HR. During the phase from 2009 to 2010 it reduced in importance and now in 2011 it is back to being second from top in terms of resources. Given the projections for revenue and staff growth it is logical for organizations to start increasing their capacity to hire. It also indicates that we could be returning to a more challenging and tight labour market in the relatively near term (e.g. by mid 2012).

Chart 3.3A: Increased Resources - Comparison Public / Private

The chart below shows the areas in the public sector which will be receiving the largest increases in resources. In some instances the challenges being addressed in the public sector appear to be universal e.g. leadership development and succession planning. In other instances the ways in which the public sector focuses on people is different with a significantly higher emphasis on labour relations and a significantly lesser focus on recruitment and selection.

(Note: This chart is sorted to reflect the priorities of the public sector and show how these compare to the private sector and the overall responses)

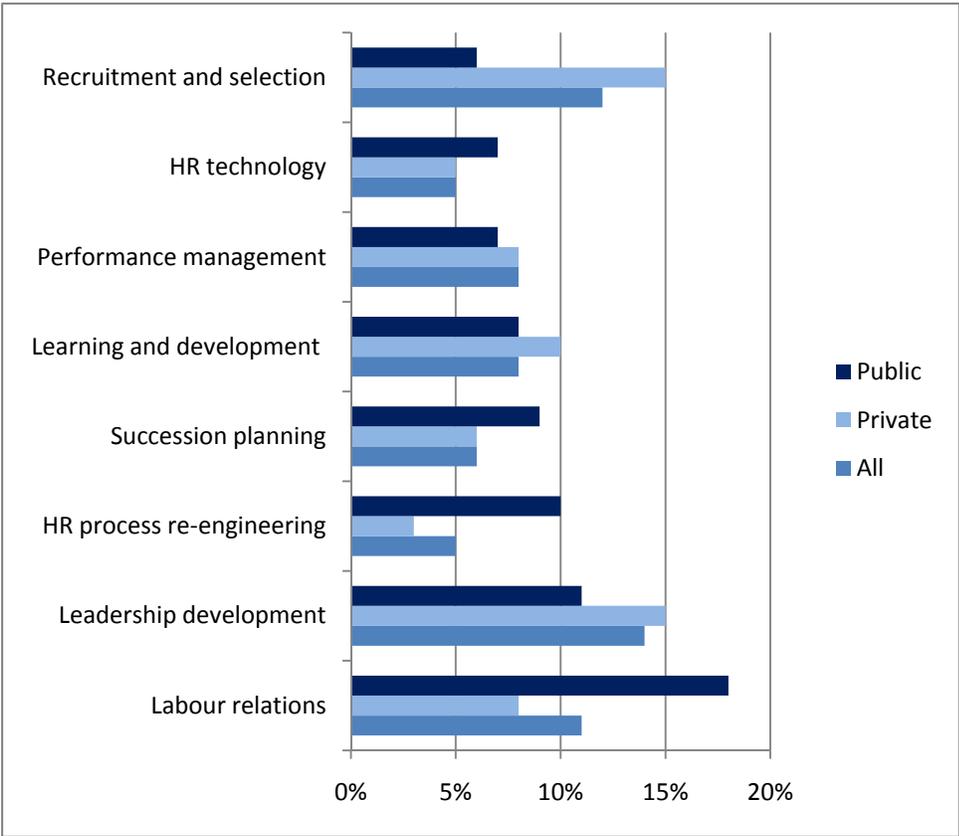
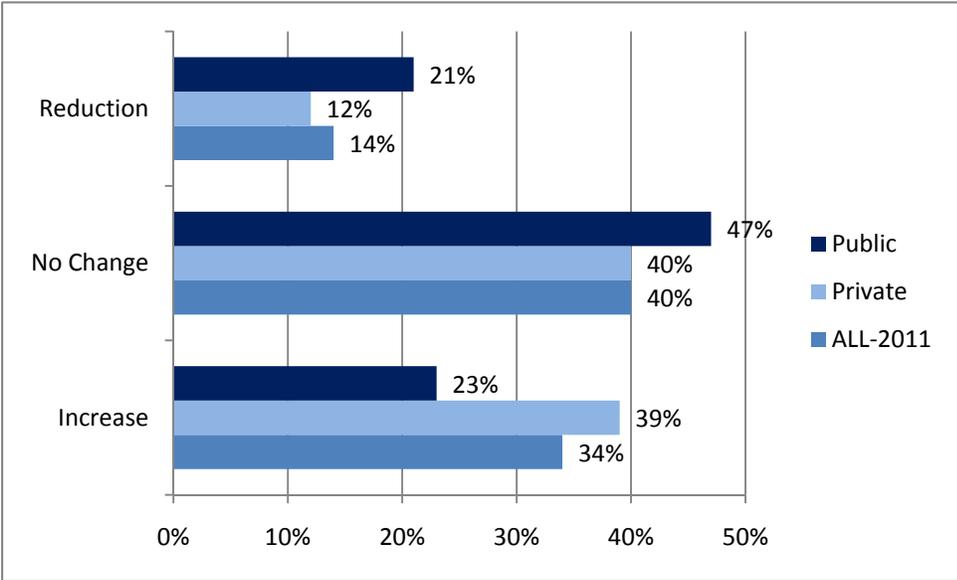


Chart 3.3B: HR Budget Change – Comparison Private / Public

The chart below shows how HR budget change varies between the public and private sectors. As might be expected the public sector is lagging in terms of increases in HR budget. In the public sector 30% more organizations expect to have their budget reduced than in the private sector. This differential in budget will impact how each sector responds to their challenges and goes some way to explaining why the public sector has more of a focus on HR process re-engineering than the private sector.



3.4 A Return to Long Term Thinking

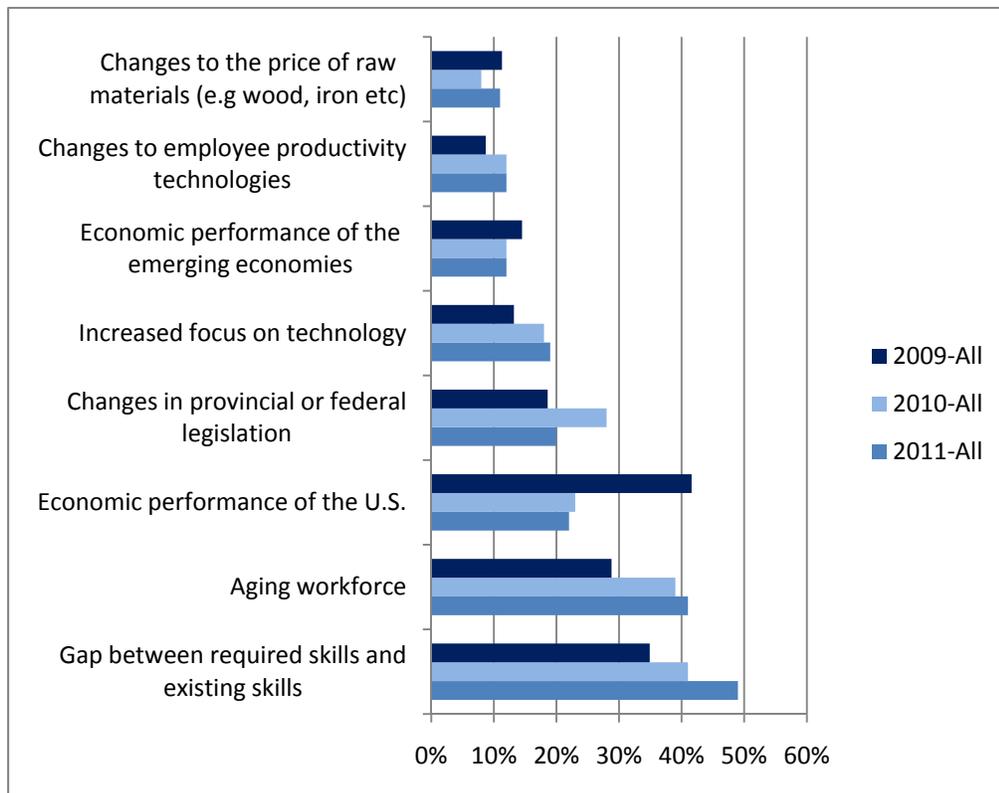
With the crisis behind us HR groups are spending more time on the long term and are starting to re-develop responses to issues that were key topics in 2007 and early 2008. There is increasing concern about the gap between required skills and existing skills and this concern has increased in each of the last 3 years. In parallel to this, organizations are concerned about the aging workforce and are starting to take steps to handle these long term trends.

In 2009 and 2010 the survey responses reflected issues that were immediate and required an immediate response. Looking ahead from 2011 the steady optimism felt by organizations has flowed through to the need for more long term focus within HR.

This long term focus is set on ensuring that organizations have both enough people and that these people have the right skill set to help their organization succeed.

Chart 3.4A: Most Important Long Term Trends – Comparison '09 to '11

The chart below shows the change in importance of a series of long term trends between 2009 and 2011. There has been a return to the focus on the aging workforce and the skills gap which have steadily increased in importance since 2009. Notably the economic performance of the US has decreased each year since 2009. The focus on technology has also been steadily climbing up the rankings. The importance of the aging workforce and the skills gap has increased for the last two years.



In this area there is a significant difference between how the issues are viewed by the public and private sector. Both sectors agree on the importance of the skills gap, however for the public sector the aging workforce is the most compelling issue whilst the private sector is more focused on the economic performance of the US.

Chart 3.4B: Most Important Long Term Trends – Comparison Public / Private

Relative to the private sector the broad public sector is much more concerned about the aging workforce. This is the most important long term trend for this sector compared with the skills gap for the private sector. The public sector is also more focused on technology and legislative changes. The performance of the US economy is not a concern in the public sector in the same way that it is in the private sector.

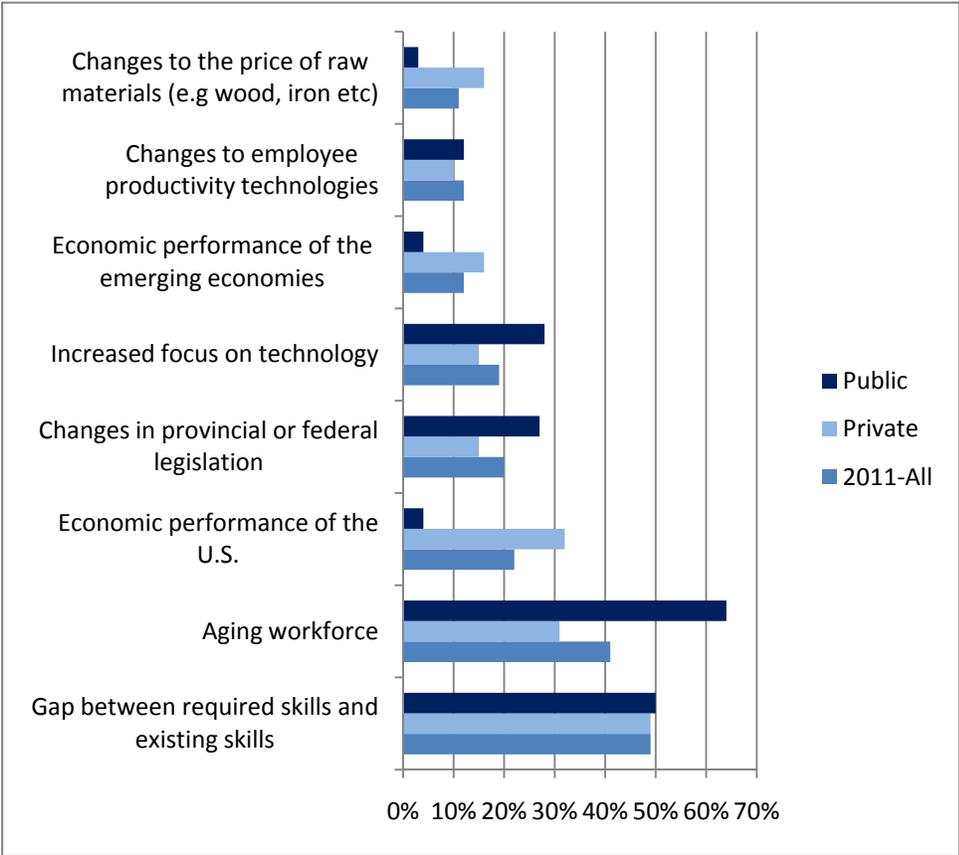
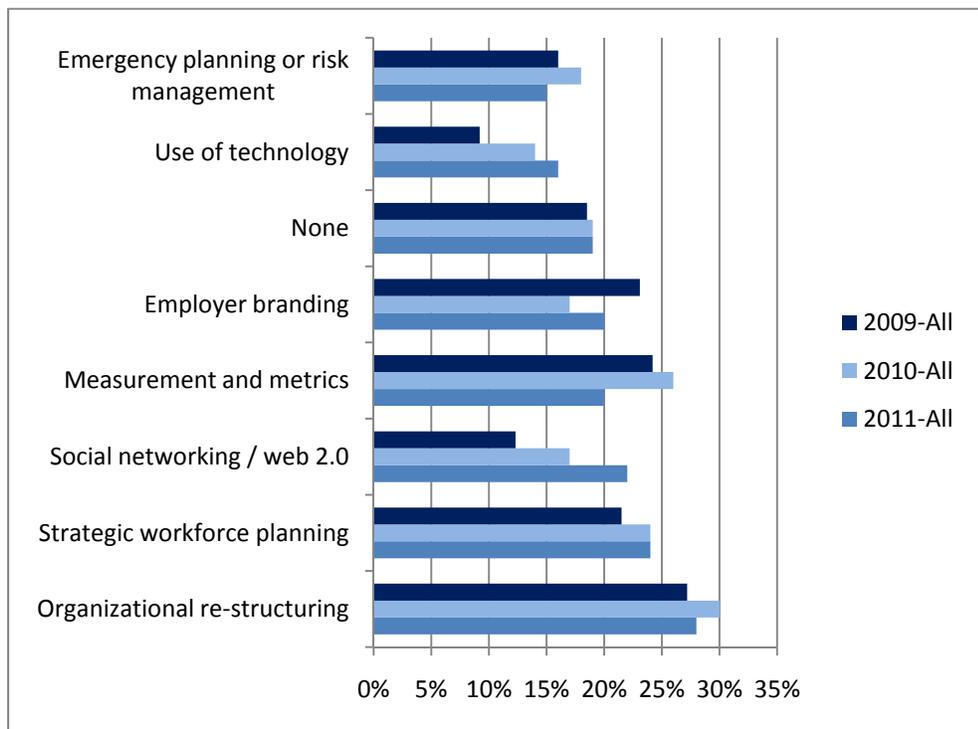


Chart 3.4C: New Areas for HR – Comparison '09 to '11

The chart below shows the trends relating to the new areas which HR has taken on since 2009. Organizational re-structuring has remained at the top for the last three years; however workforce planning and social media have increased in terms of the number of HR groups who are now working in these areas. Measurement and metrics has remained high in this list whilst the use of technology is another area that is seeing a significant increase in relevance to HR groups.



This return to the long term has influenced the new areas which have been added to the scope of HR functions across BC. The new areas that have been identified in 2011 align clearly with these long term trends and support the work required to overcome a problem the scale of which has yet to be comprehended or fully felt.

Organizational re-structuring remains the top new area for HR. This suggests that organizations continue to struggle with the complex challenge of getting the right people, delivering the right activities, in the right way. Organizational design is a complex process and its impacts are often under-estimated as well as being hard to define or measure. This result also suggests that change is still high on the agenda in many organizations whose future business plans involve continued scrutiny of exactly how their organization is shaped relative to their strategy and goals.

The second area, strategic workforce planning, supports the notion that organizations are continuing to focus on change and are getting more serious or concerned about

understanding what their future talent needs are and having the plan in place to meet them. Given that many organizations expect to grow in terms of revenue and people, these two items indicate that HR is being looked on as crucial in terms of contributing both the right structure to achieve the strategy and a timely flow of talent to meet operational and strategic demands. Both of these factors recognize that the talent market of the future is very different from the past and finding, keeping and enhancing the talent in your organization will be one of the keys to business success over the next decade. And that this result will need to be achieved in a situation of increasing local scarcity.

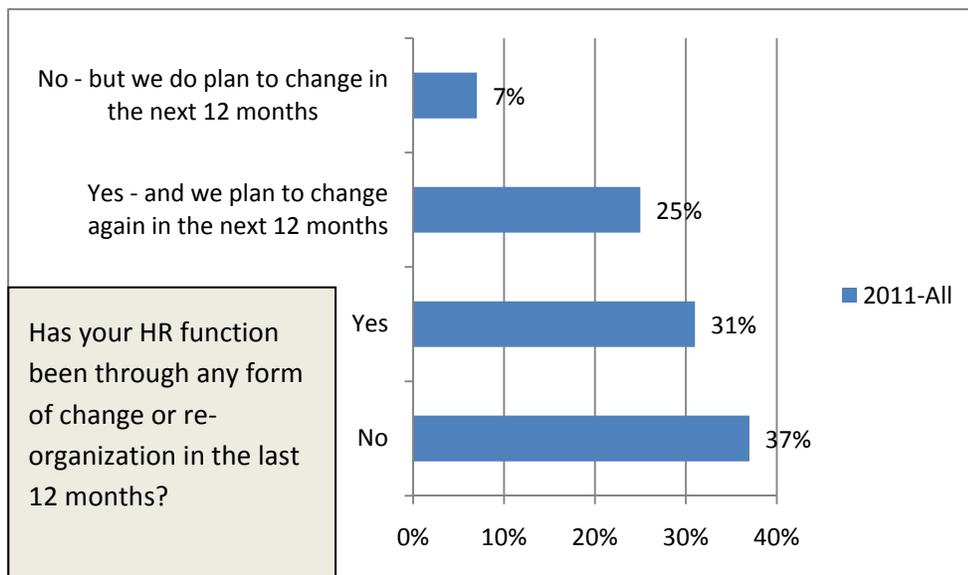
In BC from this year (2011) forth all growth in labour market participation will come from immigration. There are not enough people graduating from high school or university in BC to increase the available pool of talent. At the same time organizations are now selling into different markets and looking to compete on an increasingly global stage, requiring a different type of employee. This double shift in labour supply and competitive environment looks set to lead to continuing organizational change and the expectation of a more strategic and proactive approach to talent from HR groups.

3.5 All Change

For the first time we asked HR groups about how their own structures are changing in response to the post recessionary organizational world we are working in. The question asked individuals to determine whether they had changed, intended to change again or had not changed. The results appear quite significant in that over 62% of HR groups in BC have either changed their structure and intend to change again, or intend to change in the next 12 months. It is difficult to make any definitive judgments based on this information as this is the first time this data has been collected. However the authors of this report were surprised that it was such a high number. Experience would suggest that HR organizations have traditionally been fairly stable in how they are structured and may have even held the same structure whilst other parts of the organization have been changed.

Chart 3.5A: Change and the Intention to Change in HR Groups in BC

HR groups were asked to indicate the nature of any change they had been through or were intending to go through in the next 12 months. Only 37% of HR groups have not and will not change in the future. This leaves 63% that have either changed and/or intend to change in the next 12 months. Of interest in the result is that 1 in 4 HR groups have changed and yet intend to change again in the next 12 months.



Without other data to determine the relative nature of these findings it is impossible to determine whether or not this is a normal or abnormal situation. However what is important is that HR is having to work on the organization at the same time that it is or has been working on itself.

It has been noted above that there is an increased focus on technology within HR and previous HR Trends Reports have suggested that the steady reduction in HR budgets, and the increased demands in HR scope and complexity would lead to a strong need for

innovation and a different approach to providing HR services to the organization. One interpretation that could be generated from these results is that HR groups are in the midst of this round of innovation and are seeking both changes to structure and support from technology which allow them to keep up and deliver “more with less” and do so in a way that focuses clearly on the organization’s goals.

The return to more favourable economic times and the investment in growth and organizational change that this brings is and will continue to lead to significant demands on HR groups. Some of these demands will be new, some of them will be old demands that need to be fulfilled in a different way. However our survey suggests that at the same time as HR is working to support the business it also taking a deep internal look at how the work gets done, by whom or what, and how to optimize the function to deliver in fast changing and challenging business environments.

The success of the external delivery to the organization will be based on the success of the internal re-structuring and those who get both right will be leading the way for HR as it continues to make a strategic contribution to organizational success.

4. Report Summary

Business moves in cycles and it is clear from the results in this report that the next cycle for HR will have strong similarities to the period before the Great Recession. With a return to growth and steady projections of increased revenue and increased demand for staff the underlying dynamics of the labour market will re-assert their importance. In 2011 it was predicted that all increases in labour market participation would come from immigration to BC and Canada. This means that any organization looking to increase its staff group or plug holes left by retirements will either be in a highly competitive battle for “made in Canada” talent or will have to start managing the adjustments in hiring practices and workforce dynamics that come with hiring new Canadians. The challenge of landing, keeping and optimizing the contribution of people in the organization is set to become very demanding.

At a deeper level the skills required by organizations and the complexities and opportunities that they are looking to handle have increased in sophistication. In BC we have seen a rapid and vast transition in our export market. Exports to China have roughly doubled since 2008². The economic positioning of BC as a gateway between Asian markets and North America also requires new skills and a broader business perspective.

The HR function will be front and centre in trying to resolve these issues and bring to the organization the human capabilities that create value from the infrastructure, finance and strategies that are in place. The volatility of our current business environment and the need to be able to deliver quickly against new opportunities will increase the pressure on HR groups to innovate the ways in which they serve their organization. Although there is optimism that more resources are returning to the HR function, the level of investment appears to be lagging behind the scale of the challenge.

HR groups are responding by looking deeply at how they are structured and how they function within their organizations to achieve their goals. They are also looking more to technology to automate or reduce the time spent on low value process work.

Looking forward, the challenges and opportunities are of a positive nature and address the issues of finding, keeping and growing talent as opposed to divesting or tightly managing the contribution of existing staff. The need to re-shape HR whilst continuing to deliver results to the organization will keep HR groups on their toes for the next 12 months and beyond.

² Source: BC Business Council – Economic Outlook Feb 2011

Appendix A - Survey Demographic Data

Chart A1: Respondents by Sector

The chart below shows the percentage of respondents by organizational sector.

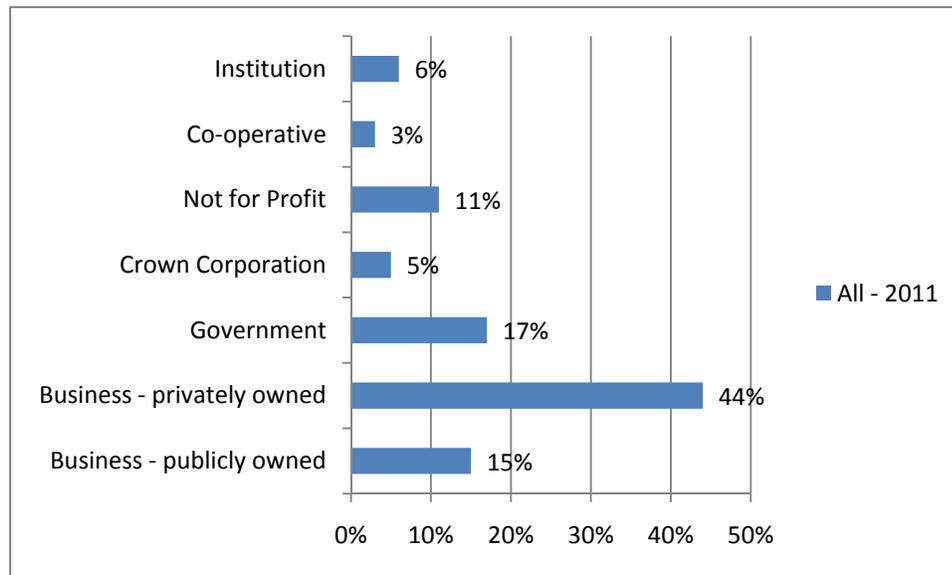


Chart A2: Respondents by Organizational Size

The chart below shows the percentage of respondents by organizational size – based on headcount.

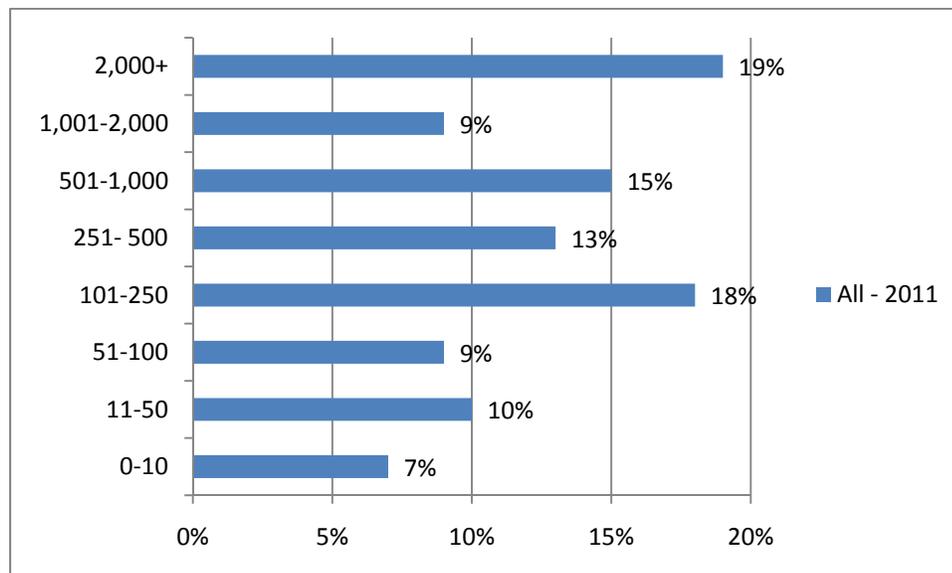


Chart A3: Respondents by Region

The chart below shows the percentage of respondents by their region within BC

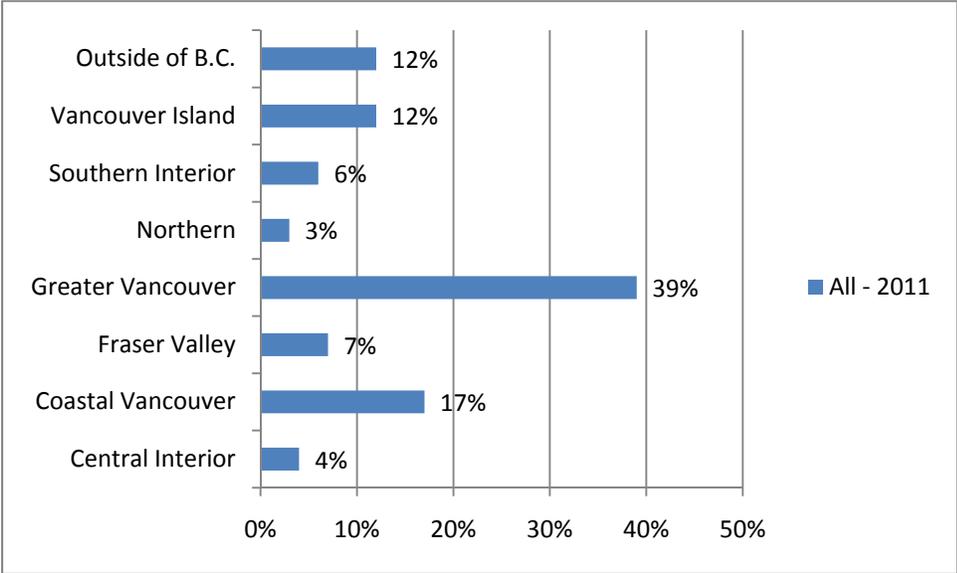


Chart A4: Respondents by Role

The chart below shows the percentage of respondents by their role within their organization.

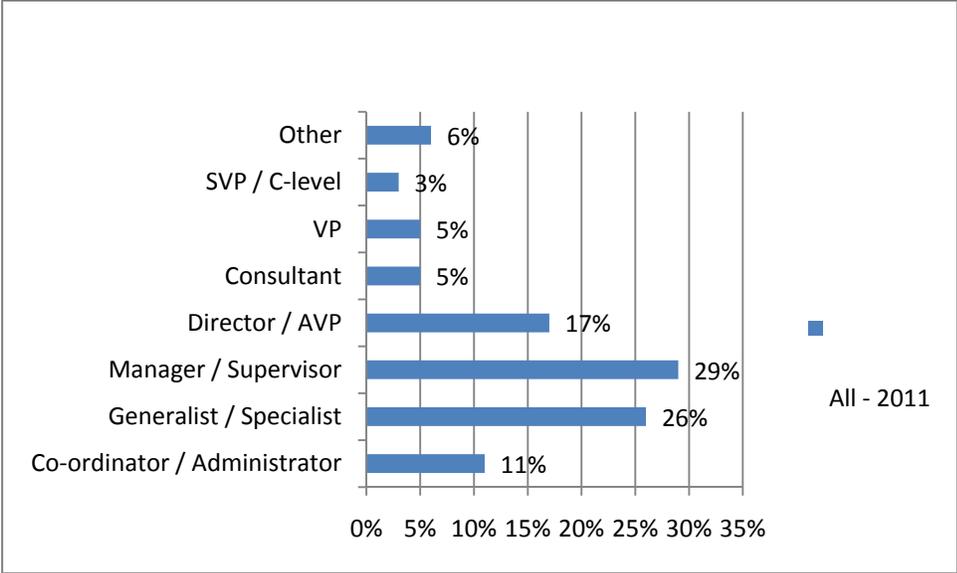
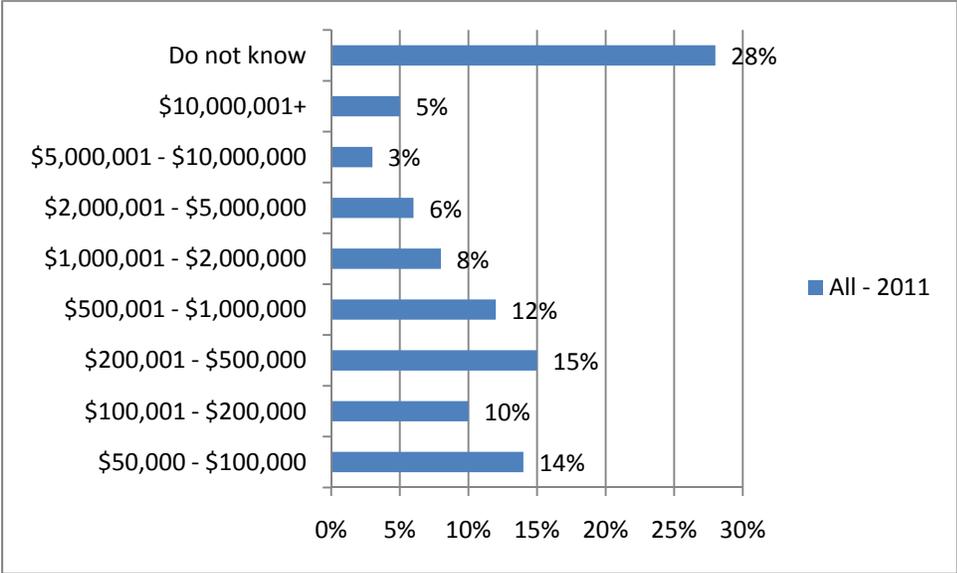


Chart A5: Respondents by HR Budget Size

The chart below shows the percentage of organizations falling within the specified budget ranges. Please note that 28% of respondents do not know the size of their budget. This is up from 24% in the 2010 survey.



About this Report

This report was authored by Ian J. Cook, Director of Research and Learning at BC HRMA. The support and advice of Kyla Nicholson, Manager, Professional Development at BC HRMA was invaluable in developing themes and interpreting the data. The detailed eye and grammatical discipline of Liz Whalley, Metrics Specialist at BC HRMA greatly enhanced the final product.

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Any questions or feedback regarding this report can be sent to research@bchrma.org.