THE MAGAZINE OF HUMAN RESOURCES THOUGHT LEADERSHIP | JULY/AUGUST 2011

HR

TRAINING AND DEVELOPMENT ON A SHOESTRING

Quenching the thirst for knowledge when the well is dry

Scrap the Performance Appraisal

GENDER BALANCE IN THE WORKPLACE

ALSO: NOTICE PERIODS AND VALUATION DATES | INCLUSION IN YOUR WORKPLACE | CONFIDENT INTERVIEWING

CONTENTS

HR PROFESSIONAL VOLUME 28/NUMBER 5 **JULY/AUGUST 2011**

46

FEATURES

Cover image: www.shutterstock.com.

DEPARTMENTS

Correction:
In the article "Size Matters: HR for Smaller Business" on page 46 of the May/June issue, the author's name was misprinted. The article was written by Georgia Curtis, to whom we sincerely apologize for the error.

UPFRONT 12

EDITOR'S LETTER

RECESSION ENABLES LEARNING ON A BUDGET

A couple of years ago, during the worst of the Great Recession, the Human Resources Professionals Association (HRPA) produced a media release warning against cutting back on HR programs and initiatives during tough times.

Then, as now, many organizations in survival mode are quick to cut the "nice-to-have" budget items, like training and development. But, as HRPA pointed out, the long-term consequences of these cuts can be very negative, with reduced loyalty and productivity and a diminished employer brand.

This is especially true of training and development, which is the focus of this issue.

In the cover story *Training and Development on a Shoestring* (page 20), writer Michelle Morra-Carlisle provides all kinds of tips for effective learning on a budget. Successful organizations are providing great training for less by doing things like mentoring—pairing a senior person with a junior employee to pass on skills and knowledge; sending one employee to a conference and then having that person teach their colleagues about what they learned; or looking for less expensive online courses.

Any way you do it, providing training and development is key to ensuring progress doesn't outgrow your workforce or having your workforce outgrow your organization—especially among the new generation of workers who value career advancement and learning new skills over salary.

Happy reading and we hope you enjoy the issue.

HR PROFESSIONAL

VOL. 28, NO. 5 July/August 2011

Editor Lyle Fitzsimmons
Publisher Robert Phillips
Legal Editor Malcolm MacKillop, Partner, Shields O'Donnell MacKillop LLP
Contributors John McTrusty, Lesley Young, Caroline Yang, Bernie Keim, Tim Jackson, Georgina Curtis, Jennifer Salopek, Beth Carvin, Alyson Nyiri, John Glass
Sales Manager Bill McDougall
Project Manager Alana Place
Art & Design Emma Law
Advertising Art Vinod Kumar
Publication Director: Wayne Jury
Advertising Sales Representatives: Maria Antonation, Tracy Goltsman, Gordon Jackson, Cheryll Oland, Norma Walchuk

HRPA

Chief Executive Officer William Greenhalgh
Director, Finance and Administration Gary Monk
Director, Professional Development Marta Pawych
Director, Marketing and Membership Chris Larsen
Director, HR Excellence Claude Balthazard, PhD, CHRP
Director, Public Affairs Scott Allinson

HR PROFESSIONAL is published eight times per year for the Human Resources Professionals Association (HRPA), 2 Bloor St. West, Suite 1902, Toronto, ON, M4W 3E2, tel. 416-923-2324, toll-free 1-800-387-1311, fax 416-923-7264, email info@hrpa.ca, www.hrpa.ca. As the premier HR association in Canada, HRPA is internationally recognized and sought out for its knowledge, innovation and leadership. With more than 19,000 members in 28 chapters in Ontario, and other locations around the world, HRPA connects its membership to an unmatched range of HR information resources, events, professional development and networking opportunities.
HR Professional magazine is published by Naylor (Canada), Inc. 2 Bloor Street West, Suite 2001, Toronto, ON M4W 3E2, Tel. 1-800-665-2456 – Winnipeg or 1-800-461-4828 – Toronto, Fax 1-800-709-5551. **www.naylor.com**

SUBSCRIPTIONS (Prices include shipping and handling) $49 per year in Canada; $79 per year in the United States and International.
Published articles and advertisements do not necessarily reflect the views of HRPA.
ISSN 847-9453
HRPA is proud to be a founding member of the Canadian Council of Human Resources Associations.
Published June 2011/HRP-H0511/5751

naylor

This publication is printed on recycled, FSC-certified paper stock. The polybag this magazine came in is 100 per cent recyclable.

CANADIAN PUBLICATIONS MAIL PRODUCT SALES AGREEMENT #40064978
Postage Paid at Winnipeg

It was great to work with him.
He always had a new way to look at things.
No one saw this coming. One day he just collapsed in his office.
By the time the ambulance arrived it was too late.
I find it hard to walk past his office every day. If only we had known how to help him in time...

If CPR is used in the first few minutes for a person in cardiac arrest, it can increase the chance of survival and recovery by more than 30%. If CPR is used in combination with an AED, the chance of survival can increase from 5% to more than 50%.

Train your employees in **First Aid & CPR**. It is mandated by the Federal Occupational Health & Safety Act for all businesses with 10 employees or more, and reinforced by provincial/territorial regulations. First Aid & CPR prepares employees to deal with emergencies, from minor to life-threatening ones. It can save lives one day, whether a colleague's, client's, or family member's.

Contact us for more information. We are one of the top national workplace First Aid & CPR training agencies, with a comprehensive portfolio and know-how. Ask us how First Aid & CPR can fit as part of your office wellness program. Let's work together for a safer workplace!

Scan with smartphone

Red Cross First Aid. Prepare for life.®
www.redcross.ca/firstaid | 1.877.356.3226

CANADIAN RED CROSS

CONTRIBUTORS

JULY/AUGUST 2011

TARA BRADACS

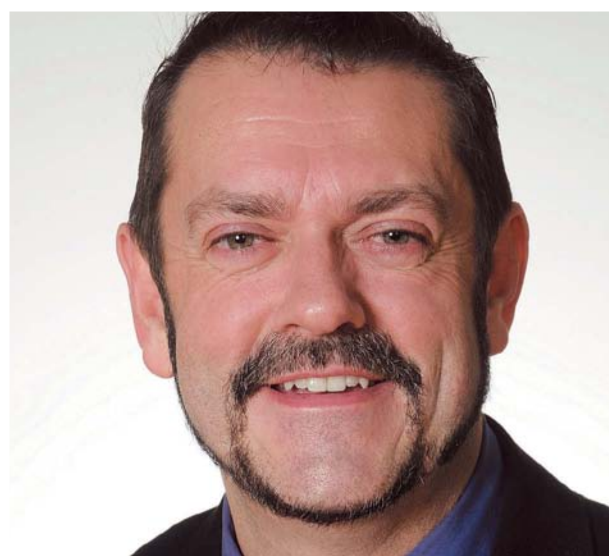
Tara Bradacs is an HR professional and leadership author published by Harper Collins. In this issue, she writes about how to achieve a performance edge when preparing for an interview. See story on page 46.

MARY PORJES

Mary Porjes has more than 30 years' experience in employment law. She provides advice to executives and senior employees on employment contracts, termination arrangements, exit strategies, constructive dismissal and sexual harassment claims. Mary discusses notice periods and payout timing for shares or stock options, on page 17.

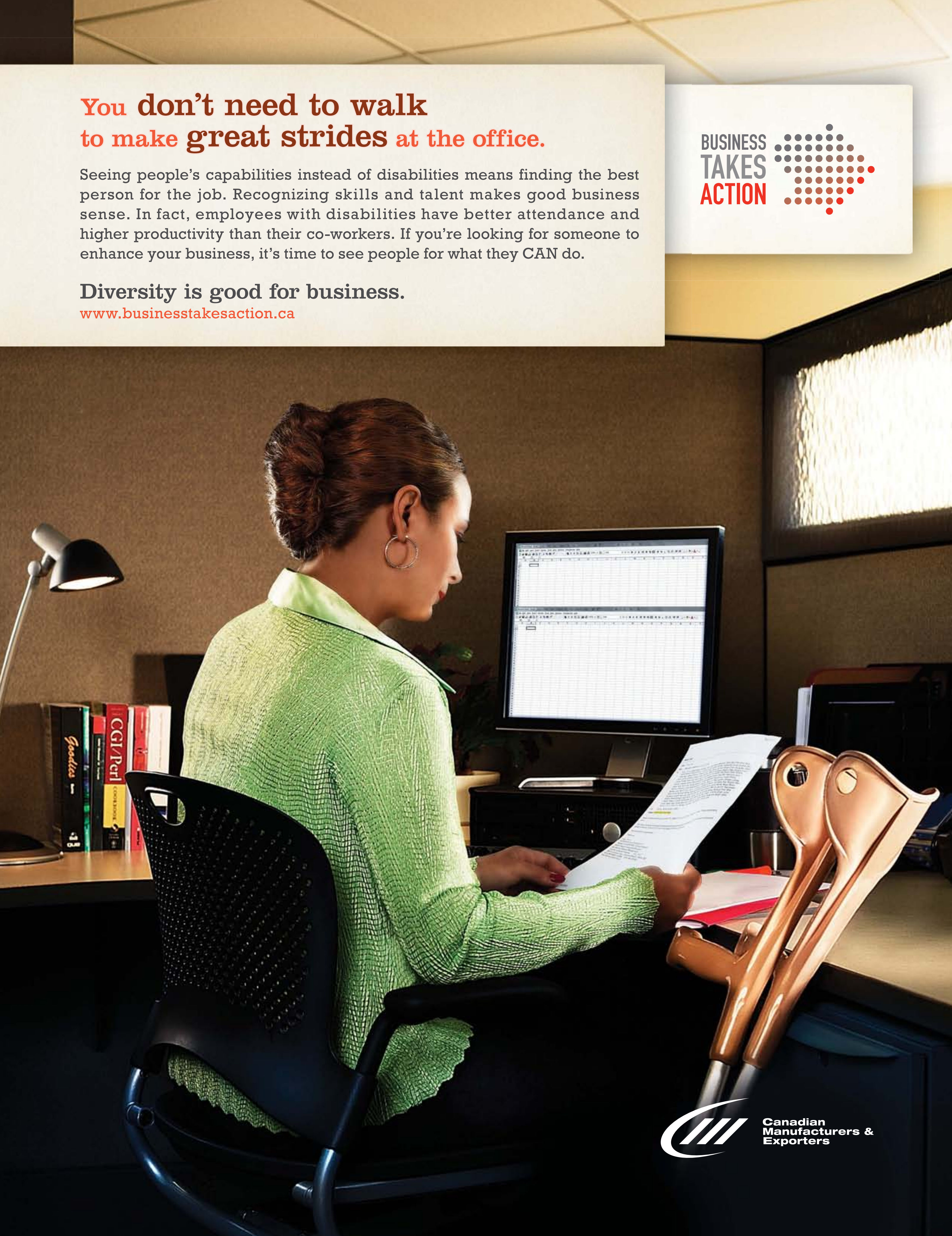
HEATHER TURNBULL-SMITH

Heather Turnbull-Smith has more than 16 years of experience in management and implementation of workforce development programs. Her previous roles, including college instructor, administrator and corporate training specialist, have given her a solid foundation in the business and science of adult education. On page 33, she discusses new learning for the new economy.



BRAD TYLER-WEST

Brad Tyler-West, CHRP, is a certified personal management coach, certified coach practitioner, and a diversity and inclusion and HR specialist with the Legacy Bowes Group. He discusses how to orchestrate diversity and inclusion in your workplace, on page 35.


You don't need to walk
to make great strides at the office.
Seeing people's capabilities instead of disabilities means finding the best person for the job. Recognizing skills and talent makes good business sense. In fact, employees with disabilities have better attendance and higher productivity than their co-workers. If you're looking for someone to enhance your business, it's time to see people for what they CAN do.
Diversity is good for business.
www.businesstakesaction.ca
BUSINESS TAKES ACTION
CGI/Perl
Canadian Manufacturers & Exporters

BY DAPHNE FITZGERALD, CHRP, SHRP

CEO PERSPECTIVES ON HUMAN RESOURCES

Last fall, HRPA commissioned Knightsbridge Human Capital Solutions to conduct 20 one-on-one interviews with CEOs from a range of sectors and differently-sized companies to get their take on Human Resources and the value HR leaders bring to their organizations.

The survey, *The Role and Future of HR: A CEO Perspective*, asked a series of questions, including the value HR brings to the business; how well HR has performed over the past several years; what CEOs consider as their biggest human capital challenges; and what they look for in a chief human resource officer.

The results were surprising. For all our gnashing of teeth about HR's "seat at the table," the CEOs feel we are already there. Overall, the survey revealed the CEOs view their chief HR officers as valued contributors to the business; and trusted advisors who often play the role of confidante to the CEO and other executives. They believe HR is on an equal footing with other business areas.

Indeed, the executives felt their HR leads were instrumental in guiding their organizations through the recent economic downturn. One half had experienced big growth during the period, while the other half underwent significant downsizing. In both cases, HR's ability to manage workforce levels and workforce effectiveness was critical.

Needs Improvement

However, they did identify areas for improvement. Many felt HR executives fall short of really understanding business challenges, largely because they don't get "in the trenches" enough. The CEOs said HR needs to get out of their "ivory towers"—where they are perceived as too often developing impractical policies and programs—and better understand the challenges of supervisors and front-line managers.

As one CEO stated, "If you don't have a business-savvy HR team, it's time to re-tool it!"

My Experience

I am fortunate to have worked my entire corporate career for an international financial services organization whose CEO believed in developing HR leaders who were truly business-savvy. His goal was to make HR executives more valuable to their business units in the short-term and develop them as possible business unit leaders and ultimately making them more valuable to the organization in the longer term.

This meant hiring a new kind of HR professional and providing business training to both HR executives, so that they could operate effectively inside and outside of human resources, and to the business leaders so that they could truly understand the value HR brought to the table.

In my own experience, when it came time to put my money where my mouth was, I took up the challenge of leading two different business units within our Canadian operation. My training allowed me to move out of HR and into a business unit leader role and let me see HR from the other side. Not only did having an HR background allow me to better understand how sound human resources principles can make business more successful, it also gave me insight on how HR could perform even better in supporting organizational goals.

As every successful business leader knows, understanding the customer is key to success. HR's many customers include business leaders (CEOs, presidents and other executives), line managers and the general employee population.

By moving out of the ivory tower, learning to speak customers' language and understanding their challenges, HR professionals not only become respected members of the executive team but also learn valuable ways of running their HR businesses, providing value-for-money to their business leaders and line managers and services and support that are truly appreciated by all of their internal customers.

The HRPA/Knightsbridge survey confirms that CEOs truly value the contributions HR brings to their organizations; but it's up to us, as HR leaders, to maintain and grow this value. **HR**

Daphne FitzGerald, CHRP, SHRP, is chair of HRPA's board of directors.

RECRUITING AND RETENTION TOOL

TEAMQUEST'S MARCI SCHNAPP-RAFAEL HAS DISCOVERED A WAY TO SOLVE THE CHRONIC ISSUES OF LOCATING AND RETAINING TOP TALENT ONCE AND FOR ALL. IT'S CALLED ROLE-BASED ASSESSMENT (RBA). THIS GROUNDBREAKING WEB-BASED TOOL WAS CREATED BY SOCIAL SCIENTISTS AT THE GABRIEL INSTITUTE OF PHILADELPHIA AND IS BASED ON THE LATEST RESEARCH. THE THREE TOP PREDICTORS OF SUCCESS ON A JOB AND IN AN ORGANIZATION ARE COHERENCE – EXPRESSED AS POSITIVE BEHAVIOURS – TEAMING CHARACTERISTICS AND ONE'S NATURAL INCLINATION OR UNIQUE ABILITY ALIGNED WITH THE JOB'S FUNCTION.

AS THE ONLY CANADIAN FIRM USING RBA, SCHNAPP-RAFAEL HAS SEEN THE BENEFITS. COMPANIES NOW HAVE THE ABILITY TO SYSTEMICALLY AND CONSISTENTLY IDENTIFY, HIRE, DEVELOP AND RETAIN PRODUCTIVE EMPLOYEES, RESULTING IN BUSINESS GROWTH.

FOR MORE INFORMATION VISITTEAMQUESTSYSTEMS.COM.

Employee Fired for Cause gets $25,000

In an unusual case, a court awarded a big chunk of cash to a man who was fired for being persistently late for work and making defective airplane parts. This decision highlights the difference in the common law and statutory definitions of "just cause" for termination.

Ontario Superior Court Justice Haines ruled that although Stephanus Oosterbosch was fired for good reasons, he was entitled to both termination and severance pay under the Employment Standards Act (ESA) of over $25,000 in total.

Oosterbosch was employed by FAG Aerospace as a machine operator from December 1990 to April 2009. As the company manufactures bearings for the aerospace industry, precision and quality control are essential.

On two occasions the plaintiff produced a large number of airplane parts that did not conform to specifications. He was also frequently late for his shifts and took overly long meal breaks even after he had been counselled for lateness three times in the previous year.

Prior to his dismissal, Oosterbosch received several written warnings and then a two-day suspension in accordance with FAG's progressive discipline policy. He sued the company for both common law damages for wrongful dismissal and termination and severance pay owing under the ESA.

Justice Haines found that in view of his persistent misconduct notwithstanding on-going coaching sessions and warnings, the defendant company had just cause under common law for firing Oosterbosch. Therefore he was not entitled to damages for wrongful dismissal.

However, the judge did not characterize his offending behaviour as "wilful misconduct, disobedience or wilful neglect of duty," which is the standard the company had to meet in order to deny Oosterbosch termination and severance payments mandated by the ESA.

Under the ESA, a terminated employee with eight or more years of service is entitled to eight weeks of notice or pay in lieu of notice. In addition, where the employer has a payroll of more than $2.5 million and the employee has five or more years of service, severance pay of one week per year to a maximum of 26 weeks is payable.

Therefore Oosterbosch was awarded $7,904 for eight weeks termination pay plus severance of $17,127.33, reflecting 17 years and four months employment with the company.

Koskie Minsky employment law partner Arleen Huggins says in all cases it is preferable to sue for both wrongful dismissal damages and ESA termination/severance pay to ensure that even if you cannot make a case for a common law award, the court can still order statutory damages.

Source: moneyville.ca

2011 HRPA Board Chair Announcement

The Human Resources Professionals Association (HRPA) is pleased to announce the appointment of Daphne FitzGerald as chair of HRPA's board of directors. FitzGerald is president of Pension Puzzle Inc. and chief operating officer of Capital G Consulting Inc., providing specialized HR consulting services and retirement education seminars to Canadian employers. Between 1974 and 2002, she held a number of executive positions with Zurich Financial Services, including senior vice president of corporate development, managing all facets of human resources, organizational development, strategic planning, corporate communications and public relations. She was ultimately appointed president of PeoplePlus Insurance, a Zurich strategic business unit providing car, home and life insurance solutions to the members of employer and association groups. In 2002 Daphne was awarded the Queen Elizabeth II Golden Jubilee Medal and in 1992 was a nominee of the Women Who Make a Difference Award (1992).

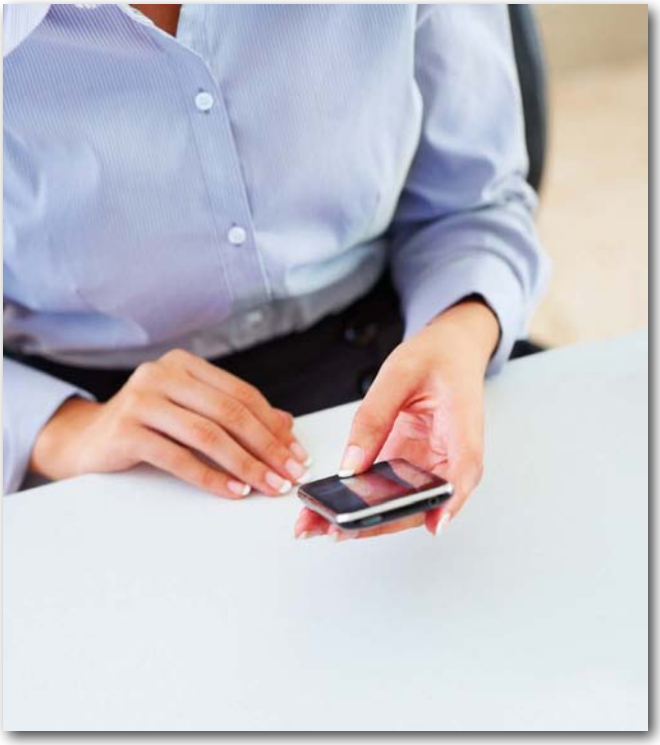
ARE YOUR EMPLOYEES RECORDING YOU?

ABC News recently asked if employees were secretly recording workplace events to gather evidence for future discrimination and other lawsuits.

Labour experts and employment lawyers say that as cell phones and other digital devices have become more common, employees have gotten increasingly savvy about using high-tech tools to record what they consider discriminatory or inappropriate activity at the office, often in secret.

Katrina Patrick, a Houston employment lawyer, estimates that more than half of the workers who come to see her bring audio or video recordings, photos or electronic messages to the first meeting. "Everyone walks around with our cell phones, and our cell phones are armed with all sorts of cameras and recording devices," she said. "I am actually more surprised when there isn't digital evidence than when there is."

Source: ohioemployerlawblog.com



ENGAGING SURVEY

PSYCHOMETRICS CANADA RELEASED A SURVEY OF 368 CANADIAN HR PROFESSIONALS. THE PARTICIPANTS WERE FROM A NUMBER OF INDUSTRIES: BUSINESS, GOVERNMENT, CONSULTING, EDUCATION AND NOT-FOR-PROFIT.

THE MAJORITY (69%) INDICATED THAT ENGAGEMENT WAS A PROBLEM IN THEIR ORGANIZATIONS. A VAST 82% SAID THAT IT WAS VERY IMPORTANT THAT THEIR COMPANIES ADDRESS EMPLOYEE ENGAGEMENT. IN FACT, LESS THAN HALF OF ONE PER CENT FELT THAT ENGAGEMENT WAS NOT AN IMPORTANT ISSUE FOR THEIR ORGANIZATION.

FOR MORE INFORMATION ON THE SURVEY, VISIT PSYCHOMETRICS.COM/EN-US/ARTICLES/ENGAGEMENT-STUDY.HTM

HR JOB POSTINGS UP

ACCORDING TO JOB SITE INDEED.COM'S APRIL 2011 INDUSTRY EMPLOYMENT TRENDS REPORT, HUMAN RESOURCES JOB POSTINGS HAVE INCREASED 17% SINCE APRIL 2010. CLICKS ON HUMAN RESOURCES JOBS HAVE INCREASED 100% SINCE APRIL 2010.

SEE THE COMPLETE REPORT AT HTTP://CA.INDEED.COM/JOBTRENDS/INDUSTRY.

SURVEY:

Canadian CEOs View HR Execs as "Trusted Confidants"

A spring survey of Canadian CEOs by the Human Resources Professionals Association (HRPA) reveals that HR does play a lead part at the boardroom table but has more to do to become the star.

In conjunction with Knightsbridge Human Capital Solutions, the survey — The Role and Future of HR: The CEO's Perspective — asked a series of questions of 20 Canadian CEOs, including the value HR brings to the business; how well HR has performed over the past several years; what CEOs consider as their biggest human capital challenges; and what they look for in a chief human resource officer.

Results reveal disconnect

The CEOs view strong HR leadership as critical to the success of the organization. The survey revealed CEOs see chief HR officers as valued contributors; and trusted advisors who often play the role of confidant to the CEO and other executives. They believe HR is on equal footing with other business areas.

Room for improvement

Many CEOs felt HR executives fall short of really understanding business challenges, largely because they don't get in the trenches enough. The CEOs said HR needs to get out of their ivory towers — where they are perceived as developing impractical policies and programs — and understand the challenges of supervisors and front-line managers.

As one CEO stated, "If you don't have a business-savvy HR team, it's time to re-tool it!"

Moving out of the recession, the CEOs confirmed that HR professionals continue to play a significant part at the boardroom table, leading the organization on key challenges including managing across generations, continuous change management and communications in the age of social media.

For full survey findings, please go to: www.hrpa.ca/Documents/HRPA_KB_CEO_Perspective_Research_Highlight.pdf

HRPA RECEIVES PRESTIGIOUS ACCREDITATION

The Human Resources Professionals Association (HRPA) has become the first Canadian credentialing body to achieve accreditation by the National Commission for Certifying Agencies (NCCA) for its Certified Human Resources Professionals (CHRP) designation program. HRPA joins the ranks of more than 100 professional and occupational certifying bodies accredited by NCCA.

"Achieving NCCA accreditation is a reflection of HRPA's commitment to excellence as a credentialing body," said Claude Balthazard, HRPA's director of HR excellence. "This achievement further reinforces that the certification process for human resources in Ontario is recognized as world class. Our Certified Human Resources Professionals and those pursuing the designation can be assured that their credentials equip them for success in the global economy."

The NCCA standards and accreditation process are the most widely referenced standards and accreditation process in the credentialing community, covering all aspects of a certification program: governance, the development of assessment instruments, standard setting, recertification, and documentation. NCCA is the accreditation arm of the Institute for Credentialing Excellence (ICE) and is recognized as the authority on accreditation standards for professional certification programs.

"As human resources management plays an increasingly strategic role in business across Canada and around the world, it has become more important than ever that the profession's certification programs are backed up by thorough and rigorous accreditation," said Debbie Bennett, Chair of The Canadian Council of Human Resources Associations. "All HRPA members should be very proud of this accomplishment."

 BY MARY A. PORJES

NOTICE PERIODS AND VALUATION DATES

Human resources professionals need to stay current on issues relating to termination packages. Two areas that come up routinely are notice periods and the timing for payout for shares or stock options. A recent case, Love v. Acuity Investment Management Inc. addressed both.

In Love, the plaintiff was employed by the defendant, Acuity, for 2.53 years when his employment was terminated without cause. At that point, he was one of only two senior vice presidents, reporting to the founder and chief executive officer. While he did not supervise any employees, he was responsible for managing the company's institutional investment clients. He was 50 years old. In terms of compensation, he received a salary, commissions, profit distribution and had a 2% ownership in the defendant company, which were worth an average of $633,548 per year of employment.

The trial judge reviewed the standard factors of age, position, length of service and management duties to determine reasonable notice. He stressed that Mr. Love's length of service was relatively short at 2.43 years and, based on similar cases, assessed a reasonable notice period of five months.

The Ontario Court of Appeal disagreed with this assessment in several respects. The Court cautioned that while short service might tend to reduce an employee's notice period, it was risky to use comparable cases on length of service to determine notice periods without addressing other factors. The Court of Appeal found that in his review of cases with similarly short periods of service, the trial judge had not taken into account the seniority of Mr. Love's position or his compensation and had not considered at all the availability of similar employment. The Court of Appeal stated that Mr. Love's senior position, substantial compensation and equity would make finding another similar job "harder rather than easier." For these reasons, the Court increased the notice period for Mr. Love to nine months, a significant increase from the five-month period assessed by the Trial Judge.

The second major issue in the **Love** case related to the date on which the company was to value Love's equity for the purpose of repurchasing his shares. The agreement provided that Acuity was to purchase Love's shares "for a purchase price, determined at the date that Love **so ceases to be an employee** of Acuity…". The Court of Appeal found that Love's employment was severed on his termination date and that was the date that he ceased to be an employee, with the result that his shares should be valued on the date he was dismissed.

This issue of timing and entitlement arises frequently with stock options and other long-term incentive compensation. There the concern is whether the employee's rights end on the date of termination or continue to the end of the reasonable notice period. The answer depends on an interpretation of the relevant agreement between the parties. For example, in the earlier case **of Veer v. Dover Corp (Canada) Ltd.** (1999 CanLII 3008 Ont.C.A) the relevant agreement cancelled the employee's options on the date of termination. In that case, the Court of Appeal held that this meant "lawful termination" with the result that Veer was entitled to exercise his options at any time to the end of his 24-month severance period. The Court of Appeal's construction of the words in Love's agreement "ceases to be an employee" appears to be inconsistent with the analysis found in earlier option cases.

The Love case serves as a useful reminder that each termination must be considered on its particular facts and that one or other of our usual benchmarks for reasonable notice should not be given undue weight without a proper assessment of all the circumstances. In terms of the valuation date and its application to vesting of options and other long-term compensation items on or following termination, unfortunately, this area continues to be muddy and the **Love** case has not helped to clarify an employer's obligations. For greater certainly, employers should review their plan documents with regard to recent cases to ensure that they clearly indicate when a dismissed employee's rights terminate. **HR**

Mary Porjes is a highly experienced employment lawyer with Porjes-Walsh Barristers & Solicitors.

BY WAYNE FORSTER

SCRAP THE PERFORMANCE APPRAISAL: IT'S DOING YOU MORE HARM THAN GOOD

Virtually every organization today uses some type of performance evaluation process. They are used for the best of intentions – to improve employee performance, to meet organizational goals and to strengthen management-employee communications and relationships.

But if you're presently conducting performance appraisals in your organization, I've got some simple advice for you: stop. Scrap your performance appraisal process. It is probably doing your organization more harm than good.

If you are conducting typical performance appraisals, you are better off not doing them at all. It's not just that they're a waste of time – it's worse than that.

Most performance appraisals are counterproductive, divisive and cause conflict. They damage relationships. They are an obstacle to communications and they hurt morale. On top of all this, managers and employees despise doing them. Consider one other problem: they simply don't work.

By its very nature, the appraisal process is adversarial. There is a power imbalance between the manager and the employee "receiving" the appraisal. The system is also open to manipulation, with managers sometimes counselled to score employees lower, to reduce wage demands.

Traditional performance appraisals also flounder because they are subjective, often focusing more on personality than on performance. Overly complex scoring systems are problematic and most do nothing more than provide the illusion of objectivity while treating subjective opinions as facts.

Typically, performance evaluations are done annually, which is too infrequent to be of true benefit. Because annual reviews tend to focus on recent behaviour, employees have been known to enhance performance just before their review, to get better scores.

The traditional process is confrontational, subjective and counterproductive. It is a task that everyone dreads and, worst of all, it does not improve performance. So, what's the alternative? Some organizations opt out of reviews, only addressing performance issues when there is a problem. Other companies cling to their traditional appraisals, but managers rush through the process and it becomes a safe but useless exercise.

There is a better way, and it starts with changing the entire structure of the performance appraisal, making the employee a participant *in*, rather than a recipient *of* the process.

At Forster Emerson, we've developed a different approach to performance improvement that can best described by this three-word phrase – *continuous collaborative conversations.*

True collaboration is characterized by a shared responsibility and accountability for performance – between the employee, their manager and the organization. Our approach includes mutually-developed performance goals, linked directly to organizational objectives. It also supports the collaborative development of a concrete action plan to improve future performance.

Our process includes a structured conversation between the employee and their manager about the achievement of performance goals. Rather than a top-down appraisal, both parties review applicable measurements, identify what needs to be done to improve performance and develop an action plan. We've also scrapped scoring systems. Instead, the tools used in the conversation are inquiry, feedback and active listening. The manager, acting as supporter and facilitator, asks questions like, "What do you need from me to improve your performance?"

Effective performance improvement is a continuous process that includes regular dialogue. We believe that every three or four months is appropriate; achieving performance goals should be deemed a high priority by everyone in the organization.

For almost two years now, our clients' responses to this approach have been tremendous. Employees actually look forward to their performance conversations. Managers also like the process. This new, more effective approach to performance improvement comprises an honest partnership with shared responsibility for achieving performance goals. Best of all, it results in a concrete action plan that actually leads to improved performance.

And isn't that the purpose of the process in the first place? **HR**

Wayne Forster, CHRP, is a Halifax-based human resource development consultant, trainer, speaker and author.

TRAINING AND DEVELOPMENT ON A SHOESTRING

How to quench the thirst for knowledge when the well is dry

BY MICHELLE MORRA-CARLISLE

THE NEED TO LEARN doesn't rise and fall with interest rates or the stock market. It is constant.

For employers still recovering from the recent economic crisis or struggling financially for whatever reason, budgets are understandably tight. What to do with the demand for learning? Your managers, top performers, new recruits and future prospects are all keeping tabs on how your company can help their career advancement. Opportunities to learn are directly related to whether or not they will work for you, how engaged they will be and how long they will stay.

There is a bright side to being forced to re-examine your training and development plan. According to Evan Carmichael, founder of Evan Carmichael Communications Group, searching for an alternative to the status quo can not only bring cost savings but introduce companies to new and better ways of learning.

"When you scrutinize your budget for ways to do it better," he says, "it forces you to be a little bit smarter. And that's something any entrepreneur can relate to."

COST-SAVINGS TIPS FOR LEAN AND MEAN LEARNING

Some of these budget training ideas will surprise you!

Employers and employees share the cost (and responsibility). Rather than the employee passively waiting to be trained and developed, it often works out better for everyone if the employee is involved in taking the initiative and sharing the responsibility and the cost. For example, some employers will pay for the whole course, but only if the employee gets an A on the final exam – an incentive to get the most out of the training.

There are three levels of training at I Love Rewards Inc.: 70% of what you learn is on the job; 20%, the company pays for, like mini-retreats with internal or guest speakers, etc.; and the last 10% is at a shared cost.

"That's where you decide for yourself," says Razor Suleman, CEO and founder of I Love Rewards Inc. "If you work in the call centre and need to brush up on your Spanish, we'll invest alongside you. Once you learn Spanish you would go up a pay grade."

For this shared responsibility to work, he says, it helps to hire learners in the first place – people who have a natural curiosity to figure out the tools they use and where their industry is going.

Partnered mentoring systems. Tapping into the skills of someone within the company costs nothing but time. In a larger organization, a more junior employee can learn a lot by partnering with a senior person through a series of meetings over lunch or coffee. "This is probably the most time-consuming method," Carmichael says, "but probably generates the best results."

E-LEARNING

The Ontario Hospital Association found that its members in remote locations understandably couldn't attend every training session or conference offered in Toronto. The solution is "Discovery Campus," an interactive learning experience delivered online. Health care professionals get 24/7, point-and-click access to OHA-approved courses on topics such as Accessible Customer Service Standard and Workplace Hazardous Materials Information System (WHMIS). They are available at a low cost, and the OHA offers bulk discounts for more modules or more users. OHA also broadcasts seminars and other presentations online for members to access at a reduced cost.

E-learning was once touted as the learning method to end all business travel; however, it has its limitations.

"Some really like it, others aren't motivated," says Carmichael. "I find it works for the keeners who are willing to invest the time and really want to understand, but for most people e-learning is not as effective."

Employees who sit in front of the computer all day have little interest in doing computer-based training in their spare time. And with e-learning there is rarely validation or feedback if the organization isn't really supporting or reinforcing the learning. But, like everything linked to the Internet, e-learning has evolved to include clever new possibilities.

Tutors via web chat. A great way to support e-learning, livetutor.ca has a staff of bilingual tutors accessible via web chat 24/7. An employee working on a project who hasn't had time to be trained but needs support can chat live with an instructor for 15 to 20 minutes and get an answer. This service isn't the cheapest for a small company, but large companies can buy it in bulk.

Video reference libraries. A service called ontracktv.com allows the user to log in, search for a topic such as "how to do a mail merge" and get a five-minute online tutorial by a professional instructor. Depending on the size of your company, an annual subscription can cost as little as $25 to $30 per person for access to a library of over 1,000 videos. The information is live, professional, targeted and on-demand.

YouTube. At the lowest end of the cost scale is YouTube, with videos on virtually any topic for free. The disadvantage is that

there is no quality control – anyone from 13-year-old ukulele players to 85-year-old mechanics can post a video, so it might take several searches to find a useful tutorial. The advantage? Zero cost and the sky's the limit.

CLASSROOMS AND SEMINARS

Even in a hot climate of iPads, smartphones and Skype it seems there is no substitute for face-to-face, instructor-led training. A change of scenery has its appeal, too.

"A lot of employees feel isolated, whether they're leaders or individual contributors," says Joan Hill, president of Core Consulting, Inc. "So for them to come to a workshop, wow, they have a chance to network and engage with people. There's a lot of energy and excitement in those environments."

When one of Hill's clients told staff they would only offer two training programs that year – on interviewing skills – both were sold out within 32 minutes and there was a waiting list of 138 people. "It's a reflection of that pent-up demand," she says. "People need that intellectual stimulation."

Here's how to enjoy the benefits while spending less:

Send only one employee, or a manager, to the course or seminar. Ideally that person pays attention at the session, takes copious notes and passes along the knowledge to others in the company.

Stay local. Avoid hefty travel costs by choosing local trainers or even having them teach the course at your workplace.

Guerilla learning. Take a hint from journalists, who never pay for events they cover. "Try to get into seminars and events as media," Carmichael says. "Maybe you want to profile the event or present it on your company blog, or write a guest post for someone else's website."

Sticking with the media angle, he also suggests looking for executives at local companies who are experts in your field, and asking if you can interview them.

Discount sell-offs. Much like tripadvisor.com and other companies that sell off last-minute flights at a discount, lastminutetraining.ca is the only company of its kind that sells off discounted, last-minute instructor-led training. Most of the training available through their service is on computer skills, ranging from simple Microsoft applications all the way up to advanced Cisco training.

When Louis Trahan started the company six years ago he thought the discounts (generally 20 to 30%, sometimes more) would be the main draw for employers, but the convenience was an even bigger draw.

"Corporations like us because finding training takes a lot of time. In Toronto there might be 20 or 30 different companies to access. Those who have to make do with less support staff can still provide quality training by taking advantage of our staff… and if they need to show that they've looked at a few sources they can do so very easily."

The lastminutetraining.ca website features the leading schools across Canada and is a great one-stop place to find schedules, curricula and dates of upcoming courses. Past trainees post reviews of the various programs and instructors, which can be invaluable when shopping around.

"And when they want to bring trainers in they can call us," Trahan says, "and we'll collect the information, go out to the competing vendors and say, 'Here's the RFP, the opportunity, and you can bid on it.' That typically makes the vendors sharpen their pencil a lot, and it's at no extra charge to the employer."

The service also includes a tool that helps trainees figure out beforehand which level of course would be more tailored to their experience and skill level.

OTHER SMART OPTIONS

Private one-on-one training. It works for piano lessons and apparently does wonders in business as well. Private training such as that offered by JN Software Consulting (and other companies accessible through lastminutetraining.ca) is time-saving, cost-saving and tailored to the learner and the job.

Trahan compares it to a full-day course in, say, Excel. "If you go into those courses you start at Point A whether you know the material or not. Let's say you just need to learn pivot tables – for 45 minutes or an hour you might be learning things you already know. That's not necessarily a good way to spend your time or money."

"Rather than spend a lot of money for a full-day course," he says, "in three hours I could have an instructor sitting next to you covering the same material. That will cost you less and instead of just generic labs, the instructor will probably use your work as your practice work. One-on-one training is a really underused way of training and it really is a shame, because it probably is the most effective use of time and money."

On-line instructor-led classes. Trahan recommends elerttraining.com as a reliable provider of this affordable option. "Instead of spending $200 for a full-day class," he says, "you could spend just $75 for a 90-minute course with an online instructor. It comes with a PDF manual, everything you'd normally get, but you don't have to leave your office."

Off-the-shelf training programs. Soft skills training in particular lends itself well to off-the-shelf programs because skills like customer service and conflict resolution rely on the same principles whether you're in sales, telemarketing or manufacturing. Organizational Learning Resources offers over 100 learning

tools for organizations or individuals, in the form of programs, workshops, assessments, e-assessments, simulations, games, activities, and a vast library of soft skills materials. Hill is a regular customer.

"Their programs save our clients money," she says. "If someone told us they wanted their leaders to understand their interpersonal style and how they approach conflict, for example, we know there are tools out there that have a proven track record and that are already tested. And they are very, very reasonable. We integrate them into our own training plan."

Instructors, too, save with off-the-shelf programs because they eliminate having to research, develop, validate and produce learning resources from scratch.

ROI: CAN YOU MONETIZE SUCCESS?

Whether you're on the same training and development budget as last year or just a quarter of it, you will still need to justify the investment. Every time anyone asks Suleman about how to measure ROI for training and development, his position is the same:

"Training and development doesn't work that way," he says. "There is no scientific way to prove that if I spend $1 I will get $3 back. It's trying to measure something that's not tangible."

Instead he advocates demonstrating how the company will benefit in non-monetary ways and, conversely, how a lack of training can really smart. For a growing company, progress notwithstanding, there is a danger of outgrowing your employees. If for example your marketing officer is a veteran at writing and faxing press releases but has no interest in learning the new social media tools such as TweetDeck, your marketing department won't keep up with the rest.

"A lot of times companies may have rapid sales growth but don't have any of the infrastructure underneath them," Carmichael says. "Part of that infrastructure is having a good team and the training that you need. So they're hiring and hiring, but if people don't have the adequate skills to do their job, that's when the company starts to lag."

Besides the risk of outgrowing your employees, there is also a risk of them outgrowing you. Training and development is tied directly to recruitment, engagement and retention. I Love Rewards Inc. recently surveyed over 8,000 university and college students on their perception of the workplace. Asked what they look for in an employer, their number one answer was career advancement, surpassing salary for the first time.

On the flipside, Suleman says, "The No. 1 reason people leave an employer is lack of recognition – and recognition is often the byproduct of training and development."

For those who prefer to talk about monetary value, he tells of a man named Rob who started at I Love Rewards as an intern then came back after graduation. He worked for eight months as an entry-level inside sales rep, was wildly successful at it, then was promoted to business development manager (making 20% more than he made as an intern).

"I'm telling you, the value that he provides as a business development rep is much greater than the value he provided in the other roles," Suleman says. "And our goal is to get him to become a senior development manager because he's taking on more responsibility and driving more revenue. That's success. When your employees can continue to learn and grow inside your organization, that's success." HR

LEARNING – HOW TO MANAGE CHANGE

BY SUE KENNEDY, CHRIS MUSSELWHITE AND TAMMIE PLOUFFE

Despite decades of research on change management, almost 70% of all major organizational change efforts still fail. John Kotter, a Harvard professor and respected change management guru, says these organizations fail because they don't take the holistic approach required to achieve and maintain the change. In his effort to help organizations become better at this holistic approach to change, Kotter devised his 8-Steps for Leading Change, a clear set of management tactics for what he identifies as the eight critical stages in the change process.

While Kotter's eight steps – establish a sense of urgency; form a powerful guiding coalition; create a vision; communicate the vision; empower others to act on the vision; plan for and create short-term wins; consolidate improvements and produce still more change; and finally, institutionalize new approaches – are clear directions on the "what," they are a little short on the "how."

That's where organizational learning professionals come in. Unfortunately, while most of the people in the C-suite realize that learning is critical to achieving any meaningful change, many don't realize that it takes a lot more than a few classroom or online training sessions. Training professionals who've been responsible for the learning behind any change initiative know that true change can only be achieved through a process of targeted learning experiences that does two things: 1) sell the desired change to the people who have to make it happen; and 2) teach them (and get them to adopt) the new behaviours required to bring about the change.

In this article, three veteran learning and training solutions professionals share their proven suggestions for tactics and tools that HR professionals can use to create the targeted learning experiences that will effectively support Kotter's holistic change process.

STEP 1: Establish a Sense of Urgency

According to Kotter, at least half of failed change efforts are due to not establishing a sense of urgency around the targeted change early in the process. To make sure everyone in a company understands the need for change, successful change initiatives should include and engage all impacted employees, right from the start. Tactics could include: a customized engagement survey, a culture survey, 360-degree assessments of management and employee focus groups. Assessments provide a benchmark against which progress can be measured. Focus groups can shed valuable light on and possibly validate the findings of engagement and culture survey – if they are held soon after the surveys are administered.

A recent McKinsey survey indicates that change initiatives are more successful when there is an equal mixture of positive and negative messages. The messages of urgency need to be balanced with acknowledgement of those things that are working effectively.

STEP 2: Form a Powerful Guiding Coalition

To lead change, Kotter states that you need to make sure an influential group leads the change effort. To make this happen, companies should strive to create *Shared Learning Experiences* for the management team. These experiences will give leaders a common understanding of the challenges and opportunities being faced by the company and create a bond around the need for change. Either as part of the shared learning experiences or soon after, leaders should be led in the development of *Action Planning Themes* – common themes around which all action and communication in the change initiative will be organized. These common themes can be drawn from the feedback provided by the engagement and culture surveys administered in step one. The development of these themes will reinforce the need for the desired change in a consistent manner.

To further help your guiding coalition communicate the change desired, it is helpful to develop a persuasive **Case for Change.** Another communication and learning tool, a Case for Change is a clearly articulated communication of the rationale behind the need for the change. This will be used by the leadership team to communicate and sell the need for the change consistently and compellingly across the company.

Finally, put a plan in place to communicate the **Action Planning Themes** and the **Case for Change** to all levels of the organization via the leaders who learned them through their shared learning experiences. Their enthusiasm and participation will be instrumental in engaging others in the organization in the need for the change.

STEP 3: Create a Vision

Kotter tells us that creating a clear vision helps everyone understand why he or she is being asked to do something. When people truly understand what the organization is trying to achieve, the directives they're given and the changes they are asked to implement tend to make more sense, and are less likely to be resisted.

Once a guiding coalition is formed and trained to communicate the desired change, experiential learning like that created by interactive, participatory simulations is an effective learning tool to create the necessary energy to effectively reinforce the need for the proposed change across the organization. A participatory, hands-on experiential learning experience can provide the deep and lasting understanding of exactly what change needs to occur, why, and how best to accomplish it.

STEP 4: Communicate the Vision

Thanks to the power of the shared experience provided by the experiential learning in step three, everyone who participates will gain a renewed sense of the urgency of the need to change as well as form a bond around the change. To take advantage of this enthusiasm, a good follow-up tactic is to have leaders create compelling personal pitches, or "elevator speeches" for their use in communicating the need for change to their teams and the rest of the organization.

The process of creating these personalized talking points will empower leaders, enabling them to effectively communicate –and more importantly– *model* the behaviours required to make the desired culture change a reality. Modeling change is critical. The success rate of change initiatives increases dramatically when respected leaders actively make and model the change they are touting to others.

Communicating equally to all levels of the organization about why change is needed and what behaviours will bring about that change is critical to the implementation of lasting organizational change.

STEP 5: Empower Others to Act on the Vision

In order to sustain the momentum generated early in Kotter's process, it is crucial to begin transferring the necessary knowledge and training from any learning solutions providers to your organization's HR and training team. This transfer of knowledge will be critical to your company's ability to successfully lead and implement future change efficiently and cost-effectively.

This can be started with *Train the Trainer* sessions to certify your organization in the assessments and experiential learning tools used in your efforts to date. This ensures that the learning can continue to support the change across the organization as time and resources allow. Putting additional personnel at all levels of the organization through the experiential learning and communications skill training implemented to date will help to reinforce the initiative's vision and equip more people in the company to communicate the change more effectively.

STEP 6: Plan for and Create Short-term Wins

An important step in any change effort is to ensure people feel like they are making progress along the way. One way to do this is by developing and implementing measurable goals and

action plans, then working with team leaders to creatively implement and follow progress being made at every level of the organization.

Hosting e-learning sessions with regional or divisional leaders to share best practice success stories and celebrate successes across the company is a good tactic to spread the word.

As the initiative progresses, administering additional engagement surveys and sharing the results is a good way to show the organization is actually changing. This will continue to bring enthusiasm to the initiative from all levels.

STEP 7: Consolidate Improvement and Produce Still More Change

Noting that many change projects fail because victory is declared too early, Kotter's seventh step in the change process calls for companies to quickly integrate changes achieved even as they continue to produce additional change. In other words: keep up the momentum.

This can include more experiential learning experiences, more peer coaching and leadership style assessments, monthly conference calls to keep all leaders informed of successes and results seen in monthly sales reports, along with more employee and customer surveys. It pays to encourage leaders to share successes with their reports. This facilitates better two-way communication, reinforces the concepts being learned, and supports desired new behaviours in the workplace.

STEP 8: Institutionalize New Approaches

Making the case for his final step, Kotter says that in order to make any change stick it must become part of the core of the organization, i.e. evidence of the changes being achieved must be visible in the changes in the company's day-to-day processes and procedures. In other words, you must institutionalize new approaches as quickly as possible. For example, Train the Trainer sessions can be a critical factor in institutionalizing the new approach to management and communication, as they help to ensure the organization's ability to implement future change in partnership with HR.

Likewise, positive-word-of-mouth about the experiential learning across the organization can spur desire among all employees for future hands-on learning experiences. This final step, institutionalizing the new approach, ensures that the organization is "living" the change it has been implementing, and not just talking about it. **HR**

Sue Kennedy is a learning solution consultant from Discovery Learning Inc. Chris Musselwhite is president of Discovery Learning. Tammie Plouffe is the principal at Innovative Pathways and a Discovery Learning associate.


Talent.
On a planet of 6.6 billion,
it's still your most precious resource.

BY DR. BARBARA ORSER AND DR. JOANNE LECK

GENDER BALANCE IN THE WORKPLACE

According to some, gender equality in the workplace is well underway. Indeed, employment opportunities for women have risen over the past 30 years. Statistics Canada reported that the number of women entering the workforce increased from 37% in 1976 to 47% in 2006. Within the Canadian federal service, women occupy 55% of all positions and 43% of executive roles. Such estimates have led to debate about the relevance of gender as a designated equity group within the *Employment Equity Act.1.* But, has equality been reached? And if not, how can HR professionals influence the advancement of women into leadership roles?

A recently-published study conducted by Dr. Barbara Orser and Dr. Joanne Leck of the University of Ottawa, Telfer School of Management, entitled *Gender Influences on Career Success Outcomes*, examined gender influences in traditional indicators of success such as compensation and ascendancy or reporting level.[2] The study also examined perceptions of success among 521 senior managers, executives and CEOs in the Canadian public and private sectors.

The Findings

Compensation disparities were found to extend into the executive suite as gender differences in compensation were observed across all reporting levels. Further, these differences were significantly higher than previously reported earning differentials. This was likely the product of how compensation is calculated. The Orser and Leck study reported on *total* compensation, including wage or salary, bonuses and other forms of remuneration, whereas most industry studies limit analysis to paid earnings. Among CEOs, women were compensated 27 per cent less than their male counterparts. Among executives reporting directly to the CEO, women were compensated 29 per cent less than their male counterparts. Similarly, female managers earned 38 per cent less than their male counterparts. The research concluded that, after controlling for a number of potential explanatory influences associated with career outcomes, gender influences remained.

The study also found that total compensation and ascendancy (or reporting level) were linked to higher education and international management experience. These observations are a reminder of the importance of acquiring academic credentials and breadth of management experience. Years of work experience was also associated with total compensation but, interestingly, not ascendancy. This latter finding is consistent with arguments that traditional career models predicated on employment tenure are no longer relevant. Firm size, defined as the number of full-time employees, was associated with ascendancy but not compensation. This is likely because larger firms enable more advancement opportunities for all employees.

Finally, results suggest that what has been coined the "paradox of the satisfied female worker," is evident in senior levels of management. That is, while female managers, executives and CEOs earned significantly less than comparable male counterparts, females expressed higher levels of satisfaction with their careers.

Several implications can be drawn from the study. First, arguments that equity legislation is no longer needed are unsupported. Differences in the representation of female leaders among public versus private sector employers may be an artefact of Canadian employment legislation for all persons working in federally-regulated workplaces. The study provides evidence that pro-active initiatives to attract and advance women are required across most sectors – particularly within bedrock industries such as forestry, fishing, raw material transformation, mining, oil, gas and knowledge-intensive sectors (professional scientific and technical services). Proactive initiatives are also required to attract and advance men in the health services sector.

These findings may motivate HR professionals to move beyond gender parity guidelines. Proactive strategies such as monitoring and reporting on gender performance related to international management assignments, educational opportunities and total compensation by reporting level and occupational category are needed. Agencies such as Statistics Canada are also encouraged to publish benchmarks of total compensation, rather than paid salary. Finally, related research suggests that a perceived lack of promotion and compensation opportunities motivates most employees to leave their current employer. The study findings suggest that employers seeking to retain top female talent must be more aware of how gender influences career outcomes of senior managers and executives. **HR**

For full details related to Dr. Barbara Orser and Dr. Joanne Leck's research, consult: (2009) Gender Influences on Career Success Outcome. Gender in Management: An International Journal. *25(5). 386-407.*

The Ottawa Citizen (2010). "Women move in, and up", April 17, 2010, p. 20

2 Orser, B. & Leck, J. (2009).Gender Influences on Career Success Outcome. Gender in Management: An International Journal. *25(5). 386-407.*

NEW LEARNING FOR A NEW ECONOMY

Corporate learning and development used to be pretty straightforward. Seminars, workshops and training were delivered in company boardrooms or training rooms and people from across the organization and from various locations would attend. It was a one-size-fits-all approach used since the '50s.

But in today's rapidly changing business environment, this one-size-fits-all approach no longer works and is no longer cost effective. That's because, over the past decade, the way we do business has been completely transformed. Our workforce has changed, our workplace has changed, our technology has changed, our economy has changed, even the way we communicate has changed. Today's workforce is incredibly diverse, made up of different cultures, different generations and different learning styles. While older workers may be comfortable with classrooms, manuals, PowerPoints and corporate trainers, younger workers have little tolerance for long and linear programming.

Stemming from the media that shaped their lives, younger generations need their learning in shorter "doses." This doesn't mean that they're not willing to invest the time and effort that previous generations have; they're simply not willing to do it in a three-day classroom setting. In addition, studies have found that Gen Y and their younger siblings, who've grown up glued to computer screens, have different neural networks than those who where introduced to digital technology as adults. As a result, technologically savvy younger workers learn in a very different way than most of their older colleagues.

The workplace has also changed, with more and more employees working virtually or on flexible schedules. For these people, attending training sessions at corporate headquarters or a branch office is often impractical and difficult. And with workforces that often span the country, if not the globe, along with ever decreasing training budgets, flying employees to corporate headquarters for several days of training has become financially impractical.

It's a real dilemma for learning and development (L&D) departments. They have a mandate to equip employees with the necessary skills for today's challenging and competitive business environment, yet the cost of doing so has become prohibitive – and is simply not working.

So what's the solution?

L&D programs need to be delivered in a variety of ways, through a variety of media and over a period of time. A blended approach to learning is required – one that integrates in-person training, online learning and informal learning. Many companies or external providers provide access to online portals that include course work and simulations in print and video formats, supplementary reading materials, webinars, job aids and bulletin boards to allow collaboration and networking between students.

However, it's informal learning opportunities that are gaining in popularity. This nebulous, unstructured form of learning now accounts for nearly 56 per cent of workplace learning. It includes "on-the-spot" problem solving, mentoring and coaching and it's having the greatest impact on learning strategies today. Businesses are changing so quickly that the immediacy and relevancy of informal learning has an undisputed appeal. Technology has been both a cause and enabler of informal learning.

What does this mean to training departments? Well, we need to evolve with business and technology. Our days of imparting knowledge in a classroom for days on end are numbered, if not gone. This can be good news to economically challenged training departments. Cost savings in travel and related expenses can now be allocated to systems that are more impactful and create greater ROI for businesses. Our real role is creating learning environments where we can facilitate the acquisition of knowledge, but not necessarily control it. HR

Heather Turnbull-Smith, B. Ed, MDE, is director of national learning & development at Ceridian Canada Ltd.


Alternative Dispute Resolution
negotiation and mediation skills workshop
Toronto: July 12-15, August 9-12
Ottawa: July 26-29, Nov. 15-18
"The content was very practical and helpful - definitley what I was hoping to walk away with."
- Terrence McMahon
Director HR
Grey Bruce Health Services
Owen Sound
40 CHRP recertification points by HRPATM
RECERTIFICATION APPROVED
HRPA
PARTNER
TM
STITT FELD HANDY GROUP
EXPECT SUCCESS
1.800.318.9741
www.adr.ca
contact@adr.ca
• Learn how to deal with emotional people
• Learn how to mediate tough problems
• Receive individual coaching in mediation
• Earn a Certificate from WINDSOR LAW
University of Windsor


Concordia University
John Molson
School of Business
UNIVERSITÉ Concordia UNIVERSITY
RETAINING AND NURTURING TALENT
Concordia University's John Molson Executive Centre can help you!
Programs designed in French or English to
meet your specific needs and learning objectives
Call us today for a consultation with an advisor
John Molson Executive Centre
514-848-3960
Toll free: 1-866-333-2271
ec@jmsb.concordia.ca
Your Partner in Designing and Delivering Customized Training Solutions
johnmolson.concordia.ca/ec

BY BRAD TYLER-WEST

ORCHESTRATING DIVERSITY AND INCLUSION IN YOUR WORKPLACE

A recent Industry Canada study reports there are more than a million small businesses in Canada — a huge number, particularly given that entrepreneurs are excluded. A *National Post* headline in early 2010 heralded Canada as a "Shopkeeper Nation" and highlighted the growing numbers of small businesses across the country. Small business has become recognized as a critical contributor to the Canadian economy, particularly over the last few recession-battered years when growth and hiring at larger companies were virtually frozen.

Orchestral Manoeuvres in the Dark, the highly successful 1980s band, rose to fame because of its revolutionary blend of synthesized and traditional instrumentation. Similarly, organizations today need to develop a new and revolutionary blend of their own music—in other words, a more effective mixture of diversity and employment equity.

Diversity 101, initiated in organizations in the 1990s, was a good place to start. It included the conversation on what diversity should look like and addressed some of the systemic barriers for diverse points of view via diverse populations in the workforce. Yes, it was a good start, yet it isn't enough. There is something missing.

In fact, Kirk Snyder, an American author and authority on the role of work in contemporary society, says: "I can attest to the fact that finding organizations that are diverse but not inclusive is unfortunately a very easy thing."

So what's needed next? The answer is Diversity 201. This concept merges the leveraging of diversity and inclusion management into one holistic platform. Consider it the next generation of diversity work. Human resource managers will need to act as the conductor of the band, to apply the creative skills of each individual to launch a whole new genre of engaged, empowered employees. This is because, as Snyder says, "For diversity to benefit an organization, inclusion must be part of the culture in order to prevent the homogeny of talents, skills and ideas."

In other words, leveraging diversity and inclusion management is the key to not only surviving but thriving through this demographic tsunami that is advancing toward us. We have an aging population with fewer younger people

entering the workforce. This creates a bottleneck in most organizations for middle management positions, as there are very few qualified candidates in the pipeline to replace those boomers when they retire. We are seeing evidence that boomers are aging their way and they are not going to engage the retirement years in the same way as previous generations.

Many boomers want to stay engaged in the world of work for a variety of reasons – either as full-time, part-time, contract or casual staff. When they do leave, capturing their corporate knowledge is going to be critical, while allowing opportunities for mentoring and professional development for younger workers who are going to have to step into their shoes.

As well, increased numbers of immigrants and newcomers are being added to our workforce, as governments and industry use immigration to provide us with the skilled workers we need. Yet, newcomers bring with them their own cultural communication and workplace expectations, widening the already existing gap in expectations among the five generations currently in our workforce.

In addition, organizations have legal and social requirements to meet the needs of our workforce, including the accommodation of gender. In an environment that incorporates Diversity 201, accommodation goes beyond accommodating only male and female employees. The workforce today includes transgender workers—especially those who are going to transition while working. There are also more openly gay, lesbian, bisexual, two spirit and transgender employees whose lives and families must be equally respected and valued. Top this off with the growing need for various religious accommodations and you can see why Diversity 101 is no longer enough.

As HR leaders, our job is to be the conductor who pulls together the diverse talent and instruments we have at our disposal. Like a conductor, we need to be inclusive of all our employees in order to create harmony and allow brilliance to flow.

> "As **HR leaders**, our job is to be the conductor who **pulls together** the diverse talent and instruments we have at our **disposal**."

Diversity 201 means expanding and leveraging the framework for employment equity and creating a new foundation that ushers in the concept of "inclusion management." The following guidelines will help to create your success:

Link to strategy. Work alongside the leaders to ensure that the strategies and goals of the business or organization are being supported by its talent management plan.

Rethink soft skills. Reality check: People skills are the new hard skill of the 21st century. It is high time to stop using soft skills when speaking of the complex and varied skills required today to get along, work together, innovate, be productive, build and maintain market share. Give your talent management programs the respect and investment they deserve.

Exhibit strong employer commitment. Once you know what strategic value your talent plays within your organization, you can express this commitment in the 3P's of your organization – policies, processes and people. Putting it in writing shows you are serious and expect that level of commitment from others.

Appoint a champion. This should be someone from your senior ranks who understands the value of leveraging diversity. Have them work alongside all departments to ensure compliance and integration.

Publicize commitment internally and externally. Sharing your vision of diversity externally helps to attract the kind of candidates you want to hire. By sharing the vision internally you maximize the talent you already have by giving them opportunities to expand beyond their present role. It prevents top management pursuing one policy while front lines pursue another.

Survey the workforce. Tap into the wisdom of your talent. Find out what it is they want and are thinking. Then give them the tools, information and resources they need, as opposed to what "you think they need." HR

BY MELISSA CAMPEAU

NURTURING CORE VALUES

Donna Ronayne of Halogen Software discusses how engaging in the HR best practices they preach has contributed to the company's success

Donna Ronayne is vice president, marketing & business development at Halogen Software, a major provider of employee performance and talent management software and solutions. She came on board in 2004 when the company was just 3 years old, had fewer than 30 employees and no more than 50 or 60 customers. Now Halogen employs more than 200 people and counts more than 2,000 organizations among its clientele. Ronayne credits a large part of Halogen's success to a real alignment between corporate values and talent strategy, allowing the company to manage and grow a top-performing workforce.

HRP: Does Halogen use any particularly effective policies to attract and retain top talent?
DR: We do eat our own dog food, so to speak. That is, we use our own learning and management tools and we market to HR professionals, so we implement a lot of our own best practices.

HRP: As well as accolades for your software, your sales and service teams have also received awards. To what do you attribute those successes?

DR: I think that we truly align our business principles, value, culture and priorities around all aspects of our talent strategy. One of our core values is called "world class customer experience." It's a top-level priority, but it's also a way of being.

HRP: Can you tell me more about "world class customer experience" as a corporate value, and how it affects day-to-day operations?
DR: Everything we do is focused on delivering a world class customer experience. Every touch point with a customer has to be brilliant. It's not just about our client service organizations who deliver really good work; it's also about our on-demand group which makes sure our product is one of the best in the industry. It's when you call us with a question about your bill, and our people in financial services understand that you're a customer and treat you with that level of care. It's about taking pride in answering questions the first time around.

HRP: How does Halogen reward great performance?
DR: Part of our compensation is based on a variable pay. If you meet those objectives, you get extra pay, a bonus pay. If you exceed them, in many cases you'll get more than your bonus.

IN A NUTSHELL

First job: Entrepreneur – 8 yrs old. Got up at the crack of dawn and went down to the river with a friend to catch fish, which we sold to the tourists.
Childhood ambition: To be a psychologist.
Best boss and why: Current boss. This is not only politically correct – it's true. Very positive, down to earth – and knows what drives our business. He doesn't wield a mega ego like some CEOs. Lets me run my show, supports me when I need it, and at the same time keeps me accountable for my deliverables.
Next move (next book, job, goal or ambition): Retire rich and devote myself to philanthropic causes – primarily helping to educate women and children around the world.
Ideal retirement or vacation destination: North shore of Kauai - Hanalei Bay.
Last iPod download or CD purchase (or the last music you listened to): Beck and Fat Boy Slim
Favourite author or book and why: Love to read – so this is tough. Favorite book is A Prayer for Owen Meany – I was either laughing or crying the whole way through.
Source of current inspiration/motivation: Remembering what Gord Downie (Tragically Hip) says in one of his songs: "… no dress rehearsal – this is your life!"

We also put a lot of effort into training and development and making sure that our employees live and breathe our values every day. One of our key objectives is called "brilliant experience." That's about making sure that the organization's executive and managers—all the way down through the organization—focus on objectives and goals. Then we're rated on how well we deliver that brilliant experience to our employees.

HRP: What do you look for in people who come to work for Halogen?

DR: We look for people that aspire to greatness. We like people who are creative and who are customer centric. We have a strong work ethic in our organization. We want people who share that same ethic, who like to get things done, with and through other people in the organization.

HRP: How important are your own people when it comes to developing business strategy?

DR: We have a pretty disciplined process. We have a 10-year plan, we have a medium-term plan and then we have an annual operating plan, and we revisit that plan every mid-year. We also look at areas where we should focus extra money and resources. We get input that starts from the bottom up as well, and we let people present concepts and ideas, and then we do use the best of those.

HRP: Do you have any advice about how organizations might achieve the most from cash-strapped training and development budgets?

DR: In a lot of organizations learning and HR are separate. They have training programs, but there's no clear link to the employee's performance; there's no tie to improving performance of the organization in a specific area. We have a tool that links performance to training. Imagine that I'm giving an employee a performance review, and I identify a deficiency in one area. While I'm giving a review and thinking about the employee, I'd be able to click on a link and open up all of the courses and development options that are available. When managers have that at their fingertips, and when it's linked to the actual competency that they're trying to improve, that's going to be much more effective. And we can now trace back the courses that we offer and see if they improved the performance as intended. It's a way to create a development plan to help the employee, so it's not just about learning.

HRP: How high a priority should training and development be for HR professionals?

DR: Very high, if training and development are linked to performance. When you identify everybody's skills gaps, and you understand what all your training requirements are, you've really saved your organization a lot of heartache.

HRP: What's the most beneficial outcome of this approach?

DR: Alignment is a key benefit. Most organizations have a particular culture. Ours is very customer centric, but if you're like 3M, for example, you're very innovation centric. You will want to make sure that the organization's key competencies—the lifeblood of your organization, if you will—are part of your performance review, part of your job descriptions, part of hiring and recruiting and also part of your learning. That's just from a performance point of view. You also have people whose careers you need to develop. Say you've identified someone as a high-potential employee, and think that you'd like to put her in the leadership pool and develop her for that, but she needs certain competencies and she needs to achieve at a certain level to be considered for a leadership role. This means you need to develop a training program and a development program, tied to not only what you need from a leadership point of view but also how to train and develop the employee. When you're able to tie it all together, you have a lot of efficiencies.

HRP: Do you have any further advice on creating alignment?

DR: Start off by looking at your two top business drivers and then align those with your talent strategy. The top driver has to be that people understand why they're there and how they're contributing to the company's success. The second priority is the company's culture and values. Is the company attracting the right people and repelling the right people? Is it keeping the right people on board? It's about aligning your culture and your values and it's about making sure that they translate into the competencies and skills that you want. **HR**

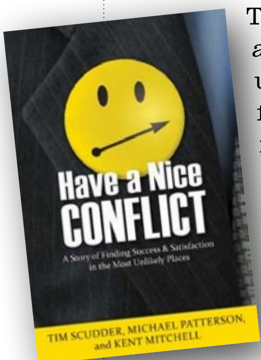
BY ALYSON NYIRI

WHAT'S WORTH READING

Have a Nice Conflict: A Story of Finding Success & Satisfaction in the Most Unlikely Places

Stanford UP, 2010

By Tim Scudder, Michael Patterson and Kent Mitchell



The authors of *Have a Nice Conflict* use a well written fictional story to illustrate a relational approach to interpersonal conflict based on the research of psychologist and educator Dr. Elias Porter. The late Dr. Porter used his experience in clinical, industrial, military and governmental settings to validate a comprehensive theory of relationships and the suite of Strength Deployment Inventories (SDI®) based on that theory. He founded Personal Strengths in 1971 and today there are offices in 14 countries. The three authors are top brass of Personal Strengths USA.

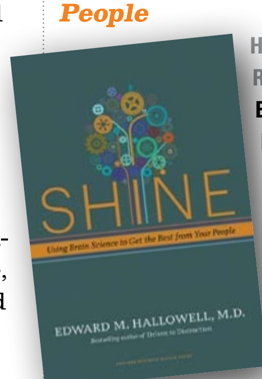
In Have a Nice Conflict, we follow sales manager John Doyle, who learns he has been turned down for a coveted promotion, again. Guided to Dr. Mac by a respected mentor, John learns how his behaviour affects his work and personal life. Dr. Mac leads him through five keys to having a nice conflict: anticipate, prevent, identify, manage and resolve. People enter into conflict when their self-worth is challenged and during conflict follow a predictable pattern of three progressively serious stages, often evident to others due to a change in behaviour.

Opposition, on the other hand, is a situation where people disagree about issues. The goal of conflict management, say the authors, is to remove the value-based threats to self-worth, so opposition can be managed while individuals are in their most productive state.

The back of the book includes "notes" from John and Dr. Mac. They provide the reader with an outline of relationship awareness theory, the seven motivational value systems that act as filters through which we interpret and understand life events, and the three stages of conflict.

The SDI is a restricted instrument requiring certification. Readers are provided with a discount code to take the inventory and receive an expert debrief of their results.

Shine: Using Brain Science to Get the Best from Your People



Harvard Business Review Press, 2011

By Edward Hallowell, MD

Perhaps more widely known as an expert psychiatrist in the area of ADHD, Dr. Hallowell has published 18 books; including the popular book *Driven to Distraction*. His latest book, *Shine*, uses brain science, performance research, and his own experience helping people maximize their potential to provide managers with a five-step Cycle of Excellence to maximize the talent and efforts of their teams.

Central to his concept of peak performance is the belief that feeling unable to do one's best while also feeling overwhelmed is the main problem facing today's top employees. Their managers are likewise overwhelmed and often incorrectly conclude that underperforming or overwhelmed employees should figure it out or get out. The solution to getting peak performance from employees like this, argues Hallowell, isn't about making them work harder or aiming to hire only motivated wunderkinds but to apply the recent findings from neuroscience – that the brain is remarkably plastic and therefore it and people can change. Thus we get better at what we practice and worse at what we neglect.

Hallowell outlines his Cycle of Excellence managers can use to foster top performance. The Cycle consists of five steps: **Select:** put the right people in the right jobs so that their brains light up; **Connect:** restore positive connection between people and the mission; **Play:** ignite imaginative engagement to tap into this productive activity of the mind; **Grapple and grow:** create conditions where people want to work hard; Shine: give the right rewards when people shine and create a culture that fosters excellence.

We can enter the Cycle at any point and a good manager's role is to help people overcome obstacles getting in the way. Consistently performing at our best over a prolonged period of time is, argues Hallowell, one of life's greatest extended joys.

Each chapter includes a key ideas recap, assessments and workplace examples. Hallowell has some very savvy comments on recruitment and selection and performance management. HR

INDEX TO ADVERTISERS

BY TARA BRADACS

IMAGINE IN ADVANCE – THE DIFFERENTIATING FACTOR FOR CONFIDENT AND SUCCESSFUL INTERVIEWS

© PIJAMA61/WWW.ISTOCKPHOTO.COM

Peak performers, including athletes and musicians, rehearse by imagining in advance. This same performance edge can be achieved by those preparing for a job interview.

Sports stars, for example, create mental images of the exact movements they want to make in their game. Boston Celtics' star player and later coach Bill Russell wrote in his book Second Wind, "I was sitting there with my eyes closed, watching the plays in my head. I was in my own private basketball laboratory, making mental blueprints for myself."

Lui Chi Kung placed second to Van Cliburn in the 1958 Tchaikovsky Competition and was imprisoned a year later during the cultural revolution in China. For the seven years he was in prison, he was denied the use of a piano; however, on a daily basis he practiced by envisioning techniques. After he was released, his concerts were even better than they'd been before. Reporters asked Liu how this was possible, and he told them, "I practiced every day. I rehearsed every piece I had ever played, note by note, in my head."

As a second degree black belt and instructor in Shorin-Ryu Karate, I learned to rehearse kata (patterns of moves) to achieve what is called mushin, or "mind of no mind." This is the state of mind achieved when the kata are so engrained and second nature to the body that the martial artist does not have to think before performing them. Through mushin the mind is not absent, but freed from inhibitions and distractions. This allows a greater ability to fully perceive surroundings and respond quickly. This concept took me many years of training to achieve and was learned only through practice and repetition.

Research shows that envisioned events imprinted in the mind can be recorded by the brain and central nervous system as memories. "The process of imagining yourself going through the motions of a complex musical or athletic performance activates brain areas that improve your performance. Brain scans have placed such intuitions on a firm neurological basis. Positron emission tomography (PET) scans reveal that the mental rehearsal of an action activates the prefrontal areas of the brain responsible for the formulation of the appropriate motor programs," writes neuroscientist and New York Times bestselling author Richard Restak.

Imagine the power that envisioning can bring to interview preparation! Practicing mental imagery will give you an edge in your confidence and your ability to react to questions and engage your interviewers. Imagining the interview in advance will help to anchor responses in your subconscious mind and register them as experiences. Instead of using all of your energy to think about what to say next, you can have a fuller awareness of your surroundings, including reading your interviewers' body language and adapting as necessary to keep them engaged.

Envisioning is different than rehearsing out loud or memorizing. It's not "the parrot approach," where preset interview responses are rehearsed and memorized. Rather, envisioning allows clients to react more naturally and utilize their intuition. Envisioning is about experiencing emotions like anxiety, fear or excitement, as if in a real interview situation, and training your body how to react to them. **HR**

Tara Bradacs is a seasoned HR professional with a passion for growing people. More on envisioning and other techniques of successful leaders can be found in her book, co-authored with Denis Shackel, Five Seconds at a Time – How Leaders Can Make the Impossible