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SPRING 2018 VOLUME 16, No. 2



Nathaly Pinchuk
RPR, CMP
Executive Director

Why Diversity is Good for Business

Win top talent and improve your bottom line

Diversity works and not just because it's the right thing to do. It works by creating friendlier and more welcoming spaces for employees and clients and by fostering a climate that encourages new ideas and creativity. Organizations around the globe are also noticing that having a diverse workforce is helping them to build better markets for their products and improving their overall bottom line.

McKinsey & Company studied the impact of diversity internationally. Their research has shown that organizations in the top quartile for gender or racial and ethnic diversity are more likely to have financial returns above their national industry medians. Companies in the bottom quartile in these dimensions are statistically less likely to achieve above-average returns. Diversity is probably a competitive differentiator that shifts market share toward more diverse companies over time.

They also found that more diverse companies are better able to win top talent and improve their customer orientation, employee satisfaction and decision making that leads to a cycle of increasing returns. They believe that other kinds of diversity in age and sexual orientation are also likely to bring some level of competitive advantage for companies that can attract and retain such diverse talent. A few years ago, they researched 366 public companies across a range of industries in Canada, Latin America, the UK and the US. They looked at metrics such as financial results and the composition of top management and boards.

Their results were startling. They found that companies in



the top quartile for racial and ethnic diversity were 35 percent more likely to have financial returns above their respective national industry medians. Companies in the top quartile for gender diversity were 15 percent more likely to have financial returns above their respective national industry medians.

In Canada, employers are now embracing diversity amongst their workers as a net benefit to their organization and society as a whole. This has allowed them to increase the talent pool that they use to recruit new employees and to help them grow within the organization. One leader in this area has been BC Hydro. They have developed a diversity strategy to target various under-represented populations to provide opportunities for professional and personal growth. They also offer cross-cultural diversity workshops, a customized workplace English as a Second Language program and have created a special team to focus on Aboriginal recruitment.

The banking industry in Canada has long been a leader in diversity at work. CIBC, for example, is partnering with community organizations in Vancouver to help eliminate barriers to employment for newcomers and internationally-trained professionals by

providing credential recognition services. RBC organizes an annual diversity progress statement to review its target goals and also has an employment equity account to ensure they continue to be a leader in these areas.

There is still extensive work to be done. RBC has done its own research on diversity in Canadian workplaces. They note that women continue to be an under-employed resource and are still not equally represented at executive levels and boards in Canadian companies. They also found that while the visible minority population has increased at a much faster pace than the total population, they are still not full participants in the workplace. They also see this as a great opportunity since

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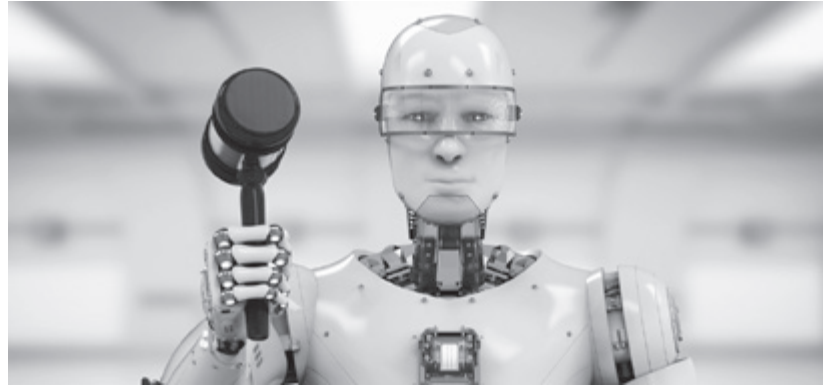
Brian W. Pascal
RPR, CMP, RPT
President

President's Message

Will a Robot Take Your Job?

Start planning for the automation of your workplace

Robots may not be taking over the world — at least not yet. However, they are taking over some jobs, in fact, a lot of jobs. They are taking over jobs in manufacturing plants and factories, even in some labs and hospitals. By the year 2025, some experts suggest that the application of robots and robotics at work could have trillions of dollars of direct economic impact on the economies of the US and Canada.



In some cases, the robots do a better job than the regular workforce. They are reliable, always show up for work and never miss a day of sick time. They cost a bit more upfront in maintenance and fluids, but they won't be asking for a raise and their performance appraisals will be pretty simple. If they ever screw up, you can just remove their batteries. Across North America they are taking spots on the assembly line, mostly spots that no one really wants anymore. Many young people are not satisfied with a factory job, particularly at low wages or minimum rates.

Robots in the workplace are raising a few other issues that some people may not have considered. These include whether or not robots are considered employees and may have rights, and more importantly, if people who are displaced by robots are entitled to additional compensation.

On the rights of robots, it seems like a silly question, since they are machines. Yes, robots are machines, but they are being equipped with complex programming and forms of artificial intelligence that are beginning to muddy the waters between man and machine. For now, they have no legal standing and therefore no rights. But in this rapidly changing technological environment, that could shift and start to move in another direction very quickly. All it would take is a smart lawyer and the right court case. Stranger things have happened.

For employees who face the loss of employment, there is a more tangible and pressing concern. This applies to employers as well. Most employment legislation and employment contracts as well as applicable collective agreements specify that employees may have particular rights and are entitled to severance and layoff payments

if their work is declared redundant. Normally, that means you can't lay one person off and hire another without paying some penalty. What happens if their work is automated or robotized? That question is still being debated.

Employee relations and entitlements aside, the growing automation of the workplace will continue to have an increased impact on individuals and society. Where will people work and how will they get paid? One approach that has been suggested by Bill Gates (Co-Founder of Microsoft) is to introduce a robot tax that would come into effect whenever companies replace humans with robots. This would perhaps replace lost taxes but what about the jobs? That's another good question.

Brian Pascal is President of IPM [Institute of Professional Management].



"It says here that you've been in college for the past 16 years. What made you decide to stop hiding from the real world?"



Tom Ross
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Dan Bokenfohr
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New OHS Requirements in Alberta

Update your health and safety management programs

Employers and other workplace stakeholders have little time to waste in preparing for the upcoming changes to Alberta's Occupational Health and Safety legislation. Most of the OHS changes take effect June 1, 2018.

While time will tell if meaningful improvements are achieved, we know this overhaul of Alberta's OHS laws will impose further layers of substantive and administrative obligations on employers.

The scale of changes to Alberta's OHS legislation will be dramatic, including:

- Broadening the concept of workplace "health and safety" to include the requirement that employers and other stakeholders ensure the psychological and social well-being of workers. This will include the requirement to protect against harassment, bullying and psychological violence.
- Expanding the definition of employer to include any person who employs or engages a worker (including self-employed persons and persons engaged for no monetary compensation), any person designated as the employer's representative, and any director, officer or other person employed by an employer to oversee the health and safety of its workers.
- Imposing more general duties on employers under the Alberta *OHS Act*, including:
 - ♦ ensuring the health, safety and welfare of their workers, other workers present at the worksite, and members of the public at or in the vicinity of the worksite who may be affected by workplace hazards;

- ♦ ensuring workers are aware of their duties and rights under the *OHS Act*, Regulations and Code, as well as any health and safety issues arising from the work being conducted;
- ♦ ensuring workers are adequately trained in all matters necessary to protect their health and safety before starting;
- ♦ ensuring workers are not subjected to or participate in workplace harassment or violence;
- ♦ ensuring workers are supervised by someone competent and familiar with the relevant requirements of the *OHS Act*, Regulations, and Code;
- ♦ establishing and consulting with a worksite safety representative or joint worksite health and safety committee;
- ♦ resolving in a timely manner any health and safety concerns raised in the workplace;
- ♦ advising the prime contractor (where applicable) of the names of their supervisors; and
- ♦ making all health and safety information readily available to the joint worksite health and safety committee, health and safety representative, workers, and prime contractor, where applicable.
- Changing when prime contractors are required at a worksite and expanding their general duties under the *OHS Act*.
- Adding to the list of stakeholders responsible for workplace health and safety under the *OHS Act*, including supervisors, owners, service providers and temporary staffing agencies.
- Expanding the scope of work that workers may refuse to perform, and enhancing pay protection for those that do. The duty to refuse work that poses an imminent danger will be replaced with the right to refuse work whenever it is reasonably believed that there is a dangerous condition at the worksite or the work constitutes a danger to the health and safety of any person. Workers will be entitled to be paid their normal wages and benefits while a work refusal is being investigated; they may be temporarily assigned to alternative work.
- Expanding the protection of workers against reprisal. Employers will now face a presumption of improper motive any time they take action in respect to any terms or conditions of employment of a worker who has refused work, raised health and safety concerns, or otherwise participated in activities under *OHS Act*, Regulations, or Code.
- Increasing the requirement for workforce participation in health and safety management by requiring the establishment of a health and safety representative or joint worksite health and safety committee at many worksites. Committees will be required at any worksite with 20 or more workers if work is expected to last 90 days or more, with at least half of the members being selected by the workforce. Designated health and safety representatives will be required at worksites with 5–19 workers if work is expected to last 90 days or more, and must be selected by the workforce.

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Feature

New OHS Requirements in Alberta

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- Expanding incident reporting obligations. Those incidents that must be reported as soon as possible to a Director of Inspection will now include, among other things, any injury that results in a hospital admission. For these incidents, as well as near misses, further investigation and reporting obligations will apply, culminating in the preparation of an investigation report.
- Expanding the powers of OHS officers to issue stop work orders (e.g., by authorizing officers to stop work at multiple worksites through a single order).
- Overhauling the OHS appeal process. The OHS director will review certain OHS officer orders and decisions, and the Alberta Labour Relations Board will hear appeals of other matters.

Given the breadth and significant nature of these changes, Alberta businesses will need to review the changes and adjust their health and safety management programs accordingly.

Tom Ross (Partner) and Dan Bokenfohr (Partner) practice Employment Law at McLennan Ross LLP. Tom Ross can be reached via email at tross@mross.com.

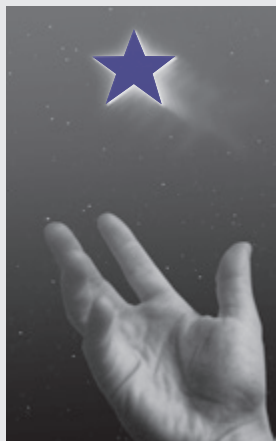


Tom Ross will be presenting on:
Today's Critical Issues in Employment Law
at IPM's Calgary May 1, 2018 Conference.

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Dan Palayew
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Partner,
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Delete or Shred?

Record keeping basics for employers

In the days of shrinking office space and crowded hard drives, HR departments may be asked to downsize and to get rid of some of their records. However, employers should be aware of legal record keeping requirements and risk management strategies before putting files in the box for shredding or deleting data from computer servers.

This article provides some guidance to assist with your record keeping practices regarding employee records. This article is not meant to address the different record keeping requirements that apply for financial records.

Record Keeping and the Employment Standards Act

The *Employment Standards Act* requires that employers keep certain records for each employee. The records may be kept by the employer or an agent (such as an accountant or payroll administrator). The records need to be accessible in the event of a Ministry of Labour inspection. Most of these records need to be retained for three years but differences arise in terms of how you calculate the three year period.

Each employer is required to keep, for each employee, records of:

1. employee names, addresses and start dates for three years after termination;
2. the information contained on employee wage statements for three years after the information is given to the employee;

3. the vacation time earned since the date of hire but not taken before the start of the vacation entitlement year, the vacation time earned during the vacation entitlement year (or stub period), vacation time taken (if any) during the vacation entitlement year (or stub period) and the amount of vacation time earned since the date of hire but not taken as of the end of the vacation entitlement year (or stub period). The records must be retained for three years;
4. the number of hours non-salaried employees worked each day and each week. For salaried employees, records of hours worked in excess of their regular work week, and those in excess of eight hours a day must be kept. These records are kept for three years after the day or week in question;
5. copies of agreements made with employees to work excess hours or to average overtime pay. These records are kept for three years from the last day on which the work was performed under the agreement;
6. an employer must keep all documents relating to an employee's leave (e.g., pregnancy, parental, family medical, etc.) for three years after the day the leave has ended;
7. clients of temporary help agencies are required to record the number of hours worked by each assignment employee for a period of three years after the day or

- week to which the information relates;
8. any agreements made to work excess hours or to average overtime hours for a period of three years from the last day on which work was performed under the agreement;
9. if the employee is a student under the age of 18, the employee's date of birth. These records shall be kept until the employee turns 21 or for three years after their employment ends, whichever happens first; and
10. additional record keeping rules apply for employers who employ homeworkers.

Employers are also required by the *Occupational Health and Safety Act* to retain all documents associated with conducting a workplace investigation into alleged harassment or violence for a period of one year from the conclusion of the investigation. Investigations related to allegations of discrimination should also be kept for at least one year.

Record Keeping and Risk Management

Employers should consider retaining other records as a risk management tool.

There are no legal requirements to maintain records of employment reviews, employment contracts, disciplinary meetings, investigation reports/interviews, promotional and salary history of an employee. However, it would be best practice to retain all of these records

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Feature



Dan Palayew and Erin Durant will be presenting on:
Performance Management and Discipline in the Workplace

at IPM's Ottawa Conference April 12, 2018.

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Delete or Shred?

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for the duration of the employee's employment with the company and for a period after the termination of the employment relationship.

In Ontario, litigation can be commenced by a former employee up to two years after a dismissal – and sometimes longer. Accordingly, it is considered best practice to consider these types of employee records for three to five years and to ensure there is no ongoing litigation involving an employee before the records are destroyed.

Email, Email and More Email

There is no law in Ontario that will tell an employer how long they need to retain company emails. Employers should have written policies regarding email retention (and who may access an employee's work email account).

In employment-related lawsuits, the lawyer acting for an aggrieved former employee often asks for production of emails related to the events at issue in the litigation. If the emails have not been preserved, the employee may claim that the employer has intentionally destroyed evidence that is relevant to ongoing or contemplated litigation (a concept known as spoliation). Employee emails also can become relevant in other litigation that an employer may become involved in – such as patent and trademark lawsuits.

Determining the length of time that a company should retain emails is a complex issue. It is often the case that emails from different categories of employees should be retained for different periods of time. For most companies and average employees, some experts suggest that emails can be retained for as little as five years in an email archiving system. However, there are some types of employees in certain departments that should have their emails retained longer – such as executives, engineers/product developers, finance, human resources and legal departments.

For high-level executives and employees involved in product development, some experts suggest email retention for as long as 50 years. The reason behind this recommendation is if there were to be a dispute regarding the ownership or development of a product or if information related to a product is improperly provided to the competition. There are consultants available to assess your individual business needs and assist you in developing and implementing email retention strategies.

Privacy and Employee Record Keeping

Access to employee personnel files and data should be limited to authorized staff who require the information to carry out their employment duties. It

is also best practice to ensure that employee personnel files are organized such that authorized staff are only able to access specific categories of information in the employee file.

For example, the following organization system could be used:

- corporate information (e.g., resume, offer of employment, salary information, emergency contact person, special dietary needs);
- group benefits information;
- health information (personal information required only by any in-house health and medical staff or benefits administrators); and
- labour relations or performance improvement management information (annual performance reviews, minutes of disciplinary meetings).

Employers need to ensure that personal information obtained by employees is kept confidential and not disclosed to others without the employee's consent.

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Murray Janewski
President, ACT One
International Corp.

Recruiting a Leader

Have you really got what it takes?

You need to find a leader for a position that is becoming vacant in the next six months. There is a succession plan in place, but this has identified a handful of internal possibilities and the corporate culture is to find the best, internal or not. You are not looking for a good leader. You are looking for a *great* leader. So what **do** you actually look for in a great leader?

Part of the answer to that question lies in looking at it from an opposite perspective — what you don't want to look for. A common mistake for a leader is to look for someone who is "just like me." After all, the leader has had success and it is natural to think that someone with a similar background, personality, attitude and work style would also be successful. In reality however, when building a leadership team, diversity is paramount. This is not meant to say that you automatically rule out someone who is similar, as long as you can show that the person can adapt to changing situations.

It is also important not to judge a book by its cover. This includes physical appearance, background and personal

beliefs. As long as someone's personal values (and there is a difference between values and beliefs) are in line with the organization's, there should be no problem.

As an example, you may have an introvert who personally values having a couple of close friends, contrasted with the extrovert who needs to be around lots of people most of the time. Both the introvert and the extrovert can align themselves with a corporate value that supports strong working relationships and teamwork. However, in another example, if someone wanted to contribute to an organization simply by showing up and getting the job done but the company puts a strong value on learning and change, there is likely to be a misalignment. It doesn't make the individual a bad person, just not a good fit for that organization.

A common mistake for a leader is to look for someone who is "just like me."

There are some universal traits that I believe need to be focused on, no matter what the culture or values, and it all has to do with credibility. There are five things a leader needs to do to establish and maintain credibility. The key to all five is consistency – not just once in a while.

1. Show up on time.
2. Finish what you start.
3. Do what you say you are going to do.
4. Say "please" and "thank you".
5. Always tell the truth.

Keep in mind that people will say they do all five, so in an interview, you need to ask questions about these behaviours and listen carefully to your candidate's responses. For starters, did they show up to the interview on time and did they come prepared base on previous discussions?

These five traits will carry a leader through a lot of ups and downs. By the way, how are you doing on these traits?

Murray Janewski is President, ACT One International Corp. and can be reached at murrayj@aoic.ca.

Feature



Murray Janewski will be presenting on:
The Work of Leaders: Connect to Real-World Demands
at IPM's Toronto Conference May 2, 2018.

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Michael Murphy
LL.B.
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Accommodation of Mental Disability

Four Steps to Help Employers Mentally Prepare

Mentally healthy employees are productive employees. Yet the Canadian Mental Health Association reported twenty percent of Canadians experience a mental illness in any given year and 500,000 Canadians can't work due to mental illness in any given week. These staggering numbers have led many employers to implement wellness programs to support employees' mental health. But when employees still suffer from mental illness that affects them in the workplace (and clearly they do), employers must be ready to fulfill their legal obligations.

Canadian human rights laws prohibit employers from discriminating against employees based on actual or perceived mental disability and impose on employers a "duty to accommodate": to take steps to offset the discriminatory impact of a workplace rule, policy, requirement or practice by adjusting, revising or eliminating it. Accommodation isn't about ensuring an employee remains in the workplace; it's about ensuring a personal characteristic protected under human rights laws, like mental disability, isn't the basis to exclude them. Accommodation can be challenging for employers in any case. Accommodating mental disability poses particular challenges.

Here are five steps to help employers prepare to meet their duty to accommodate mental disability.

"20% of Canadians experience a mental illness in any given year and 500,000 Canadians can't work due to mental illness in any given week"

Be Alive to Signs. The duty to accommodate is triggered when either the employer has been made aware of the need for accommodation, or the circumstances are such that it ought reasonably to have known of that need – even without a specific request. Employees might find it hard or impossible to communicate their need for accommodation due to a mental illness, perhaps fearing the (still lingering) stigma associated with mental illness. Since mental illness is often invisible it's often harder to spot. Employers must know and be alive to signs that suggest its presence — and the employee's need for accommodation. Where the signs of a possible mental health issue are there, the employer has a legal duty to inquire, even if it's a difficult conversation, as it often is in the case of mental disability.

Take the Meds. Employees are often reluctant to provide medical information; fear of stigma and resulting privacy concerns

can exacerbate this in the context of a mental disability. But the employer needs and is entitled to all relevant information to satisfy its duty to accommodate; when it's mental disability, this includes "reasonable" medical information. What's reasonable depends on the case, but usually includes at least the general nature of the illness, work-related limitations, whether it's permanent or temporary, the anticipated duration, the broad basis for the medical conclusion and the treatment and medications (side effects) that might impact the ability to perform the job. The employee is also obligated to provide it to prove the existence of a disability, its resulting limitations and its relationship with the accommodation sought. The employer's obligation to maintain the confidentiality of employee medical information, sharing it only with those who need to know to fulfill the accommodation duty, and communication of that commitment to the employee is perhaps of heightened significance when dealing with a mental disability.

Don't be Swayed. The duty to accommodate ends when the employer can't accommodate the employee without experiencing "undue hardship", or has accommodated them to the point where further accommodation will result in "undue hardship" to the employer. The threshold is high requiring a genuine assessment to satisfy the duty: make the necessary inquiries to gather enough

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Feature



Michael Murphy will be presenting on:
Today's Critical Issues in Employment Law
at IPM's Halifax Conference May 2, 2018.

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Jacqueline Throop Robinson
CEO,
Sparks Engagement

Peg Your Progress

Action alone is not enough

A high degree of progress is critical if you want your employees to be passionate about their work. My ongoing research continues to bear out its essential role in generating a passionate workforce.

The defining event for me came when a business partner and I were discussing the key components of being fully engaged in work. The partner spent a lot of time thinking about the importance of meaning and the need to see your work as meaning-filled. He also reflected a lot on the need for action. In fact, he had created a model that defined passion at work as high meaning supported by high action. Brilliant!

We observed that when we act to support the things that are most meaningful to us, we feel congruent and aligned to our values, our purpose and our goals. During our conversation, I began to feel the model wasn't quite complete. I considered my seven years as a corporate manager in a large organization and the main reason I had resigned.

The years I invested working for that company bore much fruit for me personally. The job itself was fulfilling. I worked on many exciting projects with some amazing people and honed my leadership skills through many lessons learned. I enjoyed dedicating myself to realizing the potential of my teams and fulfilling our mandates. We all worked hard, cared a great deal about our work and took many action steps to ensure our mutual success.

When we act to support the things that are most meaningful to us, we feel congruent and aligned to our values, our purpose and our goals.

Naturally, there were also many frustrations. This particular company was extremely bureaucratic. In addition, it was permeated with politics. When bureaucracy and politics are combined, it can create an environment in which people feel they must trudge through heavy, sticky mud as they try to execute the actions they believe are key to advance their meaningful goals and objectives.

The longer I worked for that company, the more this environment weighed on me. Taking action required significant energy in this culture. I began to notice that full engagement in my work was more difficult to achieve. I began to complain to my boss that "change around here is too slow and fraught with political landmines." I complained that "our leaders don't have the courage to do the things that will bring their stated end results into reality more quickly."

We all worked very hard, did what we believed were the right things and certainly we had some impact, but we wanted more and we felt unsupported by our environment. We knew we could achieve our goals and realize our vision, but the effort required to navigate the bureaucratic, political culture was exhausting, and advancement — at least to us — seemed excruciatingly slow.

As I reflected on this experience, I discovered what was missing from our discussion. Action alone is not enough. Action needs to produce a sense of progress!

I thought about my teams and other caring, conscientious people who'd worked with me over the years. When people care a great deal about something and take action in support of it, they expect their efforts to move them closer to achieving their goals in a timely manner. Plus, there is an expectation and hope that this forward movement will hold significance. In other words, the outcome the action produces will represent something meaningful in and of itself. To experience a true sense of progress, actions must create meaningful results and become building blocks for further action so that over time, goals are achieved.

When this happens, we feel like we're making progress. It's not enough to just "do stuff." We must feel our actions are moving us onward, closer to our goals and objectives. As we journey toward our goals, we scan our environment looking for signals of progress. Sometimes we do this quite subconsciously such as when we anticipate feedback. But

continued next page...

Feature



Jacqueline Throop Robinson will be presenting on:
Sign in Your Teams

at IPM's 2018 Conferences: Ottawa April 12, Calgary May 1 and Edmonton May 3

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Peg Your Progress

... concluded from page 10

when we receive positive feedback in the form of recognition or sometimes a simple word of appreciation, we experience a "hit" of progress. This hit of progress is like an energy booster. It uplifts us and encourages us to persevere. Without a sense of progress, people cannot fully invest or engage in their work.

Make a practice of pegging your progress. Make note of what you moved forward today. Celebrate an obstacle you have overcome. Notice the small wins. Pay attention to progress. The more progress you see, the more engaged you will be!

Jacqueline Throop-Robinson is CEO of Spark Engagement and can be reached via email at jacqueline@spark-engagement.com.

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Julianna Cantwell
President,
Juna Consulting Inc.

Improve Your Performance Management System

Top 10 Tools for Success (Part 2)

In the Winter 2018 issue of the *Members Quarterly Newsletter*, we discussed the first five tools you should consider in your performance management toolbox. In this issue, let's examine the last five.

6. Cascading Goals

Also known as Management by Objective (MBO), to support a performance management system that strategically aligns with the larger business goals, each business unit should have goals that align with the larger departmental goals, which align with the overall organizational goals, including vision, mission and values. To ensure this happens:

Key Points:

- Plan the schedule to have the executive team create their goals and conduct their annual reviews first in the fiscal year, followed by their VPs/Directors, then Managers, followed by Supervisors and so on, down to the frontline folks.
- Use a validation process to ensure goals at the lower levels support the business goals/objectives above them.

7. No More than a Handful

For succession planning purposes, it is important to attach competencies to job profiles. Three to five competencies per position is recommended. More than this and it becomes overwhelming to:

- create goals (by the employee)
- measure progress (by the manager)

- track metrics (HR department)

If an organization has more than 12 competencies total across the business, then which ones become "priority" and get the focused attention? Senior leadership should prioritize which "capabilities" are most important for people to have and develop for your organization.

Key Points:

- If you are not the final decision-maker about which competencies matter most, then identify who can help you address the "too many" issue and influence them to create clarity for the organization.
- If you do not have competencies identified for your positions, then conduct focus groups to map out which competencies are required for employees to have to be successful in which positions.

8. To Rate or Not to Rate... that is the Question!

Rating employee performance has and always will be a contentious issue, especially if the ratings are tied to compensation (i.e., merit increases, bonuses, raises, etc.).

Key Points:

- General Rule: small organizations (1-100 employees), use a simpler system like a 2-point or 3-point scale; mid-sized to larger businesses usually have a more complex, trendable rating scale.

- If you tie pay to performance, then make sure to vet your definitions of the ratings through all the stakeholders. Typically, cross-functional focus group sessions are a good way to get multiple and balanced perspectives.

9. Communicate Clearly About Calibration

Managers come in all shapes and sizes. One will rate you very highly for the same work another might rate you as average. For this reason, many organizations choose to do a "calibration" process with ratings. Once initial ratings are completed and submitted to HR, a panel of senior managers reviews and completes a final evaluation of the ratings to ensure fairness across divisions/departments. Naturally, there are many advantages and disadvantages to this process. So, particularly if favoritism is rampant in your organization, you should explore this option to equalize the ratings system.

Key Points:

- Do your research! This is an onerous step in the process and can be easily misunderstood by employees (e.g., "senior managers have 'veto' power, so what's the use in caring about the ratings anyway...?")
- Set well thought out decision-making criteria for calibration review and educate your senior managers on how to judge and negotiate ratings.

continued next page...

Feature



Julianna Cantwell will be presenting on:
Communications & Email Etiquette: Mastering the Skills
at IPM's Edmonton Conference May 3, 2018.

FOR DETAILS, GO TO WWW.WORKPLACE.CA (CLICK ON EVENTS).

Improve Your Performance Management System

... concluded from page 12

- If your organization has a balanced scorecard (dashboard metrics), it is easier to balance ratings across the organization.

10. It's All About...You!

Let's go back to basics. What's the point of a performance management system? It's about supporting employees in maintaining good (if not great) performance. So, it should be all about THEM! This message should be part of their training, part of the managers' training on how to coach their direct reports regularly throughout the year, as well as how to ensure the tone and focus of the formal review process is centred around helping SUPPORT the employee.

Key Points:

- There should never be negative surprises at the annual review meeting. HR professionals know this, but do your managers and supervisors know?
- Include a question or two on the review form asking the employees to suggest ways to improve the performance management system. Try asking them:
 - "What is the most valued part of the performance process here? Why?"
 - "What is one thing that would make the system better? Why?"

With a PMS toolkit like this in place, your organization will see the benefits of improved performance of individuals as well as groups of employees.

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Judy Suke
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Making Meeting Minutes Count

Follow the plan to ensure success

In spite of the fact that people dislike meetings, they are necessary. According to a Ziggy Cartoon from the *Toronto Star*, "Many of us are more capable than some of us, but none of us is as capable as all of us." It is through our combined efforts that we are able to clearly define issues, create better strategies for solutions, determine our team goals, distribute work fairly and keep people informed and on the same page as we go about creating success in our business.

The key to changing the feelings about meetings in your workplace is to be well-organized. You need to make meeting minutes count. While we as managers are familiar with these concepts, it is always a good idea to review these best practices with your teams so everyone follows the same process.

What to do Before the Meeting:

The first step is to determine the purpose of the meeting and decide on the best method. Should you have people in a room together; is it possible to Skype; will a conference call work, or do you need a Webinar. Whichever you choose, the preparations are the same.

Create the Agenda and send it out at least three business days in advance. It should state the following: date and day (people need to picture the day of the week); show both start and end times (people are more willing to commit when they know the time commitment); method or location with directions, room number or telephone number. Clearly state the purpose of the meeting and list the names of the people who are to attend. The agenda should include the issues that you will discuss (in order) with the name

of the person presenting them and time allowances for all. In addition to distributing the agenda, contact the people with key roles. Identify your expectations, give them a time limit and explain the importance of staying on track.

How to Conduct the Meeting

Arrive early and be well-prepared with copies of the agenda, equipment needed, water, name tags and extra pens.

Start on time regardless of missing people. If they are on the agenda first, move them down the list. Next time they will be on time. Appoint a secretary, so that you can concentrate on being an attentive and active chair. Start with the rules regarding cell phones. Follow the agenda, keeping track of your time and making sure that everyone stays focused. Have a positive attitude, encouraging participation. My mother always said, "People who plan the journey will not rock the boat." Everyone needs to have an opportunity to contribute.

Ensure that everyone contributes respectfully. Confront conflict immediately, if necessary, repeating phrases to lighten the tone. Encourage everyone to talk about the issues, not the person. Using the no name, no blame theory keeps things civil and comfortable. Summarize along the way to ensure everyone agrees. During longer meetings, often so much is said

that people are confused. Before the meeting ends, summarize everything: review the decisions, remind people of action items with names and deadlines. Decide on the date and time for the next meeting.

Things to do After the Meeting

Within 24 hours (or one business day) distribute concise and complete minutes. These would include the names of the attendees, the major points of discussion with results, and the list of actions to be taken (by whom, by when). If there is a next meeting scheduled, provide the date, times and location.

To ensure that your people have a better attitude towards meetings, put careful thought into the purpose of the meeting. Do you really need to hold one? Who must attend? Only invite the people who are involved in the project. Ask yourself, "Will it be valuable to all of the attendees?" Then have everyone well-informed and prepared before they arrive.

Remember that meetings are necessary and when handled well, will contribute to the success of your business or event. You can use the information above to create a checklist that will ensure that you follow the steps that will make your meeting minutes count.

Judy Suke is President, Triangle Seminars (www.triangleseminars.com) and can be reached via email at judysuke@bell.net.

Feature

"Hits the nail on the head..."

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nearly 20 percent of the total population of Canada identify as visible minorities and that number will continue to grow as the years go on. According to RBC, this explosive growth presents business opportunities for organizations not only to attract a diverse workforce, but also to attract new clients in a marketplace where buying power and investment needs will rapidly increase.

Other areas that employers are focusing on include persons with disabilities, Indigenous Canadians and LGBTQ individuals. Statistics Canada says that almost 15 percent of Canadian population has some form of disability and that rate increases with age. This is often an untapped market for both marketing and employment opportunities. Companies that already provide access to products and services through alternate formats are realizing a

competitive business advantage. The Indigenous population in Canada is growing nearly six times faster than the rest of the country; they are younger and have considerably higher rates of unemployment than the general population. Finally, according to data produced by the International Gay and Lesbian Chamber of Commerce, the LGBTQ population represents a market of about 100 billion Canadian dollars. This market is just beginning to be explored and targeted by Canadian organizations. Those who are involved by actively recruiting openly LGBTQ individuals and sponsoring events like Pride festivals are reaping the rewards.

Shell Canada is another national leader in diversity and inclusion. For those in Southern Alberta, Shell Canada's Diversity and Inclusion experts will be presenting at the upcoming IPM

One Day Conference in Calgary on May 1, 2018. Check our website for further details.

Diversity also works because it has been shown to improve employee relations, lead to less absenteeism, less turnover and even higher productivity. Diversity programs create a sense of belonging that makes employees want to stay longer and work harder. Having a diverse group of employees brings a new dynamic to the workplace, creates better problem solving and enhances team building. A more diverse group will bring different ideas and new solutions to old problems. They all learn together and with good management and supervision, they create the best products and solve the most complex problems.

Nathaly Pinchuk is Executive Director of IPM [Institute of Professional Management].

Accommodation of Mental Disability ... concluded from page 9

information (including medical) to make accommodation decisions; identify all of the options; evaluate each one by fully canvassing its pros, using specific criteria; and carefully document the entire process in detail. To undertake the genuine assessment required, it's critical that employers be able to set aside their own biases and those of other employees about mental illness and invisible disabilities: the inability of the employer or of co-workers to understand or appreciate a disability they can't see or don't understand does not amount to undue hardship.

Collaborate. The accommodation duty rests primarily on the

employer but employees and the union (where applicable) have parts to play too. The employee has a general duty to cooperate in the accommodation process, and specifically to give the employer sufficient and appropriate information (including medical), actively participate and cooperate in the process, accept reasonable accommodation and facilitate the implementation of a reasonable proposal. The employer isn't legally obliged to consult with the union in the accommodation process, but the union has an interest in accommodation. The union could breach its own human rights obligations if it blocks the

accommodation process, and the employer might also need its support to implement an accommodation measure that affects others' rights. When the disability is a mental illness, collaboration requires the employer to be knowledgeable about mental disability and the resources it has available, be ready and able to share them with, and possibly educate the affected employee and their co-workers where necessary.

Michael Murphy is a lawyer with McInnes Cooper in Halifax and can be reached via email at michael.murphy@mcinnescooper.com.

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