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News, Updates and Events

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CMPA
Canadian Management Professionals Association

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WINTER 2018 VOLUME 16, NO. 1

Nathaly Pinchuk
RPR, CMP
Executive Director

Perspective

Professional Designations and Memberships

What's in it for you?

> Are you using your designations on all business correspondence, your resumes and business networks such as LinkedIn?

Professional designations are more than just a few letters beside your name. They are a sign to the business world that you are qualified, competent and committed to maintaining a standard of excellence. Are you making the most out of your membership?

We've been asked to share some insights on how you can see greater benefit from your IPM designations and memberships. It's not just renewing your membership annually and filing your certificate away in your desk. Are you using your designations on all business correspondence, your resumes and business networks such as LinkedIn? Are you displaying your certificates in your work space? Are you telling others about your achievements and networking?

Many associations, particularly those offering formal HR designations have implemented an entire recertification process when you renew your designation/membership. This involves continuing education and professional development credits.

IPM has worked diligently to broaden the exposure for designations and programs not only within the business community, but with other HR and management associations as well. We have made some excellent progress and will continue so that our valued members can reap the benefits.

The good news is that IPM's accreditation programs and designations qualify for continuing professional development/education credits with other HR Associations for eligibility to write Knowledge Exams as well as obtaining recertification credits (CPD hours). Attendance at our conferences can be used towards professional development credits. Volunteering on our Regional Executive teams and publication of management articles also count towards continuing professional development.

Most professional HR and management associations including IPM have made their designations intellectual property. To keep the designations, members must renew their membership on time each year. If you let your membership lapse with most associations, there is a recertification process to reinstate the designation and additional fees involved.

How do you avoid the additional requirements and costs involved in reinstating your designation with IPM? Renew annually and keep your membership up to date.

We also work to make organizations across Canada aware of the professional designations and programs. We send packages to prospective employers every quarter and we do paid advertising in other HR and Management industry publications. We now see a growing number of organizations in all industry sectors, government departments and agencies specify a preference for our designations when hiring recruiters, trainers and managers. For example, Canada Revenue Agency recently put out a contract RFP for recruiters stipulating that applicants must have the RPR certification.

Beyond what IPM does to increase the exposure of their accreditations, members should be getting more involved and telling their colleagues and networks about the programs and events.

The wave of the future is clear. Professional designations like those offered by IPM will continue to increase in value. They are being used by employers, contract firms, government agencies and departments to verify credentials and expertise. There is a dramatic rise in the number of queries from prospective employers, background verification firms and organizations looking to award contracts to verify status of individuals applying for positions and contracts. IPM, like most other organizations, can only confirm members in good standing. We cannot rely on LinkedIn or candidates' resumes to contain the most accurate information. We commend all those who verify status and encourage others to do the same.

We urge you to make better use of your designations and memberships. It's not only what your associations can do for you, it's also what you can do for your associations!

Getting involved doesn't take much time and it can be done from anywhere in the country. Think about how you can contribute and reap the benefits.

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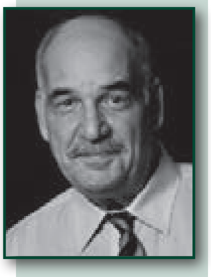

Brian W. Pascal
RPR, CMP, RPT
President

President's Message

Confidence or Cockiness: It Makes a Difference

Finding the right balance

Confidence is normally a good thing. It allows an individual to self-motivate and in many cases to inspire themselves and others to better performance at work or on the playing field. Good baseball hitters walk up to the plate with an enhanced belief in themselves and their abilities to hit a 90-mph fastball out of the park. Sometimes they do, but they also strike out — quite a bit.

That's one of the problems with confidence, or maybe overconfidence. Now research is showing that confidence does not automatically lead to more motivation or better performance in most circumstances. One of those researchers is Justin Weinhardt from the University of Calgary's Haskayne School of Business. He writes about motivation and human behaviour as it shows up in business and the workplace. One of his areas of focus is confidence and overconfidence.

Here are some of his findings about confidence. In one study of over 1,000 entrepreneurs, Weinhardt found that overconfidence led to decreased performance in both revenue growth and employment growth. In his own research with students, Weinhardt found that students who are more confident end up studying less, resulting in poor performance on exams. They know the stuff, so why study?

In Weinhardt's view, confidence has a negative impact on planning. That is the tendency for people or organizations to underestimate how long it will take to complete a task and how much it will cost, even if they have completed similar tasks in the past. He also notes that confidence can lead people

off track because we put the most resources toward the goals we are least confident about and neglect the ones we are most confident about. We let our confidence or overconfidence run the show.

The challenge with confidence, like most things in life and at work, is to find a balance. Be confident in your abilities, but watch out for tendencies to go over to the cocky side. You have to be confident enough to make good decisions, but be prepared to slow down and ask for help if you get stuck or are unsure. According to Justin Weinhardt, a little self-doubt helps. Believe in yourself and your abilities and then work as hard as you can to ensure your success.

To quote Henry Ford: "Whether you believe you can do a thing or not, you are right."

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

INSIDE THIS ISSUE

"Please don't ask me to remind you to do anything else for awhile."

Dan Palayew
LL.B.
Partner,
Borden Ladner Gervais LLP

Erin Durant
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References: Employer Sued for Telling the Truth but Action Dismissed

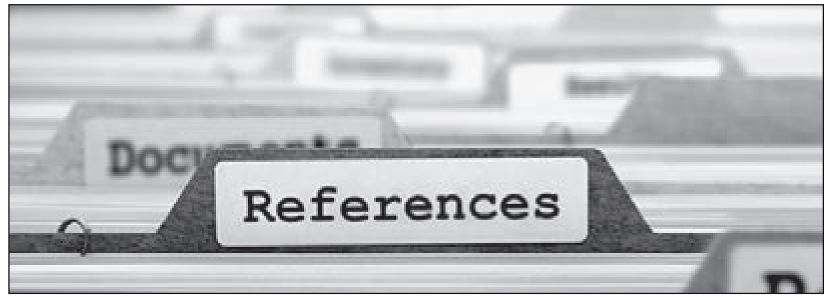
Adopt a "no-reference" policy

Employers often struggle with whether or not they should offer letters or oral references for departing employees. More and more employers appear to be adopting "no-reference" policies.

In some ways, these policies may be seen as overly cautious. Should a manager or employer not be able to provide a positive reference to an employee who is departing on good terms – perhaps due to a layoff or restructuring? We get the impression that many employers make exceptions to assist these good but departing employees. This can be a good practice as a positive reference may increase the employee's odds of securing new employment and mitigating the damage caused by the dismissal. Finding adequate alternate employment also reduces the damages claimed in a wrongful dismissal lawsuit.

But what about the "bad" employee? What are former employers supposed to do or say about them? A recent case from the Ontario Superior Court of Justice highlights the risk involved with providing references to these employees.

In the case of *Papp v. Stokes Economic Consulting Inc.* ("*Stokes*") the owner of Stokes offered to provide a terminated employee with a reference but only to confirm his technical



capabilities as an economist. Papp was interviewed for a government position and, after several rounds of interviews, he was the top ranked applicant. During the reference check portion of the process, a representative of Stokes was asked standard interview questions regarding Papp. Most of the questions focused on Papp's interpersonal skills. The owner of Stokes responded honestly. Some of the interview questions and answers are reproduced below directly from the reported decision (online: http://canlii.ca/t/h3sz1):

How would you rate his quality of work?
We were not that pleased.

How well does he get along with his co-workers?
Not greatly.

Is he able to develop good working relationships?
Did not see any evidence of it.

Would you re-hire?
No way.

Not surprisingly, Papp did not get the job. He then sued Stokes and the owner personally seeking $500,000 for defamation and a further $50,000 for intentional infliction of mental suffering. These claims were added to Papp's wrongful dismissal lawsuit. Papp was awarded four months' notice as part of his wrongful dismissal lawsuit - approximately $17,000.

Fortunately for Stokes and the owner, the other larger claims were dismissed. The Court found that the statements made by the owner of Stokes were defamatory as they did lower Papp's reputation in the eyes of a reasonable person. However, Stokes was able to defeat the lawsuit on the basis that he genuinely believed that the reference he gave in the interview was true and that he had not intended any malice.

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Feature

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Many lawyers have been writing about this case since it was released in April 2017. The consensus seems to be that this case is a "win" for employers who wish to give references as an employer will not be found liable for speaking the truth about a former employee. We generally agree with this analysis, subject to two points that we think employers should be aware of before providing a bad reference regarding a former employee.

First, ensure that what you are saying is true and also that you have proof that it was true in the event that the employee makes an issue out of the poor reference. Second, as a practical matter, remember that Stokes still had to pay a lawyer and go to trial in order to defend the reference provided by Stokes' owner and that the legal fees associated with this were likely very high and most of which would not be recoverable from Papp. Accordingly, it may still be prudent practice to deny providing references – particularly when you do not have positive things to say. As the old saying goes, "If you do not have anything nice to say, do not say anything."

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Feature

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Alberta Considers WCB Changes

Proposed changes cause major concern for employers

In a year where the Alberta government has already made substantial changes to labour and employment laws, a recent 190-page report points to more anticipated changes in respect to workers' compensation laws. The report follows 16 months of examination.

At the core of the Review Panel's recommendations lies the view that the workers' compensation system needs to change its overall approach to WCB claims. The Review Panel recommends a shift of focus from administrative "claims management" to putting the health and well-being of injured workers at the center of the system. Some of the key recommendations include:

- Establishing a new and independent Fair Practices Office (FPO). The FPO would serve an ombudsman-type function, fielding, investigating, and addressing concerns about administrative fairness.
- Relocating the Office of the Appeals Advisor (OAA) to the FPO. Currently, the OAA forms part of the WCB and is tasked with assisting injured workers and their dependents. The proposed changes would also allow employers to access the OAA's assistance.
- A new roster system for independent medical examinations (IMEs). The goal is to place responsibility for the IME roster with the Medical Panel Office, which is independent from the WCB, in order to increase impartiality and decrease "doctor-shopping."
- Greater choice for injured workers in selecting health professionals. This is one of the recommendations likely to prove controversial. Rather than selecting from an established list of WCB-retained professionals, the recommendation is that injured workers should have greater choice in their treatment professionals.
- Establishing an obligation to return workers to work. Currently, return to work services represent one of many rehabilitative options the WCB administers. The proposal, inspired by the human rights duty to accommodate, is to impose a statutory duty on employers to return injured workers to the workplace. This duty would be accompanied by a worker obligation to cooperate. The WCB would establish protocols to ensure these obligations are observed. While the proposal contemplates some limits to this obligation (e.g., it would only apply to employers of a certain size; the obligation would only subsist for 24 months unless otherwise ordered by the WCB), if accepted, it will represent a dramatic shift in how employers can deal with employees under WCB claims.

The proposal contemplates punishing employers who fail to return an injured employee to work with administrative penalties. In addition, the proposal suggests that the duty to return injured workers is only fulfilled once the worker has returned to employment for 12 continuous months. If an employer terminates the returned worker during this period, it would be assumed that the termination was inappropriate and that the employer failed in its obligation. As a result, the employer would bear the onus to rebut this presumption and convince the WCB that the termination was not related to the worker's injury.

Should this proposal be accepted, employers can expect to face difficult issues when contemplating the termination of injured workers. While the proposal makes allowance for just cause terminations, it recommends that employers be required to demonstrate "egregious conduct" in order to justify a termination on this basis. The proposal also leaves it unclear as to what options employers have to terminate injured workers in circumstances involving restructuring, lack of work, or general downsizing.

- The obligation to continue an injured workers' health benefit coverage. If the government acts on the recommendation to legislate a mandatory return to work, the Review Panel recommends that terms and conditions of employment, such as health benefits coverage, be continued as well.
- The use of case conference models throughout the system, part of the shift away from a "claims management" model. Formal processes such as internal reviews, appeals and medical panels should be regarded as tools of last resort. Instead, decision-makers in the system engage in meaningful dialogue with employers, workers and appropriate parties.
- End surplus payments to employers. Currently, when the Accident Fund exceeds its annual target, surplus funds are distributed back to employers. The Review Panel advocates an end to this practice.

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Feature

WCB Changes

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- Change to WCB policy to address continuing benefits when workers are terminated for egregious conduct. A frustrating aspect of WCB claims administration for many employers was that employees who were terminated from modified work assignments for misconduct would inevitably receive Total Disability Benefits upon termination. WCB often defended this practice on the basis that it is a "no fault" system and the WCB was not mandated to act as an arbiter of workplace disputes. The Review Panel advocates changing the current practice, enabling the WCB to look at all relevant facts to determine whether an employee was terminated for "egregious conduct".

It remains to be seen what recommendations the government will adopt and when any changes will be implemented. Some of the proposed changes are cause for concern.

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Feature

Engaging the Millennials

It's more than just meaningful work

Jacqueline Throop-Robinson

CEO, Spark Engagement

It doesn't seem to matter which part of the world I visit, a hot business topic is engaging the Millennials. Just recently in Singapore, I participated in a panel discussion on the topic. There were various points of view presented and the overall tone was that the Millennials (i.e., aged 18–35) were problematic or at least a bit of a pain.

Our Spark Engagement Model explains engagement in ways that demystify it. There are various definitions of engagement but more or less they all come down to employees making an emotional commitment to their organization.

In our Spark Engagement world, we know that passionate engagement emerges when two important drivers converge: Meaning and Progress. When we see our work as highly meaningful and we have a significant sense of progress, passion emerges!

High MEANING + High PROGRESS = PASSIONATE ENGAGEMENT!

Regarding Millennials, we question what is meaningful to them and what do they consider to be signs of progress? Once we understand their drivers of meaning and progress, we will understand their drivers of engagement.

What are the main sources of meaning for Millennials?

Millennials are often called the purpose-driven generation. It has often been thought that Millennials tend to choose a meaningful work experience over a paycheck. In fact, a recent study with LinkedIn members shows that this isn't exactly accurate. Sure, Millennials desire meaningful work but they also have other motivational drivers.

They're young, therefore establishing their career and income are important. Many are looking for partners and thinking about a family. Aligned to these results, a recent PWC study found that training & development and flexible working hours were highly valued, followed by financial rewards.

Yes, Millennials want their work to mean something. They want to contribute but they are also trying to find their groove at work and in life. However, inspire them with a sense of purpose and they are likely to be three times more productive, according to a 2015 article published in the *Harvard Business Review*. All of us want to know that our work matters and that we are making an impact. Feeling irrelevant does not make for a fulfilling work experience!

Sure, Millennials desire meaningful work but they also have other motivational drivers.

Millennials are seeking to establish themselves in life. We can support them by creating a meaningful work culture that inspires them and supports them in achieving what is most meaningful to them, while giving the organization a big boost in productivity.

What are the main signals of progress for Millennials?

Passion begins with meaningful work but it doesn't end there. Our research clearly shows that there's also a deep desire for progress. Millennials are no different. They want to experience progress in their current work but also in their career. In fact, the same PWC study concluded that "Career progression is the top priority for millennials who expect to rise rapidly through the organization. 52% said this was the main attraction in an employer, coming ahead of competitive salaries in second place (44%)."

But what does career progress look like? Baby Boomers will likely think of a formal promotion. Moving up the corporate ladder is often synonymous with career progress. Career progress is much more nuanced than this, however. Career progress can take many forms.

It is more helpful to think of career progress as a gradual incline that takes effort but is also enjoyable to ascend. This is because as you journey, you see the results of your effort. Seeing

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Special Extended Content Issue

Feature

Replicants Wanted: Six Implications of AI @ Work

Science fiction becomes a reality

Unless you live in 1982 when the original Blade Runner was released, you know the world and the workplace of 2049 is practically already here. From employers in Sweden and in Wisconsin embedding microchips under their employees' fingernails to a nursing home in Erie, Pennsylvania using biometric iris scans on its residents, science fiction is becoming reality. There's much uncertainty about how artificial intelligence (AI) and other 4th generation technology will change our society and our workplaces. But that it will and that employers must be prepared are certain. See for example the International Bar Association's Global Employment Institute (IBA GEI) recent report, "Artificial Intelligence and Robotics and Their Impact on the Workplace".

Governments have historically been ill-equipped to respond quickly to changing technologies with updated laws. Employers won't have that luxury. They must start planning now for the workplace impacts of AI and other developing technologies — many of which raise more questions than answers. Here are six of the workplace areas that will be affected and the implications employers need to think about now.

Legal Relationships

Technology is redefining the current understanding of the legal relationship of employer and employee. One need look no further than the current class action lawsuits against Uber to see how new technology is disrupting and complicating the status quo distinction between employees and independent contractors: are Uber drivers who use an "App" to register as a driver employees of Uber and entitled to all the benefits of employment (as they argue) or merely "independent contractors" or "App" users (as Uber argues)?

Privacy & Security

Employers count on employees' use of technology like smart phones and wearable devices (e.g., "smart" watches and even embedded microchips). But failing to update relevant workplace policies can cause problems, particularly vis-à-vis employee privacy and security rights. Consider, for example, the impact of encouraging employees to start social media accounts using their company-provided devices. What if an employee is harassed or "trolled" online? What if that harassment is discriminatory? Is the employer at fault for exposing the employee in this manner? Maybe. In 2016, an arbitrator decided the Toronto Transit Commission had violated its collective agreement and its Workplace Harassment Policy by providing a forum for online comments but failing to take reasonable steps to deter harassing and discriminatory comments directed at its employees.

iManage

Using technology to perform managerial and supervisory tasks can also be risky. For example, some employers rely on complex algorithms and "big data" to inform hiring and placement decisions, but this could lead to discrimination. It's vitally important to understand the functionality and limits of technology used in the workplace, as the 2015 arbitration BC Government and Service Employees' Union v BC Pavilion Corporation illustrates. The employer relied on motion-sensitive video evidence to justify dismissing an employee for sleeping on the job, but the arbitrator discounted it because the employer didn't adequately articulate the technology behind it, noting, "the challenge ... is that the employer's main witness is a deaf [AI] with limited sight operating on some unknown pixilation algorithm and could not be cross-examined."

Replace Retraining

Replacement of human workers in some industries isn't merely plausible-it's highly likely. In the "old days", new workplace technology or robotic aids typically meant employers retrained employees and collective agreement clauses reflected this. Today, new technology is less likely to be "assistive" and more likely to perform some (or all) of a job, making employees redundant. Some employers might soon find themselves requiring the use of robots and

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Special Extended Content Issue

Feature

Professional Development: No Standing Still

It's now time to get out and learn

A wise person once said that you can't stand still, gravity will pull you down. An even wiser man, Walt Disney said "We keep moving forward, opening new doors and doing new things, because we're curious and curiosity keeps leading us down new paths".

For most of us, it's hard to find the time to think, let alone time to attend a networking or professional development event. However, if we don't somehow find that time, we may be losing out- or losing ground. We're certainly not moving forward, personally or professionally. So why aren't we taking the time to develop ourselves and our careers? Let's look at some of the things we tell ourselves or we tell others.

I can't get away. I'm already two miles behind in my work.

We are all busy — too busy at work. We also like to think we're indispensable. But what would happen at work if we got sick or burnt out? How effective would we be if we stopped learning and lived inside the cocoon of our office or our department? Take a look in the mirror. Is that you? Now turn the argument around. How much better would you feel if you had a professional development day to yourself outside of the office? Wouldn't it be helpful to learn some new fresh ideas and problem-solving techniques from experts in your field? How great would it be to meet someone else who is in the same boat to talk to?

My budget won't allow it or my boss won't approve it.

Cost is an issue in these budget tightening times. There's no money for extras and it's frowned upon even to ask for something that looks personal. That's an argument we hear lots of times, often put forward by professional staff, not even their manager. We have grown used to cutting back on training and development when times are financially challenging because they are seen as discretionary spending. But every study done on the ROI of training and development shows that the company and the employee equally benefit when they invest in professional development. At times, it may even pay for you to bite the bullet and pay for the PD program yourself. Most of us can always use the extra PD/continuing education credits that come with attending for recertification purposes.

It's just a waste of time listening to other people talk. Some topics don't apply to my job.

It is a waste of time listening to the same people talk. That's what may happen when you stay in your own organization without getting out to PD and networking opportunities. After a while, you start to believe your own theories even if they have not proven to be the most effective. In addition, while you may think you don't have use for some of the information now or perhaps consider yourself an expert on that topic, you will always gain some new insights and may have use for that knowledge in a few months' time. Webcasts or video conferencing do not produce the same outcomes. It's also tedious spending time sitting and watching PowerPoint presentations from your desk with maybe a few questions at the end.

I won't know anyone there.

This may be true, but that's the whole point of going to a PD or training day. You meet new professionals who face the same day to day challenges that you do. You get to find out what systems and strategies have worked for other organizations and what hasn't worked so you can take that knowledge back with you to share with your colleagues. You actually connect in person with other members of your profession with whom you can chat and explore other ideas later.

A commitment to professional development and continuous learning are two keys to success that mark most successful leaders in every field of endeavour. PD days like the ones offered by IPM provide an excellent opportunity for the exchange of information and sharing of ideas that is vital not only to your personal growth but to the growth of your organization as well. You get to spend the day with other members of your association and find out what's happening in their workplace, what they're doing about it and what you can bring back to your office.

Registration fees for IPM conferences are very affordable. Where else can you get four sessions and speakers, breakfast, lunch, coffee breaks and handout materials for $139? And for every three people registered, a fourth person attends free of charge. The most important thing to keep in mind is that you need to get out and meet others in your field as well as continue to learn. Live in-person workshops and conferences enable you to become known and learn. Webcams don't do the same trick! Getting out and being seen has lead to job offerings, getting news about employers in your region before it hits the media and discovering new tools and

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Ask the Expert

Special Extended Content Issue

Brian Sartorelli

President and CEO
Investigative Risk Management

Workplace Fraud: The Continuing Epidemic

The need for zero tolerance

All businesses have realized that employee related fraud is detrimental to performance, customer service, outputs and the economic health of a company. Employee (or workplace) fraud comes in many forms including: flagrant absenteeism, economic fraud, workplace harassment and/or violence and lost productivity due to substance abuse. Moreover, the most difficult workplace fraud for an employer to address is fraudulent WSIB claims.

What specific red flags should employers look for in a suspicious WSIB claim?

It is fundamental that employers become familiar with the red flags which can indicate misuse of the WSIB system. The most prevalent red flag is a more extended period of absence than would be expected for the injury or situation. At times, reluctance on behalf of the employee to return to work is also an indicator. Another source of suspicion can result from third party information, intelligence or even rumors which indicate the employee has been working outside the company or seen participating in physical activities inconsistent with the type of injury sustained. In such cases, there are a regulated set of steps which should be followed if the employer wants to successfully deal with the situation. Education and proactive policy development are the keys to a healthy work environment.

How widespread are employee theft, flagrant absenteeism and workplace violence?

Every business and employer in Ontario is subject to the potential for abuse of the system through attendance fraud or corporate thefts. It is important that the employer create an environment of zero tolerance. In doing so, it will protect and support the employee who has a legitimate claim.

Workplace violence also has a mandated zero tolerance policy by legislation. Section 32, *Occupational Health and Safety Act*, (*Bill 168*), protects employees and the workplace through a set of requirements and guidelines which must be complied with by law.

How important are maintaining health and safety standards in minimizing the risk of a workplace injury?

It is fundamentally important to create the right corporate atmosphere of safety and zero tolerance of abuse. The employee must know what is expected of him/her and what performance standards and policies they will work within. The establishment of health and safety standards, and developing a corporate culture which supports such standards, will not only protect the employee from unnecessary injury but also the corporation from excess WSIB fees, health benefit costs and extra human resources expenditures related to backfilling an employee who is unable to work due to an injury. The cost of fraudulent claims will most likely cause a rise in the fees which the employer must pay.

> The most prevalent red flag is a more extended period of absence than would be expected for the injury or situation.

Workplace sexual harassment issues have been in the news lately. How should you communicate messages on this topic?

In 2009, Bill 168 was substantially changed and is now known as Section 32, of the *Occupational Health and Safety Act*. It is more commonly known as Violence and Harassment in the Workplace and is specifically designed to protect the employee from such an occurrence. This legislation has strict requirements which the company must follow including risk assessments, policy development and training. It is important for a company to create a culture of zero tolerance for such issues. Risk assessments and policy development should be completed by an expert to help create a healthy and protective work environment.

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Michelle Henry
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Special Extended Content Issue

Feature

Working Outside the Office: Privacy Concerns for Employers

Minimize data breaches and information insecurity

There have been many cases of massive data breaches, many involving incidents where an employee's mobile computing device containing personal information was lost or stolen. The increase in the number of data breach incidents can be attributed to a number of factors. For instance, many employers are incorporating flexible work arrangements in their workplaces, allowing more employees to work at home or locations other than their conventional office. Further, the increasing number of global companies means that employees are more often required to perform their job duties outside their conventional workplace. In addition to accessing personal and confidential information outside the office, employees are also required to travel with information in either electronic or paper format. Other common causes of data and privacy breaches are the insecure disposal or records and unauthorized access (i.e., snooping).

The fact is that while mobile computing devices can provide enhanced capabilities for employees, they also raise a number of privacy concerns for employers. Although many mobile devices are often stolen for the mere value of the device, personal information contained on these devices is increasingly being used for other purposes such as identity theft. Consequently, working outside the office means that employers must ensure that employees take additional steps to safeguard personal information contained on their devices.

Employers are strongly encouraged to develop policies for the protection of personal information when employees are working outside the office. The policy should provide safeguards for travelling with information, as well as safeguards for working outside the office and safe physical storage of files and other documents.

Privacy Commissions, including the Office of the Privacy Commissioner of Canada, have provided a number of guidelines for reducing the risk of a privacy breach, including the following recommendations:

- **Train employees.** While workplace policies are important, they can only be effective when employees are aware of them and the potential consequences of failing to follow the policy. Employers should have ongoing privacy and security training and awareness program so that employees fully understand their roles and responsibilities in protecting personal information.
- **Limit how employees store and save documents.** Increased employee mobility also means that employees are always looking for efficient ways to store and carry documents. Breaches due to loss or theft of unencrypted laptops, USB keys and other portable devices are now commonplace. Employers should ensure that employees use only encrypted devices to store information.
- **Protect personal information throughout its life cycle, including the destruction of information at the end of its life cycle.** Clearly set out your policies and procedures for secure destruction of personal information and ensure that they are followed. For instance, the OPC reports that it has seen a number of breaches caused by documents left behind in a move or thrown in the garbage, as well as by information not being properly erased from discarded or recycled electronics.
- **Limit access to personal information.** Employees' access to personal information should be limited to what they need to know to do their job and nothing more.
- **Maintain up-to-date software and safeguards.** While this may be viewed as common sense, it is worth reminding employers that, no matter how small you are, it remains imperative that you have a systematic and documented process that is properly implemented to proactively monitor your system, to mitigate threats, to ensure security-related patches are applied in a timely manner and to ensure software is properly updated.

Developing a response plan is also extremely important and should include reporting requirements. Employees should be made aware that any loss or theft of personal information

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Judith Richardson

CEO and Principal, PONO Consultants International

High Performance Jewels

Manage your energy instead of your time

Research shows how our bodies teach us. An Executive Coaching client looking to elevate his already high performance had enjoyed a prior career as a world-class athlete. He was accustomed to what it took to perform consistently at the highest levels and under intense competitive pressures.

In an assessment testing his behaviours and attitudes, he scored high on perfectionistic and competitive capabilities, but couldn't understand how he seemed to struggle getting to that next level in his business career. Through Executive Coaching, we noticed that his success was directly linked to feelings of pressure. In his former life as a world-class athlete, his adrenalin got pumping around intense training sessions and competition time. During these periods of inward focus, competition drove him to repeatedly perfect himself and his performance.

In the business world, his success was centered in managing chaos that often led to missed deadlines and a feeling of extreme fatigue after projects. Faced with relentless demands on his career and disappointment in his perceptions of his performance, he became short-tempered and easily distracted. His business relationships and team participation became less than desirable — people were beginning to avoid him. Though a fondness for perfection in competition is healthy, the competitive craving for perfection that had served him so well as a world-class athlete was sabotaging his business world success.

Some of us unconsciously recreate crises or take on new ones. If our success has been shaped out of pressure–filled situations, then the sense of being overwhelmed can feel familiar and even comfortable; so we recreate it over and over. We unconsciously desire the pressure that drives us to perform. Being starved for sufficient time, we put in more and more hours.

Research shows that our bodies can function well in short periods of crisis mode – but there isn't a great deal of energy left to push harder. Everything we do from interacting with clients and colleagues, to making important decisions, to being with friends and families, requires energy. Many believe that if you find talented people and equip them with the right skills for the challenge at hand, they will perform at their best. Our experience has proven that energy also needs to be induced positively to fully ignite that talent and skill in a sustainable way. Energy in the form of physical activity and the emotion generated from it positively influences our perceptions, interactions, moods and thoughts.

In a recent article, *Harvard Business Review* explained research that supports how "We "catch" energy through our interactions with people — something called "relational energy"— and it affects our performance at work. It affects our families at home with the same relational energy. High performance is grounded in the skillful management of energy rather than time. If you could wake up tomorrow with substantially more positive, focused energy (enough to invest both in the workplace and at home), how significantly would that change your life for the better?

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Feature

Improve Your Performance Management System

Top 10 tools for success

Julianna Cantwell

President, Juna Consulting Inc.

A performance management system (PMS) is, in essence, a toolkit. Its purpose is to set, measure, track, and – ultimately – improve performance of individuals and groups of employees. Some toolkits are manual and some are electronic, just as some PMS programs are paper vs. online.

In this two-part series, we will look at the Top 10 "tools" you should consider having in your toolbox. In this issue, let's examine the first five.

1. The Central Tool

The most important mechanism in a PMS is the "job description." Call it a position profile, an accountability agreement, a position description. Regardless of what you call it, it should be at the center of almost all of your HR functions. This set of knowledge, skills, abilities and other attributes (KSAOs) is what the employee has agreed legally to do for your organization in exchange for pay/total rewards. Managers should be trained to know that the job description document should be part of every:

- recruitment/selection interview
- new employee orientation process
- job classification/compensation discussion
- annual PMS review meeting
- exit interview and "stay interview"

This is to ensure it still captures the core contributions that position makes to your organization. If the role's tasks, duties or responsibilities change more than 20% from what was agreed to, there may be a case for reviewing and updating the description and/or compensation.

Key Points:

- Make sure you have developed job descriptions for all roles in your organization. Ensure they represent an accurate reflection of the role they describe and are updated annually.
- Train managers to use this tool when a new employee enters your workplace (week one) and throughout the employee's life cycle with you. It's your primary HR communication tool between management and employees.

2. KISS – Keep it Super Simple

Keep your review process as streamlined and intuitive as possible. Employees and managers both dread a heavy administrative process. A performance review "form" that is longer than two pages will feel bureaucratic by most users. Can you streamline what you are measuring? Whether you have a manual/paper program or an online HRIS/ERP system, you need to make the process easy to use. If it takes users longer than an hour to complete, they will lose sight of the value of it.

Key Points:

- Review both the results (what was achieved/not achieved) AND how they got there (behaviours). Depending on your corporate culture and what you said you value, you may want to weight these equally or differently.
- Use the "windshield" principle… 25% of the formal review process should be looking at last year's accomplishments/challenges (rearview mirror, looking behind) and 75% of the meeting should be focused on the future (car windshield, looking ahead) – where you're going and why.

3. Frequent Touch Points

If your organization only has an annual review… well, consider scrapping it! An annual performance review once a year, and only once a year, is dreadful. It is also riddled with rater biases (especially the "recency effect"). If you cannot get rid of it altogether, then implement bi-annual – or even better – quarterly reviews. In a 3-month timeframe, business priorities can change. This regular "casual conversation" between manager and employee ensures that healthy performance dialogue continues.

Key Points:

- Train and follow up with managers (diarize in your calendars to check in with them) to ensure they are scheduling and holding brief conversations with each of their direct reports on a regular basis.
- Consider providing them with $5 coffee cards to help them hold these meetings and set the tone for a more informal touch base.
- Teach managers how to have these meetings: SHARING positive (+) feedback and constructive (▲) feedback. Also, they should be ASKING employees what is working for them (+) and what should change (▲) to make them more effective.

4. Train 'em, Train 'em, Train 'em

For a PMS program to hit the mark, everyone has to own it! Do whatever you can do to make sure people do not see performance management as a Human Resources initiative. This usually requires a lot of communication and training.

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Feature

Performance Management System

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Key Points:

- Train from the top-down: Educate your executive leaders on the key elements and benefits of the PMS program. Ensure they are modeling the way. This is probably THE most important part of the whole system.
- Train from the bottom-up: Provide just-in-time (JIT) training workshops about 4–6 weeks ahead of the annual review process to front-line employees so they understand their role in the whole thing. Be clear about the WIIFM? (“What’s in it for me?”) message so that they take advantage of the opportunity to have a voice in how their performance is measured and managed. Teach them to keep a proverbial “shoebox” of accomplishments throughout the year so they are prepared when the time comes to demonstrate how they did over the last 12 months.

  Teach their supervisors to do the same thing. Create paper or electronic “working files” to provide a balanced view of performance throughout the year.
- Train the managers: Statistics from exit interviews tell us that the #1 reason why people leave your organization is due to conflicts with their supervisors. Teach your managers how to have constructive coaching conversations throughout the year, as well as during that annual review.

5. Goal Setting should be Experiential

Although it is not “easy,” it can be done. Workshops provided to employees on how to create well-defined goals for personal and professional development are a worthy investment of your HR time and budget dollars. Managers can provide targeted coaching to employees (which becomes a welcome, collaborative process in your PMS) when employees have articulated clearly what they want to accomplish short-term (1 year) and long-term (3-5 years).

Key Points:

- Make your PMS training hands-on. Adult learning principles teach us to offer 10–20 minutes of theory/information, followed by practical application. Your workshops should be approx. 80% practice by the participants. In other words, have them create goals and coach them on what is effective and what could be improved.
- Start goal setting training with the managers, then the frontline staff. Managers should be able to also COACH their direct reports in effective goal setting. They can learn this from you.

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Julianna Cantwell will be presenting on:

Communications & Email Etiquette: Mastering the Skills

at IPM's Edmonton May 3, 2018 Conference.

FOR DETAILS, GO TO www.workplace.ca (CLICK ON EVENTS).

Philip Gennis
J.D., CIRP, LIT
msi Spergel inc.

Minimum Wage Increases

Bad news for business and for jobs

The announcement by the Liberal government in Ontario to raise the minimum wage has thrown a monkey wrench into the planning and future operations of many small and medium size enterprises. At the beginning of 2017, workers in Ontario got a minimum of $11.40 an hour rising slightly to $11.60 in October 2017. That is along the lines of previous minimum wage increases in the province that are designed to allow wages to grow in relation to increased costs and the overall cost of living.

But the next wave of increases to the Ontario minimum wage are shocking. In January 2018 the rate will rise to $14 an hour and then to reach $15 an hour by 2019. Some people have suggested that this is a maneuver by an embattled provincial government to try and garner political support before the next provincial election which is scheduled to be held on or before June 7, 2018. That may or may not happen. But what will happen, according to business insiders and observers, is that there will definitely be a massive and negative impact on small and medium size enterprises in the province.

According to Philip Gennis, Senior Principal with licensed insolvency trustees msi Spergel inc., the outcome of this decision will be disastrous on small to medium enterprise. "This increase to the Ontario minimum wage will result in job loss and the replacement of current workers through automation and a dramatic rise in both business failure and business bankruptcy."

He is not alone in these views. Although only about 10 percent of workers in Ontario currently earn the minimum wage, about 30 percent of all workers in the province make less than the proposed $15 an hour. That means that the Ontario government is not just raising the rates for the most poorly paid employees, they are also handing all these other workers a raise that they didn't even ask for before this decision was made. That has led to a variety of employers, large, small and in-between to call on the provincial government to reverse its decision before more Ontario businesses have to close their doors.

One major grocery store chain in Ontario, Metro, recently announced it is looking at new ways to automate, as a result of the imminent $15 minimum wage. The evidence shows that jobs held by relatively low-skilled workers involving repetition or routine are already vulnerable to automation and this only solidifies that argument. So, while the Ontario government may say that it is trying to help support low-wage workers, that won't do them much good if they are out of a job. In fact, as Philip Gennis suggests, the higher minimum wage will actually hurt many low-skilled workers by encouraging employers to replace their jobs with machines.

That's why some of businesses and organizations in Ontario have banded together to try and bring these concerns to the public's attention. The Keep Ontario Working Coalition is a diverse coalition of groups like the Ontario Chamber of Commerce, the Ontario Federation of Agriculture and Food and Beverage Ontario. One of their major aims is to call on the Ontario government to conduct an economic analysis of the proposed minimum wage increase to inhibit negative impacts on the growth of Ontario's economy, its people and its communities.

The Keep Ontario Working Coalition has commissioned and is circulating some research to support their claims. They include the fact that some of the worst impacts of the $15 minimum wage will be on young people. They point to studies that show that increasing the minimum wage has led to a reduction in employment especially for youth. They note that even the Premier's own 2014 Minimum Wage Panel concluded that, in the Canadian context, researchers have generally found an adverse employment effect of raising minimum wages especially for young workers. In fact, Canadian studies have found that teen employment would drop by 3% - 6% if the minimum wage is raised by 10 percent.

They also published the results of an independently-commissioned Aug. 14 report that was conducted by the Canadian Centre for Economic Analysis which said there will be a "$23 billion hit to business" and "185,000 Ontario jobs will be at immediate risk" in the next two years. And the Ontario government "would need to borrow $440 million more to cover the increases in new costs from this legislation."

Even one of the provincial government's own watchdogs has stepped into the fray to warn them that this proposal could cost the province much-needed jobs. Ontario's Financial Accountability Office issued a warning that the proposed minimum wage increase could wind up resulting in an estimated net loss of 50,000 jobs, concentrated mostly among teens and young adults. The people who need the jobs the most.

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Carol Ring

Founder,
The Culture Connection

Feature

The Conscious Leader – Where do you fit in?

Leaders need to transform before organizations can grow

It seems that everyone is talking about leadership. An amazon.com search on leadership returns over 200,000 titles.

These titles would imply that leadership has become a technical skill. Scan the results list and you'll see titles like: The 21 Irrefutable Laws of Leadership, Leadership: the Top 100 Ways to be a Great Leader and Real Leadership: 9 Simple Practices for Leading and Living with Purpose.

The demand for knowledge about leadership is based on the collective awareness that command and control leadership styles have long lost their effectiveness. Today's environment is different from 50 years ago and successful leaders are following a new model. Fast-paced change, technology, social media and differing generational values are all placing pressure on leaders to perform.

The Values of Successful Leaders

Richard Barrett, author of *The New Leadership Paradigm*, says "Enlightened leaders are discovering that ethics and values are good for business. Who you are and what you stand for have become just as important as the quality of goods and services that you sell." Our values are shaped by our beliefs and it's our beliefs and values that drive our behaviour.

What are the key behaviours required to be a successful leader today? In his book *Good to Great*, Jim Collins studied the characteristics of successful businesses. When it comes to leadership, he found that successful businesses have what he has termed "level 5 leaders." These leaders have moved from being a capable individual (Level 1) to a contributing team leader (Level 2). They have grown to be a competent manager (Level 3) and then developed into an effective leader (Level 4). At Level 5, these leaders put the interest of their organization ahead of their own self-interest. The mindset has shifted from "I" to "we".

Leadership Consciousness

Richard Barrett has built a model of seven levels of what he terms "leadership consciousness." As you read these seven descriptions, think about where you fit in.

The Crisis Manager – Has strong focus on financial stability, profitability, shareholder returns and employee safety. Displays calm in the face of chaos and decisiveness in the face of danger.

The Relationship Manager – Communicates openly and resolves conflicts easily. Builds employee and customer loyalty. Is supportive and loyal to the organization, co-workers and suppliers.

The Manager/Organizer – Builds high-performance systems and processes based on best practices. Focuses on excellence, quality, efficiency and productivity. Builds employee pride.

Facilitator/Influencer – Is accountable, responsible and adaptable. Focuses on personal growth, continuous learning and continuous renewal. Encourages teamwork, empower individuals and supports team members in mastering their fears.

Integrator/Inspirer – Builds a vision-guided values-driven culture that inspires all stakeholders. Unleashes the creativity, commitment and enthusiasm of employees. Displays high levels of authenticity and trust. Is driven by a strong sense of purpose.

Mentor/Partner – Forms collaborative partnerships and strategic alliances with other like-minded organizations. Servant leader focused on mentoring, coaching and employee fulfilment. Displays intuition, empathy and consideration for others.

Wisdom/Visionary – Service to humanity and the planet. Focus on ethics, future generations and social responsibility. Displays wisdom, compassion and humility. At ease with uncertainty and ambiguity. Can handle multiple levels of complexity.

Barrett has mapped personal values into these various levels. By focusing on values and behaviours, we can easily determine where we are on the growth curve of leadership consciousness. Interestingly enough, levels five, six and seven in this model align with Collin's concept of level 5 leadership. While Collin's model encourages

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Continuations…

Professional Designations and Memberships

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Can you help us establish a chapter in your area or assist your existing chapter? Are you looking for new ways to get involved and also qualify for continuing credits for your other designations? We'd be happy to help. Send us an e-mail at info@workplace.ca. You can join the over 2,600 members who are moving their career forward in IPM Associations. We're growing and so can you!

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

Engaging the Millennials

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results as we advance motivates and enables perseverance. For some, results will take the form of learning something new or developing a new skill. Others will see broadening their area of responsibility as advancement. For some, leading a project provides the signal of progress that tells them they are aligning with their career aspirations. Still others look to financial rewards as a signal that their work is appreciated and valued, positioning them for new opportunities. And, a surprising number find meaningful feedback an important day-to-day signal of progress, assuring them that they are on track with both work and career.

Think of an incline (not a corporate ladder) marked with many signals of progress. Create opportunities to provide signals of progress and often. Share the burden as well. Help them see progress that might not be visible to them. Help them understand the impact of their work. Support them in finding signals of progress in the everyday. Millennials like the pace of progress to feel fast so learning to see and celebrate progress at very regular intervals is critical to engaging Millennials.

A final word: Although progress is critical, Millennials must also know that ultimately the incline will lead you to something meaningful, making all of your time and effort worthwhile. This is the value of aspirational goals, corporate vision and mission statements. They take our numerous efforts and make them add up to something important.

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Replicants Wanted

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other AI (including self-driving vehicles, 3-D printers, or body "augmentations" like Google Glass on factory floors) to remain competitive. How will an employer adapt if its collective agreement contains stringent provisions preventing it from adopting new technologies quickly (or at all), or from laying-off redundant employees?

Human Rights

AI advancements will, as the IBA GEI report notes, lead to new considerations for employers' accommodation of disabled employees. Once an employer introduces AI into the workplace for some purposes, is it an undue hardship to expect them to provide robotic assistants or other bio-improvements for the purpose of accommodating disabled employees?

Health & Safety

Employers are, in general, legally obligated to ensure a safe workplace. Introducing new technology often introduces new health and safety risks. Consider for example the risks inherent in using self-driving forklifts on the factory floor: what steps must employers take to ensure such technology is used in compliance with occupational health and safety laws?

While the further introduction and implementation of AI and other 4th generation technology in the workplace are inevitable, employers need not be caught by surprise. By asking the relevant questions now, employers can anticipate and become prepared for the workplace of the future, which is closer than one might think.

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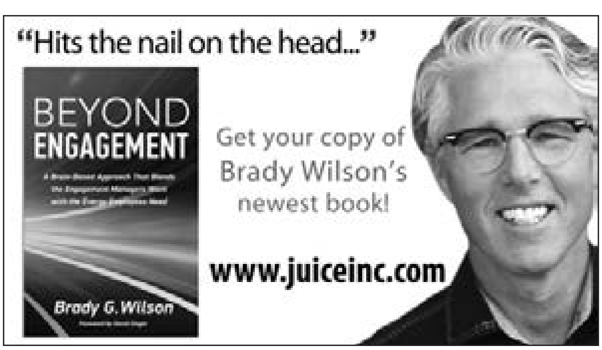

Continuations...

Professional Development

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strategies before the rest of the world finds out. Can you really afford to pass on these opportunities?

In addition, it's been proven that while social interaction is good for your health, networking is good for your career. Even with all the online social networks available, there's nothing like face to face contact and conversation. Who is going to remember you solely through emails or posts, particularly when there are ideal venues where you can exchange ideas in person or learn a few things to take back to share with your colleagues?

Don't stand still. Get out and learn. Sign up for an IPM conference and start moving forward.

Members Quarterly Staff Writer

Working Outside the Office

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must be reported immediately. If personal information has been lost through theft, the police should also be notified. The loss or theft of personal information should also be reported to the applicable privacy commissioner. In some cases, individuals whose personal information was lost or stolen will have to be notified.

Given the risks to employers in the event of a data breach, the importance of implementing policies regarding the use of mobile computing devices and educating employees about maintaining the security and confidentiality of personal information cannot be overstated.

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Minimum Wage Increases

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The bottom line is that no one opposes a staged and incremental increase to the minimum wage. Most businesses are happy to provide their workers with a little more, as long as they can plan for that increase and not have it dropped on them like an anvil that hurts them and their employees at the same time. To have the minimum wage rise over 20 percent in the first round of increases and then another 12 percent to bring it to $15 in just 18 months is not feasible or practical. According to Philip Gennis, it is a disaster waiting to happen.

Members Quarterly Staff Writer

The Conscious Leader – Where do you fit in?

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growth into Level 5, Barrett would argue that one needs to master and manage across all seven levels.

Awareness is critical to success

While it's wonderful to have new models of leadership to follow, how do we actually put them into practice? How do we evolve into better leaders? Whether you follow a change process, perform a competency gap analysis or adopt the three universal stages of evolution, it all starts with awareness. How aware are you about your own values? If you'd like to explore your values and see where you fit in, you can take a free Personal Values Assessment at www.valuescentre.com. This new awareness will provide a powerful foundation.

Our personal transformation as we grow and develop new leadership competencies also requires us to take two key steps. We must be able to release our conscious or subconscious fears and be open to new information. We must also be able to let go of our parental and cultural conditioning that has formed our values to date.

Personal transformation of leaders is important for every organization. Leaders need to transform before organizations can grow. As Albert Einstein once said, "We cannot solve our problems with the same thinking we used when we created them".

Carol Ring is the founder of The Culture Connection and the author of Ignite Your Culture: 6 Steps to Fuel your People, Profits and Potential and Awakening the Workplace. She can be reached via email at carol@carolring.ca.

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