

## RETURNING TO WORK

AFTER A MENTAL HEALTH LEAVE

2015
HRPA SUPPLIERS
GUIDE INSIDE

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### **IN THIS ISSUE**

After a leave of absence related to a mental health issue, an employee's success may depend on an effective return-to-work plan. As HR professionals, we need to develop an abilities-based plan in collaboration with the employee and her manager, with regular check-ins and adjustments along the way. To read how to successfully implement a return-to-work plan, flip to this issue's cover feature, starting on page 16.

### contributors



### **LOREN MINER**

Loren Miner is chief operating officer (COO) of recruitment firm Decision Toolbox (DT). Miner has more than 15 years of financial, corporate and leadership experience and oversees DT's daily and long-term operational processes, client relations, finance, accounting, expansion and human resources functions. Miner holds a Bachelor's degree in business economics. Prior to joining DT, Miner served as vice president of finance and administration for AHI Healthcare Systems. Read her article discussing the costs associated with vacant positions, starting on page 47.



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James Tjan is the president and CEO of Mindful Snacks, a provider of healthy snacks and beverages servicing some of the GTA and south-western Ontario's notable companies, including Google, LinkedIn, Nike and many more. Tjan founded Mindful Snacks following four successful years with Freshii, first as director of operations, and later as vice president, Purchasing and Product Innovation, where he managed over \$10 million in global purchasing annually.

Tjan graduated from Ryerson University's Hospitality program in 2003. Read his article about the benefits of readily available, nutritious snack options for employees, starting on page 72.



### Your workplace is changing . . . are you?

Most work environments today are dealing with constant change. New millennials in the workforce are seeking different rewards than their older co-workers, and evolving technology is changing the way we all do our jobs. How do we adapt to these shifts and build teams that foster collaboration?

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### letter from the editor

### TAKING CARE OF BUSINESS

s HR professionals, you undoubtedly are aware of the importance of taking care of your mental health. We've previously explored the issues surrounding mental health in the workplace in HR Professional, and the May/June 2015 edition is continuing that conversation.

We know that, in some cases, the best option for an employee is to take a leave of absence to focus on their mental health or to deal with issues arising from a mental illness. What may go unconsidered, however, is how to successfully reintegrate that employee back into the workforce once they're able to return. In our extended cover feature, writer Melissa Campeau explores how HR can step in to better the chances of a more positive outcome when an employee returns to work after a mental illness-related leave, including accommodation strategies. To read more, flip to page 16.

In this issue's other feature article, Cathy Gallagher-Louisy of the Canadian Centre for Diversity and Inclusion fills us in about Canada's looming talent shortage, and how HR can try to avoid that crisis. By tapping into Canada's underutilized talent pools - skilled immigrants, Aboriginals and people with disabilities – we can better prepare for the future. HR is in the position of building more inclusive work environments and increasing the diversity of their workforces. To read Gallagher-Louisy's article, turn to page 22.

I'm always excited to put together a new issue of HR Professional because of the wealth of interesting and engaging topics we can include – I hope that you enjoy this edition and that you learn something new from it. I'm looking forward to your feedback - please send me an email or tweet to @HRProMag. The digital edition is available for viewing at www.hrpatoday.ca.

Happy reading,

Jill Harris 866-953-2182 jharris@lesterpublications.com ■







### hrprofessiona THE MAGAZINE OF HUMAN RESOURCES THOUGHT LEADERSHIP

#### VOLUME 32 / NUMBER 4 MAY/JUNE 2015

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HR PROFESSIONAL is published eight times per year for the Human Resources Professionals Association (HRPA).

### PUBLISHED BY LESTER COMMUNICATIONS INC.

701 Henry Ave., Winnipeg, MB R3E 1T9 Phone: 204-953-2189 | Toll-free: 866-953-2189 | Fax: 204-953-2184 Email: info@lesterpublications.com | www.lesterpublications.com

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**Subscriptions:** (Prices include shipping and handling) \$49/year in Canada; \$79/year in the U.S. and International

Publication Mail Agreement #40606022

Return undeliverable Canadian addresses to Lester Communications Inc.

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# Strong HR Capabilities and Flawless Execution are Good for Business



By Phil Wilson, CHRL, CHRE

### RAISING THE BAR FOR THE PROFESSION

trong HR capabilities and flawless execution are good for business – and raise the bar for the profession.

The recent Boston Consulting Group's report entitled *Creating People Advantage* confirmed two things for me recently.

The correlation is very clear: companies that have strong HR capabilities enjoy higher financial performance over those that don't.

And secondly, the Human Resources Professionals Association (HRPA) is definitely on the right track with its updated HR certification framework: the survey found the most important HR capabilities (and the ones most heavily invested in by high-performing organizations) included talent management, culture, HR strategy and engagement. These are precisely the kinds of capabilities that HRPA's new framework defines via 213 functional competencies and 15 enabling competencies at each of the three levels of HR practice – Entry; Professional; and Executive.

Let's examine what the survey found regarding high performance organizations.

BCG's 2014-15 survey (its eighth since 2007) was produced in partnership with the World Federation of People Management Associations (WFPMA). It analyzed data from more than 3,500 online respondents from around the world, plus 64 in-depth interviews with both HR and non-HR executives.

A central finding was the clear correlation between HR capabilities and financial performance. Among the highest performers were organizations that were strongest in people management – and who were



confident in their capabilities across all HR subtopics (everything from international HR, social media and recruiting to onboarding, HR processes and metrics). By contrast, the organizations reporting the worst financial performance also showed a need to bolster their HR capability across the board.

BCG's analysis also found the strongest performers were more strategic in the efforts they invested in their HR capabilities – notably how they accurately distinguished high-priority capabilities from lower priorities and directed their resources accordingly.

### HRPA COMPETENCY FRAMEWORK

As I mentioned above, I was pleased to see how closely HRPA's updated competency framework mirrored the HR capabilities noted in the BCG survey – particularly the capabilities noted above that are considered to be most important by high performing organizations around the world.

HRPA's Competency Framework provides a template for these capabilities. Take, for example, "HR internationalization" (which, in the BCG survey, was among a few HR subtopics ranked significantly more important in high performers than in low performers). In HRPA's Competency Framework, this competency is defined as "Develop an overall HR strategy that can be adapted to various national contexts" and is further defined as to how it should be demonstrated at each level of practice:

- CHRP: Gathers relevant information upon request on HR management across various national contexts
- CHRL: Works with others to develop an overall HR strategy that can be adapted to various national contexts
- CHRE: Influences the overall multinational

# TIPS ON DEALING WITH DIFFICULT PEOPLE



#### DEALING WITH SOMEONE WHO MAKES PERSONAL ATTACKS

- 1. Ignore the attacks and focus on the issues;
- 2. Try to determine if you did anything to upset them and, if so, apologize;
- 3. Set ground rules for behaviour; or
- 4. Use an "I" statement to indicate that attacks are not helpful.

### DEALING WITH SOMEONE WHO LIES OR IS UNTRUSTWORTHY

- 1. Ask yourself whether the lie is about something important or just puffery.
- 2. Ask for proof/third party verification.
- 3. Outline the impact on future interactions if present discussion is based on a lie.
- 4. Build in a consequence that will occur if they have lied.

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In an increasingly interconnected world economy, the HR profession needs a global body of knowledge based on HR competencies that are valued and recognized by organizations – and HR professionals – around the world.

### **SOME FINAL THOUGHTS**

This is my last Leadership Matters as HRPA chair and I would like to say what an honour it has been serving our members. I am proud to have volunteered with HRPA over many years, having contributed to all the committees as an active member. Through that process I have developed as an HR practitioner as well as honed my governance skills. Through the years I have worked with a fabulous group of HR practitioners who volunteer many hours of their time on our board on behalf of our members and the public in effecting change that raises the bar for our profession. I have had tremendous insight in regards to the running of our association and can assure you that we are tremendously well served by the dedication of HRPA CEO Bill Greenhalgh and his staff.

I am very proud to have been around for two of HRPA's greatest achievements: the passage of *The Registered Human Resources Professionals Act*, 2013 and the introduction of our new HR framework and designations. Together these accomplishments help establish HRPA as a Tier 1 regulator of the HR profession, and they act together to bring about this fundamental shift in HRPA's role.

What we've done to transform the HR profession is game changing, and we are effectively pioneering the way for other HR associations around the world.

I am truly excited and confident in terms of the great potential that exists for our members and the future of our HR profession. It's a great time to be in HR.

P.S.: For those who are interested, the BCG report Creating People Advantage 2014-2015 can be accessed from http://on.bcg.com/1rLsui9.

Phil Wilson, CHRL, CHRE is outgoing chair of the Human Resources Professionals Association (HRPA).

## UPFRONT

### HR PROFESSIONALS SAY "NO" TO ONTARIO PENSION PLAN

HR professionals reject the proposed Ontario Pension Plan: that's the clear message coming out of a recent member survey conducted by the Human Resources Professionals Association (HRPA).

In a recent Ontario Retirement Pension Plan Survey, 55 per cent of HRPA members surveyed are against the proposed Ontario Retirement Pension Plan (ORPP), while 58 per cent think that the Ontario government should continue negotiating with the federal government to raise the Canada Pension Plan (CPP) and close the retirement gap.

"There does not seem to be a savings gap," said Bill Greenhalgh, CEO of HRPA. "It is clear that a majority of our members' organizations already have adequate benefit plans."

Respondents to the survey questioned the need for an ORPP when current workplace benefit plans already exist. In fact, 75 per cent of HRPA members' organizations currently offer a savings plan to their employees – more than half of which offer a defined contribution pension plan.

Affordability is another issue. Of those polled, almost half cannot afford to pay up to \$1,643 per employee per year, while 41 per cent said that it would force them to

either cancel or invest less in their current workplace plan.

"The employee benefit plans that companies currently offer will be affected," said Greenhalgh. "Of those surveyed, 44 per cent have 500 employees or more, making it challenging for these companies to maintain their existing plans while also incurring the cost of yet another mandatory savings plan."

For full survey details, please visit: http://bit.ly/1EQxOm6

### CFOs PREDICT WHAT HAPPENS WHEN YOU EMPOWER EMPLOYEES

A little employee empowerment can go a long way if you're the boss, new research suggests. Nearly one in three (29 per cent) chief financial officers (CFOs) in a Robert Half Management Resources survey admitted they would be more productive if they gave their employees greater autonomy at work. Only 21 per cent of executives feared their performance would decline if they gave workers more control.

The survey was developed by Robert Half Management Resources, a global provider of senior-level finance, accounting and business systems professionals on a project and interim basis. It was conducted by an independent research firm and is based on telephone interviews with more than 270 CFOs at companies across Canada.

CFOs were asked, "If you gave your staff greater autonomy over how and when they do their jobs, such as flexible work hours, working remotely or less direct supervision, what effect, if any, do you feel it would have on your productivity?"

Increase in productivity	29%
No change	44%
Decrease in productivity	21%
Don't know	6%

"Executives at successful companies focus on the big-picture direction of the firm and trust their staff to achieve current goals," said David King, Canadian president of Robert Half Management Resources. "It can be difficult to let go of the day-to-day but executives who perform at their optimal levels maintain focus on strategic planning and analysis, and mission-critical initiatives. An organization with empowered staff is in line to achieve the long-term benefits of increased innovation, better morale and improved retention."

# FORTY-ONE PER CENT SAID THAT [THE NEW ONTARIO PENSION PLAN] WOULD FORCE THEM TO EITHER CANCEL OR INVEST LESS IN THEIR CURRENT WORKPLACE PLAN.











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### news



### TO BE THE BOSS, YOU NEED TO MOTIVATE OTHERS

Want to move into a management role? It takes more than business savvy and decision-making skills, says research by The Creative Group. When advertising and marketing executives were asked to name the most important factor they consider when promoting professionals to management positions, more than half said they look for candidates with strong motivational or leadership skills. Interpersonal or soft skills followed, with 19 per cent of the response.

The national study was conducted by an independent research firm and is based on 400 telephone interviews – 200 with advertising executives randomly selected from agencies with 20 or more employees and 200 with marketing executives randomly selected from companies with 100 or more employees.

The Creative Group outlines five key traits for those seeking a promotion to a supervisory role:

- Vision. A sharp understanding of where your business is going is essential to success. Great leadership relies on a clear vision of the future as well as the ability to inspire others toward your goals.
- 2. **Focus.** Effective managers keep their eyes fixed on the prize. They know when to sacrifice short-term wins to pursue bigger-picture objectives.
- 3. **Creativity.** The most successful leaders share a willingness to turn established

- business practices on their heads and foster a culture of smart risk-taking. A passion to innovate and advance the company overrides their fear of failure.
- 4. Flexibility. Good managers know change in the workplace is constant and that agility is central to getting ahead. This means they can pivot at a moment's notice to take advantage of opportunities as they arise.
- Resilience. Sometimes the act of striving towards business goals means you will fail. The best bosses can bounce back and turn a setback into a well-timed gain.

### EMPLOYEE ENGAGEMENT TOPS HR TRENDS IN RETAILING

As large and medium-sized retailers shutter and online retailing grows, surviving bricks and mortar stores must redefine themselves – and the HR function must adapt to meet the challenges. That was a clear message at the Retail Council of Canada's recent HR conference.

The conference examined several HR trends affecting the retail trade:

#### **EMPLOYEE ENGAGEMENT**

Engaging store managers/associates and home office staff across multiple brands and business units has become more significant. In implementing the Hudson's Bay Company's "transformational change" program after it bought Saks Off Fifth and

Lord & Taylor, CHRO Stephen Cerrone says that engaging its beefed-up work-force started by recognizing that "people had something to say." In May last year, The Bay asked its staff 40 questions across 10 categories, with more than 38,000 employees providing 64,365 responses to three questions on "commitment."

For H&M, "employee engagement is a top focus," said spokesperson Emily Scarlett. The fashion retailer's strategy includes encouraging employees to take responsibility and to set their own development goals.

### **MULTI-GENERATIONAL WORKFORCE**

Rebecca Wood (Genuine Parts Company), Kristen MacLellan (Starbucks) and Ted Moroz (The Beer Store) say retailers are using mobile technology to attract younger people, who normally form the bulk of sales associate teams.

However, managing retailers' growing multigenerational workforce is a trending concern for retail management, says Norm Sabapathy, People EVP at Cadillac Fairview. He says retailers' HR departments are accelerating initiatives to "tap into the needs and motivations of its diverse workforce" so they can better work together toward the corporate goal.

"Our ability to influence how we bring talent into retailing [is important because different generations] are all looking for different things coming out of their work," said Wendy Swinden, VP HR at Wal-Mart Canada Corp.



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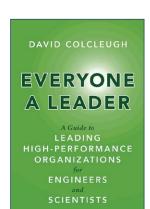
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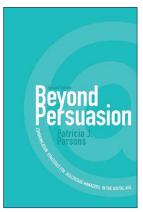


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#### **ENHANCING COMMUNICATIONS**

The largest retailers are working to ensure change management decisions are not "lost in translation" on their staff, especially in far-flung locations. Swinden says that top retailers are adopting strategic communication to help "communicate and engage more with retail operations folks." The retail giants' HR staff also makes regular visits to stores so the managers and associates obtain a "better understanding of the ripple effects" of changes.

Swinden says such enhanced two-way communication processes can only derive from cross-functional planning involving HR, IT, merchants and finance at the table. In the past, retailers' internal communication strategies were ineffective due to business groups operating in silos.

- By John Yuen, Freelance Writer, Great News for the Biz

### PROFESSIONAL AGILITY AND **COMMERCIAL ACUMEN ARE KEY FOR HR**

The changing nature of work is fundamentally altering both HR operating models and the capabilities HR practitioners need for the future, according to the latest HR Outlook survey report from the Chartered Institute of Personnel and Development (CIPD), the professional body for HR and people development in the UK. Although the role of the HR business partner has become more prevalent in recent years, the report found that many HR professionals are not developing the skills needed to fulfill these new responsibilities effectively, such as commercial acumen, data awareness and analysis and other specialist skills.

The report surveyed 630 HR professionals, covering a number of issues and emerging trends that help to indicate the current state of the profession, and measured how HR professionals and employers are understanding and reacting.

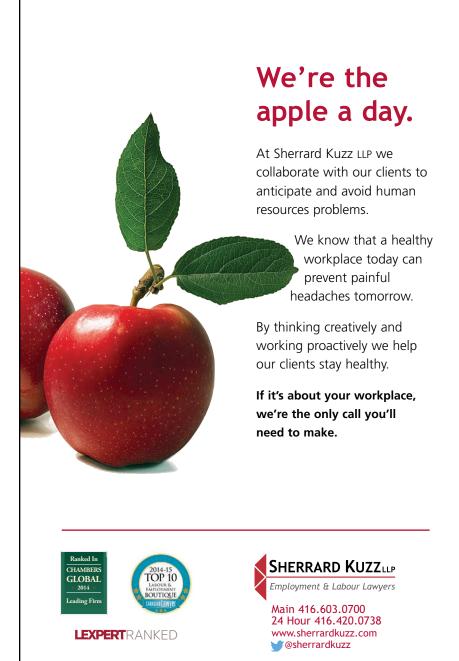
Highlights from the survey include:

- Half of HR departments have undergone a structural change in the last two years, mainly in order to enable HR to become a more strategic contributor to the business.
- Three-quarters of HR practitioners agree that HR understands how the organization works and how people practices influence the value chain.

- Over half of HR practitioners feel confident about using data and metrics to instigate change in the organization or to improve the HR function's effectiveness, but less than half said their HR function goes on to draw insight from people data and communicate it to stakeholders to drive competitive advantage.
- Almost half of HR directors surveyed said their last job role was outside of HR and seven out of 10 HR directors worked in roles outside of HR five job

roles ago. This suggests that time spent learning elsewhere in the business or rotating in and out of HR could be valuable in reaching a senior HR

"Our report highlights how much the HR function has developed in just three years, when we last surveyed the profession," said Dr. Jill Miller, research advisor at the CIPD. "HR has a crucial role to play in bringing unique insights about the organization's people to business debates, informing strategic decision-making."





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## **Identifying Cyber Risks**

CYBERSECURITY IS A GROWING CONCERN FOR ALL ORGANIZATIONS

By Justine Laurier



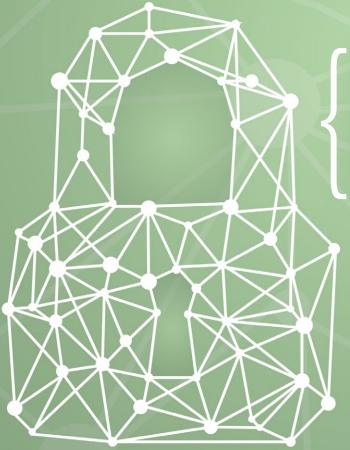
simple fact of modern business is that data is everywhere and of all information created today, 98 per cent is stored electronically. This increase in electronically stored information has brought business advantages and ease-of-access, but with it comes a growing threat of data breaches and cybersecurity violations through attacks on information technology systems. According to a PwC survey, the global cost of these breaches was an estimated USD\$23 billion in 2014.

Apart from the challenges this poses from a public relations perspective, the legal fallout is often much more important and potentially devastating to the companies involved. The disclosure of

confidential information about the company and that of its employees and clients, breaches of privacy and infringement of intellectual property rights can have dire consequences. It is clear that cybersecurity has become a growing concern for both public and private sector organizations.

### **LEARN FROM THE MISTAKES OF OTHERS**

In one of the most eye-catching cases of breaches of cybersecurity of 2014, Sony Corporation became the victim of a crippling cyber-attack, making supposedly secure and confidential information publicly available. Private employee information, such as pay slips and social security numbers, and



WHILE IT'S THE HACKING OF LARGE COMPANIES THAT MAKE THE HEADLINES, IN REALITY IT'S SMALL AND MEDIUM ENTERPRISES THAT ARE MOST VULNERABLE AND MOST OFTEN FALL VICTIM TO CYBER-ATTACKS.

### legal words

confidential corporate information, such as salary schedules, unreleased movies and movie scripts, were offered for free download on peer-to-peer data-sharing networks.

The fallout for Sony was enormous: several costly projects had to be abandoned, several high-level executives had to publicly apologize and social media erupted in negative comments. Adding insult to injury, no less than four separate class actions of disgruntled employees have since been filed in the U.S., causing a serious financial liability to the company. Some of the allegations in the lawsuits indicate that the company had, in recent years, been breached several times on a smaller scale and did not learn from

those experiences. No adequate changes had been put into place – the information was not stored in a properly encrypted format; too many people had access to confidential information; the passwords of the employees were weak and stored in a list that was, unsurprisingly, one of the first targets of the cyberattack.

Perhaps even more surprising is that the data breach at Sony was not even the largest of 2014; it ranked a meagre 33rd. In May 2014, eBay suffered the biggest attack of the year: an estimated 150 million records were breached and placed online, including the personal information (email, passwords, sales history) of all eBay users.

### **PREVENTION IS KEY**

The Internet, an undeniable asset in a globalized economy, poses a serious risk to the companies that use it without care. As reported by *The Globe and Mail*, in 2013, 36 per cent of enterprises in Canada experienced at least one form of security breach. While it's the hacking of large companies that make the headlines, in reality it's small and medium enterprises of less than 50 employees that are most vulnerable and most often fall victim to cyber-attacks. So, what should a responsible company do to avoid data breaches in the first place, and, once a breach is discovered, to limit the legal and financial fallout?

The first step is simple: realizing that no matter how large or small your company is, no matter the industrial sector you are active in, the company is at risk. Public outcry is magnified through social media, criminal capabilities grow and the legal ramifications are potentially devastating. These issues cannot be seen as just a problem for the IT department; it is a company-wide issue. Simply put, it has become too risky and too costly to close your eyes to the risk, and to clean up afterwards.

The second step is less self-explanatory: a robust IT and data protection policy should be put into place no matter the size of the company. While data encryption and firewalls should be among your first investments, it cannot end there. As more and more companies provide laptops, tablets and smartphones to their employees, the loss of these devices poses an increasing security risk. All employees should be made aware of the risks of using (and losing) such a device, so that the company can take swift and decisive action as soon as a potential breach is discovered.

THE INTERNET, AN
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### INCLUDE EMPLOYEES IN FIGHTING CYBER-ATTACKS

Your employees should be educated about what information is confidential and why, and especially the potential fallout of a breach of that confidentiality.

Recent studies indicate that only 60 per cent of Canadian enterprises have a policy on data protection. This in itself leaves them vulnerable. A company-wide confidentiality policy should therefore be devised, emphasizing the necessity for employees to not copy or use for personal purposes, or circulate confidential information in any way (including on a social media platform) and to limit the possibility of data breaches. As a result, the company as a whole is made aware of the importance of cybersecurity and employees will be well placed to recognize cyber risks and therefore notify the company accordingly and promptly.

### **PRIORITIZE TIMELINESS**

A responsible company should think of having a containment plan in place, in case things do go awry. The risks of regulatory action, class action suits and the preservation of the organization's reputation – and in extreme cases, the organization's existence – all depend on the steps taken in the very first few hours (not days) to contain the situation, mitigate the damage that has been done, fix the problem and get the organization up and running again. It is therefore essential to have a containment plan and, where needed, experts should be called in as soon as possible to minimize the negative consequences of the data breach.

### ARE YOU READY TO COUNTERATTACK?

It may seem impossible to prevent a massive cyber-attack or to ward it off completely. Companies, even if they are aware of cyber risks, are still reticent to deploy the much-needed investments. The reality is that the companies' budgets available for cybersecurity are lower than what is actually needed to provide a robust responsiveness to cyber-attacks. Budgets to prevent data breaches or to address their fallout must not be neglected as, in the case of cybersecurity, the evidence shows that prevention is a lot more cost-effective than cure.

Justine Laurier is an associate at Borden Ladner Gervais LLP's Montreal office. Nils Goeteyn provided research for this article.



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FOR EMPLOYEES
RETURNING FROM
A MENTAL ILLNESSRELATED LEAVE, HR
PROFESSIONALS HAVE A
PIVOTAL ROLE TO PLAY

By Melissa Campeau



### cover feature

magine – as an HR professional, you've helped an employee struggling with a mental health issue to coordinate a leave of absence. She and her physician are working together on her care. You've assisted her manager and team in adjusting to her absence. The tough work is behind you, right? Now you can rest easier knowing she'll come back when she's better, slip into the role she once had and everything will go back to the way it was.

Not so fast. An employee's success upon returning to work may depend – a lot – on what you do. If your employee has been gone a while, you can nearly guarantee she won't be able to resume her duties at full speed the moment she returns. But simply stripping her workload arbitrarily isn't likely to help her or the team in the long run, either. Developing an abilities-based plan, in collaboration with the employee and her manager, devising proactive solutions to potential challenges and scheduling regular check-ins and adjustments along the way are steps that HR can take to help better the chances of a more positive outcome – for everyone.

### **AVOIDANCE IS NOT A SOLUTION**

Mental illness can be a difficult subject to discuss and harder still to fully understand. Well-intentioned, compassionate employers may worsen a problem by attempting to avoid the issue altogether.

"Often, an employer is most concerned about how an employee returning from a mental illness-related leave will react in a stressful situation, and these, of course, do happen at work," said Mary Ann Baynton, program director for the Great-West Life Centre for Mental Health in the Workplace and founder of Mary Ann Baynton Associates Consulting in Waterdown, Ont. The employer may attempt to keep the employee out of the path of all possible workplace stressors, a move that can render the employee ineffective and unproductive.

"It can also contribute to a sense of inadequacy for the employee," said Baynton. "And it may create resentment among the coworkers who have to cover for that person. In most cases, it can create a real burden on the front line supervisor manager who still



### cover feature

has to meet the same business objectives with an employee who may not be doing their job effectively."

Accommodation (where required) and a return-to-work plan should help develop a solution that supports employee success on the job, which is more likely to benefit everyone involved.

'The idea of a graduated plan for an employee returning from a mental illness-related leave is that we help the employee to build up strengths over time, rather than expecting less from them, which is often de-motivating," said Baynton.

### NEED TO ACCOMMODATE

An employee's physician will indicate when he or she is ready to head back to work, and will let you know if accommodation needs to be part of the arrangements.

An employer's need to accommodate an employee is a legal obligation, but there are other compelling reasons to accommodate. On a very basic level, there's an employer's social responsibility to assist an employee, since there are significant gaps in our public health system when it comes treatment, support and care of mental-health related illnesses.

There's also a strong business case for bringing an employee back into the corporate fold sooner rather than later.

"If you focus on trying to get people back into the workforce early on, particularly with many mental health issues, most of the research would indicate that it actually aids in the employee's recovery," said Adam Kelly, a VP at Morneau Shepell in the Absence Management Solutions division. "Getting them back and engaged in the workplace is really important."

Generally speaking, it's human nature to want to be productive and make a contribution.

"When people are on a leave from work dealing with a significant mental health episode, most of them are not happy being away and disconnected from the workplace. They're struggling with some serious issues," said Kelly. "Research will tell you that getting back in the workplace helps with a recovery and makes the return to work more sustainable over time."

What's more, the longer an employee dealing with a mental health illness is away from the workplace, the less likely it becomes that she will ever return. In fact, mental illness is the leading reason for long-term disability claims in Canada.

### REORIENTATION AFTER LEAVE

In some cases, accommodation might not be necessary. That doesn't mean, however, that the employee should immediately leap back into his former routine.

"Not everyone who experiences depression or anxiety-related disorders actually needs formal accommodation," said Baynton. "But what the literature says is that anyone who's been away from work for 12 weeks or more likely needs a return-to-work plan - a gradual plan and a way to reintegrate with the team and retrain or reorient to the work."

Much like someone who has been away with a physical injury like a broken leg, getting back into a routine can take some time.

"The other point to remember is that things change when you're away. Work isn't the same after 12 weeks," said Baynton. "Employees can't just pick up where they left off. They need to get back to speed gradually."

#### DEVISING A PLAN

To ease re-entry and determine what the employee is capable of handling, you'll need a collaborative effort. This may mean hiring an external firm specializing in reintegrating employees coming back from leave. For some, this is a natural decision: reputable firms have a depth of knowledge in this area that people in the organization are unlikely to possess, objectivity to make clear decisions and the bandwidth to devote as much time as necessary to

### TOOLS AND RESOURCES

If you're searching for more information on mental health-related issues in the workplace and back-to-work programs, the following free resources offer expert guidance and training.

### **Supporting Employee Success: A Tool to Plan Accommodations that Support Success at Work**

This PDF booklet provides training, resources and support to help managers have effective conversations with their employees, as part of accommodation and return-towork planning. Access the PDF by visiting http://bit.ly/1wg5tq4. (The Supporting Employee Success authors are seeking feedback about the publication. To contribute, go to https://www.workplacestrategiesformentalhealth.com/ContactUs/Index.)

### **Managing Mental Health Matters**

This online video-based training program for leaders and supervisors covers a range mentalhealth related concerns, including accommodation, performance, managing conflict and return to work. Go to www.workplacestrategiesformentalhealth.com/mmhm/ for more information.

All of the Centre's tools and resources are available at no charge at www.workplacestrategiesformentalhealth.com, and in French at www.strategiesdesantementale.com.





the project. However, handing the issue over entirely to an outside organization can have its challenges, too.

Johanna Skitt, now director of human resources with Giffin Koerth in Toronto, was formerly a reintegration specialist with CIBC.

"Like it or not, there tends to be stigma attached to employees who come back from a leave," she said. "They can become less appealing to managers. So having someone external try to 'sell' them to managers instead of someone internal [can be hard]. I struggled with it constantly."

On the other hand, there are ways to incorporate the guidance and expertise from outside sources, while still handling all of the communication with the manager and employee internally. It's a matter of what works best for each organization.

Whether or not you employ external help, you'll want to involve the employee, his manager and the employee's physician in the process. The physician, though, shouldn't be expected to define the accommodation plan.

"The legalese around the physician's role when it comes to accommodation is that she will advise the employer if the employee has a disability that qualifies him for accommodation, and if so, inform the employer about the functional limitations related to that disability," said Baynton. "What should happen next is that the employer develops a workplace accommodation based on the functional limitations and the work requirements, but in reality, physicians are often expected to provide specifics around job accommodation requirements, when they are rarely familiar with the requirements or the demands of the jobs."

To help resolve this challenge and help employers (and even external consultants) develop accommodation and return-to-work plans, Baynton helped in the development of the booklet *Supporting Employee Success* (see sidebar for more information), an initiative of Great-West Life Centre for Mental Health in the Workplace.

"We worked with family physicians, the medical advisor for a large corporation, an occupational health physician and an occupational health nurse," said Baynton. "We knew that many employers were saying, 'We aren't mental health experts so we can't know what kind of accommodation is going to be safe for this employee.' And the healthcare practitioners were saying, 'We don't know the workplace, so we don't know what kind of workplace accommodation would best support this employee to do their job.'

"If that's what both sides are saying, the person who is left out in the cold is the employee. So we created a tool that bridges that gap and helps the employer to very concisely describe the expectations in terms of psychosocial demands on the employee."

### **MAPPING THE PLAN**

Whether you handle the process of reintegrating the employee using internal or external resources (or a combination of both), their task is the same.

"I would frame what they're developing as a disability management program," said Kelly. "One of the core purposes of the disability management program, no matter who is delivering it, is to evaluate, throughout the absence, the functional limitations associated with the health condition, relative to the employee's job description and core duties. Then, how do we understand and manage the relationship between the two? It requires appropriate



expertise to address the complexity presented by mental health issues."

Baynton recommends that the employer first outlines job expectations and some of the potential challenges inherent with them (including time pressures, exposure to emotionally stressful situations, working relationships) with the employee, manager and health care professional. The manager fills in a questionnaire, considering whether the employee's duties mean she has frequent, occasional, infrequent or no exposure to each.

The employee then fills out the next section of the questionnaire, indicating her tolerance for each challenge. For example, she could indicate that she's able to tolerate exposure to stressful situations, able to tolerate exposure occasionally or infrequently or is unable to tolerate it at all.

"The employee is saying, "This is how I feel right now," said Baynton. "The wording is designed to take away the feeling that it's a failing of an individual rather than a particular circumstance of the moment."

### PROVIDE SOLUTIONS AND SUPPORT

When you understand the areas where an employee might need help, you can offer suggestions for support.

"The list in the resource we've created provides ideas that might allow the employee to effectively manage stressful situations rather than avoid them," said Baynton.

For example, an employer could allow reasonable time off to attend counseling sessions or medical appointments and time for phone calls of reasonable length during the day to doctors or other supporters.

"Let them have a lifeline and let them have permission to reach out when they need to," said Baynton. If in-house EAP counseling services or work coaches are available, encourage the employee to access them.

### cover feature

### **MANAGE THE MANAGERS**

"One of best things employers can do is offer training to their people leaders," said Kelly. He encourages HR leaders to help managers and supervisors understand their business and legal obligations, as well as their role in this area. "They all have a stake in this and, as leaders, need to be champions and facilitators of these programs because they have the direct connectivity with the employee. That's where a lot of organizations struggle. They need to focus more on training, communication and the ongoing accountability. Managers need to know they have a role in the return-to-work process."

They also need to believe in a worker's ability to improve and contribute. Assuming the employee is keen to get healthier and thrive in the work environment, he won't get far without a manager who's on the same page.

"Unless there's appetite from both ends to accept the accommodation and focus on what an employee can do, it wont' work," said Skitt.

#### AVOIDING COWORKER CONFLICT

When workers have a lack of understanding around mental health issues, and a lack of faith in their organization's ability to deal with them, it's a problem waiting to happen. This is a possibility even in the best of circumstances. At CIBC, for example, the organization supported reintegration programs that helped to decrease the stigma for workers returning from a mental illness-related leave.

Despite this, said Skitt, "There was a general sense of 'we can't count on you' towards the returning employee from the rest of the team."

This is where a well-trained manager can have a positive impact on a returning employee and her coworkers. Focusing on the employee's abilities rather than her limitations, and employing a graduated work plan where everyone can see progress being made, may help keep coworker resentment at bay. This not only helps with team dynamics, it can benefit the returning worker, as well.

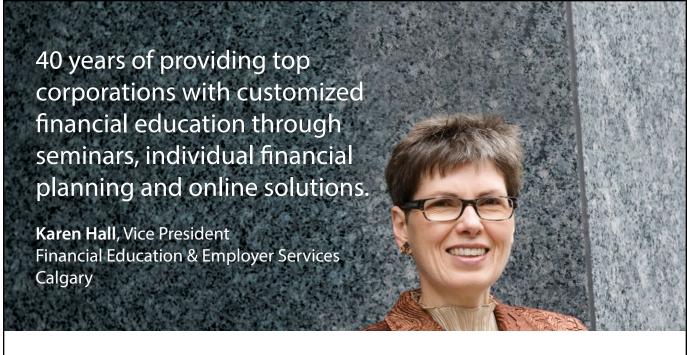
"When coworkers are resentful, it can have an incredibly negative impact on the employee who is being accommodated," said Baynton. "But when accommodation helps someone be more productive, other employees rally around that person to support them, and feel that the organization really would support them if the tables were turned."

Organization-wide education about mental health, accommodation and return-to-work programs and policies can go a long way towards helping the process run smoothly, as well. Employees can develop a comfort level with this potentially difficult issue and feel that there's structure in place to help support both the returning employee and the affected team.

#### FOLLOW-UP AND ONGOING PLANNING

Once the groundwork has been laid and a return-to-work program is underway, it's important to keep checking in with the employee.

"The frequency depends on the complexity of the situation," said Baynton. "Usually we'd follow up at least once a week, but we would suggest that it's just for 15 minutes." A brief meeting gives time to quickly go over the plan the employee has created, discuss how things are going, find out if goals are being met and talk about any problems.





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- ADAM KELLY, VP. ABSENCE MANAGEMENT SOLUTIONS DIVISION, MORNEAU SHEPELL

The schedule should lighten up over time, too.

"When you see things are going well, you might meet only once every two weeks and eventually once a month or less. But you don't want to just ignore it and hope that everything's going well," said Baynton.

### **BEST POSSIBLE OUTCOME**

"The end goal with a return-to-work plan is that the employee is ultimately able to do her job, feel valued in the workplace and know how the work she does is valued in the workplace," said Baynton. "If someone was able to do the job before they were ill, it's highly likely they can continue to do that job when they're well, and be able to thrive and progress. Some people assume that having an anxiety- or depression-related disorder means you can't do your job, but this is just not true in the vast majority of cases."

Baynton has witnessed remarkable successes when employees and employers were engaged in well-thought-out return-to-work plans.

"I've had employees who've been supported through a return to work process like this say, I feel like I have a new lease on life,' and 'I feel like I've turned a new page.""

### **LOOKING AHEAD**

Despite that kind of success, managing accommodation and return-to-work programs is still foreign territory for many organizations.

"I would say that to some extent, organizations are getting much better at recognizing that mental health is an issue that impacts the workplace and that as employers, we have a responsibility to address that," said Kelly. However, theory is one thing and practice is quite another.

"As a concept, that's been widely acknowledged, but what that means in terms of activity might be something different," he said. "There's been some improvement, but I think there's still a lot of work to be done."



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ended up closing earlier. There weren't enough people working in construction to build houses for the influx of people moving to Calgary for jobs, so housing prices skyrocketed. Clearly, the talent shortage was not a problem confined to the HR department.

Now Canada is headed for a much bigger talent shortage and it will be nationwide. The impacts to our economy could be catastrophic if we don't take action. Why? The dependency ratio. Mass retirements will cause a significant increase in the number of dependents in Canada – *i.e.*, those who are too old or too young to work. As a result, by 2030, there will be two dependents for every one Canadian of working age. This is not financially sustainable.

But here's the good news: there is a solution. We can find the talent that we need if we tap into the vast underutilized talent pools we currently have available to us.

In his report, Miner suggested that to increase the size of our workforce, we need to increase the participation of those groups who have historically been underrepresented in the workforce. These are immigrants, Aboriginals and persons with disabilities, among others. With our traditional talent pools shrinking, a talent shortage looming and its accompanying national financial crisis, we must make the most of all the talent we have. Diversity is the way to go.

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### **SKILLED IMMIGRANTS**

According to Margaret Eaton, executive director of the Toronto Region Immigrant Employment Council (TRIEC), we have an incredible untapped pool of talent in skilled immigrants. Eaton highlights startling facts about this group: the unemployment rate for university educated immigrants is double the rate for Canadian-born people. Education achieved abroad is discounted by the Canadian labour market by a factor of 30 per cent, while experience achieved abroad is discounted by 70 per cent.

Immigrants are highly skilled and educated. According to Statistics Canada, in 2006, 51 per cent of immigrants aged 25 to 64 had university degrees, compared with 19 per cent of the Canadian-born population. Unfortunately, when they enter the workplace, university educated skilled immigrants are often underutilized, and they earn only \$23,300 on average, compared to Canadian-born university grads who make \$78,900. According to a report by RBC Economics, the cost to our economy of underutilizing and underpaying skilled immigrants is \$30.7 billion per year.

Skilled immigrants also bring international expertise and can help organizations do business around the world. As our markets are becoming more diverse, and our organizations are competing in global markets, it can be beneficial to have people who have experience providing services across cultures and languages and who understand international business. We need to do better in our organizations and in society at large at leveraging and including this incredibly skilled and talented group.



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### **ABORIGINAL PEOPLE**

According to the Canadian Council for Aboriginal Business, there are more than 37,000 businesses in Canada owned by First Nation, Métis and Inuit persons. Further, the TD Bank estimated that by 2016, the Indigenous market in Canada will represent \$32 billion in combined income across households, businesses and governments. Thus, the total Indigenous income would be greater than the level of nominal GDP of Newfoundland and Labrador and PEI combined. This is a market for both customers and talent that should not be ignored.

According to a study released by the Centre for the Study of Living Standards, if Indigenous people in Canada reached the same education and employment level as non-Indigenous people, our country's GDP would increase by \$401 billion by 2026.

Yet, according to Aboriginal Affairs and Northern Development Canada, the unemployment rate for working-age Aboriginal people is more than twice the rate for non-Aboriginal Canadians of the same age (13 per cent versus six per cent).

Many companies operating in the oil and gas sector have a long history of employing Aboriginal peoples, and organizations in other sectors have seen tremendous benefits to including Aboriginal people among their employees. Some organizations report that Indigenous people bring unique decision-making approaches to their workplace, along with a deep knowledge of environmental stewardship and a strong sense of community, among other unique skills and attributes that make their contribution to workplaces especially valuable.

### **PEOPLE WITH DISABILITIES**

As David Onley (former Lieutenant Governor of Ontario and disability advocate) says, the biggest barrier to employment for people with disabilities is other peoples' attitudes. Many HR and talent acquisition professionals, as well as hiring managers, may be reluctant to hire people with disabilities because they still believe several myths about people with disabilities in the workforce – namely that they have higher absenteeism rates, lower job retention rates and that they come with significant accommodation costs.

In fact, studies have shown that people with disabilities have lower rates of absenteeism and higher rates of retention than their non-disabled counterparts. Employing people with disabilities is generally not onerous on the employer. In 57 per cent of cases, no workplace accommodation is required at all. Of the 37 per cent of cases that required a one-time cost to accommodate an employee with a disability, the average cost is \$500. Furthermore, a DuPont

study showed that 90 per cent of people with disabilities rated average or better on job performance.

Nonetheless, the Employment and Social Development Canada (ESDC) report Rethinking DisAbility in the Private Sector says that 795,000 working-aged Canadians with disabilities that would not prevent them from working are not employed – even though nearly half (340,000) have post-secondary education.



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So, how do we approach employing people with disabilities? Flexibility and open-mindedness are key, says the ESDC report. Accessibility features, once in place, often provide benefits to everyone, not just people with disabilities. Employers report multiple direct and indirect benefits to making accommodations. The first and foremost is attracting and retaining quality talent.

### **INCLUSION IS KEY**

Canada is quickly approaching a talent shortage. Increasing the diversity of our workforce is now more urgent than ever, and building an inclusive work environment is key.

When hiring people from non-traditional groups into our workforces, it's extremely important that we prepare our organizations to accept and include the new entrants to ensure that everyone works effectively

together and no one feels marginalized or excluded. It is in our best interest as a country and as HR professionals to create the best conditions so that we can tap into any under-represented talent and prepare Canada for a brighter future.

Cathy Gallagher-Louisy is director, Knowledge Services at the Canadian Centre for Diversity and Inclusion.

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# Calculating the Cost of Vacancies

#### FIVE COSTLY RECRUITING SINS

By Loren Miner, with assistance from Tom Brennan

very company deals with turnover, but the most effective companies deal with it quickly. Failure to respond to a job vacancy promptly can cost a company thousands of dollars and have harmful, non-monetary effects. To put it in perspective, most industry analysts agree that an employee generates revenue at a rate of one to three times his or her salary. Assuming there are 220 working days in a year, this means a vacancy in a \$70,000 position can cost the company \$318 to \$954 a day.

In order to develop an effective strategy for responding to vacancies, it's important to calculate the costs of various options. There are more ways to do this than can be described here, but all useful calculations should consider both direct and indirect costs. Direct costs include recruiting, separation pay and formal training for a new employee. Indirect costs might include on-the-job training, loss of efficiency and loss of productivity. There are non-monetary costs, too, such as burning out the employees shouldering the extra weight.

Here are the five most costly mistakes companies make regarding vacancies and advice for avoiding them.

#### COSTLY SIN #1: PUTTING OFF BACKFILLING

The costliest sin of all is deciding not to backfill. It may look good on paper – just distribute the responsibilities among other team members, and save on salary and benefits. However, it is more complicated than that. Burning out team members saddled with additional responsibilities will impact productivity. In addition, position accountabilities aren't Lego® bricks that can connect to just any other brick – an intangible synergy created when one individual owns a particular set of accountabilities may be at stake.

#### **COSTLY SIN #2:**

#### DRAWING OUT THE RECRUITMENT PROCESS

Diligence and thoroughness are essential in filling a vacancy, but speed is just as important. A-list talent will have multiple suitors, and slowpokes may have to settle for B- and C-list candidates. Here are some ways to streamline the process:

- Make sure all stakeholders consider recruitment a high priority. Treat recruitment like a project, with deadlines and deliverables, and hold people to them.
- Put the decision in the hands of no more than three people and hold no more than three interviews.



■ Keep the schedule tight. For example, book all of a candidate's interviews for the same morning and gather stakeholders in the afternoon to make a decision. Contact the candidate that same day with a decision.

#### COSTLY SIN #3: ASSESSING TALENT POORLY

Human resources should provide coaching to ensure hiring decision makers are competent at assessing talent. Everyone involved should ask the same questions and evaluate the same criteria. More importantly, they should be asking the right questions. Clarify the most important evaluation criteria early in the recruitment process, including both "hard" skills and culture fit. There are professional tools for assessing hard and soft skills, but keep

#### recruitment

#### DILIGENCE AND THOROUGHNESS ARE ESSENTIAL IN FILLING A VACANCY, BUT SPEED IS JUST AS IMPORTANT.

in mind that tools don't *make* decisions – they only support them.

#### COSTLY SIN #4: NOT PAYING ATTENTION TO RETENTION

A more proactive approach is to prevent vacancies altogether. It sounds simple:

hire well from the beginning and set the stage for a long, mutually satisfying relationship. In fact, it takes a good deal of effort.

One way to support this goal is to practice honesty. According to an American Psychological Association survey, about half of employees believe their employer is not completely honest with them, and 25 per cent don't trust their employer at all. Most candidates, then, would find it refreshing to hear about a role's challenges and obstacles before they make a decision. What's the payoff? A foundation of trust to build that long relationship.

The onboarding process should make a new hire feel welcome. Ask appropriate members of leadership to reach out and introduce themselves within the first week. Ensure the trainer is compassionate; starting a new job can be overwhelming, and a show of understanding can generate loyalty. Continue your honesty policy by clarifying expectations on both sides.

#### COSTLY SIN #5: STUNTING YOUR PEOPLE'S GROWTH

Training and development (T&D) is a key strategy in promoting ongoing retention. Any T&D program should include hard skills as well as soft skills like communication and leadership. Whether the T&D is delivered externally or internally, it builds loyalty and commitment. It also helps with succession planning – and promoting from within sends a positive message to other employees. A strong T&D program can become a recruiting tool that enhances employment branding.

Vacancies are expensive and the market is competitive, so companies who want to stay ahead of the curve will implement fast and efficient recruitment processes. This includes clarifying goals and priorities, ensuring all involved in the onboarding process are on the same page, and making recruitment a priority like any other business objective. Invest a little to save a lot and implement a retention strategy that ensures employees would never think of leaving to go somewhere else.

Loren Miner is chief operating officer of recruitment firm Decision Toolbox.



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## **Breaking the Habit**

#### ORGANIZATIONS CAN BE SUSCEPTIBLE TO FALLING INTO BAD HABITS, TOO

By Vanessa Judelman

honda's story is an interesting one. She is an experienced project manager. In her organization, she works with six other team members to manage large-scale change initiatives internally. This team reported to a leader who ruled with an iron fist. He was a micromanager who provided little opportunity for his team to collaborate and share their ideas.

Recently, that leader was transferred to another department. Not surprisingly, Rhonda and her team were delighted to welcome a new department head. Their new manager has a very different leadership style – the antithesis of a micromanager. Rather, she operates from a place of high trust and delegates freely. She shares clear objectives and then empowers her team to take action and make their own decisions.

However, this story has an unusual twist. One might assume that Rhonda and her team transitioned seamlessly to their wonderful new situation. But, in fact, the opposite occurred. After years of working in a low-trust, toxic environment, Rhonda and her team struggled to transition to a more inclusive one. Since the team was so used to being micromanaged, they set up systems and habits to support this management style. Once they were empowered to make their own decisions, they all felt a little lost.

What's going on here? Don't we all desire the opportunity to work for a leader who empowers us? According to the book *The Power of Habit: Why We Do What We Do in Life and Business*, Rhonda and her team's reaction is not a surprising one. Author Charles Duhigg says that our habits have a big impact on our behaviour and our success. The research indicates that we often realize that our habits are not aligned with our desires, yet we become stuck in a rut and find it difficult to change. Rhonda and her team were definitely stuck in a rut. They really struggled to create new, positive habits to support the expectations of a new and empowering leader.





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#### culture

#### SHIFTING THE THOUGHT PROCESS

The Power of Habit lists specific steps we can all take to break bad habits and develop new ones. The first step is to clearly understand that habits, for the most part, are a good thing. Habits are critical to our survival as they decrease the amount of mental energy we need to spend on day-to-day activities – like brushing our teeth or driving to work. In fact, researchers at Duke University found that more than 40 per cent of our daily actions are based on habits, not decisions.

However, when you realize a habit needs to change, what should you do? Duhigg leans on scientific research to explain how bad habits can be replaced with good ones. He describes "the golden rule" of habit change, which includes the following three steps:

- 1. Understand the "cue" or trigger that sets off a behaviour.
- 2. Identify the "reward" that you get from the behaviour.
- 3. Insert a new "routine."

So, for example, you snack too much in the afternoon at work. Think about the cue for that behaviour. When the clock strikes 2:00 p.m., is that the cue to go to out for tea and a cookie? What reward does this trip offer? Does it eliminate boredom or satisfy your hunger? Now you need to insert a new routine to change this habit. So instead of going to a coffee shop, go for a walk or grab an apple when the clock strikes two.

#### **ORGANIZATIONAL HABITS**

Like people, organizations can also change bad habits to improve their results. This may seem like a daunting task, but it actually doesn't need to be complicated. In fact, Duhigg states that by focusing on just one key habit, the culture of an organization can drastically improve. For example, a local Canadian cleaning company was struggling to retain their cleaning staff. The job itself was unglamorous and the employees were feeling unappreciated.

So, rather than developing a fancy retention strategy, the president focused on changing one bad habit. His managers and supervisors needed to eliminate all disrespectful behaviour within the firm. For two years, he trained his people to be respectful to one another. Every level of the organization was taught what respect looked like and was encouraged to demonstrate respect daily.

Wondrous things started to happen. Not only were retention issues minimized, but employees became engaged like never before. For example, they started a carpool program to address long commutes. They even began offering colleagues shifts if they knew someone needed extra money for an upcoming wedding or a baby on the way. This case study shows that one change can literally transform a culture.

As a human resources practitioner or executive, consider what new habits you need to develop. Where can you help your leaders to stop what is not working and develop more effective habits? How can your team use "the golden rule" to be more effective? All habits can be changed. With a plan and a dose of willpower, anything is possible.

Vanessa Judelman is president of Mosaic People Development.

#### **Investment Issues**

#### CHALLENGES WITH CROSS-BORDER PENSION PLANS

By Darren Coleman

re you an HR advisor for an organization that straddles the Canada-U.S. border? Do your Canadian employees often take on assignments for a lengthy time in the U.S., or do American employees ever assume postings in Canada? If so, significant issues can arise for expatriate employees who have pension and retirement programs established by their employer. This is especially true when the employee returns to their home country.

Many cross-border workers are caught in a frustrating, confusing web of compliance and regulatory issues, sometimes with bizarre complications. This happens because the regulators want to catch money launderers, terrorist financiers and tax cheats, but they create havoc in the personal financial planning of innocent business people.

HR professionals are well positioned to help their expatriate staff navigate the dilemma that occurs when someone wants to come back across the border. Indeed, many situations can result for employees with retirement plans provided by their companies, such as Defined Contribution or Defined Benefit Pensions or group RSPs in Canada, or 401(k) and IRAs in the U.S. Often, the issues will not be identified by a tax or legal advisor because these people may not be well versed in such scenarios.

For one example, a group of executives were returning home to Canada after successful careers in the U.S. They established residency back in Canada, but discovered that their IRA provider would no longer maintain their accounts.

The issue is not that the IRA or 401(k) becomes immediately taxable. Once the plan participants return to Canada, they may continue to enjoy tax-deferral benefits of their IRA, 401(k) plan and Roth IRA balances just as if they were still U.S. residents. This explains why it often goes unnoticed by many tax and HR professionals who advise employees

about moving across the border.

In another example, a certified professional accountant told their client not to expect adverse tax consequences when returning to Canada. Imagine how shocked this person was to receive a notice from her U.S. brokerage firm that her IRA had to be transferred or moved or within 90 days. If not, it would be cashed out, and she faced a tax that she didn't expect of over a quarter-million dollars.

To the untrained eye, this may not initially look like a tax problem, but a regulatory-compliance issue that later becomes one. By then, however, it may be too late.

U.S. brokers will not maintain IRA accounts for individuals who move back to Canada because of recent changes from the Canadian Securities Administrators regarding the registration requirements for all broker-dealer and advisor firms doing business in Canada.



#### benefits

#### ONCE THE PLAN PARTICIPANTS RETURN TO CANADA, THEY MAY CONTINUE TO ENJOY TAX-DEFERRAL BENEFITS OF THEIR IRA, 401(K) PLAN AND ROTH IRA BALANCES JUST AS IF THEY WERE STILL U.S. RESIDENTS.

individual investors and registration requirements for dealers. So, they let this business go and ask for the accounts to be transferred to another firm.

The taxpayer left in the lurch must then search for an institution that will take on a new account for a Canadian resident, and this can be an ordeal. Usually, Canadian investment firms cannot open IRAs because these are U.S. plans. It is possible for IRA proceeds to be moved to an RRSP, but that's the exception rather than the rule.

There have also been situations involving Canadian expatriate executives who participate in their employer's 401(k) plans. While the 401(k) can be moved to an IRA, the employee and their HR department may be surprised to learn that the 401(k) provider will not roll over the plan to an IRA when the participant retires, as is commonplace for U.S. employees.

Likewise, Americans working in Canada face similar challenges when they return home. While Canadian investment firms have the ability to manage RRSP and RRIF plans for U.S. residents in most states, not all firms will. Why? This ability was primarily intended for Canadian snowbirds, not permanent U.S. residents. Unless they are licensed, registered and able to do business in the United States, Canadian financial advisors are not permitted to advise and solicit trades from U.S. residents in their non-registered accounts.

If that isn't enough, another problem can arise, too. Some investments are not portable across the border. For example, people who invest in mutual funds cannot hold them outside their original jurisdiction; U.S. mutual funds cannot be held by Canadian investors, and vice versa. In many cases, when an investor moves back to Canada they are forced to liquidate, and must face a tax bill on any unrealized capital gains. Other investments, such as shares traded on the NYSE or NASDAQ, do not have this issue. So, the choice of investment type becomes critical for the ex-pat investor if they wish to minimize their tax bill and avoid complications.

It is estimated today that over one million Americans live and work in Canada, and an even larger number of Canadians live and work in the U.S. Thus, these financial issues affect a lot of people.

The solution? Have the human resources professional and expatriate staff member consult with a financial advisor who is familiar with cross-border investment issues, and licensed to do business in *both* countries. ■

Darren Coleman is an investment specialist with Coleman Wealth of Raymond James Ltd. in Toronto.



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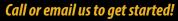
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#### leadership

# **Connection Point**

#### ENGAGE EMPLOYEES USING A HEART-CENTRED APPROACH

By Susan Steinbrecher

he demand for exceptional leadership skills has never been more vital to unlocking transformational growth in business.

According to Deloitte's Global Human Capital Trends report, released in March 2014, leadership development was listed as the most "urgent" or "important" global challenge facing organizations today by 86 per cent of the HR and business leaders surveyed. Only 13 per cent of the respondents felt that they did an excellent job developing leaders at all levels.

Research continues to emphasize that leadership development needs to be

centred on interpersonal skills and human relationship building in the workplace. The problem with most leadership development programs today is that they are focused on outdated models. The future of leadership is, at its core, about people connecting with people – there is a significant cost when you neglect the human connection point in business.

Over the past 20 years, a substantial amount of data has shown that investment in the human element in business is a profit-making proposition. It is no secret that programs directed at employee engagement, leadership development,

work-life balance, wellness and employee assistance all show a meaningful return-on-investment for employers.

One example of this research is a 2012 Towers-Watson study of 50 global companies, comparing those with low regard for sustainable engagement strategies versus those with high regard for such. These strategies include a people-first leadership approach, along with an emphasis on work-life balance, job clarity, supervisor support and ethical business practices. The study found that those companies with low engagement had an average operating margin of 10 per cent, whereas for



# THE FUTURE OF LEADERSHIP IS, AT ITS CORE, ABOUT PEOPLE CONNECTING WITH PEOPLE – THERE IS A SIGNIFICANT COST WHEN YOU NEGLECT THE HUMAN CONNECTION POINT IN BUSINESS.

those with high engagement, the average one-year operating margin was close to three times greater, at just over 27 per cent. There is strong evidence that these results may be due to the positive impact that a more heart-centred leadership approach has on employee performance.

In our business culture, and society in general, the image or metaphor of the heart is often associated with yielding, kindness or perhaps weakness. Yet, the heart is also strong and powerful, as well as the driving force of life. A leader's ability to lead well is hindered when there is an unbalanced connection with the heart.

Anyone can be a heart-centred leader if he or she has the determination and daily commitment to practice certain core principles. The root or basis of these principles is fueled by "the power of the human element." Two things are required to tap into this human component that will enable leaders to connect to and inspire their employees. The first is the ability to listen or, better yet, the ability to learn how to listen. The second is to have an unwavering willingness

to clear personal obstacles and organizational limitations that get in the way of this deeper listening.

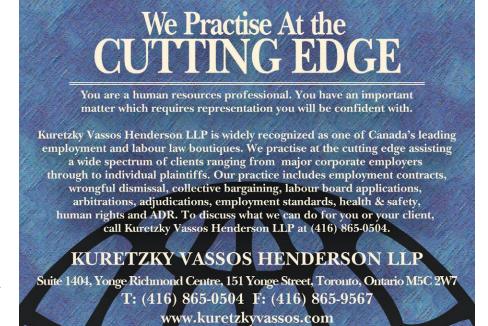
Leaders can move mountains when they understand that they share the same universal needs that their associates do. People want to be valued, listened to, appreciated, respected, involved and connected. They wish to have meaning in their lives. At the very least, people want their self-esteem to be maintained and, ideally, enhanced. However, these needs are rarely expressed out loud. People in a working environment will not come right out and ask, "Will you value me?" or "How can we create more meaning on the job?" But when leaders step back and really take in all that is being said, both verbally and nonverbally, they will find that - at the root of the problem, frustration or challenging situation - people are really saying that they want to be valued.

It is important to understand how the human element shows up at work. Many problems result when human needs for self-esteem and meaning are not valued or are even thwarted. The following is a short list of the ways that these "people needs" surface when they do not receive the attention they deserve:

- Meetings that drag on. Time is often wasted in meetings because an associate just wants to be heard or feels that what he or she has said is not valued.
- Office politics. Office politics are usually about protection, self-interest and self-esteem; they are about being valued.
- The need for team-building. When a team is in trouble, it is often more about relationships and less about team processes and structures. Leaders want and need their associates to get along, cooperate and have their needs met, both as individuals and as a group.
- Retention problems. Associates rarely quit the company. More often than not, they quit their boss. For more than 30 years, researchers have studied factors related to associates' commitment to their organizations and their reasons for quitting. Almost always, the number one determinant of leaving was the lack of leadership or support by administration, managers or supervisors.

A wide variety of problems that companies face today can be improved through effort spent in the human connection point. In short, there is great power in understanding the importance of heart-centred practices in business. Remember that honouring the heart does not signify weakness. True power means listening to and from the heart and having the commitment and humility to clear all that stands in the way of that heart connection. Leaders who have authentically tapped into this power can positively transform any organization and run extremely successful and profitable businesses.

Susan Steinbrecher is a business consultant and coauthor of Heart-Centered Leadership: Lead Well, Live Well.





#### **Remote Job Trends**

#### THANKS TO TODAY'S TECHNOLOGY AND POTENTIAL COST SAVINGS, MORE EMPLOYEES ARE TELECOMMUTING

By Lisa Kopochinski

ore North American companies are incorporating remote job options – such as telecommuting – into their business practices. Over the past decade alone in the U.S., it has been estimated that telecommuting has grown by more than 70 per cent across all sectors.

In Canada, statistics are a little more difficult to confirm, but FlexJobs, a U.S.-based website for flexible jobs, calls Canada a leading country in the telecommuting career revolution. Even before many other countries were offering this form of work, Sara Sutton Fell, CEO and founder of FlexJobs, says Canadian companies were providing flexible job options. And she can't tout the benefits enough.

"By having people work from home, companies can drastically reduce their overhead and real estate costs," she said. "But they

also reap the benefits of a more productive, more engaged and happier workforce."

Sutton Fell knows all of this from personal experience. She formed FlexJobs in 2007 while pregnant with her first son, having been just laid off from a C-level position.

"I was experiencing firsthand the frustrating search for professional jobs that also offered flexible work options," she said. "I wanted to find a job that would allow me the flexibility I needed to be there for my growing family while pursuing my career. I was overwhelmed by the scams that existed in the work-fromhome job market, but I knew flexible jobs existed, and I knew I couldn't possibly be the only professional searching for more work flexibility."

#### technology

While telecommuting can be incorporated into a wide variety of positions, it lends itself particularly well to certain fields.

"The work that we see most commonly associated with telecommuting includes jobs in the fields of medical and health, administrative, sales, computer and IT, marketing, nonprofit and philanthropy, education and accounting and finance," said Sutton Fell.

#### **PROS OFTEN OUTWEIGH CONS**

Telecommuting (sometimes referred to as telework or remote work) is essentially an arrangement where employees do not commute to a central place of work. One can work remotely all or part of the time, thanks to today's technology.

Kristy Carscallen is chief human resources manager for KPMG, a firm offering audit, tax and advisory services. With 34 locations across Canada, the company has more than 700 partners and

6,000 employees that provide services to many top business, not-for-profit and government organizations. She says it makes good business sense for the company to incorporate telecommuting into their business strategy.

"It enables us to take care of our greatest asset – our people – allowing KPMG to achieve a balance between managing work and personal commitments. Telecommuting is cost-effective and reduces absenteeism for people with minor illnesses and family responsibilities."

Carscallen says KPMG has many employees who telecommute, but they don't track these figures formally as the number varies by season.

"Our people work with their managers to create plans that make sense for both the individual and the firm. Many of our people telecommute on an ad-hoc basis to help manage personal commitments," she said.

Erin Sproule is just one of KPMG employees who telecommutes. As manager in the Transfer Pricing (Tax) group, he is responsible for managing the whole lifecycle of engagements, from start-up/administration, to delivery and billing.

Working out of his home office one day a week in Milton, Ont., Sproule says he has the flexibility to do more if needed.

"My wife is a college professor and doesn't have flexibility in her teaching schedule," he said. "So if she has early classes, I have to be able to drop off our kids, or if she has late classes, I have to pick them up from school/childcare. When I'm working downtown and have to be home by 5 p.m., it means taking the 3:40 p.m. train home. I often do a couple extra hours of work in the evenings after the kids have gone to bed. My arrangement is flexible for both me and the company."

The pros of telecommuting can be plentiful – increased productivity, decreased overhead costs, reduced commuting time and decreased rate of absenteeism.

The cons are that it can be more challenging to build a team environment and alleviate isolation.

"The biggest thing you miss out on is networking," said Sproule. "When you're not physically there, [it can be more difficult] to deepen relationships with other colleagues."

#### **RECRUITING REMOTELY**

Carscallen says when recruiting employees for certain positions or hard-to-find skillsets, telecommuting can be very beneficial because it virtually eliminates geographical limitations by opening up a wider pool of candidates for selection.

"The cost of relocation of an employee and family is potentially

eliminated. KPMG recruits for telecommuting positions through our regular channels such as LinkedIn, social media, a member referral network and our alumni network. Our recruiters and hiring managers speak to the 'flex work' options during the interview stage."

She says that KPMG's human resources department is highly supportive of its telecommuting staff by providing a strong performance management system that includes annual goal setting and year-round feedback.

"This helps our people in terms of accountability for their work responsibilities and to achieve their goals," said Carscallen. "Keeping our people engaged with business and social updates through our internal portal is also helpful."

As wonderful as telecommuting can be, it is not for everyone. It requires a high level of self-motivation.

"You have to be disciplined in setting specific hours to be working and stick to them," said Sproule. "I shower, get dressed and say goodbye to my family when I head into my home office, just like I would if I were leaving for the train."

Since employees (remote or otherwise) are often only as effective as their managers, it's vital that a company sets a strong foundation for its telecommuting program. For example, policies must be in place to govern schedules, regular communication and meetings and any other expectations the firm has for its team.

"It's also important that we make sure that our telecommuting employees are aligned with our privacy policy to ensure documents are stored and saved properly," said Carscallen.



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# Wide Open Spaces

#### TODAY'S FLEXIBLE WORKSPACES MIGHT BE THE TICKET TO A MORE COLLABORATIVE CULTURE, BUT HR NEEDS TO LEND A GUIDING HAND

By Melissa Campeau

nyone who has ever picked up a paint brush to change the feel of their living room or de-cluttered a desk in search of a little Zen understands that physical space impacts performance. Study after study supports the idea that the environment in which we work can't help but shape what we do and how we feel about it.

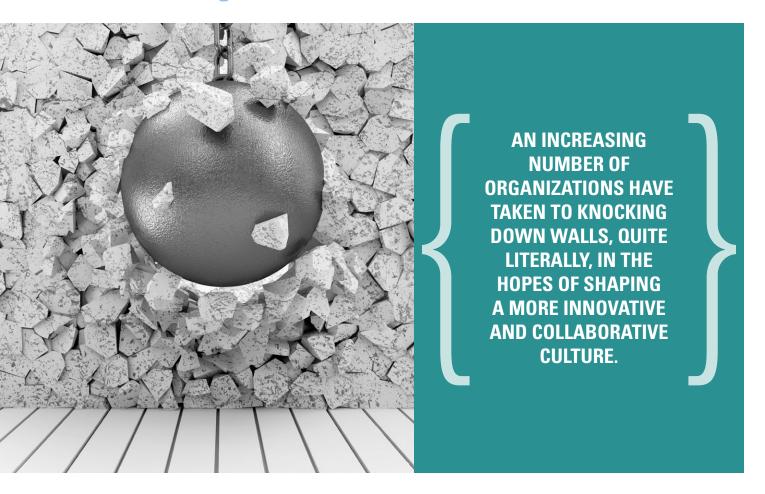
With this in mind, an increasing number of organizations have taken to knocking down walls, quite literally, in the hopes of shaping a more innovative and collaborative culture. Often fueled by an organizational emphasis on cross-functional teams, they're hoping a more open and flexible workspace will translate into greater creativity and a corresponding competitive edge in the marketplace.

Employees in Google's Toronto location, for example, don't have offices or cubicles. Instead, employees are gathered in four- or six-desk open clusters and take advantage of more than 50 designated spots for private phone calls, team meetings and larger gatherings.

Deloitte Canada's offices use a similar model, with an extra variable: their employees don't have assigned seats. This makes smart fiscal sense for an organization like Deloitte, where a large percentage of employees are working remotely or visiting clients at



#### talent management



any given time. But much like Google, Deloitte had broader cultural goals in mind when the company made the shift to flexible offices, complete with workstations, phone booths, reading nooks and more.

The reasoning for the office design goes like this: ideally, workers with a range of backgrounds and experiences from different areas of the company sit next to each other, discuss ideas and challenges and gain company-wide knowledge from each other.

"I'd call it learning by osmosis," said Cissy Pau, principal consultant with Clear HR Consulting in Vancouver. "Let's say you're a developer sitting in an open space, and you're next to a graphic designer, who's next to a sales person. It's a way of learning what's going on with their world and being more engaged in the organization. You hear the challenges and maybe you can start contributing to some of those discussions from your perspective, your knowledge."

The plan isn't without its drawbacks, though.

"It sounds like utopia, but without some guidance – and this is where HR can make a real difference – it can be chaos," said Pau.

#### **PLANNING STAGES**

It can also be a rocky transition for some employees, but starting the conversation early in the process can smooth the path.

"Before employees walk in and find that all their desk space is gone and they have no walls, you need to talk to them and say, 'This is what we're doing, this is why we're doing it," said Pau. "You need to ask them what challenges they foresee and how those might be mitigated. It's all about change management."

During the development phase at Deloitte, the project team worked with one or two people from each area of the business.

"They told us what their typical days looked like, from a morning client meeting offsite, followed by a few hours at a desk at the office, then a team meeting, then lunch with a colleague, followed by a confidential client meeting in the afternoon," said Jason Winkler, managing partner, Talent at Deloitte Canada.

Considering the details of how every part of the business functions can help pinpoint what to include in a flexible environment. Those in accounting, for example, may need more filing space for papers and proximity to printers. Tech people may need space for or proximity to particular pieces of equipment.

"People in HR, for example, aren't going to discuss sensitive topics like someone's mental health issues in a wide open space, so the planning needs to consider where those things will happen," said Pau. "You need to find ways to accommodate each person's different needs."

#### **SOCIAL SPACES**

Beyond workstations, meeting rooms, readings nooks and other productivity-focused areas, new flexible workspaces place an emphasis on spots for socializing, as well.

"When I walk into the average Starbucks I see a lot of people talking, working and connecting," said Winkler. "One of the things we realized when planning our new design is that many of the spaces we had before didn't really enable connections between people the way we would like. The addition of social spaces

into the workplace was a really important component of what we wanted to do."

While the emphasis might be on connections, it's important to consider how to support the individual, as well.

"If you're moving to this environment and suddenly you don't have a regular desk or a high wall where you can tack pictures, I think sometimes people can feel a little bit lost or homeless," said Pau. "It's important to work through some of that and consider, 'How do we still build personalization and community and that ownership without saying everyone's got their own little silos?""

#### **SOUND ISSUES**

When people imagine open-concept spaces, they often imagine noise, and lots of it. That can certainly happen, although it can often be avoided or addressed with some office etiquette ground rules and a good communication plan.

Sometimes, it's not noise but quiet that's the challenge.

"When we go into clients' workspaces, some of those open concept environments are deathly quiet," said Pau. That's a problem for collaboration, since workers are less likely to speak up with half-baked brainstorming ideas if they feel the entire office is listening. To counter this, some companies gather desks in smaller groups to create the feeling of intimacy, and others pipe in enough white noise to ensure voices don't carry beyond a certain distance.

"For HR, finding a balance between competing employee interests becomes critically important," said Pau.

#### **MANAGE YOUR MANAGERS**

Another consideration – employees in open and collaborative work environments often need a different kind of manager. In this setup, workers typically take more control of their time and tend to move around each day, making use of meeting rooms, phone booths and other task-specific areas of the office. The environment also places an emphasis on the employee's responsibility to sort out the "how" of getting a project done.

"A command-and-control style manager may have a hard time with this transition," said Pau. "This is where HR can play a role, and help coach those managers on how to manage by objectives and expectations, because you don't have the luxury of observation."

#### A MEASURE OF SUCCESS

If an organization's goal in making this change is increased collaboration, innovation or some other outcome, consider how you'll assess whether you've met the goal.

"What's the measure for you to say this is better than what it was?" said Pau. "Will you measure productivity, the number of new ideas that come out, engagement or something else? The question deserves some thought, even if you don't know the answer."

Along the way – and Pau points out it can take a few years for organizations to fully adjust to a new working environment – it's likely that some personalities, professionals and generations may warm to this shift more easily than others.

"For HR, it's really about finding solutions to make sure everyone is accountable and buying in," said Pau. "It's not just for the twentysomethings. This can work for nearly everyone, with the right planning."



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Bill Conaty, former SVP HR at General Electric (GE)

11:30am-1:30pm

**JUNE 18, 2015** 

Culture Connection: How Developing a Winning Culture Will Give Your Organization a Competitive Advantage Marty Parker, CEO, Waterstone Human Capital 12:00-2:00pm

**SEPTEMBER 16, 2015** 

The Real Deal on People: Straight Talk on How the CHRO Creates Business Value

Les Dakens, former CHRO Maple Leaf Foods and CN Rail 12:00-2:00pm

**OCTOBER 14, 2015** 

Optimizing Organization Design: A Proven Approach to Enhance Financial Performance, Customer Satisfaction and Employee Engagement

**Ron Capelle** 12:00-2:00pm

### **Criminal Record Checks**

#### PREVENTING FRAUDULENT DOCUMENTS IN THE HIRING PROCESS

By Rod Piukkala

ending candidates to the police station to get their criminal record check is a practice familiar to many HR managers across Canada. In fact, according to research, 69 per cent of employers use criminal record checks to screen job applicants as part of their hiring process.

There are several reasons why criminal record checks are a popular screening tool. Overall, background-screening helps employers make more informed hiring decisions, leading to a more engaged and efficient workforce. The result is a decrease in employee turnover and improved retention rates. Criminal record checks, in particular, are effective at creating a safer and more secure workplace, preventing occupational fraud and theft and reducing the legal liability associated with negligent hiring.

Unfortunately, by putting the onus on the candidate to obtain and provide a clear criminal record check, employers could potentially expose themselves to the risk of receiving a forgery.

#### **CREATING FALSE DOCUMENTS**

When a candidate is sent to their local police station to obtain a criminal record check, the results are provided back to the candidate, who is then expected to pass the document along to their prospective employer. This practice compromises the chain of custody, leaving the document in the hands of the person who would benefit from altering its contents.

With access to a scanner, the appropriate computer software and a quality printer, a candidate could alter the name or result on a document. There have also been cases where candidates with more advanced computer skills have recreated authentic-looking police checks from scratch using basic desktop publishing software.

For those candidates who are less tech-savvy, a clear police check can be purchased for the right price. A western Canada police service recently became a target for an illegal scam artist offering police clearance certificates for \$4.250.

#### PREVENTING FRAUD: AN EASY FIRST STEP

As a best practice, hiring managers should conduct a physical check of the candidate's photo identification. Background screening is rendered ineffective if the hiring manager has not verified that the candidate standing in front of them is indeed the person who they might be investigating. For example, a candidate with a lengthy criminal record could attempt to gain employment using a stolen or borrowed identity. If the hiring manager never bothers to check their photo identification, the candidate's criminal history would likely go undetected.

#### THIRD-PARTY SCREENING

Another effective way to prevent the intake of a fraudulent police check is to use a third-party service provider. Background checking companies replace the candidate as the intermediary between the police and the employer. The results are provided back to the employer, removing the opportunity for candidates to alter or forge results.

When considering a provider, employers should first confirm that the criminal record checks are being performed by accredited and authorized police partners and gather information on the types of checks that are available. Not all criminal record checks are created equal.

#### PREVIOUSLY COMPLETED CHECKS

In certain situations, employers are faced with the question of whether or not they should accept a criminal record check that was previously conducted. One of the most common examples of this is when an employee is contracted through a staffing agency. While simply accepting the check might be more convenient and save both time and money, it is accompanied by the risk of relying on an outdated document.

Employers should record their procedure for accepting existing checks in their screening policy. If an employer intends to accept criminal record checks completed by staffing agencies, there should be clear criteria - such as how and when the check was originally completed – in order for it to be accepted.

Criminal record checks can be valuable to the hiring process; however, to get the most value from a screening program, employers need to regularly evaluate their screening policy and take measures to close any loopholes. ■

Rod Piukkala is vice president, Police Service Technologies at







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#### HR Career Paths: Tracy New, CHRL

#### OCCUPATIONAL HEALTH AND SAFFTY EXPERT

By Lisa Kopochinski

rowing up in Scarborough, Ont., Tracy New always thought she would pursue a career in sales. Her father was in sales and owned his own business, but it was her mother's job in the human resources department as a pension actuary that really motivated New to pursue HR.

"I've always been told I'm a people person," she said. "I truly care about peoples' well-being. That — I believe — is a skill to be successful in any area of business and, in particular, human resources. I also have an education in business management, so that meant I could choose to focus on any segment, including accounting/finance, sales and marketing, operations and human resources."

As HR manager for iCheck, one of Canada's largest national maintenance and repair companies, New calls her current position a perfect fit. The firm provides comprehensive work-order dispatch, client support, invoicing, portfolio analysis and reporting to more than 4,000 companies of varying sizes.

"Our entrepreneurism keeps me close to strategic business development, while human resources keeps me close to developing our people through so many programs, but especially in the health, wellness and safety of our employees," she said.

When she started at iCheck 15 years ago, New says basic HR responsibilities were divided into different departments – including accounting and operations – and managed by the controller.

"I started as an account manager in operations and then went back to school to obtain my CHRL," she said. "As our company evolved, I was promoted into human resources to develop this new department. Programs, policies and procedures continue to be developed, including a strong focus on occupational health and safety."

HR Professional recently sat down with New to find out more about what she does and why she is so devoted to this specific facet of HR.

#### What are your main areas of responsibility?

Tracy New: I have responsibilities for all HR disciplines, including occupational health and safety, recruitment and selection, training and development, employee relations, compensation, strategic development, policy development and additional functions. My biggest responsibility is ensuring that managers, supervisors and employees carry out their roles in compliance with the company's health and safety policies and procedures. I also work in partnership with employees and contractors (operational partners) to minimize operational losses, accidents and injuries. It's my continuous responsibility to promote a positive health and safety culture in the workplace.



#### What do you like most about your job?

TN: There are benefits to working with a mid-size company, especially one that is always growing and has an entrepreneurial spirit. There is great satisfaction to be part of a team that turns ideas into successful business.

Depending on the project, we may deal with asbestos in a residential home in New Brunswick to infection control in a health facility in B.C. We must train our supervisors, managers and contractors to be health and safety advocates across the nation. We're successful because of our people.

#### What does a typical work day look like?

TN: Depending on the day, I may need to juggle project work with daily activities and spontaneous urgent matters, while always working towards the company goals. My day can be spent carrying out risk assessments and considering how risks could be reduced; outlining safe operational procedures that identify and take into account all relevant hazards; making changes to working practices that are safe and comply with legislation; preparing health and safety strategies and developing internal policy; leading training with managers and employees about health and safety issues and risks; recording incidents and accidents and producing statistics for managers, or producing management reports, newsletters and bulletin reports.

#### career paths



#### What are some of the challenges you experience on a day-to-day basis?

TN: It could be from an accident investigation or an employee relations issue or a client process audit. Being an HR generalist provides me with a diverse range of challenges. Human resources is aligned with the strategic goals of the company, so we are forever planning new, innovative ways to develop our people.

#### What skills do you possess that make you a great fit for your position?

TN: I would say it's my ability to communicate and negotiate. I have to sell ideas to managers, colleagues, employees and owners

on a daily basis. When I started here, HR was pretty much nonexistent. I had to communicate and negotiate new programs, policies and procedures. It was a new mindset for the entire company. Since we are a progressive company, I have to be innovative and possess analytical skills.

#### What advice do you have for others interested in pursuing a career in HR and specializing in occupational health and safety?

TN: HR continues to be a necessity in the success of any business. Organizational health and safety is a broad and ever-changing field. There are multiple dimensions including technical, legislative, political and personal. If you're looking to pursue a career in HR, and specifically occupational health and safety, I suggest you have a passion for it and believe in the concept. You need to be a strong advocate of the subject and possess strong communication and negotiating skills. You also need the education to help you with the necessary knowledge and skills. There will always be a demand for health and safety in organizations and it will continue to play a key role in all businesses globally.

#### Away from your busy job, what do you like to do?

TN: I like embracing Canada's four seasons and enjoy the outdoors. I love spending weekends at the cottage in Muskoka, downhill skiing, water sports, walks and golfing – but only when I play well!



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#### MEET THE HR INFLUENCERS:

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#### DRIVING TRANSFORMATIVE CHANGE

By Lisa Gordon

hroughout her 30-year career, Melissa Sonberg has been a driving force for transformative change. Never one to shy away from a challenge, her career path has immersed her in the corporate, non-profit and academic sectors, touching on many aspects of human resources along the way.

Today, Sonberg is executive in residence/adjunct professor at McGill University's Desautels Faculty of Management. She is happiest working in the trenches of innovation, where new ideas are formed and cultivated. Although Sonberg thrives on rolling up her sleeves and building solutions, she freely admits that once that framework has been built, she's happy to let someone else maintain it. For her, it's all about conquering a challenge.

HR Professional caught up with Sonberg recently to discuss her career highlights, her current work at McGill and how some long-ago advice has always inspired her to "just do good work."

When did you decide you wanted a career in human resources?

Melissa Sonberg: HR chose me, rather than the other way around. When I did my master's degree in health administration, I had to do an organizational internship at Royal Victoria Hospital in Montreal. I had a couple of weeks in almost every department, and the department that was the most fun and where I felt the most connected was human resources.

What was your first HR job?

MS: Conveniently, that internship turned into my first human resources job, as an HR generalist for the Montreal Neurological Hospital. I did everything from recruitment to managing payroll and benefits, supporting labour relations and dealing with all kinds of people problems. There were a few hundred employees and I had to do everything pretty much on my own, although I had access to the resources of the greater McGill University Health Network for specialized services.

Tell me about your current job. What are your main areas of responsibility?

MS: I joined the McGill faculty last year after 30 years in organizational life – 15 of which were spent with AIMIA, the public company that developed from Air Canada's Aeroplan frequent flyer program. The company grew internationally and by the time I left, it was running loyalty programs and services in 23 countries. Turning 50 triggered a decision to look for my next set of challenges. McGill was incredibly welcoming; I'm now attached to the

#### hr influencer

#### IN A NUTSHELL

First job: I was a lifeguard at an apartment building pool when I was 15.

**Childhood ambition**: I wanted to be a doctor. That lasted well into my undergrad degree and is one of the reasons I did the master's in health administration.

Best boss and why: I had some really great bosses, but I'd have to say my last boss at AIMIA, Group CEO Rupert Duchesne, was probably my best for a couple of reasons. First, he had intellectual horsepower to the max and constantly challenged my thinking. He was also one of the most humane leaders I've worked with — he cared as much about the people as the profit.

**Current source of inspiration:** I have two daughters, aged 18 and 21. They inspire me for so many reasons. They are strong young women who have clear views of the world; they give me a fresh new perspective.

Best piece of advice you ever got: This goes back to very early in my career. I was flailing around trying to get a handle on how to implement a new mandate. My boss said, "Just do good work." So, focus on doing the best work you can do and stop being paralyzed about how to do it.

**Favourite music:** Classic rock going back to the early 1970s. Carole King is a favourite.



How you spend your time away from work: My primary activity is helping to support human rights education and development through my work chairing the board at EQUITAS-International Centre for Human Rights Education. I'm very involved in supporting their efforts. And, I also like to travel with my husband and kids.

organizational behaviour department. There's a component of my work that is traditional teaching, but I also participate in organizational change initiatives, such as faculty visioning exercises and setting strategic priorities. The third part of my role is to be a conduit between the university and the local, national and global business communities. I am basically here to be a professional resource to students and faculty.

What do you love about your job?

MS: The first thing I love is that I don't actually have a job in the traditional sense – I have a portfolio of interests. I have a wonderful position at McGill, where my experience and expertise are being well leveraged to help students see the world through a different perspective. This role also pushes me to keep learning myself, and I have a lot more control over what I do, so that I have variety and complexity on my own terms.

What are the challenges you experience in your job?

MS: I'm a very community-oriented person, and very loyal to my group of people. So, being a free agent all of a sudden was very challenging — where do I belong and who are my people? There wasn't an obvious answer. Fortunately, I now have several organizations in which I feel at home. Another challenge is that in the university environment, we're under constant budgetary pressure. It's always a challenge to make tough decisions when there are a lot of competing demands for scarce resources. The last challenge would be having an impact in the limited time I do have with the students.

What's key to leading HR during a difficult time for a client organization?

MS: I've had both good times and bad times in my career. It's interesting how some of the key leadership attributes are the same during both. From a leadership perspective, the challenge is always

to focus on the bigger picture. You may feel you're playing tennis with one racket against a hundred opponents who are all lobbing balls at you, but focusing on the overall outcome will always get you through. Also, be a source of calm amidst the chaos. People will look to you to stay above the fray and provide a sense of direction and optimism for the future. And, finally, get things done! Say what you're going to do, and do it.

What skills are important for success in HR?

MS: Clearly, HR exists as a service to the greater enterprise. Knowing the business of the business – the intricacies of how that business works – is a given. For HR in particular, you need the ability to know your function at a level where you can engage, inspire and challenge in the best way possible. You also need good listening skills and integrity. We have to deal with humanity at its best and worst, and we must get the right things done.

What tips do you have for new grads or those in entry-level HR jobs who want to move up the ladder?

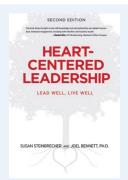
MS: Do your homework and know what opportunities are open to you. Once you know those parts of the puzzle, get out of your comfort zone! Move into a line job or a supervisory role to understand the challenges of management, so you can be a better adviser.

What's the future of HR?

MS: To me, HR should not be isolated. There are too many articles about how to get HR to the table. Let's get over that; HR is at the table! The real question is how does HR become more effective? Essentially, the things that make each business unique are the people who show up to work every morning and go home every afternoon. Organizations need to understand how to leverage that uniqueness as a competitive advantage and deploy it in support of the enterprise goal.

# OFF THE SHELF

By Alyson Nyiri, CHRL



#### HEART-CENTERED LEADERSHIP: LEAD WELL, LIVE WELL. SECOND EDITION.

Susan Steinbrecher and Joel Bennett Sustainable Path Publishing, 2014

Ten years ago, the original edition asked readers to go inward and reflect and choose the course of action from your heart. It was a hard sell; however, today's leadership strategies have changed. Organizations are more open to innovative approaches and are beginning to understand the need to infuse meaning into their workplace.

Heart-Centered Leadership offers seven principles (e.g., know your impact) and corresponding virtues (e.g., integrity and foresight) for heart-centred leaders to follow. The principles offered relate to conviction and a deep and abiding belief in nature of work and people.

#### **Talking point**

Heart-centered leadership is defined as having the wisdom, courage and compassion to lead others with authenticity, transparency, humility and service. The terms used here could fit many spiritual traditions. How easily could it be adapted to fit your multicultural workplace?



#### NO ONE UNDERSTANDS YOU AND WHAT TO DO ABOUT IT

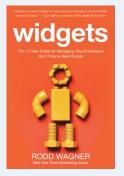
Heidi Grant Halvorson Harvard Business Review Press, 2015

Opening with Lululemon's founder and former CEO and chairman Chip Wilson's now famous blunder that "some women's bodies just actually don't work" for yoga pants, social psychologist Dr. Halvorson demonstrates how critical it is to come across the way you intend to.

Despite what we may believe, we are much harder to read than we realize. Added to that, we rely heavily on assumptions. For communication to succeed, it is essential that we learn to accurately perceive others and ourselves. Halvorson offers numerous strategies for correcting and overcoming bad impressions.

#### **Talking point**

Halvorson talks about ways to produce egalitarian perception, which is the goal of judging people fairly and treating them accordingly. As HR practitioners, we're well trained in this process. But is the profession accorded the same courtesy?



#### WIDGETS: THE 12 RULES FOR MANAGING YOUR EMPLOYEES AS IF THEY'RE REAL PEOPLE

Rodd Wagner McGraw Hill, 2015

"Your people are not your greatest asset. They're not yours, and they're not assets. Assets are property. You don't own your people."

Rodd Wagner declares employees are not "human resources" or "inventory." Money, land, buildings and computers are resources. By depersonalizing people as widgets, it becomes easier to apply a variety of operational terms such as "onboarded" or "downsized."

Realizing that HR and management wanted more from employee engagement methods, he and his team developed the New Rules, addressing issues such as transparency, wellbeing, pay, fearlessness, meaning, collaboration and employees' perceptions of their future.



#### COPYFIGHT: THE GLOBAL POLITICS OF DIGITAL COPYRIGHT REFORM

Blayne Haggart University of Toronto Press, 2014

Grappling with copyright and intellectual property, plus the relevant law, is part of the job for many HR professionals.

Two questions drive the book. First, in a world where economic giants drive copyright reform, are smaller countries able to exercise copyright-policy autonomy? Second, when it comes to making copyright policy, whose voices matter?

Haggart examines the development of and decisions made by the U.S., Canadian and Mexican governments regarding Internet treaties as well as their individual copyright policies.

#### **Talking point**

Humans are reciprocal. For corporations, this has enormous implications. After the Great Recession, Wagner says companies are unprepared for the new breed of worker who is more individualistic, impatient, thrill-seeking and connected, and who will require better leadership and managing than at any time before.

#### **Talking point**

A copyfighter is the broad banner to describe people who are fighting for reforms to intellectual property – trademarks, patents, copyrights and what are called "related rights."

# It Pays To Snack

#### EMPLOYERS SHOULD SHARE RESPONSIBILITY FOR EMPLOYEE HEALTH CHOICES

By James Tjan

t's 2 p.m. and that mid-day craving spikes. Do you reach for the chips from the vending machine or a donut from the coffee shop? Anything will do to sustain energy for the rest of the day.

As the theory goes, a well-fueled worker provides the best functionality and the best productivity. Top results are shown when energy levels are kept up throughout the day. However, with increasingly busy work schedules, employees tend to neglect their own health. With so many fast food options — vending machines, convenience stores, baked goods — it's easy to fall victim to unhealthy choices.

Though healthy food options are more readily available and becoming the more popular choice, getting them into the hands of employees is the hard part; employees may not be making conscious healthy choices at work when that mid-day snack craving creeps up.

If a healthy option was readily provided to employees by their employers, not only would employees be at peak performance all day, they would also be improving their overall health.

Work environments should be structured with wellness in mind in order to get the best out of employees. A large part of this comes down to making healthy choices throughout the day, and if a quick, easy and healthy snack is readily available, the choice becomes simpler. Employers can take responsibility for this small but crucial aspect of employee wellness.

There are a number of simple changes employers can make that will provide optimum opportunity and encouragement for their employees to sustain a healthy lifestyle in the workplace. Try making small but important changes, like these:

■ Consider removing vending. Instead, think about offering healthy snacks to your employees for free. They'll appreciate the gesture, and you'll reap the benefits of a healthier workforce.

- Order fruit or veggie platters for meetings instead of baked goods. Fruits and vegetables bring energy levels up, and keep them up through the day without the sugar crash.
- Provide healthy eating tips/nutrient facts. Post useful and informative information in communal spaces to educate employees.
- Remove things that promote poor eating habits. Limit the types and amount of food available, and control when and where it is offered.

The key to a healthy workplace environment is making the choice an easy one, with little to no thought about it. Usually, if it's there, people will take it. Employees and employers will both reap the benefit. Starting small is a great way to get going – a "healthy snack day," for example, can focus just one day of the week to encourage staff to bring healthier lunches and snacks or for the employer to offer various healthy snacks in the afternoon for free.

The need for a healthy workplace is more important than ever and employers can play an important role in providing better options for employees. Not only does a healthy lifestyle improve the overall quality of life, but it also improves the quality of work being done and the productivity of employees. In the long run, providing the benefit of a healthy workplace leads to greater results.

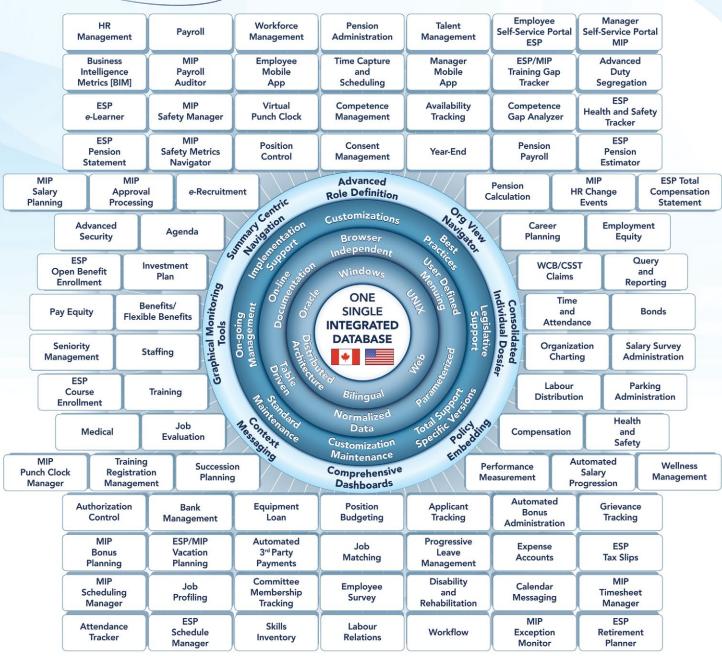
James Tjan is president and CEO of Mindful Snacks.

THE NEED FOR A HEALTHY WORKPLACE
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#### **INTEGRATED SYSTEM**

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