Professional Development Guide

Newfoundland and Labrador

Regional Economic Development Association

Newfoundland and Labrador Association

for Community Business Development Corporations

Municipalities of Newfoundland and Labrador

Preface

There are sections included in this professional development guide that are considered to be relevant and up-to-date information. This guide is only meant to serve as a tool for board members, staff and members of municipalities when planning their professional development goals. This guide is not meant to be a primary tool to be followed precisely but instead, a tool to help one achieve their professional development goals in the creation of a professional development strategy.

It is very important for Regional Economic Development Boards (REDBs), Community Business Development Corporations (CBDCs) and Municipalities in Newfoundland and Labrador to pursue professional development and take into consideration the professional development concepts that have been outlined in this document. All three organizations have common requirements for professional development and looking at professional development from a collaborative approach is an effective way to solve any concerns with professional development. Staff, board members and councilors from the three organizations should be open to any opportunities regarding professional development in order to appreciate the skills one can gain from such activities.

This manual serves as a guide that covers common professional development requirements that each organization shares. The topics that are possibly common between all three organizations include (but are not limited to): learning plans, performance appraisals, mentorship, community capacity building, strategic planning, effective meetings and public speaking, human resources and tools and templates.

Acknowledgements

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Section 1: Learning Plans

A learning plan is a defined on the Treasury Board of Canada Secretariat website as "a personalized action plan designed to help you set and meet your professional development goals"(The Treasury Board of Canada Secretariat, 2004). All organizations should be concerned with training and development. It is important to develop some sort of organizational learning strategy with this goal in mind. It has been proven that an organization can possibly derive more benefit from training and development with a learning plan in place. The key is to plan ones learning with up to date, useful learning materials. There are many options and approaches to learning and knowledge management for organizations to consider (Coulson-Thomas, 2006). An organization needs to keep in mind their needs and goals. Professional development is something that needs to be planned in order to be effective.

1.1 Preparing a Learning Plan

The first step to learning is to create your own learning plan. The Treasury Board of Canada Secretariat's official website includes step by step tips on how to create a learning plan for those working within the government of Canada. This can be useful as an example of a learning plan for not-for-profit organizations such as the REDBs, CBDCs and the Municipalities in Newfoundland and Labrador. It is useful to look at a sample of a learning plan and create a learning plan that can suit the needs of an individual in an organization. In order to make an effective learning plan, you need to keep the plan alive by looking at it and assessing your progress (The Treasury Board of Canada Secretariat, 2004).

1.2 Assess your Learning Needs

There are templates available to help you discover your learning needs. In the tools and Templates Section of this manual, you can find a needs assessment example that is used by the Community Business Development Corporations as a learning tool to conduct a needs assessment. There are two assessments: one for staff and the other for volunteers. Although specific to the CBDCs, this template can be used by REDBs and Municipalities as a way for an individual to become familiar with some of the things they need further professional development in (ACOA-APECA Learning Plan, 2008).

Individuals that are interested in furthering their professional development will benefit using any special tools that help one focus on information about them for performance improvement. Assessments are not intended to prove anything, but are only used to focus on a single topic for an individual, promote engagement with a topic, and to prompt individual insights and learning along with positive workplace behavior changes. It is a true fact that adults learn best when they are actively engaged in the learning process. An assessment is the perfect tool for an individual to use so they can learn quickly and begin the performance improvement process (Burn & Payment, 2000).

Benefits from learning assessments include a self-evaluation of an individual's skills, abilities or attitudes and a quick picture of how much an individual already knows about a topic (Burn & Payment, 2000).

1.3 Decide on Learning Priorities

In order to begin your learning plan, you must decide which needs and priorities stand out. This can be done with a supervisor or another employee. In order to develop a plan that best suits your needs, one should consider learning style, the organizational context and the resources available to provide this learning experience towards professional development (The Treasury Board of Canada Secretariat, 2004).

1.4 Obtain the Necessary Resources

In order to ensure your learning plan for professional development, it is useful to make sure that there are resources available. It is possible to be creative in learning by obtaining inexpensive ways to learn. These include: coaching, peer mentoring, books, e-learning and even new job assignments (The Treasury Board of Canada Secretariat, 2004).If there are professional development topics you wish to pursue, check out the low-cost resources first and research options in your area. These options may include university courses, college courses or even distance education through another institution over the internet. Avail of seminars and workshops available to your organization and be proactive in finding these resources. It is great to investigate learning opportunities and bring them to the attention of other employees and figures of authority. If you feel that someone might be more knowledgeable in an area, initiate contact with these people to discuss learning opportunities and professional development goals (The Treasury Board of Canada Secretariat, 2004).

1.5 Keep your Learning Plan Alive

Update your plan regularly and keep a record of any professional development activities you've participated in so far. Updating your learning plan regularly will reflect your progress or the changes in professional development goals. This should be kept somewhere to remind you of your commitment to learning. Another great thing to do is to share your commitment with other colleagues and receive feedback on how you've been doing with regards to your personal professional development goals. An individual will be successful in an environment that is supportive of learning activities. Personal commitment is a major success factor. Discovering professional development activities that will help better your performance in a position are very beneficial when they are approached correctly (The Treasury Board of Canada Secretariat, 2004).

The following websites and resources are useful for developing a learning plan:

Government of Saskatchewan, Canada:

- Employee Learning- How to Develop a Learning Plan
  http://www.psc.gov.sk.ca/Default.aspx?DN=1d0d02dc-8ad6-40d5-9d2e-a41f20c64166

Preparing a Personal Learning Plan

- A Guide for Ongoing Career Growth, by Hal Macomber
  http://www.halmacomber.com/Preparing_Learning_Plan1.html

Treasury Board of Canada Secretariat

- Build your Learning Plan
  http://www.tbs-sct.gc.ca/gui/bpln-eng.asp

Section 2: Performance Appraisals

Performance appraisals are a way to evaluate an employee's performance on the job and to provide the employee with feedback. It is said that performance appraisals are more important than ever in today's society.

The following section titled "Performance Management" is taken from the Newfoundland and Labrador Regional Economic Development Association's Human Resources Reference Manual which was composed in 2008 by work term student, Lisa Smart, at the Atlantic Canada Opportunities Agency (ACOA).

Performance management is an emerging area of human resources which is meant to help an organization achieve its strategic goals. Furthermore, annual performance appraisals enable management and monitoring of standards, agreeing expectations and objectives, and delegation of responsibilities and tasks. In the case of REDBs, performance management can enhance the overall implementation of strategic economic plans by way of evaluating the employees' achievement of past set goals. In fact, performance appraisals could possibly be a part of the REDB work plan and therefore required. To make a performance appraisal system (PAS) work for an organization, there are several characteristics required:

- *Performance objectives:* This is a critical aspect of a REDBs strategy which, if not met, may result in the failure to reach strategic economic goals.

- *Performance goals:* This would be achievable and realistic targets to which actual outcomes can be compared. For example, a REDB sets and reaches the goal of creating a tourism marketing strategy by a specific deadline.

- *Performance measurement:* Measuring the process of achieving preset goals including timelines, resourcefulness, quality of work and overall outcome. In relation to a REDBs strategic economic plan, the project success indicators could be used as a measurement tool.

- *Outcome measures:* Results compared to preset targets.

The key to any effective performance management system begins with goals. This being the case, every REDB and every employee needs goals and plans for achieving them. Goal setting should be a top-down approach; key goals in a REDBs Strategic Economic Plan should then be transferred into individual employee goals. The employees then work throughout the year to achieve and build upon these preset goals, all the while contributing to the organization's overall strategic mission. In order for performance appraisal systems to truly capture a snapshot of the employee and of the organization as a whole, the system itself must be effective. The following are some questions to address when creating an outline of performance appraisal:

- *Is it valid*?: The system must be based solely on a thorough job description for the respective position. As mentioned in section one, many employee evaluation practices will go back to the job description. This is because it is clearly communicated to the employee from the employer.
- *Did employees have input into the development of the PAS?*
- *Are its goals acceptable to employees?*
- *How frequent is the feedback to employees?*
- *Do the appraisals have consequences?*

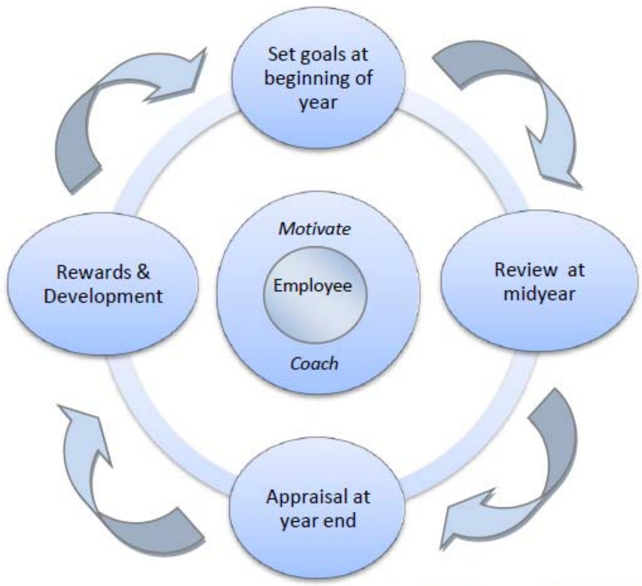

Figure 1: Performance Management Cycle
Source: "Harvard Business Essentials: Performance Management." B.J. Hall, 2006

2.1 Individual Personal Appraisal Assessments

Once the PAS is in place, organizations shift focus to work on the evaluation process of the system itself. Normally, a template is developed to evaluate the employee and the preset goals that were given to them. Before the supervisor/appraiser begins their evaluation, it is a generally accepted practice to allow the employee to evaluate their own performance while providing feedback on their position within the organization. Developing a performance appraisal system template keeps self-evaluation consistent with all employees. As well, it allows supervisors to appraise each employee with the same level of reliability. Normally, the employee will fill out their part of the PAS template, return it to the evaluator who will then examine it. Then a meeting to discuss the PAS and its outcomes will occur.

The following are some sample questions an employee can fill out on a PAS template. The template should begin with basics: organization name, division and department, year or period covered, employee’s name, position, number of months in present position, length of service, supervisor’s name, and evaluator’s name.

Questions for Employee

1. State your understanding of your main duties and responsibilities.
2. Has the past year been good/bad/satisfactory or otherwise for you, and why?
3. What do you consider to be your most important achievements of the past year?
4. What do you like and dislike about working for this organization?
5. What elements of your job do you find most difficult?
6. What elements of your job interest you the most, and least?
7. What do you consider to be your most important aims and tasks in the next year?
8. What action could be taken to improve your performance by you and your boss?
9. What sort of training/experiences would benefit you in the next year?

Based on these answers, the evaluator should engage in discussions about the employee’s views according to their feedback. Located in Appendix 5, a sample of a PAS template can be viewed which includes the employer’s feedback section. As shown, the use of numerical scoring is also helpful in coming up with an overall grade. This will give the employer the ability to compare and contrast PAS forms from employee to employee.
It is essential that the evaluator is cognizant of what they will say to the employee during the PAS meeting. The employee will naturally be nervous since the discussion is revolving around their performance, so their perception of the feedback is very sensitive. Here are some tips:

- Emphasize positive aspects of employee performance.
- Tell each employee that the evaluation session is to improve performance, not discipline.
- Conduct the performance review in closed, private setting with little interruption.
- Review performance at least annually and more frequently for new employees.
- Make criticism specific, not general or vague.
- Focus feedback on performance, not personality traits.
- Identify specific actions an employee can take to improve performance.
- End the evaluation session by stressing the positive aspects of the employee’s performance and reviewing plans to improve performance.

In the end of the PAS session, both the employee and evaluator should walk away with a clear understanding of what has been achieved in the past year (or time frame since last evaluation) and also have outlined possible new changes or additions to the employee’s goals. It will make the employee feel successful when the employer can eliminate several preset goals because they have been achieved and add new ones to the employees. To sum up, to make performance management work within REDBs, the following summarized points should be noted:

- Goals are the starting point to performance management.
- Create alignment between company and individual employee goals.
- Goals should be written down, put in a time frame, and supported by rewards.
- Work with each employee in developing an action plan for achieving goals. That plan may include training and assistance.

There is a sample of a performance appraisal attached to this guide in Section 12 titled "Performance Appraisal Form Template".

3.1 What is Mentorship?

Mentoring is a form of peer coaching. This is a type of developmental tool that will help enhance both personal and professional development. Not only can mentoring enhance career learning but it can accelerate the process. There has been an increased focus on learning as a "foundation of career growth as individuals assume responsibility for their own career development" (Parker, Hall & Kram, 2008).

Mentoring is encouraged by some organizations. These organizations encourage groups to work with a senior manager or someone of authority who acts like a "friend, philosopher, and guide in achieving career success" within the organization (Schwind, Das & Wagner, 2007). Mentors could be identified formally or informally, whatever the organization decides. It has been said that formal mentoring systems result in tangible results and accountability for those receiving mentoring(mentee) and those acting as the mentor (Schwind, Das & Wagner, 2007).

3.2 Career Learning

One of the biggest challenges today is how to promote a continuous career learning environment. At one time, career learning might have been an educational process including a one-time educational credential to an ongoing lifelong process. Not only are individuals responsible for preparing for the world of work, but they must be prepared for job transitions, and adjusting to different changing circumstances. Some of the skills that students consider to contribute to the improvement of workplace situations are: oral and written communication skills, motivating and the management of interpersonal relationships, and leadership skills. Not only are workers returning to different tertiary institutions at various stages of their lives, but they are participating in continuous workplace training.

3.3 Mentorship Programs: Professional Development

Currently, the Newfoundland and Labrador Regional Economic Development Association is working with Memorial University of Newfoundland to develop a mentorship program. The goal of this collaboration is to "increase the effectiveness of Regional Economic Development Boards (REDBs), assist staff in their professional development, and raise the capacity of volunteer boards" (One Page Opportunity Description, 2008). This guide could serve as an example of mentoring for Municipalities and Community Business Development Corporations (CBDCs) in an effort towards professional development. NLREDA has put together a guide titled "Mentor

Program Guide” which explains in detail the history of mentoring, the NLREDA Mentorship Program, the screening, selecting and pairing process, mentor program instruction, mentor responsibilities, mentee responsibilities, and a list of tips for mentors.

Mentoring should not be something that is a standalone ritual. Mentoring is said to work best when used in partner with diversity initiatives. It is important that a mentor holds a high position of authority within an organization, while being respected by other managers and figures of authority. It is important to record those discussions that occur between the mentor and protégé (mentee) to keep in a file for later discussions. In performance evaluations in some organizations, an authoritative figures experience as a mentor will be adhered to (Schwind, Das & Wagner, 2007).

Community Capacity Building Modules are offered by the department of Innovation, Trade and Rural Development. Not only is their goal to advance regional economic development initiatives, but it also is available for any interested persons that want to learn more about economic and business development. This training is free for any of the REDBs, CBDCs and members of Municipalities. These modules help economic development organizations such as those mentioned in this report to facilitate regional economic development opportunities, as well as provide professional development opportunities for those that observe the modules (Community Capacity Building, 2009).

The Capacity Building Modules are available through the following website:
http://www.intrd.gov.nl.ca/intrd/regionaldev/capacitybuilding.html.

The department of Innovation, Trade and Rural Development (INTRD) is currently developing a new departmental website which should be available soon. There are new modules that are under construction and will be available in Fall, 2009.

4.1 Capacity Building Modules

The Capacity Building Modules include the following sections.

4.1.1 Alternative Dispute Resolution

This module deals with dispute resolution. This module focuses on conflict management as opposed to conflict elimination. This module talks about how progressive solutions can be a result of conflict management (Community Capacity Building, 2009).

4.1.2 Basics of the Co-operative Module

This module introduces co-operatives by letting readers know exactly what a co-operative is, what types of co-operatives that are out there, while also looking at co-operatives as a business model (Community Capacity Building, 2009).

4.1.3 Board Orientation

This module is a facilitator's guide which helps facilitators "deliver a workshop as an introduction to the principles, practices, and processes of community development" and "orientates participants to the exceptions, roles and responsibilities of board governance and membership". This guide also includes workshop exercises and a "Participant's

Toolkit". This to, like a professional development guide, can be modified to meet the needs of the participants involved (Community Capacity Building, 2009).

4.1.4 Communications (Interpersonal Skills)

This is a facilitator's guide that helps one facilitate a workshop. It also includes information on an agenda, learning objectives and the basics of getting started. Not only does it review the channels of communication such as the sender, receiver, but it also provides information on barriers and the types of communication that are used (Community Capacity Building, 2009).

4.1.5 Communications (Communications Planning)

This is a facilitator's guide that reviews the communications planning process, reasons why an organization communicated, learning objectives, communication strategies, distribution channels, tips on what information to communicate and much more (Community Capacity Building, 2009).

4.1.6 Community Development (Principles and Practices)

This module defines Regional Economic Development and provides information about community development as a process. The module familiarizes users with community development, what a community is, along with the terms rural development and regional development. It also provides models of community practice as examples for readers (Community Capacity Building, 2009).

4.1.7 Group Dynamics

This module defines the term "group". It explores the social process by which people interact. Not only does it inform readers about the influence of personality, power and behavior of the group process. This module answers questions such as "Is the relationship between individuals conductive to achieving groups goals?" and "Is the structure and size of the group an asset in pursuing both the task and maintenance functions of the group?" to name a few (Community Capacity Building, 2009).

4.1.8 Leadership and Motivation

This module reviews the major influences that affect how individuals perform in their environment. They include: i) The type of leadership that exists, and ii) personal motivation. The research information included in this module identifies some of the theories and general conclusions about why people perform, how they perform and exactly why some people display different behaviors placing them in positions of leadership (Community Capacity Building, 2009).

4.1.9 Legal Issues for Not-for-Profit Development Groups

This module provides an overview of legal issues concerning not-for-profits. There is a lot of material and explanations concerning topics such as the Corporations Act and corporate procedures (Community Capacity Building, 2009).

4.1.10Meeting Management

This module includes information about anything that is necessary to manage a meeting. It includes such things as planning and preparation, the efficient disposal of business, the assignment of responsibility and effective follow-op on decisions. It reviews the different roles of those participating in meetings and decision-making procedures (Community Capacity Building, 2009).

4.1.11 Opportunity Management Facilitators Guide

This facilitator's guide was designed to help individuals deliver one-day Opportunity Management workshops. Not only does it include a Participant's Guide but power point slides that can help one progress through the workshop itself (Community Capacity Building, 2009).

4.1.12 Organizational Governance

This Capacity Building Module is a facilitator's guide which helps support the effective facilitation of a discussion about board governance among individuals that express an interest. This helps these individuals approach the topics such as governance practices, principles and protocol in an aim to achieve individual and organizational success (Community Capacity Building, 2009).

4.1.13 Understanding Project Management Module

This module covers project management and provides a facilitators guide towards utilizing the module. It explains project management, the project life cycle, scheduling tools, risk planning tools and project management tips and suggestions to name a few (Community Capacity Building, 2009).

4.1.14 Public Participation in Regional Economic Development

This module explains the most effective tool for regional economic development; participation. It provides the reader with information on how participation contributes to development, how it provides empowerment, and includes information on some of the obstacles concerned with public participation (Community Capacity Building, 2009).

4.1.15 Regional Economic Development

This module provides a background on Regional Economic Development. It provides an overview of the economy and its indicators that measure economic performance (Community Capacity Building, 2009).

4.1.16 Regional Economic Development Boards: A New Approach

This provides information on Regional Economic Development Boards, their core functions, information on provisional boards and organizational structure (Community Capacity Building, 2009).

4.1.17 Strategic Planning

This module is a facilitator's guide that provides information on strategic planning, the benefits of strategic planning, the types of planning, strategic planning modules and how to "Plan a Plan" (Community Capacity Building, 2009).

4.1.18 Proposal Writing

This module provides information on requesting financial assistance to implement a project and how to develop a proposal to help one do so. The information included in the module helps an individual develop proposal writing skills and help one identify issues relevant to a proposal (Community Capacity Building, 2009).

The capacity building modules are very useful for REDBs, CBDCs and Municipalities because they include a lot of information on a variety of topics. Viewing these modules online is beneficial for members of these organizations because they are free of charge (Community Capacity Building, 2009).

One of the things that organizations need to become familiar with is the communication process. Day-to-day communication is something that is very important to become knowledgeable about. There is a discrepancy between the amount of time that people are trained on the topic of communication as opposed to the amount of time these communication skills are used.

There is a module available through the province of Newfoundland and Labradors Innovation, Trade and Rural Development (INTRD) departments' website that explains the communications process and what it is composed of (Community Capacity Building, 2009).

5.1 Effective Employee Communication

In order for management and employees to be efficient with regards to information about the organization and its environment, and it's people, it is essential to gain information about the communications process. In order to make effective decisions, an effective flow of communication is essential to learning organizations (Schwind, Das & Wagner, 2007).

There isn't always a specific formula for communication styles. Most organizations use a blend of formal and informal (ad hoc) communication arrangements. It is convenient to split these communication approaches into *downward communication systems* and *upward communication systems*. Downward communication is when information is provided to employees, while upward communication systems are in place to obtain information from employees. Employee communication is part of the five key dimensions of employee relations which have been taken directly from Chapter Eleven: Managing Employee Relations in the text titled "Canadian Human Resource Management: A Strategic Approach" (Schwind, Das & Wagner, 2007).

The Five Key Dimensions of Employee Relations:

(1) Employee Involvement
(2) Employee Communication
(3) Employee Counseling
(4) Employee Discipline
(5) Employee Rights

5.2 Downward and Upward Communication Systems

5.2.1 Downward Communication Systems

Downward communication occurs when information is passed down from the top of an organization to its employees further down in the hierarchy. This method is necessary for decision makers (Schwind, Das & Wagner, 2007). Knowledge and feedback are the products of downward communication. Types of downward communication include:

In-House Publications- These can be internal magazines, newspapers or bulletins that may be distributed in hard copy and electronic form. They inform employees about the organization mission through information about current developments and projects.

Information Booklets- These can include things such as an employee handbook that employees receive when starting in a position. Information like this should be reviewed and updated regularly to ensure the information is current and up-to-date.

Electronic Communication- This is very common in today's society. Electronic mail (email) can be used regularly in some organizations. Email is a great tool that can be used to distribute employee surveys and deliver messages to certain employee groups.

Information Sharing and Open-Book Management- This type of downward communication includes reports about the organization's economic performance and other details that are relevant. This is presented in the same way as annual reports are usually.

5.2.2 Upward Communication Systems

Upward communication occurs when information that is initiated by those that want to inform or influence those in a higher level of an organization. The most common upward communication that occurs is between employees and supervisors which is common on a day to day basis in most organizations (Schwind, Das & Wagner, 2007). Types of upward communication include:

Electronic Communication and Upward Communication- Email, intranets, and discussion groups are very beneficial for facilitating upward communication.

In-House Complaint Procedures- These are upward communications procedures that help employees solve a problem if they are not able to discuss it with a supervisor. There are formal methods in which an employee can register a complain in organizations.

Manager-Employee Meetings- This is a form of upward communication that allows employees to discuss complaints, suggestions, opinions and any questions they may have. These meetings can also be used to inform the management group about developments within the organization. Keeping in touch on a regular basis is good. The attendance at these types of meetings may vary depending on how the meetings are planned. It’s possible for small organizations to meet more regularly than larger organizations, while larger organizations may meet annually or semi-annually.

Suggestion Systems- This is a formal way to generate, evaluate, and implement employee ideas. This may occur through way of discussions and meetings.

Employee Attitude/Opinion Surveys- This form of upward communication is useful to find out exactly what employees think about an organization. It will help upwardly communicate any concerns or problems and even possibly help employees with career planning efforts.

6.1 Professional Development and Strategic Planning

When it comes to professional development, strategic planning is a very important process. Strategic planning takes into account the environment and its resources in a realistic light. Strategic planning is simply a way to manage change by developing strategies to make the communities and their residents feel they can control their own futures. Not only is planning a tool for development, but it is very important in professional development.

There is a module associated with strategic planning that can be obtained through the province of Newfoundland and Labradors Innovation, Trade and Rural Development (INTRD) departments' website (Community Capacity Building, 2009).

There are certain issues that strategic planning must address and this process can be seen in the strategic planning module provided by the province of Newfoundland and Labrador. This is very relevant to the topic of professional development because some of the issues that strategic planning is involved with include employment needs, education and training, and even quality of life issues. With everything, you must have targets and initiatives, along with a process for monitoring and tracking ones goals. Organizations need training and professional development activities that address strategic planning to ensure the members of organizations know how to assess their planning needs.

6.2 Strategic Economic Plan (SEP)

A Strategic Economic Plan (SEP) is a requirement for the Regional Economic Development Boards (REDB) Planning and Renewal Process. There are certain things that should be included. Below is a list of some things that are necessary to include in a Strategic Economic Plan (SEP) and can be useful in any strategic economic planning process.

General outline of what should be included in the SEP:

1. **Environmental Scan-** is an analysis of internal conditions and external data and factors that affect the organization
2. **SWOT Analysis-** Identify strengths, weaknesses, opportunities, and threats- analysis of current economic conditions within the region
3. **Mission, Vision, Values**
4. **Goals-** General statements about what needs to be accomplished to meet the mission, and address major issues facing the organization
5. **Objectives**
6. **Long Term Sustainable Initiatives** (Who, Where, What, When, Why, How- answered)
7. **Implementation Schedule**

8. **Communication Plan**
9. **Monitoring and Evaluation**
10. **Need for Public/Industry Consultations**- Need to coordinate/facilitate consultations with major stakeholder groups to identify priorities and initiatives for development
11. **Board's Role in the SEP Process**- Should identify the boards role in the consultation process & their input during the development of the plan

The Integrated Business Plan (IBP) is another part of the planning and renewal process that could be an example of things that should be included with regards to strategic planning.

General outline of what should be included in the Integrated Business Plan:

- Statement of the SEP Goals
- Title of Initiative and Location
- Description of the Initiative
- Expected outcomes of the Initiative
- Resources required to Implement the Initiative
- Tasks and Timelines
- Lead Partners and Support Partners
- Status (if appropriate)

Section 7: Effective Meetings & Public Speaking

7.1 Effective Meetings

As we spend more time communicating through different mediums because of ever-changing technology, it is necessary that people take part in professional development activities that will help them make meetings as effective and efficient as possible. Despite the fact that there are many ways to communicate such as email, web conferences, online social networks, personal face-to-face meetings are still important. The key thing that makes a meeting effective is preparation. Without preparation in advance, meetings can be very frustrating, unproductive and inefficient. There are certain things to consider when having a meeting.

7.1.1 Is it absolutely necessary to call a meeting?

The first is whether or not it is absolutely necessary to call a meeting on a certain topic. Key questions to ask one's self are "What do I want to happen as a result of this meeting?" and "Can I achieve this objective without holding a face-to-face meeting?"

7.1.2 What will the outcome of the meeting be?

Secondly, you should consider what the outcome of a meeting will be. In the preparation process, an agenda should be established. If you are meeting on something that is very complex, you must consider the level of detail that needs to be obtained from a meeting and what type of plan needs to be generated.

7.1.3 Who do you invite to the meeting?

Thirdly, something to take into consideration is what people you invite to this meeting. If the critical experts and decision makers aren't present in the meeting, it makes it very difficult to finalize a decision. If there are too many people that attend the meeting that aren't directly involved in the desired outcome and not enough of the critical decision makers, a meeting could become a disaster (How to have Effective Meetings, 2008).

7.1.4 What are stakeholders expecting to get from a meeting?

Before a meeting, you should figure out exactly what the stakeholders are expecting to get from a meeting.

7.1.5 Preparation is the key.

One thing you should do before holding a meeting is to prepare the content and topics that need to be discussed, and the exact processes that will be necessary to have these discussions. In order to present certain ideas, presentations may be required.

7.1.6 Who makes the decisions?

One of the most important things that should be considered is the decision making groups. There may be executive members and experts in the room, and others that will provide a consensus. It is important to be clear about who will make the decision and what decision-making method will be appropriate for the group.

7.1.7 Make sure documentation for a meeting is complete.

Lastly, you should make sure all documentation including meeting minutes and reports are compiled properly and that follow up is planned. Sometimes, instead of compiling a lengthy report, all which is necessary is a list of the actions in a meeting. It is important to follow up on the topics discussed in meetings. Follow up is necessary in order to support the commitment. Status checks and progress reports on a certain project or topic are necessary to keep things on track (How to have Effective Meetings, 2008).

The province of Newfoundland and Labradors Innovation, Trade and Rural Development (INTRD) departments' website has a community capacity building module titled "Meeting Management" (Community Capacity Building, 2009).

7.2 Public Speaking

Public speaking is very important. When trying to convey a message to an audience that is deliberate, structured and done to inform listeners, there are a few things you should know. The following 20 tips for public speaking were taken from a journal titled "20 Public Speaking Tips for Clarity, Connection and Confidence" (Evans, 2005) by Paul Evans, obtained through the Memorial University's online library. These 20 tips you see below are taken directly from the journal.

- **No speech is ever perfect.** Striving for perfection creates fear. Do your best — and leave it at that.
- **Forget about what you forgot to say.** Trust that the audience heard what was needed.
- **It's said that you should put 10 hours of practice into a one-hour presentation. You can, but it's overkill.** Practice until you feel as though you have 80 percent of it down, and let the other 20 percent take care of itself. If you know your stuff, you may not need any practice at all.
- **Make your point of view clear.** No rambling. No tangents. The audience should leave knowing your position, whether they agree with it or not.
- **Be conversational.** Don't try to adopt a "professional" persona. Speak like you would to a friend over a cup of coffee. Be you.
- **Leave your ego at the door.** It's not about you; it's about giving the audience something of value.
- **Get to know the audience.** Meet and greet before and after. Get as close to the crowd as possible when ***speaking***. Don't hide behind a lectern.

- **Use as few notes as possible.** I like a single index card or Post-it note that has my major points written on it.
- **Use props if, and only if, they clarify or support a specific point.**
- **Don't tell jokes — tell stories.** In front of an audience, an anecdote about something foolish you did as a child is going to be funnier than any joke.
- **You become what you think about.** Think scared, you'll be scared. Think passionate, you'll be passionate. Trace your feelings and you'll discover they came from thoughts.
- **Fear is part of *speaking*.** Even the best speakers feel some butterflies before they go on. Fear is not unusual; it's normal. Don't let it surprise you expect it, and let it energize you.
- **You cannot get better if you do not speak regularly.** Join a club such as Toastmasters International to get experience and exposure. Many inexperienced speakers think they can get in front of an audience and be fabulous the first time. It doesn't happen. No one can play a musical instrument without practicing. The same is true with ***public speaking***.
- **If you can't summarize the intended result of your speech in one sentence, your intent isn't clear.** There should be no room for doubt.
- **Once in a while it's your job to offend.** In such cases, audience members get what they need, not what they want. And that's the way it goes sometimes.
- **Don't sacrifice clarity for cuteness.** If you're amazed at the cleverness of your speech, chances are your audience won't be.
- **Outlining your speech should never take more than an hour.** If it does, you're working too hard, Jot down your points on a single piece of paper. Subtitle some illustrations. Then practice. The truth is, ***speaking*** is much easier than most people make it out to be.
- **Don't take yourself too seriously.** Self-effacing humor works miracles. If you're not willing to look dumb, then you're not too smart.
- **Don't compare yourself with famous speakers.** Your best for this moment is the best you can be. Afterward, you can commit to growing, learning and improving.
- **Words will never become ineffective.** We live in a world of advanced technology and pervasive multimedia, but nothing will ever replace an individual with a bold message, the passion to share it, and an audience that wants to listen.

(Evans, 2005)

7.2.1 Keeping the Audience Engaged

When delivering a presentation to a group, it requires many different techniques (3 Tips to Keep the Audience Engaged, 2009). The three tips below were influenced by an article titled “3 Tips to Keep the Audience Engaged”.

When preparing a presentation, you should remember the following:

- **Strike a visual-verbal balance-** If there are slides in your presentation that is heavy on data, you should follow this up with a slide that is very simple and has very little text. Images and visual representations of data will give the audience a break.
- **Organize in 10-minute intervals**- It is very easy to lose the audience’s attention. Minds wander during presentations. A great thing to include in the presentation are video clips,

- **A hungry audience can often be a distracted audience-** If you hold a meeting at a time when people are usually hungry; it is good to provide a lunch or a small snack.

(3 Tips to Keep the Audience Engaged, 2009).

8.1 Hiring Practices

The following section titled "Performance Management" is taken from the Newfoundland and Labrador Regional Economic Development Association's Human Resources Reference Manual which was composed in 2008 by work term student, Lisa Smart, at the Atlantic Canada Opportunities Agency (ACOA).

Attracting and retaining qualified employees is vital to the success of any organization. Regional Economic Development Boards (REDB) are certainly no exception; just like many not-for-profit organizations, turnover can often be higher than average and thus, an emphasis should be placed on the hiring and retention of employees. It is helpful to have standardized hiring practices for each respective REDB as this will allow for a smoother hiring process that is clear to both employees and applicants. Furthermore, a consistent hiring process will dramatically decrease the often overlooked errors when hiring new employees. The first step towards hiring for a position, it is to fully understand the role and responsibilities associated with the position itself. From here, the hiring process can be based on this information.

8.1.1 Preparing a Job Description

Accurate and concise job descriptions are often necessary for recruiting new employees, managing existing employees or reporting to funding agencies. Before starting the process of screening applicants, it is essential to understand and be able to aptly describe the position that will be advertised and the most important element of this is the job description. Many elements of human resources, such as performance appraisals, stem from an employee's job description; it is a written record of the responsibilities of a particular job. Some key parts to a job description are: job identity, job summary, job duties, qualifications, working conditions and salary. The following is a brief description of each section:

Job Identity**:** This typically includes the formal job title, job location, job code, job grade and its status (whether or not exempted from overtime laws).

Job Summary and Duties**:** Following the job identity section, the next part is a job summary. This includes a narrative which concisely summarizes the job in a few sentences, telling what the job is, how it is done and why. As well, it is often written in an action-orientated style, describing job duties.

Qualifications & Requirements**:** Identify the minimum qualifications needed to perform the essential elements of the job, including education, languages, experience, equipment, credentials, skills, and knowledge. Any critical expertise or skills should be noted. When hiring a new employee, be careful not to over-qualify for the job.

Working Conditions**:** Brief facts about the work atmosphere which includes characteristics such as physical location, hours of work, any particular hazards, and any travel requirements that may go hand-in-hand with the job itself.

Salary: When advertising for a new position, include whether the salary is negotiable, dependent upon experience, within a range, or fixed. Job seekers prefer knowing as accurately as possible how much you expect to pay them.

8.1.2 Job Specification

Much like a job description, a job specification is a written statement that explains what a job demands of jobholders and the human skills and factors required. This includes lists of knowledge, skills and abilities. These requirements include experience, training, education and physical and mental demands. For example, the job specification may call for at least 3-5 years of experience in a related position or strong communication and networking skills. Because a job description and job specification both focus on the job, they are often combined into one master document and referred to as a job description.

8.1.3 Creating a Job Ad

Once a job description is complete, the next step is to begin to advertise for the position. Advertising in the newspaper or a trade journal is a common recruiting method for many positions and one that is familiar to most job seekers. A job ad should cover four areas: the type of sought-after applicant, pay, and benefits and where and how to apply. To avoid turnover of dissatisfied employees, do not misrepresent the position which is advertised; it is a common mistake of organizations to "oversell" the position as an attempt to make it sound as attractive as possible. The more accurately a job is presenting in an advertisement, the more appropriate and applicable resumes the organization will receive.

The Four Elements of a Job Ad

1. ***The Type of Applicant*****:** If this is not clear and concise in the advertisement, applicants may face ambiguity and as a result, the organization will receive resumes which are not applicable to the position. Clearly stating qualifications will significantly cut down on the number of redundant resumes. The ad should include: specific job skills required, experience and background required, educational requirements, travel or relocation requirements and whether or not training will be provided. Avoid setting high standard. For example, if all that is required is an undergraduate degree or three years of experience, there is no need to require an MBA. This will only result in deterring good candidates or hiring people who will quickly leave. As well, use of unclear and general adjectives such as "dynamic" or "creative." Instead, it is more helpful to be precise and realistic.

2. ***Pay:*** It is not necessary to actually state the salary for the position but however, some mention of pay should be made. For example, many job ads state that "competitive salary" is offered or they may request that applicants supply a suggested salary range for the level of experience they will bring to the position. Although, stating salary range is proven to decrease the number of applicants as many people tend to overestimate the amount of salary they believe they should earn. If there is a possibility that too many resumes will be submitted, it can sometimes be helpful to use this approach as it will cut down the number of applicants. Although, organizations always run the risk of losing qualified applicants by doing so.

3. ***Benefits:*** While salary is still a top priority for job seekers, medical and other benefits are becoming increasingly important. Company benefits can attract good candidates. In a recent survey of job seekers, 57 percent considered salary their primary concern –
compared to about 90 percent just several years ago. Today, 42 percent of those seeking employment are just as interested in good benefits.

4. ***Where and how to apply*****:** It is important to be specific here and do not omit the obvious. It is not uncommon to find an employment advertisement that says "Send Resume" but neglects to say where. If running an open ad, provide board name, address, email and phone number (if accepting call-ins). As well, if applicable, always provide a deadline for resume submission. Please reference Appendix 1 for a sample of a NLREDA job advertisement.

8.1.4 Interview Guidelines

An employment interview is a formal, in-depth conversation conducted to evaluate the applicant's acceptability. The interviewer seeks to answer two broad questions: *Can the applicant do the job? How does the applicant compare with others who are applying for the job?* An interview has become one of the most widely used selection tools in human resources. Not only does the employer gain a firsthand impression of applicant's suitability for the job but it also offers an opportunity for the organization to "sell" a job to candidates. In areas where employment opportunities are in high supply, the organization can use an interview as a medium of public relations; speaking about employment policies, career opportunities and overall quality of work life.

8.1.5 Types of Interviews

You want to be certain that you select employees who will match the job requirements most closely while fitting in with your company's culture and team members. After all, performance in the workplace doesn't just depend on specific job skills. People must be motivated to perform well, and what motivates one person might be very different from what motivates another. When interviewing applicants for potential hire, there are various types of interview methods to use. Listed on the next page are the most commonly used methods.

Interview	Types of Questions to Ask:	Advantages:
Unstructured	Few, if any, planned questions. More so a casual and improvised. Questions are made up during the interview itself.	Allows interview to pursue, in depth, the applicant's responses.
Structured	Predetermined checklists of questions are created prior to interview and are usually asked to all applicants who are interviewed.	Useful for valid results, ensures transparency when dealing with high number of applicants.
Mixed	A combination of structured and unstructured questions which usually resembles what is done in practice.	Realistic approach that yields comparable answers plus in-depth insights.
Behavioral Description	Questions are limited to actual behaviors. Evaluation on the solution and the approach of the applicant.	Useful to understand applicant's past work behavior and abilities under specific work situations.
Situational	Questions focus on important situations likely to arise on the job and what the applicant would do in such situations.	Useful for understanding the applicant's behavioral

8.1.6 Choosing Behavioral Description Questions

A survey of Canadian organizations indicated that 83% of companies use structured interviews. Of these structured interviews, over 46% are comprised of behavioral description questions which are becoming increasingly popular in Canada. They attempt to find out how job applicants have responded to specific work situations and specific skills utilized in the past. Behavioral description questions normally begin with "*Tell me about a time when…*" Some relevant sample questions are as follows:

- Tell me about a time when a project or idea that was implemented primarily because of your efforts. What was your role? What was the outcome?

- Please give examples from your current/previous employment of when you have worked with other people to achieve a particular goal or target. What was your contribution to the team? What was the outcome of the team's efforts?
- Tell me about a time when you had to deal with a difficult employee? Describe the situation and how you dealt with it? What was the overall outcome?
- Have you ever had to introduce a policy change to your work group? How did you do it? Or have you ever met resistance when implementing a new idea or policy to a work group? How did you deal with it?
- Tell me about a time when you were able to use your leadership skills to build motivation in your co-workers, classmates, volunteer committee, etc.

- Describe the most challenging negotiation or mediation situation in which you were involved. What did you do? What were the results for you? What were the results for the other party?
- Describe your leadership style and give an example of a situation when you successfully led a group.
- Please describe a challenging situation that best demonstrates your ability to lead an agency or program/project under difficult circumstances. What was the situation? What were the roadblocks that you encountered? What was your approach?

When evaluating answers to behavioral description questions, there is a generally accepted acronym created to assess the effectiveness of an applicant's answer; the STAR technique is as follows:

Situation or Task	Applicant can effectively describe the situation that they were in or the task that they needed to accomplish. Must describe a specific event or situation, not a generalized description of what they have done in the past.
Action Taken	Applicant describes the action they took and be sure to keep the focus on you. Even if you are discussing a group project or effort, they able to articulately describe what they did -- not the efforts of the team as a whole.
Results Achieved	What happened? How did the event end? What did they accomplish? What did they learn from the experience itself?

8.1.7 Choosing Situational Interview Questions

Situational interviewing techniques focus on what candidates would do in a specific situation. This technique involves questions that describe a hypothetical situation based on challenging, real life, job-related occurrences and ask the candidates how they would handle the problem. Situational questions may be useful with less experienced candidates. Inexperienced candidates can demonstrate their competencies as they might relate to your company through simulated situations. Examples of situation interview questions include:

- You are representing your board on a committee. The issues the committee must deal with are sometimes difficult to resolve. You find that committee members have diverse views and sometimes hold very strong opinions or positions. You find yourself repeatedly conflicting with a representative of a board. How would you establish a satisfactory working relationship with this person to accomplish the tasks?

- People differ in their preference for jobs that have well laid out tasks and responsibilities or ones in which work changes frequently. Tell me about a time when you were successful in dealing with an unstructured work environment?

- Having a good solution for a problem often entails more than just being intelligent. Often, exercise of good judgment is needed to complement logic in choosing a practical solution. Describe when you used good judgment in solving a problem.

- In your experience speaking with clients/community partners, tell me about an instance when communication became challenging and how you overcame that.

- Getting the job done may necessitate unusual persistence or dedication to results especially when faced with obstacles or distractions. Tell me about a time in which you were able to be very persistent in order to reach goals. Be specific.

When forming situational interview questions, it is most helpful to return to the original job description for the position. It is here that you will find characteristics of the job that can be used when creating situational interview questions that pertain most to the position. Think of real-life situation which the applicant may often face if they were awarded the position. While behavioral description interview questions rely solely on the past behavior of the applicant, situational interview questions can be beneficial for applicants who have little experience in a similar position. For example, some applicants may be new graduates or come from a different management background. For this reason, situational interview questions may informative for the interviewer.

8.1.8 Interview Pitfalls to Avoid

There are a variety of issues to keep in mind when preparing and implementing an interview. First and foremost, it is essential that all the questions which will be asked are both ethical and legal. The easiest way to avoid legal problems in the hiring process is to ensure that all requirements and selection decisions are directly related to the legitimate job requirements. The following is a variety of generally acceptable and unacceptable interviewer behaviors.

Do:

- Be well prepared and know the desired flow of interview.
- Collect only job-related information and not information on general personality traits.
- Concentrate on securing information about the applicant’s past job behavior.

- Use of several interviewers to increase the reliability of the interview process.
- Treat all interviewees equally and impartially.
- Have a checklist of questions to ask each applicant to ensure consistency.
- Attempt to create a relaxed setting by asking easy, nonthreatening questions fist and showing support to the applicant.
- Provide job-related information to the applicant
- Compare evaluation of each candidate with other interviewers and find out why discrepancies exist.

Do Not:

- Attempt to predict personality traits from a single interview.
- Be guided by initial impressions (or nonverbal cues) and generalize them to all relevant work and non-work behavior of the applicant.
- Allow evaluation of the candidate's job performance t o be influenced by a single characteristic (such as how the applicant dresses, speaks, etc.)
- Be attempted to make snap judgments of the candidate early in the interview as this will hinder the rest of the interview.
- Asking leading, bias questions that will communicate the correct or desired answer to the applicant.
- Exhibit any personal bias.
- Dominate the interview; rather, use the interview to collect relevant information about the candidate.

As these are just guidelines above, an employment interview must follow legislative laws within Canada. According to The Canadian Human Rights Commission, an employment interview is conducted to learn more about the suitability of people under consideration for a particular job. However, sometimes the information sought during interviews is not relevant to the job being filled and may let discriminatory elements affect the selection process. The Canadian Human Rights Act prohibits the potential employer to ask applicants a variety of personal questions. The *Canadian Human Rights Act* entitles all individuals to equal employment opportunities without regard to race or colour, national or ethnic origin, religion, age, family or marital status, sex (including pregnancy or childbirth), pardoned conviction, disability (either physical or mental or as the result of dependence on alcohol or drugs), or sexual orientation. All interview questions must adhere to this Act and failure to do so could result in discrimination which could also result into legal issues.

8.1.9 Conducting the Interview

Since the majority of a job interview involves a data exchange between applicant and interviewer, it is vital that the interviewer can effectively ask questions and evaluate answers. For this reason, interviewers must be well-prepared for the interview; they should know the flow in which they want the interview to follow. If more than one person is interviewing the applicant, known as a panel interview, delegation of who will ask what questions should take place prior to the interview. As well, note-writing should be delegated among the interviewers. Although, questioning may seem like an easy skill to come by, there are a variety of tactics that comprise an efficient interviewer. The following are some areas which the interviewer should pay focus on in order to create the most positive, information-gathering interview session as possible.

8.1.10 Developing Rapport

The approach taken in an interview is determined, to great degree, by the interviewer's personality. The first step to an effective interview is to develop a positive rapport with all applicants before the questioning begins.

The physical setting of the interview is very important as it sets the atmosphere of how it will play out. Choose a place that is quiet, comfortable and private without interruption.

When applicants arrive, the interviewer should be prompt. Interviewer should introduce themselves as soon as possible. When greeting applicants, they should be friendly and always make eye contact.

Before the interview formally begins, both the interview and applicant should engage in small talk to break the ice using a casual, neutral topic. At this stage, the interviewer should still keep away from personal topics and avoid prying for information.

The interviewer should take notes during the interview but this does not need to be stressful to the applicant. Interviewers should only jot down responses while continuing to maintain regular eye contact with the applicant as they are answering questions. For example, if the applicant is discussing a sensitive topic, the interviewer should refrain from taking any notes.

8.1.11 Behavioral/Verbal Encouragement

The interviewer's behavior during the interview will have an impact on the candidates' level of comfort and for this reason, interviewers must be aware of their own behavioral and verbal cues. Attentiveness is key; the interviewer must intently listen to the responses to their questions and give the impression that they are sincerely interested in what is being said. Other behavioral cues include smiles, nods, leaning forward slightly. Praise, encouragement and supportive comments will help maintain a continuing flow of information from the applicant.

8.1.12 Reference Checking

According to research, approximately 90% of all hiring mistakes can be prevented through proper reference checking procedures. Instead, many interviewers rely solely on their own impression of the applicant and their resume to guide their final hiring decision. Employer's who fail to check references thoroughly find themselves faced with a variety of situations. Seventy five percent of today's job searchers don't have their references checked by prospective employees. These employers may be opening themselves up to issues due to an emerging theory of employer liability known as "negligent hiring." This theory states that an employer may be sued directly for an employee's irresponsible or criminal behavior. Employers may be held liable if it turns out that their screening efforts were inadequate and can be logically connected to subsequent wrongful conduct. The following are some possible questions to ask when checking references:

- What were the dates of employment?

- What was their position and responsibilities?
- Did the applicant fulfill these duties? If not, what areas did they have difficulty with?
- How was the applicant's attendance and punctuality?
- How was the applicant's overall work performance?
- How did the applicant get along with co-workers? How did he/she respond to management/supervisors when something was required of him/her?
- What were the applicant's reasons for leaving you organization?
- Would you rehire than applicant? Why or why not?

Give the reference a chance to add additional comments.

8.1.13 Selection

After the selection of an applicant is made, REDBs should try to make an offer as soon as possible after the interview. This normally comes with a phone call to the applicant informing them that they are the successful candidate as well as a formal letter of offer which outlines all facts associated with the offer. Since employers cannot always be certain that the applicant will accept, they should keep their second and third choices in mind until they have formally received the acceptance of the letter of offer from the first applicant. In the letter of offer, the following facts should be presented:

- Formal offer of stated position, start date, salary
- Relocation terms (if applicable)
- Duties and responsibilities
- Probationary period
- Conditions of employment
- Deadline to accept offer

8.2 Human Resources Management

8.2.1 The Human Resource Strategy

The human resource strategy is the most important thing in human resources management. If there is a change in the organizational strategy, there must be changes to reflect this in the human resource strategy. When formulating these strategies, the personnel managing human resources in an organization must focus on five major groups of activities. These five major activities can be seen below (Schwind, Das & Wagner, 2007).

Activity Group 1: Planning Human Resources

In order to obtain information about the various positions within an organization, the human resources personnel must conduct a job analysis. This simply means to analyze the required job behaviors and performance standards of each position. This planning, titled "Human Resource Planning" helps determine the supply and demand of certain types of human resources within an organization. In order to come up with a human resources strategy, there must be a job analysis in order to shape the strategy and facilitate employment and training planning (Schwind, Das & Wagner, 2007).

Activity Group 2: Attracting Human Resources

In order to attract people to work for an organization, whether it be profitable or a not-for-profit organization, those staff concerned with human resources should meet all legal requirements. These requirements include equal employment opportunity laws and affirmative action policies. Recruitment itself is defined as "the process of finding and attracting capable job applicants and results in a pool of high-quality candidates" (Schwind, Das & Wagner, 2007). The selection process is a process that contains many steps used to determine which people should be hired while matching the job requirements and duties with the applicants abilities (Schwind, Das & Wagner, 2007).

Activity Group 3: Placing, Developing and Evaluating Human Resources

Once employees are hired, they need to be introduced and oriented into the organizational environment. Once hired, employees should become familiar with the organizations policies and procedures and be placed in their new positions. It is very common that new workers are a perfect fit with the organizations needs right away. It is necessary that these new employees must be trained to perform effectively in their new positions, as well as be developed continuously to prepare for future responsibilities. This is done through professional development and systematic career planning. Performance appraisals (mentioned previously in this guide) are necessary in order to provide employees with feedback on their performance. Not only is this good for the employee, but it is good for the organization because it helps identify future training needs. If there are training procedures in place that aren't working effectively, they will be noticed once a performance appraisal is carried out- often meaning that training activities need to be redesigned (Schwind, Das & Wagner, 2007).

Activity Group 4: Motivating Employees

When an employee performs well on the job, they must receive compensation for their performance. Some benefits may be required by law, such as the Canada Pension Plan for some organization, while others are voluntary for the organization (ex: dental plans and health plans). In order to maximize the performance of employees, internal work procedures, workplace climate and work schedules must be continuously modified to meet the ever-changing needs of the workplace (Schwind, Das & Wagner, 2007).

Activity Group 5: Maintaining High Performance

It is important to monitor the human resource strategy to make sure productivity from each member is at a maximum level. There are employee relations practices in most effective organizations which will help encourage good communication between higher levels of authority and employees, standardized disciplinary procedures and counseling systems for most organizations. It is important to be able to ensure safety for every employee and promote a diverse workforce (Schwind, Das & Wagner, 2007).

8.2.2 The Roles of the Human Resource Department (HRD)

The following are the roles of human resource departments across many organizations, although it varies between many organizations. These activities are taken directly from Chapter One: Strategic Importance of Human Resource Management in the text titled "Canadian Human Resource Management: A Strategic Approach" (Schwind, Das & Wagner, 2007).

The activities are as follows:

- Assist the organization to attract the right quality and number of employees;
- Orient new employees to the organization and place them in their job positions;
- Develop, disseminate, and use job descriptions, performance standards, and evaluation criteria;

- Help establish adequate compensation systems and administer them in an efficient and timely manner;
- Foster a safe, healthy and productive work environment
- Ensure compliance with all legal requirements insofar as they relate to management of the workforce;
- Help maintain a harmonious working relationship with employees and unions where present
- Foster a work environment that facilitates high employee performance; and establish disciplinary and counseling procedures

8.2.3 Human Resources Objectives

In order to perform the activities that were listed above, the human resources department must have objectives. These objectives provide the human resources department with benchmarks against which actions are evaluated. Human resource management in most organizations, profit or not-for-profit, has three main objectives- *organizational objectives, societal objectives, and employee objectives.* The following definitions are taken directly from Chapter One: Strategic Importance of Human Resource Management in the text titled "Canadian Human Resource Management: A Strategic Approach" (Schwind, Das & Wagner, 2007).

(1) Organizational Objectives: An organization's short and long-term goals that the Human Resources department aims to achieve.

(2) Societal Objectives: Societal priorities (e.g., lower pollution levels) that Human Resources department targets while setting its own objectives and strategies.

(3) Employee Objectives: Goal set by Human Resources department to assist employees to achieve personal goals that will enhance their contribution to the organization.

When looking for professional development activities, there are many options available. Although university and college courses are expensive, they can be very beneficial for those interested in certain professional development topics. Some of the places where people go to receive formal education include:

The Gardiner Centre

The Gardiner Centre is an organization that focuses on providing practical training and solutions for organizations in order for them to grow. There are a variety of programs and services that individuals can avail of through The Gardiner Centre. This organization has a section on their webpage that informs viewers about professional development opportunities and schedules. Some of the topics that are available to help one accelerate their business career include: communications, human resource management, marketing and project management. They strive to encourage individuals and groups to invest in professional development (The Gardiner Centre, 2008). Some of the current courses The Gardiner Centre offers that could be relevant to topics discussed in this professional development guide are:

- Conflict Management and Resolution
- Priority Time Management and Workload Balance
- Graduate Management Admission Test (GMAT) Preparation Review
- Performance Coaching and Development
- Developing an Effective Marketing Plan
- Accounting for the Non-Accountant
- Training the Trainer: From Design to Delivery
- The Business Analyst Course
- Stress Management for Professionals
- Understanding Personality Types in the Workplace- Using MBTI
- Employee Retention Strategies
- Critical Thinking and Strategic Problem Solving Skills for Leaders
- Stand and Deliver: Presentation Skills

Other professional development topics covered by the Gardiner Centre include those that are based on the needs of today's organizational environments such as:

- Technical Report Writing

- Interpersonal Negotiation Techniques
- Performance Coaching for People and Teams
- Fundamentals of Project Management
- Supervisory Management Skills

You can view the other seminar and program listings, the program schedule and register online through the Gardiner Centre Website at:

http://www.busi.mun.ca/gardinercentre/default.htm.

Contact information:

Memorial University of Newfoundland
Business Administration Building
St. John's, NL A1B 3X5
Phone: 709.737.7977
Fax: 709.737.7999
Email: gardinercentre@mun.ca

Memorial University of Newfoundland (MUN)

Memorial University offers a number of courses concerned with many of the business subject most organizations would like to receive by way of professional development activities.

The following courses can be related to topics in this guide and are available through the Faculty of Business Administration at Memorial University. They are business electives available to students at Memorial University.

- 3101 Accounting Applications
- 5160 Cost Accounting
- 5210 Marketing Communications
- 5220 Marketing Research
- 5500 Financial Management II
- 5530 Public Finance
- 6100 Intermediate Accounting I
- 6110 Intermediate Accounting II
- 6240 Channels and Internet Marketing
- 6310 Advanced Personnel and Human Resource Management
- 6311 International Human Resources Management
- 6312 Employee Recruitment and Selection
- 6550 International Finance
- 6610 Small Enterprise and Regional Development

For a complete list of business course electives and their descriptions, you can go to the following link:

http://www.mun.ca/regoff/calendar/sectionNo=BUSI-0330

Anyone interested in finding a list of programs and courses is available through the following website:

http://www.mun.ca/programs/

Memorial University's Distance Education and Learning Technologies offers a variety of courses that can be taken online at one's convenience. Many courses that can be relative to this guide are available through distance education. You can view the distance education course listings by following this link.

http://www.distance.mun.ca/future/courseprogram/listings.php?S=ListingsCourses&D=Business&SEM=Fall%202009

Memorial University prides itself on the fact that they offer over 100 degree programs and has a student population of over 17, 000 students. There are two campuses in St. John's, Newfoundland, one of which is Marine Institute, and there are also campuses in Corner Brook and Harlow, England (Memorial University of Newfoundland, 2009).

A visitor's guide is available through the link below:

http://www.mun.ca/memorial/visitors/

Dale Carnegie

Dale Carnegie Training is a performance-based training company that is available worldwide. This training company was founded in 1912 and has evolved tremendously as a performance-based training company. The focus of Dale Carnegie is to provide people with the opportunity to improve skills, performance in order to "build positive, steady, and profitable results" (Dale Carnegie Training, n.d.).

There is a link on the Dale Carnegie website that allows users to search the courses and subject areas. The following subject areas are covered by Dale Carnegie courses:

- Change Management Training Courses and Seminars
- Customer Service Training Courses and Seminars
- Effective Communication and Interpersonal Skills Training Courses and Seminars
- Employee Engagement
- Executive Leadership Training Courses and Seminars
- Leadership Development Training Courses and Seminars
- Management Seminars and Training Courses from Dale Carnegie Training
- Organizational Development Training
- Presentation Skills and Public Speaking Training
- Sales Training and Sales Management Training

In order to get in contact with Dale Carnegie Training, one must fill out an online form to receive further information on courses available.

Some courses that are relevant to the topics in this professional development guide that are available through Dale Carnegie Training are:

- Dale Carnegie Course: Effective Communications & Human Relations
- Generation.Next: Dale Carnegie Training for Young Adults
- Leadership Training for Managers
- The People Side of Process Improvement

Dale Carnegie Training offers a variety of one day, two day and three day training seminars as well. A full list of courses can be obtained by following the link below.

http://www.dalecarnegie.com/search_courses/select_subject_seo.jsp?courseSubject=LED&keycode=google06&WT.srch=1&WT.mc_id=G_Brand

When you visit the Dale Carnegie Website, there is a free download titled "Secrets to Success" which includes information on how to communicate with diplomacy and tact, become a more positive communicator, be an effective leader and reduce stress.

http://www.dalecarnegie.com/about_us/about_us.jsp

The College of the North Atlantic (CNA)

The College of the North Atlantic offers a variety of courses. A list of courses can be obtained through the following link:

http://www.cna.nl.ca/programscourses/School_Business.asp

The Business Administration and Management course offerings at the College of the North Atlantic include:

-Business Administration
-Business Administration (Accounting)
-Business Administration (General)
-Business Administration (Human Resource Management)
-Business Administration (Marketing)
-Business Management (Accounting)
-Business Management (Human Resource Management)
-Business Management (Marketing)

A list of continuing education courses can be obtained through the following link:

http://www.cna.nl.ca/ProgramsCourses/desc_search.asp

University of Waterloo

The University of Waterloo which is located in Waterloo, Ontario, has great distance education resources. You can complete an entire degree online. They also offer part time studies and continuing education courses. For more information, you can go to the link below:

http://dce.uwaterloo.ca/

Some of the opportunities that the University of Waterloo's Continuing Education program offers are:

- Classroom courses
- Online courses
- Corporate Training
- Partnership Programs
- Certificate Programs
- Pre-University Courses

List of Appendices:

10.1 Appendix A- Sample Learning Plan Template

Sample Learning Plan

Name of Employee:	Name of Supervisor/Manager:
Date: y/m/d	Period Covered From: to y/m/d y/m/d

Professional Development Goals (Optional):

<table>
<tr><td>Learning Objective</td><td colspan="3">I want to learn:</td></tr>
<tr><td rowspan="2">Category</td><td>Required Training</td><td>Organizational Learning Events</td><td>Work Related</td></tr>
<tr><td>Professional Development</td><td colspan="2">Other:</td></tr>
<tr><td>Learning Method(s)</td><td colspan="3">How will I reach my objective? There may be more than one way (e.g. reading, course, distance course, online, on-the-job, mentoring, etc.)</td></tr>
<tr><td>Success Indicator</td><td colspan="3">I know I will have reached my professional development goals when:</td></tr>
<tr><td>Target Date</td><td colspan="3">When will I be able to put into practice what I have learned (estimate month/year):</td></tr>
<tr><td>Commitment</td><td colspan="2">Employee (Time and Money):</td><td>Employer (time and money):</td></tr>
</table>

Learning Objective	I want to learn:		
Category	Required Training	Organizational Learning Events	Work Related
	Professional Development	Other:	
Learning Method(s)	How will I reach my objective? There may be more than one way (e.g. reading, course, distance course, online, on-the-job, mentoring, etc.)		
Success Indicator	I know I will have reached my professional development goals when:		
Target Date	When will I be able to put into practice what I have learned (estimate month/year):		
Commitment	Employee (Time and Money):	Employer (time and money):	

Learning Objective	I want to learn:		
Category	Required Training	Organizational Learning Events	Work Related
	Professional Development	Other:	
Learning Method(s)	How will I reach my objective? There may be more than one way (e.g. reading, course, distance course, online, on-the-job, mentoring, etc.)		
Success Indicator	I know I will have reached my professional development goals when:		
Target Date	When will I be able to put into practice what I have learned (estimate month/year):		
Commitment	Employee (Time and Money):	Employer (time and money):	

10.2 Appendix B- Performance Appraisal Form Template

10.3 Appendix C- CBDCs Volunteer Needs Assessment Tool

10.4 Appendix D- CBDCs Staff Needs Assessment Tool

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performance appraisal form template

usage guide

org/division/dept:	location/based at:	
name:	position:	ref:
year or period covered:	time in present position:	length of service:
appraisal date & time:	appraisal venue:	appraiser:

Part A Appraisee to complete before the interview and return to the appraiser by (date)

A1 State your understanding of your main duties and responsibilities.

A2 Discussion points:

1. Has the past year been good/bad/satisfactory or otherwise for you, and why?

2. What do you consider to be your most important achievements of the past year?

3. What do you like and dislike about working for this organisation?

4. What elements of your job do you find most difficult?

5. What elements of your job interest you the most, and least?

6. What do you consider to be your most important aims and tasks in the next year?

7. What action could be taken to improve your performance in your current position by you, and your boss?

8. What kind of work or job would you like to be doing in one/two/five years time?

9. What sort of training/experiences would benefit you in the next year? Not just job-skills - also your natural strengths and personal passions you'd like to develop - you and your work can benefit from these.

A3 List the objectives you set out to achieve in the past 12 months (or the period covered by this appraisal) with the measures or standards agreed - against each comment on achievement or otherwise, with reasons where appropriate. Score the performance against each objective (1-3 = poor, 4-6 = satisfactory, 7-9 = good, 10 = excellent):

objective	measure/standard	score	comment

A4 Score your own capability or knowledge in the following areas in terms of your current role requirements (1-3 = poor, 4-6 = satisfactory, 7-9 = good, 10 = excellent). If appropriate bring evidence with you to the appraisal to support your assessment. The second section can be used if working towards new role requirements.

1. commercial judgement	
2. product/technical knowledge	
3. time management	
4. planning, budgeting and forecasting	
5. reporting and administration	
6. communication skills	
7. delegation skills	
8. IT/equipment/machinery skills	
9. meeting deadlines/commitments	
10. creativity	
11. problem-solving and decision-making	
12. team-working and developing others	
13. energy, determination and work-rate	
14. steadiness under pressure	
15. leadership and integrity	
16. adaptability, flexibility, and mobility	
17. personal appearance and image	

others (for current or new role):	
18. corporate responsibility and ethics	

A5 In light of your current capabilities, your performance against past objectives, and your future personal growth and/or job aspirations, what activities and tasks would you like to focus on during the next year. Again, also think of development and experiences outside of job skills - related to personal aims, fulfilment, passions.

Part B To be completed during the appraisal by the appraiser - where appropriate and safe to do so, certain items can completed by the appraiser before the appraisal, and then discussed and validated or amended in discussion with the appraisee during the appraisal.

B1 Describe the purpose of the appraisee's job. **Discuss and compare with self-appraisal entry in A1. Clarify job purpose and priorities where necessary.**

B2 **Review the completed discussion points in A2, and note the points of and action**.

B3 List the objectives that the appraisee set out to achieve in the past 12 months (or the period covered by this appraisal - typically these objectives will have been carried forward from the previous appraisal record) with the measures or standards agreed - against each comment on achievement or otherwise, with reasons where appropriate. Score the performance against each objective (1-3 = poor, 4-6 = satisfactory, 7-9 = good, 10 = excellent). **Compare with the self-appraisal in A3. Discuss and note points of significance, particularly training and development needs and wishes, which should be noted in B6.**

objective	measure/standard	self-score/app'r score	comment

B4 Score the appraisee's capability or knowledge in the following areas in terms of their current (and if applicable, next) role requirements (1-3 = poor, 4-6 = satisfactory, 7-9 = good, 10 = excellent). If appropriate provide evidence to support your assessment. The second section can be used for other criteria or if the appraisee is working towards new role requirements. **Compare scores with the self-appraisal in B4. Discuss and note agreed points training/development needs and wishes (to B6).**

1. commercial judgement			others (for current or new role):		
2. product/technical knowledge			18. corporate responsibility and ethics		
3. time management					
4. planning, budgeting and forecasting					
5. reporting and administration					
6. communication skills					
7. delegation skills					
8. IT/equipment/machinery skills					
9. meeting deadlines/commitments					
10. creativity					
11. problem-solving and decision-making					
12. team-working and developing others					
13. energy, determination and work-rate					
14. steadiness under pressure					
15. leadership and integrity					
16. adaptability, flexibility, and mobility					
17. personal appearance and image					

B5 Discuss and agree the appraisee's career direction options and wishes, and readiness for promotion, **and compare with and discuss the self-appraisal entry in A5.** (Some people do not wish for promotion, but everyone is capable of, and generally benefits from, personal development - development and growth should be available to all, not just people seeking promotion). **Note the agreed development aim(s):**

B6 Discuss and agree the skills, capabilities and experience required for competence in current role, and if appropriate, for readiness to progress to the next role or roles**. Refer to actions arising from B3 and the skill-set in B4, in order to accurately identify all development areas, whether for competence at current level or readiness to progress to next job level/type.) Note the agreed development areas:**

B7 Discuss and agree the specific objectives that will enable the **appraisee to reach competence and to meet required performance in current job**, if appropriate taking account of the coming year's plans, budgets, targets etc., and that will enable the appraisee **to move towards, or achieve readiness for, the next job level/type, or if no particular next role is identified or sought, to achieve the desired personal growth or experience.** These objectives must adhere to the SMARTER rules - specific, measurable, agreed, realistic, time-bound, ethical, recorded.

B8 Discuss and agree (as far as is possible, given budgetary, availability and authorisation considerations) the training and development support to be given to help the appraisee meet the agreed objectives above.

Refer to the guidance notes. Personal development and support must be offered to all employees, irrespective of age, gender, race, disability, etc., and not just to those seeking promotion. Development is not restricted to job skills - it includes 'whole person'. Use your imagination. Job skills training isn't restricted to courses. Think about coaching, mentoring (by and of the appraisee), secondment to another role, holiday job cover, shadowing, distance-learning, e-learning, books, videos, attending meetings and workshops, workbooks, manuals and guides, researching, giving presentations; anything relevant, helpful and agreed to help the person develop. Avoid committing to training expenditure before suitable approval or availability has been confirmed. Understand development options and procedures before conducting the appraisal. Develop the whole person.

B9 Other issues (to be covered separately outside of this appraisal - continue on a separate sheet if necessary):

Signed and dated by appraisee: and by appraiser:

Grade/recommendation/summary as applicable:

Distribution of copies/confidentiality/accessibility details:

Volunteer Needs Assessment Tool

Staff Name: ___________________________________

CBDC: ____

Skill	Session Topic	I would like to receive Professional Development on the following topics	
		Introduction	Advanced
Reading Financial Statements	Understanding the Statements		
Director & Staff Liability	1) Legal Responsibility		
	2) Accountability, Transparency and Confidentiality		
	3) Duties and Responsibilities: Interacting with each other		
How to Conduct an Effective Meeting	1) Essential Elements of Successful Meetings		
	2) Parliamentary Procedure		
How to Network and Partner Effectively	Promoting CBDCs within your community		
Evaluating Board Effectiveness			
Risk Management	Managing Risk within the investment portfolio		
Occupational Health & Safety Workplace Health & Safety	1) Implications for your Clients		
	2) Implications for your Office		
Policy & By-Law Development			
The components of the CBDC Business Plan	Your role in this process		
HR Management	1) Recruiting Effectively		
	2) Steps in hiring the right employee		
	3) How to Conduct Effective Job Interviews		
	4) Executive Director Performance Appraisals		
Advocacy Strategies for Board			

Other Desirable Sessions:

1. ____
2. ____
3. ____

Please complete and send to Provincial Association of CBDCs via fax, 709-834-8363.
Thank you for your contribution to the Professional Development initiative.

Staff Needs Assessment Tool

Staff Name: ___________________________________

CBDC: ____

Skill	Session Topic	I would like to receive Professional Development on the following topics	
		Introduction	Advanced
Bankruptcy	The process of filing for and the implications of bankruptcy		
Statutory Liens	How they are used		
Financial Analysis	1) Of a business		
	2) Statement Analysis		
Spreadsheets	Update skill set on using spreadsheets		
Collections	The process		
Legal Issues			
Risk Management	Managing Risk within the investment portfolio		
Workplace Health & Safety	1) Implications for your Clients		
	2) Implications for your Office		
Business Plan Assessment	What the assessment should include		
Word Processing Packages	Update of skills in specified suite		
HR Management	1) Recruiting Effectively		
	2) Steps to hiring the right employee		
	3) How to Conduct Effective Job Interviews		
	4) Employee Performance Appraisals		
Client Counselling	Counselling a client, one on one		
Loan Monitoring/Aftercare	The process for maintaining a successful client		

Other Desirable Sessions:

1. ____
2. ____
3. ____

Please complete and send to Provincial Association of CBDCs via fax, 709-834-8363.
Thank you for your contribution to the Professional Development initiative.