ABSTRACT

This project addresses the issue of Succession Planning from the point of view of the individual employee as opposed to the more traditional view which comes from the organization and the employee's manager.

The model presented here will challenge much of the existing literature which tends to put the onus for training and career development in the hands of the organization and not the individual.

It will describe the various groups involved in succession planning, (organization, manager, and individual employee) and identify the responsibilities that each have, and the benefits that each will receive when the individual is directly involved in the process.

A variety of tools have been developed to assist the individual in progressing through the necessary steps to determine where their talents lie, where their interests lie, and how they can work with their employer to attain their goals while also helping the employer meet its goals.
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CHAPTER 1 - INTRODUCTION

It is a well known fact that Northern British Columbia, along with the rest of the country is in the middle of a severe skills shortage in many areas of the labour market and that it will only continue to worsen. “Next to the mountain pine beetle infestation, skills shortages are the single most important challenge facing the business community in our province” says Ken White the Chair of CFDA. Demand for skilled and educated workers is greatly outpacing the supply of those workers and companies are facing severe problems in their ability to produce results as there just are not enough people to do the work. As the supply of external workers is lessening, organizations must rely more heavily on their internal resources, and as a result, Succession Planning has become the model in today’s work world.

Succession Planning is the buzzword in many business journals of the day but the question begs to be asked as to whether succession planning is a term and philosophy that is truly understood. Defined as “a process designed to ensure the continued effective performance of an organization by making provision for the development and replacement of key people over time. Succession planning is generally considered to be a strategy of workforce planning” (HR-State-Tx).

Succession planning begins with the identification of certain individuals whom the company views as integral to the ongoing and continued success of the organization. Either by way of their attitude or their skill set, or a combination of both, these are people whom management feels would be worth the investment of time and dollars;
the intention being to keep them within the organization, helping to take it into the future.

As it is currently understood, succession planning is the responsibility of management – they are in charge, and they set the plan in motion, but in today's labour market, is that sensible, and is it fair? What about the individual employees? Do they, or should they have their own responsibility in the succession planning process?

Organizations look at succession planning as a means of meeting their goals and will make development and selection decisions based on the meeting of those goals. Therefore, it is understandable that they are looking at their employees with a view to screening those that they feel have promotional potential and to which the dollars available for development and training will be best utilized. Therefore, attitude and initiative can be just as important, if not more important, than job skills which can often be learned through training.

Large amounts of time and money are invested in the process of finding the right person so employers do not want to spend the money to train an individual who will leave and go to work for somebody else. In a 2003 article in Canadian HR Reporter, it was calculated that a company looking to hire a Client Services Associate with a $40,000 annual salary actually cost the hiring organization approximately $14,000 when it added up “... all the activities attributed to the hiring process, such as the
compensation of those involved, the purchase of office supplies, training, lost productivity and the learning curve" (Williams 2003).

Organizations want as much assurance as possible that the investment they make in their employees will be worth the cost and as such, may not be interested in investing in those individuals who do not demonstrate a level of initiative or interest in their current position.

With a succession plan that is purely employer driven, decisions will be made based on what the employer wants to accomplish for the organization and it will look to those employees that it views as having the highest potential. While this can be very successful, the exclusion of input from the individual employees creates a situation where ideas are coming from only one side of the table.

The question needs to be asked as to why the employees are not more involved in the process and the answer to this is not necessarily easy to determine. For some, it may be simply that they are not looking to advance their careers within the organization and are satisfied to remain where they are. For others who do want to advance, many may not know how to make that happen and what they individually need to do to obtain management support in their endeavour to move forward.

Through research, it will be shown that many organizations and employees still see succession planning as a tool for management and not one that should be utilized by all parties involved in the process. It will also be demonstrated that individual
employees can, and must take control of their own career development by way of a toolkit created just for this purpose.

Throughout this report there is one important underlying assumption that has been made – that of the culture of the organization in question. It must be understood that in order for a model such as the one presented here to be successful, there must exist a culture within the organization that encourages personal development and creates trust between all of the parties involved.

For this trust to happen, effective communication must not only be championed but put into action on a daily basis. Individuals must feel that they are working within a safe environment, one in which their ideas and goals are acknowledged and appreciated.
CHAPTER 2 - LITERATURE REVIEW

In his book, "The 7 Hidden Reasons Employees Leave: How to Recognize the Subtle Signs and Act Before It's Too Late", Leigh Branham (2005) states that 80% of workers surveyed over the last twenty-five years say they are not using their strengths on a daily basis and that their companies do not take full advantage of the employee skills that exist internally. With the need to retain one's employees and keep them engaged, why is it that companies are not, as Branham says, taking full advantage of these skills?

 Employers develop their staff members with the goal of retaining them and their knowledge within the company and as such, will try to make development decisions that support corporate strategy and goals however these corporate goals may or may not align well with the individual goals of the employee.

If the individual is looking to move into an area of job responsibility that is significantly different from their current situation, in all likelihood, the employer will not be aware of that interest and the corporate development plan will not reflect it. This is not the primary responsibility of the employer for two reasons:

1) The employer is looking to meet his or her own development goals.

2) It is not the job of the employer to know the specific aspirations of each of its employees – if the employee is looking for developmental support in an area that may not align with his or her current position, it is the responsibility of that individual to speak up and inform the employer.
Individuals need to understand that while their employers may have an interest in their personal ambitions it is not the job of the employer to act on those ambitions. Individuals also need to understand that they themselves must be in charge of the process and look to their employer as a potential resource to them, but not as the primary driver of their career development.

**PURPOSE OF RESEARCH PROJECT:**

To develop a model and subsequent toolkit which will provide individual employees with the means and methods required to take charge of their own career development in a way that will maximize their personal objectives while also aligning with the needs and objectives of the organization for which they work.

The labour market looks very different than it did just a few years ago due to the skills shortage and the fact that individuals no longer automatically stay with the same employer for their entire lives. “Globally, we are moving from a “buyers” labour market where there were more good employees than good jobs to a “sellers” market” (Duxbury 2005).

In the past, an employer could expect to receive numerous applications from qualified individuals for a single vacant position whereas now they are often fortunate to receive just a handful. As a result of this situation, employers need to look towards their current employees and work with them to keep them interested,
happy, and engaged. But what if the employee has different career aspirations for themselves than the employer has for that person?

Does this then make it necessary for the employer to shift their focus from the development plan of the employee who works for them to that of the individual who works for them? Is it realistic for the employer to take on, or be a part of the individual development of that person? What exactly is individual development and how, if at all does it differ from employee development?

Individual development can be defined as a personal decision made to advance one's individual talents and potential and then the creation of a plan to put that decision into action. Employee development is basically the same as individual development with one important difference - the decision is being made by another party, in this case, the manager and/or organization. Someone else is in charge of the process.

Are organizations already combining the development of the individual with that of the employee? In some cases, definitely yes, but why does this happen for some employees but not for others? What is it about a certain person that gives management the idea to become more involved? Is it something that management initiates, or is it something the individual initiates? What happens to nudge the employer to take that extra interest in one individual over another? Is it based purely on management wanting to take care of itself and pinpoint those individuals
that it views as of importance to the organization, or has the individual made their aspirations known?

Can the two work together in harmony? This model says yes, but puts the onus for certain aspects of it in the hands of each party. The organization can provide a nurturing environment and the tools necessary to create and implement a development plan but ultimately, the decision is up to the individual as to whether they want to use it or not.

The idea behind this model is simply as follows: Individuals need to take responsibility for their own development and future and stop presuming, or hoping that someone else, namely their employer will do it for them.

EMPLOYEE ENGAGEMENT

Much has been said and written around the idea of Employee Engagement and that not having an engaged workforce can prove disastrous for an organization.

Employee Engagement is a term, and an idea that is top of mind for many organizations today. Defined as “... the means or strategy by which an organisation seeks to build a partnership between the organisation and its employees, such that:

- Employees fully understands and is committed to achieve the organisation's objectives, and
- The organisation respects the personal aspirations and ambitions of its employees.
It is seen largely the organisation's responsibility to create an environment and culture conducive to this partnership [sic] (Hayward accessed July 2008).

Employee engagement is often given as the reason why many individuals leave their organization and is therefore something that managers must take seriously. "An engaged employee is an employee who is satisfied, who is committed, who is loyal and who gives that above-and-beyond discretionary effort" (Canadian HR Reporter 2005). From an employer point of view, having engaged employees may mean that your workforce has more loyalty to you as they feel they are appreciated for what they do and that they are an important part of the success of the organization. The general thought therefore, is that an engaged employee is an employee who will stay with your organization and not leave, or not leave as easily as a disengaged employee.

Employee Engagement Surveys are conducted regularly by many organizations to gauge the level of satisfaction that their employees feel. While management may take the lead in this process, employees need to understand that they share responsibility for their own engagement. Ingenuity Technologies Inc. of Montreal made it clear to their employees that they needed to share the effort of creating an engaged workforce. After completing an engagement survey with their employees, they promptly returned the results to the workforce stating "you have to help us help you. We can't just come up with all the answers" (Canadian HR Reporter 2005).
There are potentially many reasons why employees do not feel “engaged” and one of the most common is that of a lack, or a perceived lack of development opportunities, or the idea that their company does not value their individual contributions.

In a recent (2008) survey of employees at BC Colleges, of 77 statements presented, 5 of those which directly related to employee development scored in the bottom 10. Those statements were:

- Promotions are given to the most qualified employees at my organization.
- My organization is doing a good job of retaining its most talented people.
- My organization is doing a good job of developing its people to their full potential.
- My last performance evaluation was helpful in identifying actions I could take to improve my performance.
- The procedures for considering employees for job openings are fair.

This survey makes it clear that employees view career development as a key factor in their satisfaction, or dissatisfaction with their employer.

Authors of the book “Answers to Questions Most Frequently Asked about Organizational Development” state that “We do not have to stretch a point to say that upgrading employees’ skills and competencies increases their motivation to function more effectively in their work situations...The more competently workers perform, the more productive they are in their work setting” (Hanson 1995).
In his book, "Creating Commitment: How to Attract and Retain Talented Employees by Building Relationships that Last", Michael O'Malley states that while companies deploy formal and informal training for their employees, "there is, however, quite a bit that employees have to do on their own. It takes exceptional striving and developmental efforts to achieve extraordinary corporate ends. People have to learn on their own. For many employees, this means caring sufficiently about the employer and their work to want to exert the extra effort and put in the additional time..." (O'Malley 2000).

O'Malley expresses the opinion that employees are part of the process and his view is reiterated by Rob Yeung in his work "The Ultimate Career Success Workbook" (2003). Yeung is very clear in his opinion that in order to be considered for a promotion, an individual must exhibit three essential elements: 1) competence; 2) confidence and 3) a compelling argument. Yeung professes that it may not be enough to be skilled at one’s current job, to be considered for promotion one may need to exhibit the skills and behaviours necessary to attain the new, desired position.

This is where an individual who wants to develop their own career can take charge of the situation by being proactive in determining what skills they will require, projecting confidence in their ability to acquire these new skills and communicating to the decision makers that they have an interest in the new position. This last point again reiterates the need for employees to be proactive in letting their organization
know that they possess an interest in another position, whether within their field or not.

**THE EMPLOYEE / EMPLOYMENT MATCH**

"... a common cause of chief executives' downfalls is the failure to put the right people in the right jobs" (Barnett 2000). While this sentiment may relate to chief executives specifically, it underscores the importance of ensuring the right people are doing the right jobs and this is true at all levels of the organization, not just at the top.

Branham suggests that employers are not taking full advantage of the skills their employees have and goes on to say that the reason for this is a lack of passion on the manager's part for matching the talent of the individual to the right job for that individual. He continues by asking why so many businesses lack that passion and commitment to truly understand the nature of human talent.

It is easy to agree with Mr. Branham's logic that matching the right individual to the right job can often create a successful partnership for everyone involved; however the question remains, should it be solely up to the employer to know what that perfect match is? Is it not reasonable to hope, or expect that the individual involved will take some responsibility for that match?

From the very first moment that an individual submits an application for a job, that person is initiating the matching process between what they feel they can offer and
what the organization is requiring. When an individual applies for a position within a company, they are applying for a particular position, not a "place" within the company and it is in that position that their talents are recognized.

Why is it that some individuals continue on with being a part of the matching process while others curtail their involvement, allowing management to do it for them? Why should the process stop at that initial application? Is it not reasonable to hope that those individuals who want to advance will continue to match their skills and interests once they are in the company?

Every individual has things that they are good at and to which they have a natural talent. Branham refers to these traits as "motivated abilities" and says that "...people are naturally self-motivated to use them in their jobs, even if their jobs do not appear to require them". If this is the case, would it not make sense for the individual to apply for those positions where they can exercise these motivated abilities? While the answer may easily appear as yes, many individuals may not recognize a "motivated ability" as a true natural talent. It may be necessary to help the individual recognize what they are skilled at and what they enjoy doing.

When a position becomes available within an organization, generally the first thing that is done is to determine what is needed to fill the void and to help the company meet its goals. From that information, the knowledge, skills, and abilities required to perform those tasks are documented and written up into a job description that is the basis for the recruitment and selection process. That position is then advertised and
individuals who meet those criteria and who are interested in the stated position will apply. Historically, that is what it has all been about – filling the current need within the organization.

Hiring for the present may be just a part of the equation. Organizations looking towards their future growth may start to identify those traits – those motivated abilities – that will assist the individual in not only performing well, but staying interested and engaged.

In the past, when there were more applicants than available positions, organizations had the upper hand and could focus purely on their own requirements but the pendulum is shifting. There are often more vacant jobs than qualified applicants available to fill those jobs, meaning that in today’s business world the organization may need to start thinking more about the development needs and interests of the individuals who work for it.

**JOB EMPLOYEES VERSUS CAREER EMPLOYEES**

“I am convinced that nothing we do is more important than hiring and developing people” (Barnett 2000).

In many cases, specifically with entry level positions, individuals are applying for a job within a company. They hear of a vacancy and then they apply for it with their goal being the acquisition of that position. At that point, most often, they would be seen as a “job” employee – one who is hired to perform a particular set of tasks and
responsibilities based on what their resume and interview indicated they could do. They have no history within this new organization and both parties (applicant and organization) are hoping they have made the correct decision.

There is no set time limit required to determine if a new employee is someone that the organization will want to keep for the long term but when that decision does occur, the employer has made the shift from job employee to career employee. With that shift comes the planning of that individual's development within the organization.

General Electric has become very successful by doing just this – planning out an individual's development. "Every professional-level employee at GE has a career map that describes where they are in their career relative to positions they've had and may hold in the future. The map includes an assessment of their skills and the specific skills they'll need for the next positions" (Tichy 1998).

Employers identify certain traits or talents within the individual that they see as beneficial to the organization and ideas and plans are put in place to develop that person into the future employee that the company sees. While it may not be instantaneous, if a manager sees potential in an individual, they will very likely monitor that person officially or unofficially to see how they are doing over time, where their strengths and weaknesses lie and may, formally or informally, be mapping out a development plan for that person. In the employer's mind, this person is now a career employee.
Individuals may see themselves as job employees or career employees but "...Federal Express and Disney consider all individuals as career employees. Both firms have a large number of employees who are unlikely to spend their careers with the firm. Nonetheless, both treat everyone as a potential career employee. The training Federal Express gives its customer service people in Memphis and Disney's training of a 17-year-old would-be jungle boat driver far surpass the training many technical firms give their machinists" (Peters 1987).

What the company is doing when they identify who they determine is a career employee is what the individual needs to do if they want to become that career employee. However, the individual in question may not have made that same shift in how they see themselves. They may view their current job as just that, their current job which will end when something else comes along either within the same organization or not. However, if the organization is able to create a supportive environment and culture which provides the tools to help employees develop their interests and potential, "job" employees may quickly become "career" employees.

If the individual makes that shift, they may "map" out a very different plan than what their company is preparing for them, however ultimately, both parties have the same goal in mind – to develop the individual and maintain the employment relationship. If the "roads" are different, then the parties need to meet and work together towards a common direction. The company knows it wants to keep this individual, and the individual wants to stay – both sides just need to determine what that will look like.
It is very common to see many employee engagement survey results stating that individuals feel that they are not important in the workplace and that their contributions are not being recognized (BC Colleges Consortium 2008 Employee Survey). These are the career employees or potential career employees who may feel that they are only seen as job employees.

**SOLID CITIZENS - STATUS QUO IS FINE**

Being a career employee does not necessarily mean one has to aspire to move throughout the organization, searching out opportunities to advance either within their direct department or elsewhere within the company. Career employees can also be those individuals that Linda Duxbury refers to as “solid citizens”.

Solid citizens are those employees who are reliable, who come to work on time, and who do their jobs to the best of their abilities. These are the employees that managers can rely on and though they may never shine as the stars of their departments, they are solid and steady contributors to the success of the companies for which they work. Solid Citizens are dependable and are interested in being the best employees they can be within their current position and often times, that may be sufficient and more than satisfying for them.

Solid Citizens may or may not be interested in career development and this is a critical piece for management to understand. Not all employees want to be career employees under the definition that management attaches to that term. An organization needs its “solid citizens” and must not push those people into career
development paths that they may not want to take. Suggestions can be made and may be accepted, but if not, under no circumstances should the individual involved be viewed any differently than before the offer was made. People have their own motivations and these must be respected at all times. It is crucial that management not minimize the contributions or aspirations of this group of employees or that they not exclude these people when designing training programs and allocating training budgets.

“Career employee” can mean different things to different people and organizations need to be very careful that they do not forget these solid citizens. If they do, members of this group may become disillusioned and solid career employees could turn into job employees.

PERSONAL BRANDING

Perhaps one of the biggest problems that individuals face in moving upwards within their organizations is that they view their abilities and accomplishments in a different manner from how management views those same abilities and accomplishments. Each party has its own way of looking at things depending on what end goal they are working towards and as a result, individuals may need to present themselves in a way in which management can see them for what they feel they have to offer. In this regard, individual employees need to think about Personal Branding.

“Personal branding is basically the way you market yourself to the world” (Pavlina 2008). Similar to corporate branding which is about “identifying your organization’s
“cause” and leveraging it to attract the right people”, (Wheeler 2008) personal branding is a way for an individual employee to identify their own cause and attract the right opportunities to them.

“Branding is such a powerful tool in selling products that it makes perfect sense that we as individuals should brand ourselves – thereby creating a strong, positive sense of ourselves (the product) and our services that is different and better than what our peers have to offer (the competition) – for the greatest possible career success” (Andrusia 2000).

Those individuals who regard themselves as career employees understand the need to portray themselves in such a way that their organization also regards them as career employees. They recognize the need to “brand” themselves as branding allows them to take more control over their own development and marketing as opposed to letting someone else do it for them. This is particularly crucial if an individual wants to move from one functional department to another. While many skills and competencies may be transferable between the two, the change in department may not be something the manager would think of when looking at development plans for the employees within their division. If the individual is looking to make a change or just thinking about making a change, they need to take control of the situation. “If you don’t brand yourself, someone will do it for you – and you may not like the brand that is ultimately assigned to you” (Andrusia 2000).
The brand that someone else assigns an individual may be purely based on the position that that individual currently holds within the company. Being stereotyped by one's job is a very real possibility as a manager may equate an employee with the duties that person performs and may not regard that individual's prospects outside of their present position.

For example, an employee who is currently in the custodial department may wish to move to the retail side of the operation. If this person is highly personable and customer service driven, the career move may be logical to the manager, but then again it may not and the manager should not be the sole person responsible for making that connection and working towards it. Managers can identify strong workers and recognize skill sets but they can not, nor should they take the lead on the individual's desires if they are not made aware of them and that same individual does not actively do anything to move their chances forward.

A person needs to decide how they want to be identified within their work relationships – as an employee of the company for which they work or as a brand that contracts itself to that company. If the individual views themselves as a brand, in all likelihood they will take a greater interest in their own career path and be more proactive about their development. "The point I got is the need to ensure that you as a brand, are always evolving, learning and growing to ensure that you are marketable" (Schein 2005).
CHAPTER 3 – METHODOLOGY

America has always been the Self-Help Nation. Bootstrap Nation. Pioneer Nation. In the early years of our democracy, everybody provided for themselves and their families (and their neighbors in time of need). Nobody expected to be taken care of. Self-reliance, independence, and the freedom that goes with them were what we stood for, what defined us (Peters 1987).

WHAT IS A TOOLKIT?

If an organization wants to retain its staff, it must ensure it provides the tools necessary to allow its employees to develop and advance to jobs of greater complexity, challenge, or pay. Organizations can not be held responsible for the desire of the employee to advance – that is the job of the individual but what they can do is to put the tools in place to help that employee map out their own development.

As defined by Webster's New Millennium (on-line) Dictionary of English, a toolkit is defined as “the set of tools, implements, or weapons created and used by a cultural group or industry”. In the context of this report, a toolkit is a collection of charts, diagrams and templates that individual employees can access and use to determine where they currently sit in contrast to where they may want to be one day. It will enable the individual to see what skills, education and experience they will need to possess in order to get where they want to go.
Having access to a career development toolkit will allow an employee to research different career paths within their existing organization either with the assistance of their manager or confidentially on their own. For some individuals, being able to plan a course privately may be a more comfortable way to initially proceed.

While there are many advantages to an organization having a toolkit available to its employees perhaps most importantly, it puts the duty on the individual to take control of their own development and future. It allows them to have some control over what they do and how they are perceived within their organization. Some individuals may have already taken that control but many others may not have for the simple reason that they do not know how to create a plan based on what they want or do not want.

Having a toolkit available allows each person to use it if they want to and in any degree of involvement. It puts the pieces of the puzzle in place and provides an individual, private method of understanding one's career options and a means to putting ideas into action. For some, it may be simply an instrument for exploration of interests allowing them to see what may be an option for them, whether they want to follow through with it or not.

Hanson and Lubin (1995) ask “Related to employees’ contributions is how much influence they want and have in what happens on the job. Do they participate in decisions that affect their work life? At team meetings, are they being listened to and asked for their thoughts and feelings about what is being discussed? Being influential does not mean that employees get everything they ask for, but it means
that they are considered valuable assets to the team, department, or organization. The feelings that stem from being influential increase self-esteem and commitment to the department and to the organization”.

A toolkit provides a tangible way to prepare for a conversation that may not otherwise happen due to an employee not wanting to come forward or not feeling comfortable in coming forward to their manager. Having many of the pieces in place may initially create or increase a level of comfort in potentially moving forward.

There are obvious benefits to the employer. A toolkit of this type will help management identify those employees that they may not have initially viewed as career employees. If management provides these tools and employees are aware of them, the responsibility of using them now rests with the individuals. But these tools should not be seen as something that the employer insists that the employees use rather, they must be completely voluntary. The tools should be provided as a way for the organization to assist its employees in developing their own interests and talents which can ultimately result in an interested, engaged individual who feels supported and appreciated by their organization. The toolkit is just that – the tools that will help both parties succeed.

An added benefit of a toolkit is that employees may also realize they are qualified or nearly qualified for positions they may not have considered before. This toolkit will create options for individuals to view their abilities against the required qualifications and then let them map out the next steps in meeting those required standards either
with the assistance of their managers or on their own, whichever way they choose to do so.

For some employees with aspirations into areas that are significantly different from what they are currently doing, the fear may exist that they will not be taken seriously. Having career development tools in place will allow employees to begin the education and experience path that will help to move them towards these areas of interest. For most organizations, training budgets are defined and may be limited, so an employee looking to branch out into a new area may be a bit of a risk for the employer in that they might lose a dedicated employee from their initial position and may not end up with a strong employee in the new position. If the employee can show that they have done some research into what is required and perhaps even started the process on their own, they help their case by showing the manager that they possess a level of initiative. It is this initiative that may make the manager more willing to take a risk on that employee as they have come forward with the plan themselves and not waited for it to be presented to them.

The individual components of the toolkit, especially the Position Charts let the employee visualize where they currently are within the organization and where they may potentially want to be. The toolkit will provide the employee with the information they need, without necessarily having to ask for it, as for many individuals this may be the riskiest part of the whole development process – exposing themselves to a new possibility. The toolkit will allow them to figure it out privately and put them in charge of when, and if, they want to share their vision for themselves.
If the individual has a well outlined plan for themselves, and an idea of how to get there, management will be that much more willing to review it and work within it. "Employees feel valued when their employer is interested in retaining their skills and willing to invest in their futures" (Neault 2006).

But what about those individuals who do not really know what they want to do but do know that they want to remain with the organization in some capacity, potentially one that may be outside of their current duties. At this point, the toolkit would be very helpful in providing a method for individuals to inventory their current knowledge, skills and abilities allowing them to clearly define where their strengths and weaknesses lie. Completing a skills inventory is not that different from updating one's resume but the context of this process is to be for the benefit of the individual to see where they are at as opposed to producing a document, similar to a resume that is written with the employer in mind.

Many people may feel that they are perceived, or pigeonholed into a particular position or department and may not consciously look outside of that department for development opportunities. This could happen for a variety of reasons:

- Lack of knowledge of the organization and its opportunities
- Lack of confidence in one's own abilities
- Fear of going outside of one's familiar zone
- Not knowing what skills they are lacking in moving forward
- Not knowing what the employer may be looking for
While considering and/or deciding on a career path, and the development options necessary to do that must be the responsibility of the individual, the employer can definitely help by having employment documentation that clearly outlines the requirements of each individual job, the standards that the company expects in fulfilling those job duties and a visual depiction of all the current jobs within the company and what is thought to be the natural progression for those jobs.

Certain skills and abilities are more tangible than others and easier to both understand and measure. For example, typing speed is easy to determine with a test and corresponding word count – an individual can type 40 words per minute or they can not and this could help determine their ability to perform in a new job. Unfortunately, not all skills are as easy to quantify.

Certain abilities focus on soft skills – more intangible elements that can greatly help, or hinder an individual's chances of success within a new position. The ability to organize, communicate, and manage time are not as easy to judge and may have different meanings of accomplishment to different people. If a position calls for strong organizational skills, how does an individual know what that means and if they possess that skill? The organization must be able to provide guidelines of their expectations in what they see as exceptional, satisfactory, and unsatisfactory.

Understanding this will allow the individual to determine where their skills lie in comparison to what the company is looking for. Having this knowledge will facilitate the employee focusing on development in those areas where they feel they may fall
short and may also help them to decide if they even want to achieve these levels of performance. It must be acknowledged that advancing within a company is as much a personal choice as is not advancing within a company.

This knowledge will also enable the employee to review their employment history and better prepare for assessment processes used to hire for the positions in which they are interested. Knowing what the expectation is and being able to demonstrate the ability to meet that expectation will show the employee in a far better light, specifically if they are applying for a position in an area outside of their current department. Many skills are transferable and that fact needs to be understood by all involved.

If an employee is a top communicator in one department, there is no reason to believe that they can not “transfer” those same skills over to another department, the players may be different and the tasks may be different, but the ability and talent to perform those tasks is still in place.

Transferability of skills is an area that many individuals may not understand and this is something that could be stopping them from moving into different areas. People must understand that the ability to prioritize one’s workday does not change from job to job, what may change are the specific elements within each particular situation but the skill set necessary to determine what must be viewed as most important is the same.
If an individual can swim in a pool, they can also swim in an ocean. They may need to adapt their swimming style to allow for water currents and waves, but the basic swimming skills are still in play. It is that skill level and ability to adapt and transfer those skills to the new department that the individual needs to highlight to their employer.

THE INDIVIDUAL TOOLS
The existence and availability of the individual tools will make the employee's career development process easier as it will provide a full documentation package allowing them to understand where they are, in what areas they possess strengths and weaknesses, and how to approach their managers with their new plans.

The toolkit will be made up of the following documents:

- Position Charts
- Job Descriptions
- Adaptive Skills Templates
- A Skills Inventory Template
- A Career Development Plan Template

For the purposes of this model, individual tools have been created for a fictional organization, XYZ Company.
POSITION CHARTS

Position Charts are visual depictions of how individual positions are structured within a department and then how those departments are structured within the overall organization. They are basically the same as Organization Charts but without the attachment of individual names. The point here is to show the flow of jobs within the company, not who is currently doing those jobs.

Many individuals may have an idea of where they want to be in relation to where they are now and may also have the ability to map out the direction on their own. Others may not and this may be simply because they are not aware of all of the potential avenues within a company and the relationships between those avenues. The visual depictions, as provided in the Position Charts are beneficial as they illustrate how the individual positions fit within the organization and allow the employees to see where they fit within that organization. Helping the individual to see how the entire company is laid out, in addition to their personal department shows a willingness to look within when it comes to promotions and opportunities.
FIGURE 1: POSITION CHART
FLOOR SERVICE (OPERATIONS) DEPARTMENT

Floor Manager, Operations

- Department Supervisor
  - Floor Service - Individual Departments
    - Casual Floor Service
  - Floor Service - Individual Departments
    - Casual Floor Service
- Department Supervisor
  - Floor Service - Individual Departments
    - Casual Floor Service
- Department Supervisor
  - Floor Service - Individual Departments
    - Casual Floor Service
FIGURE 2: POSITION CHART
CUSTOMER SERVICE (CASHIERS) DEPARTMENT

Customer Service Manager, Cash

Head Cashier

Shift Supervisor

Cashier

Returns / Special Orders Supervisor

Returns / Special Orders Clerk

Casual Cashier
FIGURE 3: POSITION CHART
PURCHASING DEPARTMENT

Purchasing Manager

Head Buyer

Assistant Buyer

Casual Buyer
FIGURE 4: POSITION CHART
SHIPPING AND RECEIVING DEPARTMENT

Manager, Shipping and Receiving

Assistant Manager, Shipping and Receiving

Shipper and Receiver

Casual Shipper and Receiver
FIGURE 5: POSITION CHART
FINANCE AND ACCOUNTING DEPARTMENT

Controller

Chief Accountant

Accountant

Payroll Supervisor

Accounts Payable Supervisor

Payroll Clerk

Accounts Payable Clerk

Casual Clerk

Accounts Receivable Supervisor

Casual Clerk

Accounts Receivable Clerk

Casual Clerk
FIGURE 6: POSITION CHART
HUMAN RESOURCES DEPARTMENT

Director, Human Resources

Administrative Assistant

Associate Director, Human Resources

Benefits and Pension Administrator
Training and Development Administrator
Compensation Administrator
Labour Relations Administrator
FIGURE 7: POSITION CHART
SENIOR EXECUTIVE TEAM

President

Executive Assistant

Director, Human Resources

Controller

Purchasing Manager

Manager, Shipping and Receiving

Floor Manager, Operations

Customer Service Manager, Cash

Manager of Facilities
FIGURE 8: POSITION CHART
XYZ COMPANY

- Floor Service (Operations) Department
- Shipping and Receiving Department
- Finance and Accounting Department
- Customer Service (Cashiers) Department
- Human Resources Department
- Purchasing Department
UPDATED JOB DESCRIPTIONS

A Job Description is a “...written statement that describes the activities and responsibilities of the job as well as important features of the job (such as working conditions and safety hazards)” (Dessler 2007). Job Descriptions are a valuable career planning tool as they not only allow employees to ensure they are meeting all the requirements of their current positions but they also provide full information on other jobs in which the individuals may have an interest.

Understanding what will be required in future positions makes it much easier for individuals to plan out their development and work towards those areas in which they need to increase, or expand their skill set.

Included on the next page is a sample Job Description for a Cashier’s position within XYZ Company.
TABLE 1: SAMPLE JOB DESCRIPTION – CASHIER
XYZ COMPANY

Job Title: Cashier
Department: Customer Service
Reports to: Customer Service Manager, Cash or their Designate
Hours of Work: 35 hours per week
Wage: $20.00 per hour with full benefits after 3 months

Summary:

The cashier is part of the Customer Service (Cashiers) Department and is responsible for handling cash and credit payments, making change, giving receipts, and accounting for all payments.

Specific Duties will Include:

- Greeting customers
- Establishing or identifying prices of goods
- Tabulating total prices of goods using an electronic cash register, optical price scanner or other equipment
- Receiving and processing payments by cash, credit card or debit card
- Wrapping and placing merchandise in bags
- Answering customer inquiries
- Processing returns and exchanges

Qualifications:

- Grade 12 Diploma
- Minimum of 2 years experience in a cashier position
- Ability to interact well with fellow employees
- Outstanding communication skills
- High level of comfort with numbers and calculations
- Ability to work in a busy, stressful environment

Additional Information:

- Cashiers must be alert and courteous at all times
- This position requires the individual to be on their feet at all times
- Moderate lifting of 10 to 20 kilograms may be required on occasion
- Some evening or weekend shifts may be required
ADAPTIVE SKILLS TEMPLATES

One of the more difficult elements of employee selection that managers face is in the determination of the soft skills - those items that are not easy to quantify. As a result, managers may feel unprepared to make hiring decisions for positions that encompass a great deal of these soft skills and applicants may not understand why they were deemed as not having these abilities. It is in these situations that Adaptive Skills Templates can be extremely helpful.

As developed by Dr. Steven Crenshaw, "Adaptive Skills are those competencies that enable people to manage themselves in relation to the demands of conformity and/or change in particular situations. Adaptive skills are acquired in the course of life experience, particularly in early childhood, on practically a subconscious level. They are integrated as the values, attitudes, and manner of responding to the physical, social, and environmental circumstances in which persons find themselves..." (2007).

Adaptive skills are those abilities that individuals exhibit in situations where there is no set answer as the solution to the problem is not one-dimensional - there is no right way or wrong way to do the job. Adaptive Skills encompass the entire knowledge and experience that each individual has and their ability to take that knowledge and experience and apply it to the situation in which they now find themselves.

Where problems can arise are in the understanding of what makes an individual an outstanding team player versus an acceptable, or very poor team player. When
hiring decisions are being made on these factors, it is crucial that both parties have a clear and similar understanding of the criteria used in these determinations. It is because of this situation that organizations should develop Adaptive Skills Templates that are available to both managers and employees.

From the point of view of employee career development, an individual who wants to move into a new position that is deemed as requiring an outstanding degree of communication skill can understand what that means to the company. Adaptive Skills Templates help to quantify those items that are often very difficult to quantify.

The most often cited soft skills that managers look for when filling positions are:

1. Communication Skills
2. Multi Tasking Skills
3. Organizational Skills
4. Teamwork Skills
5. Time Management Skills

Included on the following pages are sample Adaptive Skills Templates for all positions within XYZ Company.
<table>
<thead>
<tr>
<th>Outstanding: Constructive Assertion</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Understands the implications of the communications and ensures that all necessary parties are included</td>
</tr>
<tr>
<td>• Acts in an appropriate manner at all times and with all groups</td>
</tr>
<tr>
<td>• Has a strong command of the English language, both verbal and written</td>
</tr>
<tr>
<td>• Has a strong command of any technical language that may be necessary to the position in question</td>
</tr>
<tr>
<td>• Is able to communicate ideas clearly and concisely</td>
</tr>
<tr>
<td>• Knows when to bring information forward, before it may be asked for</td>
</tr>
<tr>
<td>• Understands that some information may be highly confidential and is able to maintain that secrecy</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Acceptable: Reactive Engagement</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Does not always understand the confidentiality of information and may share it in error</td>
</tr>
<tr>
<td>• Is able to understand technical language at a basic level and communicate it to others at that same basic level</td>
</tr>
<tr>
<td>• Has a general idea of what information can, and should be shared</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Very Poor: Disintegrating Disengagement</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Is unable to communicate information to other parties</td>
</tr>
<tr>
<td>• Does not respond to messages in a timely manner</td>
</tr>
<tr>
<td>• Does not respond to the appropriate parties</td>
</tr>
<tr>
<td>• Uses inappropriate language (slang and profanity)</td>
</tr>
<tr>
<td>• Shares confidential information</td>
</tr>
</tbody>
</table>
### TABLE 3: ADAPTIVE SKILLS TEMPLATE – MULTI TASKING SKILLS

<table>
<thead>
<tr>
<th>Multi Tasking Skills</th>
<th>Outstanding: Constructive Assertion</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Is able to successfully complete a variety of different tasks simultaneously</td>
</tr>
<tr>
<td></td>
<td>Is able to meet all deadlines of various projects and tasks</td>
</tr>
<tr>
<td></td>
<td>Is able to prioritize own tasks while ensuring that information required by other parties is received in a timely manner</td>
</tr>
<tr>
<td></td>
<td>Understands what is important and can make judgment calls on completion of items if time is a constraint</td>
</tr>
<tr>
<td>Acceptable: Reactive Engagement</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Can work on multiple projects at a time if provided with some guidance and direction</td>
</tr>
<tr>
<td></td>
<td>May require occasional help in prioritizing multiple activities</td>
</tr>
<tr>
<td></td>
<td>Is able to meet deadlines most of the time</td>
</tr>
<tr>
<td></td>
<td>May make occasional mistakes if working on too many items concurrently</td>
</tr>
<tr>
<td>Very Poor: Disintegrating Disengagement</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Is unable to successfully complete more than one task at a time</td>
</tr>
<tr>
<td></td>
<td>Must be provided with clear instructions and timelines if given more than one task to complete during the same time period</td>
</tr>
<tr>
<td></td>
<td>Frequently misses deadlines when completing tasks</td>
</tr>
<tr>
<td></td>
<td>Makes frequent mistakes if working on more than one project at a time</td>
</tr>
<tr>
<td>ORGANIZATIONAL SKILLS</td>
<td></td>
</tr>
<tr>
<td>------------------------</td>
<td></td>
</tr>
<tr>
<td><strong>Outstanding:</strong> Constructive Assertion</td>
<td></td>
</tr>
<tr>
<td>• Is able to keep the elements of each project separate from those of other projects</td>
<td></td>
</tr>
<tr>
<td>• Is able to quickly reference and provide information when asked</td>
<td></td>
</tr>
<tr>
<td>• Rarely loses information and papers</td>
<td></td>
</tr>
<tr>
<td>• Personal filing is always current</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Acceptable: Reactive Engagement</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Is generally able to work successfully on more than one project at a time</td>
</tr>
<tr>
<td>• Is able to produce requested information, though not always in a timely manner</td>
</tr>
<tr>
<td>• Occasional may misplace information and materials</td>
</tr>
<tr>
<td>• Personal filing is current at most times</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Very Poor: Disintegrating Disengagement</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Confuses details from one project with other projects</td>
</tr>
<tr>
<td>• Is unable to produce information when requested and may even lose important documents/websites</td>
</tr>
<tr>
<td>• Personal filing is not current and can result in decisions being made based on incomplete information</td>
</tr>
</tbody>
</table>
## TABLE 5: ADAPTIVE SKILLS TEMPLATE – TEAMWORK SKILLS

<table>
<thead>
<tr>
<th>TEAMWORK SKILLS</th>
<th>Outstanding: Constructive Assertion</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Is able to recognize the individual strengths and weaknesses of each team member</td>
</tr>
<tr>
<td></td>
<td>Is able to put any personal differences aside in order to support the success of the team</td>
</tr>
<tr>
<td></td>
<td>Gives full credit to team members for their contributions</td>
</tr>
<tr>
<td></td>
<td>Works well with other people at all times</td>
</tr>
<tr>
<td></td>
<td>Is frequently requested as a committee/team member</td>
</tr>
<tr>
<td></td>
<td>Is very comfortable bringing forward their own ideas while understanding that the team may not agree, and the idea may not be used</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Acceptable: Reactive Engagement</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Enjoys working with others but can be distracted by an occasional personality conflict</td>
</tr>
<tr>
<td></td>
<td>May not easily be able to see the talents of fellow team members but realizes that every member has been selected for a particular reason</td>
</tr>
<tr>
<td></td>
<td>Is generally comfortable bringing forward their ideas but may be upset if the group does not agree</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Very Poor: Disintegrating Disengagement</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Does not enjoy working with others and discourages team projects within their own personal work place</td>
</tr>
<tr>
<td></td>
<td>Takes personal credit for the work of other members of the team</td>
</tr>
<tr>
<td></td>
<td>Does not appreciate differing opinions and viewpoints</td>
</tr>
<tr>
<td></td>
<td>Is not able to put personal feelings aside for the good of the team</td>
</tr>
<tr>
<td></td>
<td>Will not bring forward their own ideas or if they do, will be angry if the other team members do not agree with them</td>
</tr>
<tr>
<td>TIME MANAGEMENT SKILLS</td>
<td></td>
</tr>
<tr>
<td>-------------------------</td>
<td></td>
</tr>
<tr>
<td><strong>Outstanding:</strong> Constructive Assertion</td>
<td></td>
</tr>
<tr>
<td>- Proactively puts together a comprehensive, written schedule of required tasks and goals</td>
<td></td>
</tr>
<tr>
<td>- Adheres fully to set timelines</td>
<td></td>
</tr>
<tr>
<td>- Adapts schedule as needed for anticipated unexpected events and circumstances</td>
<td></td>
</tr>
<tr>
<td>- Builds adequate &quot;slack&quot; for schedule</td>
<td></td>
</tr>
<tr>
<td>- Comes fully prepared to each session (effective use of class time)</td>
<td></td>
</tr>
<tr>
<td>- Negotiating agreements with significant others over time commitments</td>
<td></td>
</tr>
<tr>
<td>- Leaves open sufficient time for health/well-being activities</td>
<td></td>
</tr>
<tr>
<td>- Effectively prioritizes all activities</td>
<td></td>
</tr>
<tr>
<td>- Negotiates well ahead of time for time off, etc.</td>
<td></td>
</tr>
<tr>
<td>- Is honest, realistic, and accurate in budgeting time</td>
<td></td>
</tr>
</tbody>
</table>

| **Acceptable:** Reactive Engagement |
| - Has a rough approximation of schedule of goals and tasks (might not be written down) |
| - Completes assignments on time, but sometimes at the last minute |
| - Sets/monitors schedule but sometimes loses focus on time scheduling activities |
| - Occasionally over or under schedules |
| - Sometime leaves too little "slack" in schedule |

| **Very Poor:** Disintegrating Disengagement |
| - Has no schedule required tasks/goals to be completed |
| - Misses assignments |
| - Procrastinates on completion of tasks |
| - Puts off important tasks/assignments |
| - Gets side-tracked by trivial, irrelevant tasks |

Please note, this specific Adaptive Skills template (Time Management) was developed by Steven Cronshaw and the 2nd year MBA class at UNBC in October 2007.
SKILLS INVENTORIES

Defined by Business Dictionary (on-line) as a “listing of abilities, capabilities, qualifications, and career goals of the employee to identify suitable candidates for internal recruitment or promotions”, a Skills Inventory is a tool often used by management to determine which employees are ready for promotion. Based on the idea of individual career development, the Skills Inventory is a document that employees need to be aware of and use to its fullest extent as it provides a clear listing of what particular skills and abilities each individual has.

The benefit in creating a Skills Inventory is that once completed and kept current, an individual can easily compare the things they can bring to the job versus those items that are outlined in the job description. Being able to identify the outstanding items allows the individual to see where they may fall short and/or where their strengths lie in respect to a different position.

A Skills Inventory not only helps the individual list those talents and traits that they are utilizing in their current positions, it also provides a place where they can list those things that they both like and dislike about their jobs, current or previous. Recognizing clearly what aspects of work they enjoy or do not enjoy is useful as this knowledge can assist individuals in pinpointing those areas that they would like to explore further or avoid entirely.

Included on the next page is a sample Skills Inventory template.
TABLE 7: SAMPLE SKILLS INVENTORY

NAME:  
DATE:  
CURRENT JOB TITLE:

<table>
<thead>
<tr>
<th>FORMAL EDUCATION and TRAINING:</th>
</tr>
</thead>
<tbody>
<tr>
<td>(include: High School / College / University / Apprenticeships / Other)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ADDITIONAL COURSES AND WORKSHOPS ATTENDED:</th>
</tr>
</thead>
<tbody>
<tr>
<td>(include type of course, subject of course, year taken/completed)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>EXPERIENCE:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>WHAT ASPECTS OF YOUR CURRENT OR PREVIOUS JOB(S) DO YOU ENJOY?</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>WHAT ASPECTS OF YOUR CURRENT JOB OR PREVIOUS JOB(S) DO YOU NOT ENJOY?</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>WHAT SKILLS AND TRAITS DO YOU CONSIDER AS YOUR STRENGTHS?</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>WHAT SKILLS AND TRAITS SO YOU SEE AS AREAS OF OPPORTUNITY?</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>WHAT AREAS OF THE ORGANIZATION ARE OF INTEREST TO YOU?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Are you willing to relocate to another location, if applicable?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>WHAT OTHER TALENTS DO YOU POSSESS AND HOW CAN THOSE TALENTS HELP YOU IN YOUR CAREER DEVELOPMENT?</th>
</tr>
</thead>
</table>

CAREER DEVELOPMENT PLANS

A Career Development Plan (CDP) is a comprehensive document that encompasses all aspects of an individual's path towards their intended goal. The purpose of the CDP is to provide a tangible, clear illustration of what needs to occur in order for the individual to move from where they are to where they want to be.

The CDP provides a full, detailed description of the activity or activities that the employee plans to undertake, the anticipated timeframe, any resources that will be required, the benefits to all stakeholders, and any other details deemed relevant to the plan.

While the CDP is designed to be a self-directed document, it will definitely assist the individual in approaching their manager if and when they choose to move forward with their plan and wish to secure further organizational support.

Included on the next page is a sample Career Development Plan template.
### TABLE 8: SAMPLE CAREER DEVELOPMENT PLAN

**NAME:**  
**DATE:**  
**CURRENT JOB TITLE:**  

<table>
<thead>
<tr>
<th>ACTIVITY or ACTIVITIES</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Please provide as much detail as possible regarding the context of the activity.</td>
<td></td>
</tr>
<tr>
<td>Are there numerous components to the activity?</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TIMEFRAME</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall timeframe and timeframe of any individual components?</td>
<td></td>
</tr>
<tr>
<td>What alternate dates are available?</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>RESOURCES REQUESTED</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>What dollars, supplies, materials, etc. are required?</td>
<td></td>
</tr>
<tr>
<td>Are there any grants / funding / etc. available to the organization to assist individuals with this training?</td>
<td></td>
</tr>
<tr>
<td>Is there any funding available through partnerships with the business community?</td>
<td></td>
</tr>
<tr>
<td>What monetary commitment is the employee willing to make?</td>
<td></td>
</tr>
</tbody>
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<tr>
<th>BENEFITS TO THE EMPLOYEE</th>
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<tr>
<td>How will this training/development benefit you?</td>
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<tr>
<th>BENEFITS TO THE ORGANIZATION</th>
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<tr>
<td>What are the benefits of this employee development to the organization?</td>
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<th>MISCELLANEOUS</th>
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<tr>
<td>Are there additional cost(s) associated with this training?</td>
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<td>Will the organization need to join and maintain membership in a professional association?</td>
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<td>Are there annual dues or fees that will need to be paid? Who will pay them?</td>
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<tr>
<td>What about future upgrading of skills to maintain certification – is it necessary? Who will pay for it?</td>
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THE TOOLS TOGETHER

Once the tools are in place, the employer must ensure that all employees are aware of their existence, and that access to them is available to everyone in a manner that allows the individuals to use them confidentially if they so choose. Management must understand that while some employees may be very comfortable in sharing their plans, others may not. For some, this exercise may be a very strong step in career development within their organization that they are happy to share, others may not be so sure and may fear, rightly so or not, repercussions from their current manager or the fear that they may not be taken seriously. Others may want to undergo the exercise just for interest purposes only, with no immediate plans to act on the information.

Everyone involved in this process needs to be clear on the fact that having a toolkit in place does not necessarily ensure that an individual will actually use it. The intent of these tools is to assist individuals in taking the lead on their own career planning practices - it is not to force individuals to do it. The old adage “you can lead a horse to water but you can not make him drink” is appropriate here.

It must be noted that for this model to work, the organization must ensure that everyone within the company is aware of these tools and that they have full, confidential access to them. If this does not happen, or does not happen consistently, the whole intent of the process is compromised.
CHAPTER 4 - MEANS AND METHODS

"... Many organizations are taking greater interest in assisting employees to analyze and assess their abilities and interests and to implement their career planning activities; it is becoming increasingly clear that individuals must also assume greater responsibility for their own career development, ensuring a sufficient knowledge and experience base to remain employable" (Bowditch 2008).

The intent of this model is to assist employees in their own career planning and development but it is not just the employee who is involved. There are various stakeholders with an interest in the process, each having their own responsibilities to the model and each hoping to receive benefits from that model.

WHO ARE THE INDIVIDUAL STAKEHOLDERS?

There are three very distinct parties involved in this process each having their own goals and needs: the organization, the manager, and the individual employee and all three must realize that these distinct goals and needs may not always be in harmony between the parties. In some situations a fourth group, the union may also be part of the process.

THE ORGANIZATION

The organization has a huge role to play in the success of an employee career development model and subsequent process as it sets the tone for everyone who works within it. Ultimately, it is the organization that is responsible for providing the
tools necessary for the employees to plan out their development, should they want to. Without the organization behind it, this model will be purely for show, not application.

If this happens, not only will a great opportunity be lost, but credibility will be questioned. If the organization wants this to happen, it must put into place all those items that are required for it to succeed and ensure that all of its employees, regardless of title or position know that it exists and that it is supported. If it is discovered that constraints have been put in place by certain individuals or departments, it is the job of the organization to ensure those constraints are removed.

THE MANAGER

The manager generally has the closest relationship with the individual employee and can have a significant influence on that relationship. Through their career development plans, employees may wish to stay within their current departments, working their way up through the various positions, as is common in most corporate development plans. If this is the case, the manager may be very willing to help the employee advance as they (the manager) will continue to personally benefit from that individual’s contributions. But what if the individual is looking to move outside of their current department?

Potentially, this can put the manager in a difficult position. On the one hand is the desire to keep a strong employee within their circle to help meet departmental goals, whereas on the other hand is the overall corporate culture of encouraging individual
development, potentially within a different organizational area. Managers may not want to "lose" their strong employees.

There is also the possibility of the manager feeling threatened by the individual's career aspirations, however in the context of this report, the assumption continues to be made that the entire organization and its individual members are supportive of this new model.

THE EMPLOYEE

It is of utmost importance that the employee understands his or her role in this career development model.

If an organization has a culture of development and growth and provides these career development tools to its employees, it is evident that the engagement of staff is of top priority. Individuals however must not mistake this as a "free pass" to move anywhere within the organization by nature of their being part of that organization. Each individual, if they choose to, must take the initiative to use the tools made available to inventory and develop their skills in creating their own futures.

THE UNION (IF APPLICABLE)

If the organization is unionized, rules pertaining to promotion as set out in the collective agreement may directly conflict with the concept of advancement within the organization as presented here. If the collective agreement clearly states that positions are hired on the basis of the seniority of its members, then individual
employees may feel stymied in their efforts to develop their skills and advance their careers.

If seniority is the sole deciding factor, the question needs to be asked: Where does the union stand on the concept of individual career development? If seniority is, and remains the deciding factor, the whole intent behind individual career development is essentially a moot point as positions will be awarded to the longest term members, not necessarily the members who are the best qualified or who have made the effort to increase their skills with the goal of obtaining the new positions.

If seniority is currently the key factor, there is no reason to believe that conversations can not occur between the organization and the union to potentially change the way that promotion and advancement are handled. If the culture of the organization is one of partnership and trust, there is a very real possibility that the collective agreement language could be altered to embrace the concept of personal employee development.

WHAT ARE THE RESPONSIBILITIES?

Each group has distinct responsibilities to ensure the success of this model. Those responsibilities are as follows:

THE ORGANIZATION

What the organization must provide are the tools outlined below:

- Position Charts
• Job Descriptions
• Adaptive Skills Templates
• A Skills Inventory Template
• A Career Development Plan Template

In addition to these tangible items, the organization must also provide an environment that encourages personal development, whether in the form of budgetary assistance and/or time away from work for education whenever possible.

THE MANAGER

It is the manager who will often know of future development opportunities long before they are made public and that manager may begin thinking of the optimal match between opportunity and employee. In some cases, the manager may not know that an employee is beginning the development process as the tools are purposely set up to allow for a level of confidentiality should the employee want that.

If the manager already knows, or at the point when they find out, what they can do is to listen to the employee and offer suggestions where applicable, especially if the development plan is within the current department. Managers can assist employees here in that they will generally have more information regarding training budgets and how to access them, upcoming educational and operational opportunities, and any other avenues that the employee may not be aware of.
In the very real situation that a new position may not be readily available, the manager may be able to provide the employee with some additional duties in their area of interest or involve them in a team or project that would allow them to further investigate their new interest and potentially allow them to show off some new skills. This not only acknowledges the initiative taken by the employee, it also demonstrates organizational support of the overall idea of personal career development.

THE EMPLOYEE

These tools are put in place for the benefit of the organization’s employees, should they choose to use them, therefore in a sense the employees have no responsibility in this process if they do not want it. Because this model is purposely set up to allow for confidentiality, the duty of the employee only commences once they have come forward and voiced their intention to take advantage of the tools that the organization is providing. At this point, they are then taking responsibility for their own futures.

Once they have decided to do this, they are now accountable to themselves in choosing to take steps towards their personal development. Again, the employee is the driver of this model and they have the option of using it, not using it, or using it to some particular degree. They must realize that choosing to use the model and actually moving forward with it is their personal choice and subsequent responsibility.
WHAT ARE THE BENEFITS?

The benefits of this model are many and can be specific to each of the individual groups and/or beneficial across all stakeholders.

The training and development of employees not only builds a more engaged workforce, it also can increase an organization’s competitive advantage in the marketplace. In its 1995 annual report, The Men’s Warehouse noted that it had “…achieved compounded annual growth rates in revenues and net earnings of 32 and 41 percent, respectively, and that the value of its stock had increased by approximately 400 percent. The company attributes its success to how it treats its people and particularly to the emphasis it has placed on training, an approach that separates it from many of its competitors” (Pfeffer 1999).

THE ORGANIZATION

In the immediate instance, being known as an organization that has and that supports a strong employee career development model may attract those individuals to whom development is an important feature of employment. For those people, this may be an employer with whom they will wish to remain, thereby increasing the organization’s chance of having this employee for a longer period of time.

Having the tools in place to allow an individual to develop their career not only helps the individual in question, it helps other employees within the organization by actually showing that the organization practices what it preaches. Being able to see fellow co-workers move throughout the organization may stimulate other employees
to review and increase their skills allowing them to benefit from that same level of movement. As employees move, the positions they held now become available providing opportunities for others to take advantage of. Individuals will also recognize that the support they receive shows the loyalty the organization has for them and hopefully that loyalty will be reciprocated.

THE MANAGER

Individual employees can begin the development process easily on their own with the tools already described, but ultimately at some point they will need the support of their individual managers. It is therefore critical that those managers understand that this model will benefit them also, both in their own development as they personally use the tools, and in the increased competencies of their staff.

The benefit to the manager is that as the employee goes through this process and learns new skills, those skills will now be available to use within the department or division. Even a slight increase in knowledge and skill can assist a manager in addressing a new problem or finding a better way of doing something.

THE EMPLOYEE

Benefits to the employee are numerous. First and foremost is the knowledge that the organization for which they work supports them and recognizes them for the contributions they provide. Having an employer show that sort of loyalty to its employees is a good indication of how that organization operates in the bigger picture.
A model such as this one allows an individual to, in a sense, spread their wings both in what they do and how they think. Knowing that support exists, be it in a moral or more tangible way will boost one's confidence and may also increase the possibility of looking beyond the more expected areas of advancement. Knowing that one is in a safe, supportive learning environment can greatly increase the desire to look farther than one normally would if they were standing alone.

HOW DO THE DIFFERENT GROUPS CONNECT?

As described above, each of the stakeholder groups has its own interests and its own benefits to gain by using this model however; it is the interconnection of the groups and the degree of that interconnection that makes the model the most successful.

The organization, by supplying the tools and encouraging career development shows itself to be an entity that recognizes the importance of its employees and will do what it can to help them succeed professionally while hopefully remaining within the organization.

The manager, by assisting the employee in learning and demonstrating new skills and letting the employee use those skills when possible shows the support of the organization on a more personal level, and in a way in which the employee can easily be involved.
The individual, by using the tools provided better prepares themselves for future opportunities within the company, stays engaged, and provides the organization with a competent, productive employee.

While each group has its own role to play and its own responsibilities within the model, when there is a combined effort between some or ultimately all of the groups, the results can be that much more effective.

**PRIVATE SPACES**

Each stakeholder – employee, manager, organization and union, if applicable will have their own private space in which they formulate their ideas and purpose in relation to the other groups. Private space is that part that each group may not necessarily want to share. This is where they can think and plan, with just their own personal thoughts. Each group will have its own goals but must also recognize and respect the goals of the other groups.

For an employee choosing to use this model and initiate their own career development plans, this private space is where they can do their thinking and planning, without having to publicize their intentions.

For the manager, their private space can be where they personally use the model to consider a development path they may want to explore. It is also the place where they can begin to strategize and plan out the goals of their departments without necessarily having to involve the organization. In a sense, this space is like a
personal brainstorming session – all ideas and thoughts are on the table and can be considered but without having to share, if that is not desired at this particular point.

The private space of the organization is slightly different in that the information created here tends to be public in nature and would include its mission statement, and its strategic goals. Of course, there are certain aspects of corporate strategy which may remain confidential and not be publicized.

JOINT SPACES
Joint spaces will occur when the groups overlap and it is in these joint spaces that group goals will exist, with the optimal situation being a joint space between all parties. There needs to be a high amount of trust, respect and communication at play for these joint spaces to flourish. The larger the combined joint space is between the groups, the greater the utilization of the model and the more benefits which will be realized for all concerned.

This connection can be illustrated in three separate ways:
1. Organization, Manager, Employee – with no Union present
2. Organization, Manager, Employee – Union on the side
3. Organization, Manager, Employee, Union
FIGURE 9: ORGANIZATION, MANAGER, EMPLOYEE, NO UNION

ORGANIZATION

MANAGER

EMPLOYEE

JOINT SPACE

OPTIMAL JOINT SPACE
In this illustration, the three groups are represented as each having their own private spaces and each overlapping with the other to create joint spaces. In the centre of the figure is the optimal joint space where all three groups are working together.

Of particular importance is the relationship between the employee and their manager as it is the manager who can greatly influence and assist in the development of that individual. It is also the manager who may help to influence the organization if the employee is suggesting a developmental avenue outside of the individual's current area of responsibility.
FIGURE 10: ORGANIZATION, MANAGER, EMPLOYEE, UNION ON THE SIDE

- ORGANIZATION
- MANAGER
- EMPLOYEE
- JOINT SPACE
- OPTIMAL JOINT SPACE
- UNION
In this situation, the workplace is unionized with a collective agreement that clearly states that all promotions are based purely on the seniority of its members.

The existence of the union in this situation serves to completely undermine the model and render it virtually useless, hence the placement of the union fully separate from the other groups. While each of the other stakeholders can support the model’s existence and work within it, if advancement is based purely on length of service, the benefits intended will only be on a very personal basis and may result in individuals leaving the organization with their newly acquired skill sets to join the competition, ultimately damaging any competitive advantage held by the original organization.
FIGURE 11: ORGANIZATION, MANAGER, EMPLOYEE, UNION
In this situation, the union is included in the development space and supports the advancement of its members throughout the organization and acts as a partner within the process.

**WHEN THE GOALS DON’T ALIGN**

For optimal success in this development model, all parties must work together. Organizations must support management who in turn must support individual career development by putting into place those actions and items that allow for the employee to take control of their own development but the employee, should they want to advance, must take the initiative to use those actions and items.

However, sometimes the goals may not align. Even when all stakeholders are working with the best of intentions, what the employee must always realize is that even though the organization promotes and supports career development, the implementation and speed of that implementation may look different from the perspective of each of the stakeholders.

Individuals must understand that organizational and departmental/divisional goals may not always align with their own goals, be it a matter of timing or overall strategic direction. Organizations are complex entities and decisions may be made or plans set in place for reasons that the individual may not know or may not be able to see. They need to recognize and accept that what may be their top individual priority may not be viewed with the same importance by one of the other parties based on other circumstances.
As much as the parties may believe in the strengths of this model and support it to the best of their abilities, there is always the possibility that development may not be possible for the employee in the manner in which they are hoping. If the process does not unfold as the employee envisioned, that does not necessarily mean that the opportunity is not available or that the support is not there, it may just mean that the plan is not right for the organization or the manager. Individuals need to understand that first and foremost, the organization and its management team must always work towards meeting organizational goals and those goals may not align with the development goals of the individual.

If this is the case and discussions can not satisfactorily resolve the differences between individual goals, the employee may choose to leave the organization. It must be noted that in no way does this event, should it occur mean that the model did not work, or that the support was not there, sometimes the circumstances in which the organization operates are unable to accommodate the individual plans of the employees.
CHAPTER 5 – CONCLUSION and RECOMMENDATIONS

The retirement of the Baby Boomers paired with fewer qualified applicants looking for employment has drastically changed how organizations staff their operations. In today’s global work environment, the upper hand no longer rests purely with the employer. Organizations must be much more pro-active in succession planning to ensure that they remain viable into the future. But it is not just the organization that needs to think about this – the employee must also be more involved in the process.

INDIVIDUALS AS LEADERS

If individuals want to advance within their careers, they must assume a leadership role and take charge of their own development in order to have a say in how they are viewed by their employers. If they do not take this leadership role, they may find themselves on a development path that their manager wants for them, not necessarily one that they want for themselves.

While the idea of personal career development is not necessarily new, much of the literature in this field has put the onus on the organization to take charge of the process while putting the individual employee almost in a secondary role. While this model may be the most common, one has to ask whether it is necessarily the best.

A better model is one where the individual plays an active role in their own development from the very beginning, starting with determining where their talents lie, understanding where they fit within the organization, and identifying where they
eventually want to end up. This model is based on the premise that all parties within the employment setting share the same end goal – to develop the individual and create and maintain a successful employment relationship.

For this model to work, communication must always be open and available to all those who need it, the organization, the manager, and the employee. Lack of information makes it very difficult for any of these stakeholders to make informed decisions and may result in frustration when plans are put forward and not acknowledged or acted upon, and it is this frustration that often shows up in Employee Engagement surveys.

**EMPLOYEE DISENGAGEMENT**

Results derived from these surveys have been very clear in providing hard statistical evidence showing that many employees feel undervalued and unappreciated, and that their workplaces do not value their contributions. It is because of this that many may look to leave their current employers or perhaps worse, stay where they are but do so with a negative attitude.

While it is imperative that organizations recognize this lack of engagement and work towards alleviating it, it is not just the employer who has responsibility for making the situation better. In those areas where “disengagement” is due to a lack of development opportunities, the individual employee has just as important a role to play.
Certain individuals may have a very clear plan for not only where they want to be within the company but also how they intend to get there. These individuals understand the benefits and advantages of corporate training programs and budgets. They actively search out learning opportunities for themselves and often will include their supervisors in their plans at some level. They want to be there and they recognize that their company is looking to identify those individuals who want to advance. A model, like the one presented here will enhance their development planning process.

Where this model will be particularly useful is for those individuals who want to move into new areas of responsibility but may not be comfortable in their ability to do so. It will provide a confidential, illustrated method of career development making it that much easier for the individual to explore their options and eventually communicate their intentions, if they so choose.

**STATISTICAL EVIDENCE**

While it is obvious that creating an environment where employees feel valued and supported in their careers will create a happier, more engaged workforce, there is hard evidence to substantiate the idea that having an organizational culture which supports employee development is profitable to a firm’s bottom line.

According to a 1996 study of 702 firms in America, it was proven that “A one standard deviation improvement in the human resources system was associated
with an increase in shareholder wealth of $41,000 per employee – about a 14 percent market value premium” (Pfeffer 1999).

It must be stated that at no time is the argument being made that employers should not be involved in the career development of their employees. Obviously employers have a strong interest in how their staff are developing and moving throughout the organization, but the end goal of each party and the idea of how to get there may or may not be the same. This model puts the responsibility for individual career development with the individual, and makes the other stakeholders players in the process.

The employee needs to understand that the aim of the organization is to ensure that it has the best trained people in place to help it meets its objectives. While it may want to promote and develop from within, it may see its employees in certain areas that may or may not be the same as how the employees see themselves. Employers can not be mind readers so the employees must help their company see them in the light in which they want to be seen. It is in this ideal that employees need to drive their own development, and ultimately, succession plans.

CAREER PLANNING

Career planning is a very personal thing and should not be dictated by someone other than the individual whose career is being planned, however the organization can be there to provide support as the end results are beneficial to everyone.
Career planning practices do three things:

1. Help employees conduct their own career planning by raising questions and providing information on available opportunities and resources, and helping them construct narratives that capture their experiences and future hopes.

2. Guide organizational members in taking advantage of systems available for career development, such as job posting, training, and education assistance programs.

3. Increase employee confidence in the organization’s career management, and demonstrate to outside parties that the firm is concerned with career development, particularly for women and minorities (Bowditch 2008).

AREAS FOR FURTHER RESEARCH

The intent of this study is to create a new model for employee career development and succession planning from the point of view of the individual living through it. Taking this into the future, it would be of great interest to introduce and implement this model in a real organization, with all stakeholders involved. In addition, this model would fit well into an organizational Performance Management model if and when the individual chooses to bring their plans forward to their manager and collaborate with them on a career development plan for the future.

FINAL THOUGHT

Perhaps this entire study can be summed up in the following thought: In leading edge organizations “career development is employee owned, manager facilitated and organization supported” (Agriculture Canada 2000).
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