

# Human Resource Essentials





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Alberta Agriculture and Forestry's Explore Local is a team of experts servicing the direct to consumer industry that assists producers and small scale processors to capitalize on the demand for local food. The team achieves this through providing timely and targeted information, training and tools that support sound business and industry decision making, building networks through opportunities for clients and stakeholders and encouraging industry led advocacy.

The Explore Local website ([www.explorelocal.ca](http://www.explorelocal.ca)) provides a list of all upcoming events and new and updated resources to those interested in pursuing direct to consumer business opportunities.





Explore Local Team Member Contact List	
<p><b>Abby Verstraete</b>            Alberta Agriculture and Forestry            Rural Business Specialist            Ph: 780.422.2550            Email: <a href="mailto:abby.verstraete@gov.ab.ca">abby.verstraete@gov.ab.ca</a>            Legislature Annex, Second Floor            9718 107 ST            Edmonton AB T5K 1E4</p>	<p><b>Christine Anderson</b>            Alberta Agriculture and Forestry            Local Food Specialist            Ph: 780.968.3514            Email: <a href="mailto:christine.anderson@gov.ab.ca">christine.anderson@gov.ab.ca</a>            Provincial Building, Second Floor            4709 44 AVE            Stony Plain AB T7Z 1N4</p>
<p><b>Cindy Cuthbert</b>            Alberta Agriculture and Forestry            Project Coordinator            Ph: 780.538.5287            Email: <a href="mailto:cindy.cuthbert@gov.ab.ca">cindy.cuthbert@gov.ab.ca</a>            Main Floor Provincial Building            1201-10320 99 ST            Grande Prairie AB T8V 6J4</p>	<p><b>Gerard Bos</b>            Alberta Agriculture and Forestry            Workforce Retention Specialist            Ph: 780.980.4222            Email: <a href="mailto:gerard.bos@gov.ab.ca">gerard.bos@gov.ab.ca</a>            Agri-Food Business Centre,            Main Floor, 6547 Sparrow DR            Leduc AB T9E 7C7</p>
<p><b>Mark Shand</b>            Alberta Agriculture and Forestry            Manager Explore Local and Field Offices            Ph: 403.948.8507            Email: <a href="mailto:mark.shand@gov.ab.ca">mark.shand@gov.ab.ca</a>            97 East Lake Ramp N.E.            Airdrie AB T4A 0C3</p>	<p><b>Margurite Thiessen</b>            Alberta Agriculture and Forestry            Value Chain Specialist            Ph: 780-968-3513            Email: <a href="mailto:margurite.thiessen@gov.ab.ca">margurite.thiessen@gov.ab.ca</a>            Main Floor Provincial Building            4709 44 AVE            Stony Plain AB T7Z 1N4</p>



Denise is co-founder of The Performance Group OE Inc. She is a natural leader and an engaging trainer, speaker, facilitator, and coach. Denise is committed to enhancing the development of individuals, teams, and organizations. She delivers a wide variety of workshops on topics such as influencing difficult people, conflict resolution, energy management, coaching skills, facilitations skills and leveraging strengths.

[dburrell@performancegroup.com](mailto:dburrell@performancegroup.com)

### **Human Resources Essentials**

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# Human Resources Essentials

## Purpose

This one-day workshop is an introduction to human resource (HR) management through the lens of the specific challenges faced by Alberta's agri-food entrepreneurs. In this interactive session, participants will discuss the impact of HR issues on their business and explore how an HR strategy can prevent and address these issues. Through facilitated discussion, participants will share challenges, solutions and will have the opportunity to apply a variety of practical tools. They will leave the day with an action plan for developing their most important resources – their human resources.

## Learning Objectives:

At the end of this one-day workshop participants will be able to:

- Describe how human resources impact business results.
- Describe the key components of an HR strategy/strategic workforce plan.
- Prepare a simple job description for a job they are familiar with using the template provided.
- Outline the steps in recruitment.
- Develop sample interview questions for a job they are familiar with using the template provided.
- Describe the factors that support and sustain performance using the Performance Equation (Performance = Role + Goal Clarity x Ability x Willingness).
- Develop a simple orientation plan for a job they are familiar with using the template provided.
- Identify strategies to retain employees and build employee engagement.
- Describe tools for managing performance.
- Develop a Draft HR Strategy and their next steps.

## Group Discussion



What are the issues that keep you up at night?



## Why are Human Resources Such an Important Resource?

Having an effective HR strategy will help you get a better night's sleep; it will also contribute significantly to your bottom line. Our goal is to get the right people in the right places at the right time and with the right skills and the desire to contribute. Attaining, sustaining, and retaining the right kind of workers will help your business accomplish its goals.



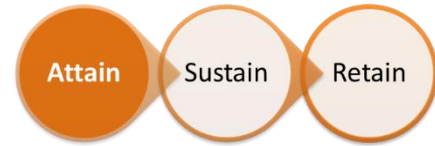
What activities are you involved in related to human resources now?

## What is a Human Resources Strategy?

All businesses large and small need a workforce strategy to succeed. Many an agribusiness has faltered without a strategy for responding to the supply and demand fluctuations for a capable workforce. Your workforce strategy sets out how your agribusiness is going to attract, develop, retain and motivate the people with the right skills at the right time for the right cost. The strategy is the result of analysis of the work that needs to be done, the production cycle, the skilled labour needed to do the work and the labour market. An effective workforce strategy is key to the workforce planning processes.



# Attain: How to Get the Right People at the Right Time



## Forecasting Requirements

Human resources forecasting involves thinking about your business' short-term and long-term labor needs. Businesses forecast their needs based on projected sales, business growth or decline, commodity prices, seasonal changes, worker attrition and more. Forecasting involves thinking about the number and type of workers you'll need, and also the business impacts of either adding workers or downsizing.



Based on your business experience, what is forecasting? Why do you forecast?

What do you consider when forecasting? When do you forecast?

What type of skills do you need? How many? Where would you find them? When would you need to start?

What trends and patterns do you see in your area specialization, in your community and across the province?

## Developing Job Descriptions

Job descriptions are crucial because they:

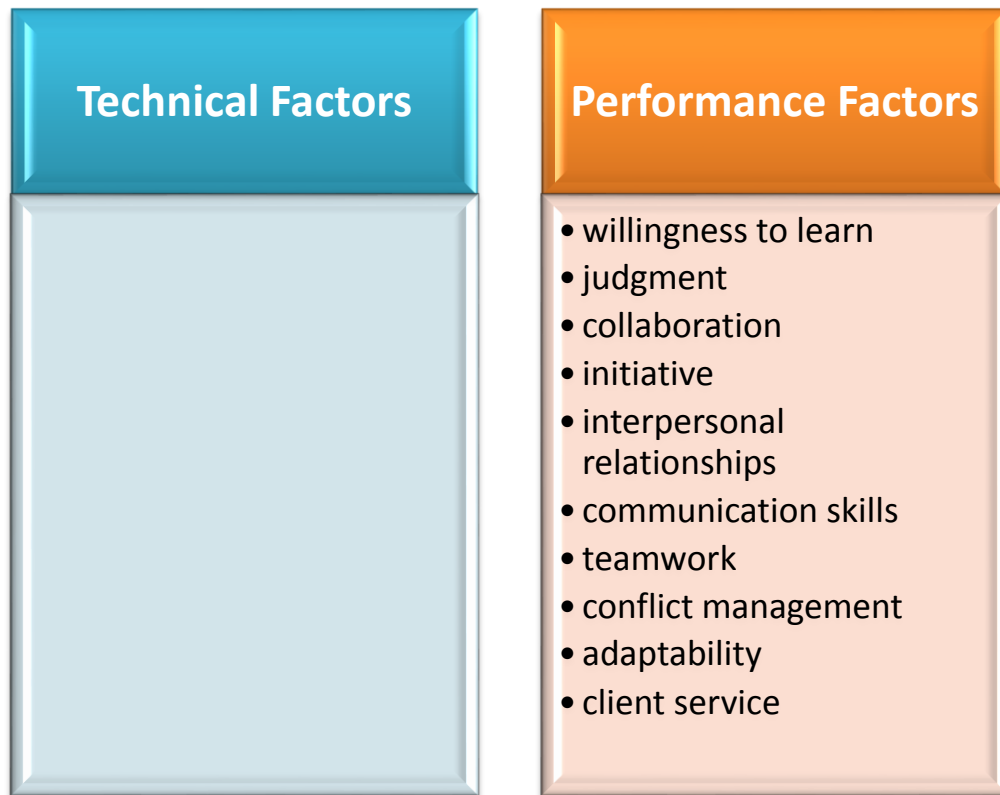
- serve as a basis for interviewing candidates
- allow workers to understand the responsibilities and the duties that are required and expected of them at work
- are helpful in developing compensation standards
- are a key component in performance management (the job description can serve as a baseline for performance)

## What's in the Job Description?: Technical versus Performance Factors

Before you write a recruitment ad, develop the right questions, or interview someone, you first need to think critically about what are the key factors that will make someone successful in this particular job. Not only are you determining technical skills, but it is also critical to determine other performance factors that will really set that person up for success in your job, environment, and organization.



### My Sample Job



Many organizations will hire for technical factors, and fire when the person is missing the performance factors.<sup>1</sup> Leadership IQ followed 5,247 hiring managers who collectively hired more than 20,000 employees during the three-year study period. The study found that 46% of newly-hired employees failed within 18 months. Of these, only 11% failed because they lacked the necessary technical skills. Failing due to performance factors (inability to accept feedback, lack of emotional intelligence, lack of motivation, and having an incompatible temperament for the job) was 81%.

<sup>1</sup> "Why New Hires Fail." Leadership IQ. <http://www.leadershipiq.com/blogs/leadershipiq/35354241-why-new-hires-fail-emotional-intelligence-vs-skills>. Accessed December 7, 2016.

## Job Description Template<sup>2</sup>

<b>Job title</b>	<i>The formal title of the position</i>
<b>Reports to</b>	<i>The title of the position that the job incumbent reports to</i>

### Job purpose

Provide a brief description of the general nature of the position; an overview of why the job exists; and what the job is to accomplish. The job purpose is usually no more than four sentences long.

### Duties and responsibilities

List the primary job duties and responsibilities using headings and then give examples of the types of activities under each heading. Using headings and giving examples of the types of activities to be done allows you to develop a flexible job description that encourages employee to ‘work outside the box’ and within reason, discourages “that’s not my job.”

- Identify between three and eight primary duties and responsibilities for the position
- List the primary duties and responsibilities in order of importance
- Begin each statement with an action verb
- Use the present tense of verbs
- Use gender neutral language such as s/he
- Use generic language such a photocopy instead of Xerox
- Where appropriate use qualifiers to clarify the task – where, when, why or how often – for example instead of “greet visitor to the office” use “greet visitors to the office in a professional and friendly manner”
- Avoid words that are open to interpretation – for example instead of “handle incoming mail” use “sort and distribute incoming mail.”

### Qualifications

State the minimum qualifications required to successfully perform the job. These are the qualifications that are necessary for someone to be considered for the position. All qualifications must comply with provincial human rights legislation. Qualifications include:

- Education
- Specialized knowledge
- Skills
- Abilities
- Other characteristics such as personal characteristics
- Professional Certification
- Experience

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<sup>2</sup> Adapted from “Job Description Template.” HR Council. [hrcouncil.ca/docs/Template\\_JD.doc](http://hrcouncil.ca/docs/Template_JD.doc). Accessed December 9, 2016.

### **Working conditions**

If the job requires a person to work in special working conditions this should be stated in the job description. Special working conditions cover a range of circumstances from regular evening and weekend work, shift work, working outdoors, working with challenging clients, and so forth.

### **Physical requirements**

If the job is physically demanding, this should be stated in the job description. A physically demanding job is one where the incumbent is required to stand for extended periods of time, lift heavy objects on a regular basis, do repetitive tasks with few breaks, and so forth.

### **Direct reports**

List by job title any positions to be supervised by the incumbent.

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*Ideally, a job description should be reviewed annually and updated as often as necessary.*

## Sample Job Description

<b>Job title</b>	<i>Crop Crew (Seasonal)</i>
<b>Reports to</b>	<i>Crop Supervisor</i>
<b>Job Purpose</b>	Plant, maintain, and harvest a variety of heirloom crops.
<b>Duties and Responsibilities</b>	<ul style="list-style-type: none"><li>• Harvest and inspect crops for ripeness, quality, and pests – daily, by hand.</li><li>• Irrigate soil and maintain pipes and hoses.</li><li>• Spray fertilizer and pesticide solutions to control insects, fungi, and weeds, as required.</li><li>• Grade, weigh, and package crops.</li></ul>
<b>Qualifications</b>	<ul style="list-style-type: none"><li>• Dexterity and speed</li><li>• Excellent visual acuity</li><li>• Listening skills</li><li>• No diploma or experience required</li><li>• Previous manual labour experience desired</li></ul>
<b>Working Conditions</b>	<ul style="list-style-type: none"><li>• Outdoors in a variety of weather conditions.</li><li>• Variable work schedule peaking in July-August.</li></ul>
<b>Physical Requirements</b>	Ability to lift up to 25 kilograms.
<b>Direct Reports</b>	None



## Job Description Template

<b>Job title</b>	
<b>Reports to</b>	
<b>Job Purpose</b>	
<b>Duties and Responsibilities</b>	
<b>Qualifications</b>	

**Required Courses / Certification**

**Working Conditions**

**Physical Requirements**

**Direct Reports**

# Recruitment Plan

Recruitment is the process of attracting, identifying and hiring the best suited and most qualified candidate to fulfill the responsibilities and duties of a vacant position. It is a very important function of human resource management because it is where you have the opportunity to shape the position to meet existing and future needs.

Effective recruitment is based on:

- Knowing what is required for the position before starting the process.
- Investing the time in recruitment activities to ensure a quality hire.
- Planning for immediate and future needs.
- Exploring and considering different hiring options to meet needs.
- Assessing the fit of candidates against both the qualifications set out in the job description and the knowledge, skills/abilities and personal suitability through the interview process.

An effective recruitment plan has the following elements:



What are some of the unique factors of your work that might make it attractive?

Where and how might you find workers? What are the advantages and disadvantages of these different sources?

## Where to Recruit<sup>3</sup>

Source	Advantages	Considerations
Private placements agencies	Pay for performance or service of screening and locating.	Evaluate the cost benefit of a service versus your time and expertise.
Recommendation from current employees	Current employees understand your needs and have a stake in whom you hire.	Maintain a professional manner to avoid possible friction with the employee who made the recommendation.
Advertisements in local newspapers	You spend relatively little money, reach a large audience, and get results quickly.	Write a specific ad to prevent too many unsuitable candidates from applying.
College/university placement offices	You reach the type of employee you want for positions that require formal training.	Coordinate your search with the college year to find students before they take other positions.
Job announcements on bulletin boards	You can target a specific area such as local schools to find seasonal help.	Make your job announcement specific and easy to read.
Neighbours	They know you. They may know of people who are looking for employment.	Be specific about the type of employee and qualifications you require.
Personal contact with good employees in your area	You can see how they work before you hire them.	Determine what advantages your business could offer them. Consider how this may affect your relationship with other neighbours and the situation in which you place the potential employee.

<sup>3</sup> Employer's Handbook for Horticulture and Agriculture: Section 2: Hiring.  
[http://www1.agric.gov.ab.ca/\\$department/deptdocs.nsf/all/grc796/\\$FILE/section2.pdf](http://www1.agric.gov.ab.ca/$department/deptdocs.nsf/all/grc796/$FILE/section2.pdf). Accessed December 29, 2016

## Recruitment Advertisements

### Cover key information:

- ✓ Job title
- ✓ Brief description of job
- ✓ Major responsibilities
- ✓ Special features
- ✓ Hours
- ✓ Wages and benefits
- ✓ Location
- ✓ Minimum qualifications, education and experience
- ✓ How to apply
- ✓ Closing date

### Spark interest:

- ✓ Use your target audience's language.
- ✓ Why would they want the job?
- ✓ What makes the job appealing?
  - flexible work arrangements
  - benefits
  - company values
  - unique work environment

## Sample Recruitment Ad

### **Farm operations manager**

#### **The Alberta Berry Farm Ltd**

We are seeking an experienced Farm Operations Manager for the day-to-day operations of our berry farm located at Rivers End.

This exciting role requires a hands-on approach to manage and oversee all aspects of the farm, including crop performance and packing shed operations.

You will ideally be a commercially astute team player who is patient and flexible, with the capacity to take responsibility and make decisions. Your ability to identify and perform farm maintenance requirements is a must. The successful candidate will demonstrate an ability to manage daily issues and support the team.

You will be expected to:

- Perform long and short term project management
- Manage, supervise and train pickers and packing staff
- Perform machinery operation, repairs, maintenance
- Organize and supervise chemical weed and pest controls
- Understand and work towards production targets
- Manage budget
- Source and oversee contractors Maintain HAACP and OH&S standards

You will need:

- A minimum of 3 years' experience in farm operations
- Tertiary qualifications in agriculture
- Experience/qualifications in chemical handling
- A solid understanding of maintenance operations
- Good computer skills
- Good communication skills
- Forklift license

A salary package commensurate with experience and qualifications will be negotiated for the right applicant. Living quarters with all mod cons will be provided as part of the package. For further information, please contact Kane Reacham, Managing Director, The Alberta Berry Farm Ltd, [k.reacham@email.com](mailto:k.reacham@email.com) or phone on (03) 9999 0000.

# Interviews

A job interview gives you important information about a candidate's knowledge, skills, and abilities, as well as insight into their personality and motivation. It helps you determine whether the candidate's education and experience are a good fit for the position you need to fill.



Describe your best and worst interview (either as employer and employee).

	<b>Best</b>	<b>Worst</b>	

Based on these examples, what are some Do's and Don'ts for effective interviews?

	<b>Do's</b>	<b>Don'ts</b>	

## Interview Steps

### Set the Stage

- Ensure candidate scheduling has clarified time, specific location, length of interview, panel member names/titles, who to speak to when arriving at reception area (also ensure reception area is aware of applicant names/times).
- Prepare appropriate location.
- Consider offering water, coffee, napkins.
- Avoid interruptions.
- Split up opening, closing, note taking, and question asking amongst panel members.
- Have resume, list of questions, and rating guide handy.

### Open the Interview

- Welcome the candidate.
- Make introductions.
- Provide a brief overview of the job.
- Explain the process of the interview.
- Explain time allotted.
- Take notes.
- Develop BDI questions.
- Allow time for candidate questions.
- Explain next steps at end.

### Ask Planned Questions

- Ask planned questions.
- Ask follow-up questions.
- Take notes.
- Probe for specifics and contrary evidence

### Close the Interview

- Availability to start (if they are the successful candidate)
- Review references – ensure you ask for the references that you want.
- Salary expectations.
- Clarify any answers that still may be vague.
- Answer candidate questions.
- Explain next steps.
- How and when the person will be contacted.
- Thank the candidate.



## Interview Questions You Can and Can't Ask<sup>4</sup>

Generally, any information that could be used to discriminate against you or restrict or deny you employment is off-limits. This chart shows the kinds of questions you can ask and which ones you should avoid asking.

Question area	Recommended	Not Recommended
Age	Old enough to work legally in Alberta?	Specific age of applicants who are 18 years or older, including retirement information.
Clubs or organizations	Membership in professional associations, clubs or organizations, hobbies or interests, as long as they are job-related.	Specific inquiries about club and organization memberships that would indicate race, colour, religious beliefs, ancestry or place of origin.
Disability	Indicating the job offer is contingent upon a satisfactory job-related medical examination to determine capability to perform the duties as outlined.	General disabilities, limitations, present or previous health problems, Workers' Compensation claims or sick leave or absence due to stress or mental or physical illness.
Education	Educational institutions attended; nature and level of education achieved.	Inquiries about religious or racial affiliation of educational institution.
Gender, marital status, family status	Availability for shift work, travel, etc.	Plans for marriage, family, childcare. Any inquiries specific to gender or marital status (including common-law relationships) or family status.
Height and weight	Describing job duties that require heavy lifting or other physical job requirements.	Minimum/maximum height and weight requirements/stipulations.
Languages	Ability to communicate in any language specifically required by a job.	Other languages, when not required in a specific job.

<sup>4</sup> Government of Alberta. ALIS Tip Sheet: "Human Rights and You: What Can Employers Ask?" <https://alis.alberta.ca/ep/eps/tips/tips.html?EK=3336>. Accessed December 16, 2016. (Reproduced from Alberta Human Rights Commission Information Sheet, A recommended guide for pre-employment inquiries, February 2012.)

Question area	Recommended	Not Recommended
Name	Previous names, only if the information is needed to verify the applicant's past employment or education and to do a reference check.	Maiden name, "Christian" name, reference to origin of name, being related to another person by blood, marriage or adoption.
Photographs	In rare situations such as modelling and entertainment.	Requesting photographs (these can reveal race, gender, etc.).
Race, colour, ancestry or place or origin	Legally permitted to work in Canada.	Place of birth, citizenship, racial origin, next of kin.
Religious beliefs	Availability for shift work, travel, etc.	Inquiries about specific religious holidays observed by the applicant, customs observed, religious dress, etc.; requiring applicants to provide recommendations from a church or religious leader.
Smoking	Indicating the successful applicant will be required to work in a non-smoking environment.	Asthmatic or permanent respiratory conditions that may be affected by smoke.
Source of income	Job-related information such as former employment.	Inquiries unrelated to the specific job to be performed.

## Behavioural Description Interviewing

Behavior Descriptive Interviewing is considered best practice in interviewing. Leading human resource experts believe behavioral interviewing may increase hire quality by more than 50 percent.<sup>56</sup>

Behavioral questions are based on the concept that the best predictor of future performance is past performance in similar circumstances. Using the BDI technique, the candidate answers an interview question by describing their behavior from a similar past experience.

- **Traditional (Situational) Question:** How would you handle conflict with a colleague?
- **BDI Question:** Tell me about a time when you had to deal with a conflict between you and a colleague. What actions did you take, and what was the result?

### Key BDI Question Phrases

- Tell me about a time...
- Describe a situation...
- Tell me exactly how you dealt with...
- It would help me if you could describe in more detail how you...
- Think of a specific time you... and tell me about what you did.



Develop 3 BDI interview questions for a job you are familiar with.

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<sup>5</sup> Salgado, J. F. (1997) Personnel Selection Methods' in C. L. Cooper and I. T. Robinson, International Review of Industrial and Organizational Psychology. New York: Wiley.

<sup>6</sup> "Getting a 9x Interview Success Rate with Behavioral Interviewing." Patrick Hauenstein, Ph.D. March 25, 2013. OMNIview. <http://www.theomniview.com/pov/blog/getting-a-9x-interview-success-rate-with-behavioral-interviewing/>. Accessed December 8, 2016.

## Interview Rating Guide

Job Title:

Candidate Name:

Interview Date/Time:

Selection Factors	Rating
Education	
Experience	
Technical Factors	
Performance Factors	
Other	
<b>Total Points</b>	

### Definitions of Ratings:

9-12 = Outstanding – Exceeds Requirements

5-8 = Very Good – Meets Requirements

1-4 = Not Suitable – Does Not Meet Requirements

## Conducting Reference Checks

Begin the reference check by providing a brief description of the job for which you interviewed the candidate. This will help the reference person to put their comments into a more focused perspective. As well, ensure that you let the reference person know that their comments will be kept confidential. Ensure you question the reference about any “red flags” about the candidate that the interview panel identified.

Note: The questions below are general. Make them specific for your job and the individual you interviewed.

1. How long have you known the person?
2. What position did they hold in your organization?
3. From your experience with this person, what were their overall strengths and can you give me an example of what you observed?
4. How would you describe their \_\_\_\_\_ skills? Can you give me an example?  
*(Note: use this question to probe several specific technical/performance skills specific to the job you interviewed the person for.)*
5. What were a few areas they struggled with the most? Can you give me an example of what you observed?
6. In our interview, we did not get a strong sense of their \_\_\_\_\_ skills. What have you observed were their strengths and areas for development in this area?
7. From your experience with this person, what advice would you give to working with them successfully?
8. Can you describe a situation when the person had to deal with \_\_\_\_\_. What actions did they take and what were the results?  
*(Note: use this question to probe several specific technical/performance skills specific to the job you interviewed the person for.)*
9. If you had a position for them, would you hire them back?



# Sustain: Developing and Growing Ability



## Orientation

The orientation process introduces a new hire to the business and the people they will be working with, and gives them an overview of how the company operates. A good orientation helps the employee get accustomed to the work environment, feel comfortable in their role as quickly as possible, and move into their job duties effectively.



Describe your worst and your best first day (or week) at a new job.

Best Worst

## Orientation Plan and Timeline<sup>7</sup>

<b>Before First Day: Conditions of Employment</b>	<b>When</b>	<b>Who</b>
<input type="checkbox"/> Job description		
<input type="checkbox"/> Acceptance Letter/Terms of Contract		
<input type="checkbox"/> Compensation and Benefits		
<input type="checkbox"/> Performance Expectations / Evaluation		
<input type="checkbox"/> Probationary Period/Terms of Contract		
<input type="checkbox"/> Attendance / Sign-in Procedures		
<input type="checkbox"/> Hours of Work; Work Schedule Changes		
<input type="checkbox"/> Meals / Break Periods		
<input type="checkbox"/> Leaves and Absences		
<input type="checkbox"/>		
<input type="checkbox"/>		
<b>First Day: About the Workplace</b>	<b>When</b>	<b>Who</b>
<input type="checkbox"/> Introduction to co-workers; Buddy / mentor		
<input type="checkbox"/> Location of supplies, tools, etc.		
<input type="checkbox"/> Fire extinguishers, exits, alarms; Evacuation Procedures		
<input type="checkbox"/> Location of restroom / break areas / storage for personal items		
<input type="checkbox"/> Rules regarding food / coffee / smoking		
<input type="checkbox"/> Dress code		
<input type="checkbox"/> Telephone and E-mail Protocol		
<input type="checkbox"/> Use of mobile devices		
<input type="checkbox"/> Keys / Alarms / Building Access		
<input type="checkbox"/> Parking / Parking Permits		
<input type="checkbox"/>		
<input type="checkbox"/>		
<b>First Week: Basics of the Job</b>	<b>When</b>	<b>Who</b>
<input type="checkbox"/> Identify who to get help from if needed		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

<sup>7</sup> Adapted from "Employee Orientation Program" and "Orientation Checklist." Government of Newfoundland and Labrador. <http://www.exec.gov.nl.ca/exec/hrs/onboarding/timeline.html>. Accessed December 30, 2016.



<b>Within First 2 weeks: Performing the Job</b>	<b>When</b>	<b>Who</b>
<input type="checkbox"/> Set initial goals and objectives		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<b>Within 3 months</b>	<b>When</b>	<b>Who</b>
<input type="checkbox"/> Learning and development opportunities		
<input type="checkbox"/> Work with employee to develop an individual learning plan		
<input type="checkbox"/> Check progress and provide feedback		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<b>Within 6 months</b>	<b>When</b>	<b>Who</b>
<input type="checkbox"/> Check progress and provide feedback		
<input type="checkbox"/> Review overall performance		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		



# Training and Development

Proper training ensures that employees have the skills they need to perform their jobs effectively and efficiently. Training can address weaknesses and it can build on strengths, providing employees with the opportunity to advance or create added value to the business. Training also increases employee’s confidence, helps them feel valued, and increases employee engagement.



Compete with other small groups to brainstorm the highest number of ways to develop employee’s skills and ability.



8

<sup>8</sup> “Learning and Development Options.” Alberta Corporate Human Resources. <http://www.chr.alberta.ca/learning/careermgmtkit/cycle/develop-plan-part3.htm>. Accessed January 5, 2017.

## Training and Development Plan Template<sup>9</sup>

Name: \_\_\_\_\_

Developmental goals for the coming year	Relationship of goal to the organization's goals	Knowledge, skills, abilities to be developed	Developmental activities	Resources	Date for completion
Goal 1:					
Goal 2:					
Goal 3:					

\_\_\_\_\_  
Employee's signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Manager's signature

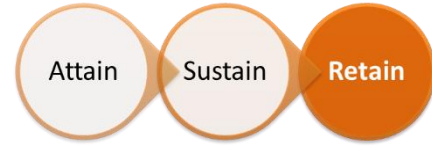
\_\_\_\_\_  
Date

<sup>9</sup> Adapted from "Individual Development Plan." HR Council. <http://www.hrcouncil.ca/hr-toolkit/learning-implementing.cfm>. Accessed December 30, 2016.





# Retain: Keeping Good Employees and Keeping Employees Good



## The Performance Equation<sup>10</sup>

A basic leadership premise states that a performer's performance is a function of their level of role clarity, goal clarity, ability, and willingness. This premise is illustrated by the following formula:

$$\text{Performance} = f(\text{role clarity} + \text{goal clarity}) \times \text{ability} \times \text{willingness}^{\circledR}$$

In this formula, performance is defined as the successful completion of a task, activity, or project to standards 100% of the time. This implies that no task can be performed successfully unless the performers who are to carry it out are clear on their role and understand what is expected of them.

They must also possess the ability to do so. Ability refers to the performer's knowledge, skills and experience related to the task and the resources required to carry out the task successfully.

Furthermore, it states that no task can be performed successfully unless the performers are willing to achieve the desired performance. Regardless of their knowledge, skill, and experience, their abilities alone are not sufficient to achieve performance. Performers must also want to achieve the desired performance.

### Clarity

- Goal Clarity
- Role Clarity
- Priority Clarity

### Ability

- Skills, Knowledge and Experience
- Time
- Tools
- Support

### Willingness

- Comfort
- Confidence
- Awareness of the Consequences
- Commitment
- Challenge

<sup>10</sup> © The Performance Group OE Inc.



Think about the individuals on your team. How would you score each person's performance on a scale of 1 (low) to 10 (high) in each of the components of the performance equation?

<b>Individual</b>	<b>Clarity (role + goal) (5 + 5)</b>	<b>Ability (10)</b>	<b>Willingness (10)</b>	<b>Total (Out of 1000)</b>
Renee	$5 + 4 = 9$	7	8	504



What are some of things that make or break performance in a job you are familiar with?

## Communicating Clear Expectations

Often in the agribusiness, leaders or supervisors are limited in implementing consequences to a lack of performance. For example, family run agribusinesses can't fire someone because they are family. Ensuring that each employee, duty and task has clearly communicated expectation and consequences of not meeting expectations minimizes the potential for poor performance.

When communicating expectation, follow these steps:

<b>Clearly explain the desired end results</b>
<ul style="list-style-type: none"><li>• Be specific about what you expect. Describe the purpose of the task.</li><li>• Identify the standards that must be met.</li><li>• Discuss your instructions with the employee and answer any questions about the task.</li></ul>
<b>Explain the value to the business</b>
<ul style="list-style-type: none"><li>• Identify how their performance contributes to the business.</li><li>• Ensure that the employee accepts responsibility for carrying out the assignment.</li></ul>
<b>Grant authority</b>
<ul style="list-style-type: none"><li>• Explain what resources are available to the employee.</li><li>• Are they to work alone or as part of a team?</li><li>• Clarify how much authority the employee has. Should they check in with you? How often?</li></ul>
<b>Explain how performance will be monitored</b>
<ul style="list-style-type: none"><li>• Tell the employee who is available for guidance and support.</li></ul>
<b>Get agreement to deadlines</b>
<ul style="list-style-type: none"><li>• Indicate when the task needs to be completed.</li><li>• Identify if progress reports are required</li></ul>
<b>Provide feedback on results</b>
<ul style="list-style-type: none"><li>• Review what went well and what could be improved next time.</li></ul>

# Communicating Clear Expectations Template

<b>Clearly explain the desired end results</b>
<b>Explain the value to the business</b>
<b>Grant authority</b>
<b>Explain how performance will be monitored</b>
<b>Get agreement to deadlines</b>
<b>Provide feedback on results</b>





## Addressing Performance Concerns

<b>Prepare for the conversation</b>
<ul style="list-style-type: none"><li>• Identify the issue (separate judgment from facts; pinpoint behaviours; be specific)<ul style="list-style-type: none"><li>○ What have you observed that tells you there is a problem?</li></ul></li><li>• Identify the expectations/standard<ul style="list-style-type: none"><li>○ What would it look like if it were fixed?</li></ul></li><li>• Identify the impact (to employee, team, business)<ul style="list-style-type: none"><li>○ Why is it important?</li></ul></li></ul>
<b>Have the conversation</b>
<ul style="list-style-type: none"><li>• Describe the concern; be specific</li><li>• Share what is expected/standard</li><li>• Ask for their perspective (consider the cause)</li><li>• Identify future actions to overcome the problem (collaborative)</li><li>• Ask them to summarize their action plan</li></ul>
<b>Follow up and follow through</b>
<ul style="list-style-type: none"><li>• Confirm your support and their commitment</li><li>• Agree on a follow up date to check on progress</li><li>• Observe and provide feedback</li></ul>
<b>Document</b>
<ul style="list-style-type: none"><li>• Date</li><li>• Time</li><li>• Discussion points</li></ul>

# Addressing Performance Concerns Template

<b>Prepare for the conversation</b>
<b>Have the conversation</b>
<b>Follow up and follow through</b>
<b>Document</b>



## Exercise: What is a Supervisor or Manager to Do?



Maria works for you at a farmer's market. You have noticed that she is often using her smartphone. Her head is often down looking at her device and she is not interacting much with customers.

Dan, the new farm worker you hired two months ago, did not properly secure the barns last night. This is the third time he has missed completing this function since he was hired; you addressed this concern both times he missed them previously.

Janet and Blake work in the same mixed vegetable farm and perform the same role. Recently, you noticed they are not getting along and don't appear to be supporting each other. While they are meant to share their workload, you have noticed when Janet has finished processing her rows, she does not check to see if Blake needs help; Blake also does not check to see if Janet needs help. They do, however, take the initiative to help their other workers in their area.

You have an employee who is excellent at the job when he makes it to work. His life seems to be a collection of calamities, one after another. Car didn't start, electricity went out, had a minor car accident, cat was sick, etc. Everything is always beyond their control. This time he was 1.5 hours late for work because his alarm clock got switched from a.m. to p.m.

# Employee Engagement

Employee engagement is the emotional connection a worker has to the organization and the commitment they feel towards their job. Businesses with high employee engagement are more profitable, more productive, have better customer ratings, have less absenteeism, and fewer safety incidents. However, studies show that in the United States, only 33% of workers are engaged; worldwide, only 13% are engaged.<sup>11</sup>



## Employee Needs Survey

Survey Results	Your Ranking	Employee Needs
		Financial security
		Appreciation for doing good work
		Good relationship with supervisor
		Chance for advancement
		Professional growth and development
		Freedom from injury or bodily harm
		Prestige
		Independent thought and action
		Authority to make important decisions
		Work that is interesting and meaningful

<sup>11</sup> "Do Employees Really Know What's Expected of Them?" Gallup. *Business Journal*, September 27, 2016. [http://www.gallup.com/businessjournal/195803/employees-really-know-expected.aspx?g\\_source=EMPLOYEE\\_ENGAGEMENT&g\\_medium=topic&g\\_campaign=tiles](http://www.gallup.com/businessjournal/195803/employees-really-know-expected.aspx?g_source=EMPLOYEE_ENGAGEMENT&g_medium=topic&g_campaign=tiles). Accessed January 5, 2017.





## Engagement Assessment and Plan

	Never	Seldom	Sometimes	Often	Always
1 When assigning new work, I ensure performers understand its context and purpose.	1	2	3	4	5
2 I seek out and share responses to concerns raised by performers.	1	2	3	4	5
3 I support and reward creative efforts and reasonable risk-taking by performers.	1	2	3	4	5
4 I ensure the standards of the work unit are clear and expect that performers will meet the standard 100% of the time.	1	2	3	4	5
5 I continually look for ways and means of providing performers with opportunities to participate more fully in the work of the unit (e.g. cross-training, special projects).	1	2	3	4	5
6 I actively seek out work experiences that will provide performers with opportunities to develop new skills.	1	2	3	4	5
7 I regularly communicate our business goals and provide updates on our progress.	1	2	3	4	5
8 I engage in two-way sharing of facts and feelings.	1	2	3	4	5
9 I actively seek out work experiences to provide performers with opportunities to develop their existing skills.	1	2	3	4	5
10 I meet with performers on a regular basis to identify work activities they will find interesting and challenging.	1	2	3	4	5
11 I set group goals to maximize teamwork and minimize competition.	1	2	3	4	5
12 I ensure that the information required to do the job is readily available.	1	2	3	4	5
13 I ensure performers are clear on the role of the work unit.	1	2	3	4	5
14 I ensure that the level of participation I expect is appropriate for the situation.	1	2	3	4	5
15 I provide feedback that is timely, specific and recognizes the desired performance.	1	2	3	4	5
16 I clearly communicate my 'vision' of the future, what I expect the work group to become over time.	1	2	3	4	5
17 I provide opportunities for performers to participate in decisions affecting the work group.	1	2	3	4	5
18 I make sure adequate resources are provided to support the performance expected.	1	2	3	4	5

## Inventory Scoring Sheet

Transfer your scores from the list of behaviours to the columns below. Add the scores for each column.

<b>Creating Challenge</b>	<b>Maximizing Contribution</b>	<b>Building Commitment</b>
1 _____	2 _____	3 _____
4 _____	5 _____	6 _____
7 _____	8 _____	9 _____
10 _____	11 _____	12 _____
13 _____	14 _____	15 _____
16 _____	17 _____	18 _____
Score: _____	Score: _____	Score: _____

## Rewards and Recognition

Employee recognition is the acknowledgement of an individual or team's behavior, effort and accomplishments that support the organization's goals and values. Recognizing and appreciating employees is critical for employee engagement, development and retention.

Recognition:

- is about creating an open and supportive environment for staff and colleagues;
- is a great opportunity to encourage others, acknowledge and show appreciation for their contributions, and encourage higher levels of performance;
- supports a culture where employees feel valued and appreciated for their contributions within their organization;
- is specific to the individual or team being recognized; and
- is easy to begin if you start small and keep it simple.

Recognition can be formal such as long service award or informal such as a thank you card for a job well done. Recognition can be delivered by anyone to anyone. Colleagues can recognize each other; supervisors and managers can recognize employees and employees can also recognize supervisors and managers.



Identify rewards within your control to support retention.



# Human Resources Strategy Checklist



Use this HR Strategy Checklist to assess strengths, gaps and priorities.

## Attain

Strategy Component	% Developed	Priority Level
Forecasting Requirements		
Job Descriptions		
Recruitment Plan		
Recruitment Advertisements		
BDI Interview Questions		
Interview Procedure and/or Rating Guide		
Reference Check Plan		

## Sustain

Strategy Component	% Developed	Priority Level
Orientation Plan and Timeline		
Training and Development Plans		

## Retain

Strategy Component	% Developed	Priority Level
Performance Management Strategy and Tools		
Engagement Plan		
Rewards and Recognition		

## Ah—ha!!



Research shows that if you use an idea within 24 hours of hearing it, you are more likely to integrate it permanently. So when you discover something in the workshop that you'd like to incorporate in your skills toolbox or something you didn't realize about yourself write it down on this page immediately.

At the end of the workshop tear this page out of your workbook, take it back to your office and hang it where you can't miss it. *That way you can put your "ah-ha's" into action!*

1.

2.

3.

4.

5.

## My 3, 30 and 90-day Action Plan



I will...

**In the next 3 days**

**In the next 30 days (Date: \_\_\_\_\_ )**

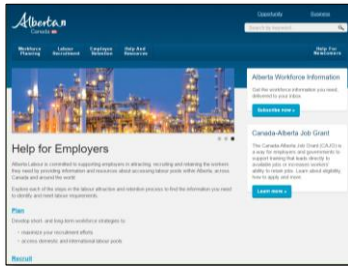
**In the next 90 days (Date: \_\_\_\_\_ )**



# Key Resources and Tools



## Websites



### Alberta Canada: Help for Employers

This comprehensive website contains information about workforce planning, labour recruitment, and employee retention.

<http://www.albertacanada.com/employers>



### Alberta Labour: Rules and Regulations

In Alberta, employment standards are contained in the **Employment Standards Code and Regulation**. Through these laws, minimum standards of employment have been established for employees under age 18, minimum wage, overtime, vacations, and more.

<http://work.alberta.ca/employment-standards/standards-and-definitions.html>



### Alberta Labour: Publications

This page contains a wealth of information on Alberta labour market statistics and projections, health and safety, labour force and industry profiles, temporary foreign workers, and occupational health and safety.

<http://work.alberta.ca/labour/inform-publications.html>



### HR Council: Sample Policies on Common HR Topics

Introductions and sample policies on common Human Resource topics such as compensation, recruitment, orientation, employment of relatives, performance management and occupational health and safety.

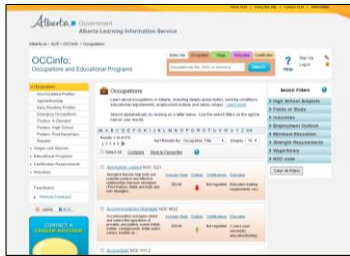
<http://hrcouncil.ca/hr-toolkit/policies-sample-policies.cfm>



## Alberta Learning Information Service (ALIS): Wages and Salaries

Find wage and salary information for occupations in Alberta. Information is based on the 2015 Alberta Wage and Salary Survey. Search for occupations alphabetically.

<https://occinfo.alis.alberta.ca/occinfopreview/info/browse-wages.html>



## Alberta Learning Information Service (ALIS): Occupations

Learn about occupations in Alberta, including details about duties, working conditions, educational requirements, employment outlook and salary ranges. Search for occupations alphabetically.

<https://occinfo.alis.alberta.ca/occinfopreview/info/browse-occupations.html>



## Alberta Agriculture and Forestry: Agri-Industry Workforce Development Initiative

This initiative provides assistance to address specific workforce issues in agricultural production and agri-processing sectors. The Studies and Research section lists the work done on employee satisfaction and public perception.

[http://www1.agric.gov.ab.ca/\\$Department/deptdocs.nsf/All/aggp14162](http://www1.agric.gov.ab.ca/$Department/deptdocs.nsf/All/aggp14162)



## Alberta Agriculture and Forestry: Workforce Strategy

Funding may be available to help your business with its human resource challenges. Check out the grants in this site for more information. There are Workforce Development Grants related to retention and productivity improvement.

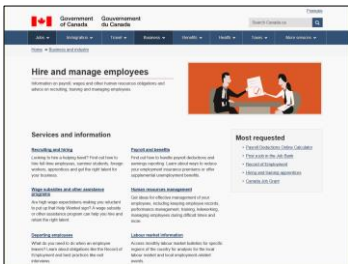
<http://www1.agric.gov.ab.ca/general/progserv.nsf/all/pgmsrv338>



## Alberta Human Rights Commission: The *Alberta Human Rights Act*

The *Alberta Human Rights Act* covers a number of areas related to employment practices and prohibits discrimination in the area of employment (based on the protected grounds of race, colour, ancestry, place of origin, religious beliefs, gender, age, physical disability, mental disability, marital status, family status, source of income and sexual orientation).

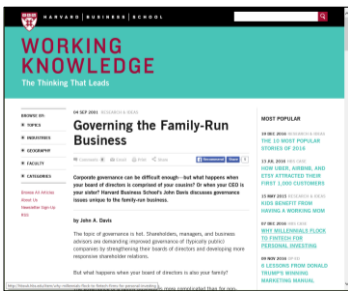
<http://www.albertahumanrights.ab.ca/employment.asp>



## Government of Canada: Hire and manage employees

Information on payroll, wages and other human resources obligations and advice on recruiting, training and managing employees.

<https://www.canada.ca/en/services/business/hire.html>



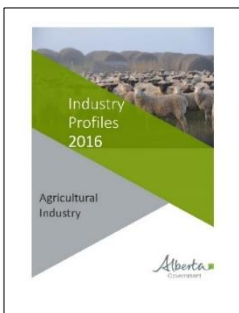
## Harvard Business School Series: Managing the Family Business

Articles in this series include

- Governing the Family-Run Business
- Leadership Roles
- Survival's Secret Sauce
- Firing the CEO

<http://hbswk.hbs.edu/item/governing-the-family-run-business>

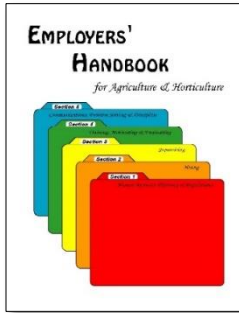
## Handbooks and Guides



### Alberta Government: Agriculture Industry Profile

This profile provides information about employment and unemployment, industry growth, industry trends, human resource demographics, wages and salaries and more.

<http://work.alberta.ca/documents/industry-profile-agriculture.pdf>



## Alberta Agriculture and Forestry: Employers' Handbook for Agriculture and Horticulture

The Employers' Handbook is written as a guide to owners, managers and supervisors in agricultural and horticultural operations. This handbook will help you to recruit better employees; supervise, motivate and train your employees to reach desired performance; and discipline and dismiss employees should that be required.

[http://www1.agric.gov.ab.ca/\\$department/deptdocs.nsf/all/grc796](http://www1.agric.gov.ab.ca/$department/deptdocs.nsf/all/grc796)



## Alberta Government: Employer's Guide to Occupational Health and Safety

This Safety Bulletin is to help you understand the *Occupational Health and Safety Act (OHS Act)* as well as your role in ensuring health and safety at the work site. The Bulletin describes the major sections of the OHS Act and will help you understand how to comply with the legislation and make your work site a healthier and safer place.

<http://work.alberta.ca/documents/OHS-bulletin-LI009.pdf>



## Alberta Government: Strategic Workforce Planning Guide

Strategic Workforce Planning involves identifying, assessing, developing and sustaining employee workforce skills required to successfully accomplish business goals and priorities while balancing the needs and expectations of employees. This guide will take you through the steps of strategic workforce planning and illustrate how you can apply a four-part framework to your organization or company.

<http://work.alberta.ca/documents/strategic-workforce-planning.pdf>



## Job Description

<b>Job title</b>	
<b>Reports to</b>	
<b>Job Purpose</b>	
<b>Duties and Responsibilities</b>	
<b>Qualifications</b>	

**Required Courses / Certification**

**Working Conditions**

**Physical Requirements**

**Direct Reports**

## Interview Rating Guide

Job Title:

Candidate Name:

Interview Date/Time:

<b>Selection Factors</b>	<b>Rating</b>
<b>Education</b>	
<b>Experience</b>	
<b>Technical Factors</b>	
<b>Performance Factors</b>	
<b>Other</b>	
<b>Total Points</b>	

### Definitions of Ratings:

9-12 = Outstanding – Exceeds Requirements

5-8 = Very Good – Meets Requirements

1-4 = Not Suitable – Does Not Meet Requirements





## Reference Check

Question	Notes
How long have you known the person?	
What position did they hold in your organization?	
From your experience with this person, what were their overall strengths and can you give me an example of what you observed?	
How would you describe their _____ skills? Can you give me an example?	
What were a few areas they struggled with the most? Can you give me an example of what you observed?	
In our interview, we did not get a strong sense of their _____ skills. What have you observed were their strengths and areas for development in this area?	
From your experience with this person, what advice would you give to working with them successfully?	
Can you describe a situation when the person had to deal with _____. What actions did they take and what were the results?	
If you had a position for them, would you hire them back?	



## Orientation Plan and Timeline<sup>12</sup>

<b>Before First Day: Conditions of Employment</b>	<b>When</b>	<b>Who</b>
<input type="checkbox"/> Job description		
<input type="checkbox"/> Acceptance Letter/Terms of Contract		
<input type="checkbox"/> Compensation and Benefits		
<input type="checkbox"/> Performance Expectations / Evaluation		
<input type="checkbox"/> Probationary Period/Terms of Contract		
<input type="checkbox"/> Attendance / Sign-in Procedures		
<input type="checkbox"/> Hours of Work; Work Schedule Changes		
<input type="checkbox"/> Meals / Break Periods		
<input type="checkbox"/> Leaves and Absences		
<input type="checkbox"/>		
<input type="checkbox"/>		
<b>First Day: About the Workplace</b>	<b>When</b>	<b>Who</b>
<input type="checkbox"/> Introduction to co-workers; Buddy / mentor		
<input type="checkbox"/> Location of supplies, tools, etc.		
<input type="checkbox"/> Fire extinguishers, exits, alarms; Evacuation Procedures		
<input type="checkbox"/> Location of restroom / break areas / storage for personal items		
<input type="checkbox"/> Rules regarding food / coffee / smoking		
<input type="checkbox"/> Dress code		
<input type="checkbox"/> Telephone and E-mail Protocol		
<input type="checkbox"/> Use of mobile devices		
<input type="checkbox"/> Keys / Alarms / Building Access		
<input type="checkbox"/> Parking / Parking Permits		
<input type="checkbox"/>		
<input type="checkbox"/>		
<b>First Week: Basics of the Job</b>	<b>When</b>	<b>Who</b>
<input type="checkbox"/> Identify who to get help from if needed		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

<sup>12</sup> Adapted from "Employee Orientation Program" and "Orientation Checklist." Government of Newfoundland and Labrador. <http://www.exec.gov.nl.ca/exec/hrs/onboarding/timeline.html>. Accessed December 30, 2016.



<b>Within First 2 weeks: Performing the Job</b>	<b>When</b>	<b>Who</b>
<input type="checkbox"/> Set initial goals and objectives		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<b>Within 3 months</b>	<b>When</b>	<b>Who</b>
<input type="checkbox"/> Learning and development opportunities		
<input type="checkbox"/> Work with employee to develop an individual learning plan		
<input type="checkbox"/> Check progress and provide feedback		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<b>Within 6 months</b>	<b>When</b>	<b>Who</b>
<input type="checkbox"/> Check progress and provide feedback		
<input type="checkbox"/> Review overall performance		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		





# Training and Development Plan

Name: \_\_\_\_\_

Developmental goals for the coming year	Relationship of goal to the organization's goals	Knowledge, skills, abilities to be developed	Developmental activities	Resources	Date for completion
Goal 1:					
Goal 2:					
Goal 3:					

\_\_\_\_\_  
Employee's signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Manager's signature

\_\_\_\_\_  
Date





# Communicating Clear Expectations

<b>Clearly explain the desired end results</b>
<b>Explain the value to the business</b>
<b>Grant authority</b>
<b>Explain how performance will be monitored</b>
<b>Get agreement to deadlines</b>
<b>Provide feedback on results</b>



## Addressing Performance Concerns

<b>Prepare for the conversation</b>
<b>Have the conversation</b>
<b>Follow up and follow through</b>
<b>Document</b>

