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International Labour Organization

▶ **Human resource management: A manual for employer and business membership organizations**

Tool 5: Development and training

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Tool 5: Development and training

Contents

Acknowledgements

Foreword

This manual – consisting of seven stand-alone tools – aims to assist employer and business membership organizations (EBMOs) to transition towards more structured, formal and strategic governance measures. The manual contains useful information on the business of human resource management and related best practices for EBMOs, based on real-world examples. Although this publication is not intended as a resource for EBMOs to use in providing guidance to member companies, some of its content can be used for this purpose.

Human resource management bridges the gap between an organization's staff and its executive administration. It enables organizations to tackle human resource issues strategically, supporting them to attract and retain talent and assisting their leaders and employees to adapt to organizational change. Human resource management has a critical role in managing staff and helping EBMOs work effectively and creatively, thereby allowing the organization to better support its members and achieve its mission.

A successful EBMO requires human resource management that is committed to the progress and growth of the organization and the services it provides to its members. Best practices in managing human resource, including practices that adopt a culture of diversity and inclusion, are fundamental for EBMOs, particularly because they should set an example to those they serve and represent. Additionally, an EBMO's board of directors (or executive committee) and secretariat should help identify structural barriers or exclusionary criteria and then help find solutions for eliminating them.

Having a manual of human resource management is also considered a best practice. Thus, this manual encourages human resource teams to pull from it applicable and contextualized portions to create or refine their own manual for better managing the staff within their EBMO.

This tool 5 was produced to assist EBMOs towards improving their productivity and impact by optimizing the effectiveness of their staff development and training practices. The tool discusses the requirements for a policy on training and development, the methods for determining training needs, implementing training for staff and leaders in the organization and how an engaged workforce enhances motivation and organizational performance.

The tool also offers guidance for informing the development and enhancement of human resource policies in an EBMO and for providing technical support to member companies where an EBMO provides this type of service.

The primary audience for this tool is the EBMO's chief executive officer, senior management and human resource officers. But the language used and guidance offered are also designed to make the information relevant to all EBMO staff members.

Each tool includes additional resources (checklists, templates, examples and/or guidance) that can be adapted by an EBMO when customizing it to their individual needs or for inclusion in their own human resource management manual.

Introduction to the manual

The theory behind human resource management is that staff who are provided with effective administration can more efficiently and productively contribute to an organization's direction, thereby ensuring that it achieves its goals and objectives. Human resource management covers a spectrum of components for creating, managing and cultivating the employer–employee relationship and includes both strategic and comprehensive approaches to managing people, the organizational culture and the workplace environment.

In practice, the role of human resource managers (or the executive with that function) in an employer and business membership organization (EBMO) is to ensure that its most important asset – its human capital – is nurtured and supported through the creation and management of programmes, policies and procedures and by fostering a positive work environment through effective employee–employer relations.

The International Labour Organization's (ILO) Bureau for Employers' Activities recommends that this human resource management manual be adapted and maintained by an EBMO's executives and human resource managers. This manual's intent is to educate and guide the chief executive officer, human resource officers and senior management to a high level of strategic success and achievement in accordance with best practices. The manual an EBMO produces (or updates) should contain relevant information, policies and procedures as a tool to facilitate the improved understanding of good governance, legal obligations and better practices as they relate to managing the organization's human resource.

Each of the seven tools that constitute this manual provides definitions, explanations and resources to improve the management of the human capital within an EBMO. The content also may be of value to EBMOs looking to assist member companies towards improving their human resource management. For an overview of EBMO services in the field of industrial relations and human resource management, please refer to *The Effective Employers' Organization,* a publication from the ILO and its International Training Centre.

The content of this tool is based on relevant best practice at the time of its preparation and was developed with input from the ILO's Employers Specialists working in all regions and from EBMOs of all sizes. The manual takes into account best practices and guidance from human resource industry bodies as well as the practical guides on building and managing an EBMO more strategically and effectively that the ILO's International Training Centre has created.

This publication is not exhaustive. Thus, readers are encouraged to consult the cited resources to improve their knowledge in areas of particular importance or relevance and to adapt the information provided according to the needs and requirements of their particular EBMO and to the legal framework of the country in which the organization operates.

WARNING: When creating strategies, policies and procedures, specific terms and conditions need to be reviewed and updated by an EBMO to reflect actual obligations under national legislation and regulations, contracts of employment or other industrial instruments relevant to each jurisdiction.

How to use the manual

This human resource management manual consists of seven tools, each with its own checklists, examples, templates and other resources. Each tool breaks down a human resource management function, as the table highlights. Collectively, the tools have two purposes: (a) to remind (or inform) human resource officers and upper management of an EBMO of the best practices in managing all staff members of the organization and (b) to offer guidance to EBMOs for developing their own internal guidance in these different areas.

Tool 1. HRM in the organization – Fundamentals

Tool 2. Staffing and recruitment

Tool 3. Benefits and compensation

Tool 4. Performance management

▶ **Tool 5. Development and training**

Tool 6. Employee relations

Tool 7. Separation practices

First, refer to the definitions and abbreviations section in each tool (located at the back, before the additional resources) to become familiar with the terms commonly used in human resource management, governance and organizational management processes.

Second, review the main portion of each tool, which will take you through the basic elements of a specific function of human resource management. Where possible, examples are included to bring clarity on how to approach drafting and implementing a process, strategy or policy. Take what you need from this section for your own internal guidance for managing human resource (or even the employee handbook) and adapt it to your EBMO and jurisdiction.

Following the various prompts

⚙️	This mechanical signal highlights advice, guidance or direction to a relevant link.
🔍	This magnifier leads to further guidance in the additional resources section.
🖱️	This pointer suggests possible content for your own human resource management manual.

Third, review each tool's additional resources section. The first checklist is a prompt for producing organization-specific documentation, policies and other information for your own human resource management manual. Where applicable, the additional resources include templates and guides for EBMOs to use. Make sure your documents are relevant, up to date and complete – this is important for the validity and accuracy of implementing human resource management functions and ensuring legal compliance.

Fourth, consult the ILO for additional online resources relevant to the tool or subsections for further advice and guidance.

Fifth, as with this manual, the human resource management manual that an EBMO produces ultimately should be a living document, updated as policies and procedures change. Thus, it is best to present your EBMO manual in a loose-leaf format, which will allow pages to be separated or added as required. Ideally, if technology and competency permit, the organization should consider producing an electronic version and printing only when necessary.

▶ **Tool 5**

Development and training

This fifth tool aims to assist EBMOs towards improving their productivity and impact by optimizing the effectiveness of their staff development and training practices. It discusses the requirements for a human resource policy on training and development, the methods for determining training needs and conducting training for staff and leaders in the organization. And it gives a grounding on how an engaged workforce enhances motivation and organizational performance.

Key points

▶ Training needs analysis identifies skill gaps and performance issues, thus making development plans easier to produce.

▶ Training and developing staff promotes the creation of intellectual capital and enhances knowledge management within the organization.
NOTE: This point is often overlooked.

▶ Measuring employees' engagement supports positive workplace culture, employee retention and their connection to the goals of the organization.

▶ Developing leaders helps to drive the organization's mission, goals and values.

▶ Development and training is a key aspect of an EBMO's employee value proposition and an important plank of the talent retention strategy.

Staff development process

Development and training encompass a range of on-the-job and off-the-job methods for employees to acquire new knowledge, skills and behaviours. This process should flow from the business strategy and aim to produce a plan for ensuring human resource capabilities that will sustain current and future business performance.

A clear, systematic and continual identification of how development and training needs relate to performance gaps is critical for ensuring that there is effective learning throughout the organization. Investment in development and training by an EBMO can be beneficial by:

▶ improving business performance, productivity and efficiency;

▶ improving employees' skills and knowledge for their current job role;

▶ increasing employees' generic skills (such as team work, problem-solving and communication);

▶ ensuring compliance with legal or contractual obligations;

▶ fostering shared attitudes and values of the EBMO;

▶ providing for succession planning;

▶ providing career development for staff; and

▶ encouraging motivation within the workplace.

The following flowchart illustrates the process of organizational learning and development activities and its relationship to managing intellectual capital.

Staff development policy

For an EBMO's learning and development strategy and policies to be successful, they should focus on facilitating the achievement of the organization's objectives and reflect its mission, values and culture.

The strategy articulates the foundation for learning and development within the EBMO and explains the responsibilities of those who manage and participate in development and training initiatives and programmes.

A staff learning and development policy and its supporting procedures should outline the opportunities that will be provided to staff to undertake development and training. It must be consistent with and supportive of the strategic and operational goals of the organization. It is also critical that what individuals learn becomes part of the organization's structural capital and can be transmitted to the rest of the staff.

An effective learning and development policy must attempt to:

▶ define the roles and responsibilities of human resource, executives, managers and general staff;

▶ describe the opportunities available to all staff to pursue their learning and development (including how staff can find out what and when opportunities are available);

▶ clarify mandatory compliance training requirements (namely, occupational safety and health);

▶ specify any special conditions associated with learning and development (such as budgetary allowances, leave entitlements and obligations to the organization after completion of qualifications);

▶ highlight administrative processes and resourcing requirements associated with development and training programmes;

▶ outline how training and development will be monitored during implementation and how subsequent outcomes will be measured; and

▶ make clear to managers and staff whether employees, the EBMO or a combination of both, will be required to pay for any training. *NOTE: Some organizations require staff to pay back a portion of training costs covered on their behalf if the employee attains a qualification and leaves the EBMO before it has received any benefit from the employee. This is typically used for high-cost training programmes, such as formal tertiary or vocational certification.*

> ▼▼ It is critical for EBMOs to have an operational structure that supports the creation, capture and transmission of knowledge. Individual learning of skills by staff in the secretariat, whether formal or informal, contributes to an EBMO's intellectual capital, and therefore it is important that what individuals learn becomes part of the EBMO's structural capital and can be readily captured, shared and utilized by the rest of the secretariat in relevant areas.
>
> ▶ Deborah France-Massin, Director, ILO Bureau for Employers' Activities

In smaller EBMOs in which people often fulfil multiple roles, it can be easier and less demanding on resources when implementing a learning and development policy that focuses on:
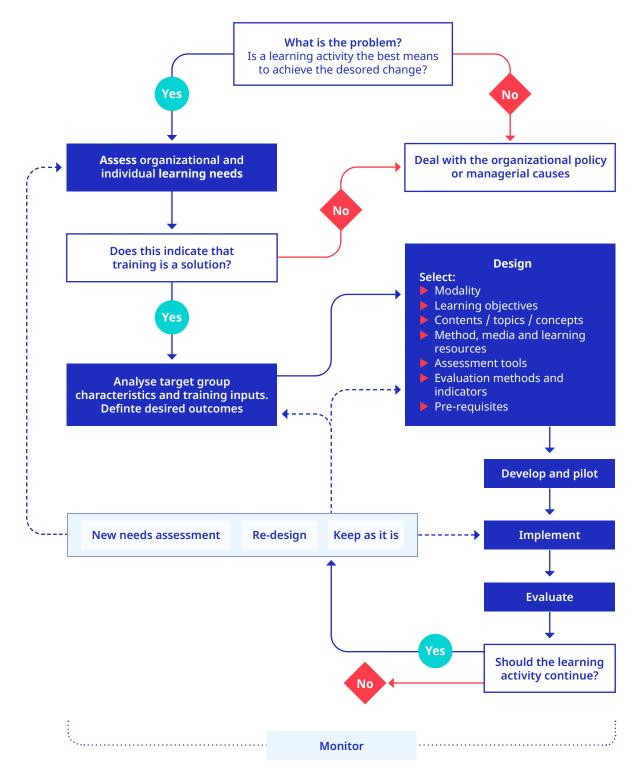
▶ closely consulting with managers on how any skills gaps can be identified and addressed;

▶ fully assessing the costs and benefits that apply to smaller businesses;

▶ investigating sources of funding or resourcing through government support;

▶ developing solutions that allow flexible learning or alternative forms of delivery; and

▶ having a simplified method to monitor and evaluate learning programmes.

The board of directors (executive committee) and senior management in smaller EBMOs have acknowledged the loss of acquired knowledge when multitasking staff leave the organization and could not be replaced by staff with similar levels of knowledge or productivity. This highlights the importance of having knowledge management (creation, transfer and implementation) imbedded in a human resource management strategy.

☞ The following illustration depicts the learning management cycle, detailing how needs analysis drives the learning process in an EBMO after a learning activity is considered the most appropriate path for achieving change. The learning management cycle is based on the ADDIE (analyse, design, develop, implement and evaluate) instructional design tool. EBMOs can benchmark parts or all of their own training methodology against this best practice model.

The learning management cycle

Learning systems framework

What is the problem?
Is a learning activity the best means
to achieve the desored change?

Yes

No

Assess organizational and individual learning needs

Deal with the organizational policy or managerial causes

No

Does this indicate that training is a solution?

Yes

Design
Select:
▶ Modality
▶ Learning objectives
▶ Contents / topics / concepts
▶ Method, media and learning resources
▶ Assessment tools
▶ Evaluation methods and indicators
▶ Pre-requisites

Analyse target group characteristics and training inputs. Definte desired outcomes

Develop and pilot

New needs assessment	Re-design	Keep as it is

Implement

Evaluate

Yes

No

Should the learning activity continue?

Monitor

Training needs analysis

EBMOs must identify the learning and development needs of the organization, teams (departments) and individuals via needs analyses. The assessment of what skills and development training to provide to staff involves identifying skill gaps or poor performance as well as establishing expected outcomes on completion of training, both for the staff and for the outputs of the organization.

Development and training needs should also be prioritized in terms of their potential impact on an EBMO's effectiveness, productivity and profitability. There are three levels of a training needs analysis to address when designing, delivering and measuring value to the organization accurately:

   i. **Organizational level** – considers why training is needed and where resources are best invested for development, along with the training activities to help achieve the strategic goals and objectives. The analysis also incorporates such aspects as organizational culture, human resource objectives and any external influences.

   ii. **Task or job level** – considers the specific knowledge, skills and abilities required to perform particular jobs within the organization. This is largely related to the workforce planning process and refers back to the position description and job analysis as a basis for analysing standards of work outputs (see tool 2).

   iii. **Individual level** – focuses on who needs training and for which tasks. This level considers the actual performance of an individual compared to the expected performance standards in determining whether training is the appropriate solution to address any deficiencies. Common examples of assessing performance are the performance appraisal and stakeholder feedback.

Training can be overly focused on the benefit to an employee rather than what the training can bring to the EBMO as a whole. All three levels of value need to emphasized. The following illustrates how a training opportunity's utility at all three levels has been assessed.

A great training opportunity – But does it add value to your EBMO?

Training opportunity:	ILO International Training Centre free online training for employers on Lobbying and Advocacy

The training follows a step-by-step approach to improving the effectiveness of the lobbying and advocacy work of EBMOs. It provides practical advice, tools, good practice examples and exercises to support EBMOs in their capacity-building efforts. It takes approximately 1 hour to complete the module and the final test and has been designed to help executives, directors and managers.

See www.itcilo.org/courses/lobbying-and-advocacy

Example assessment of training opportunity against organizational needs		
Organizational needs	EBMO is preparing for a strategic planning exercise to confirm a business agenda for the next five years.	The practical tools and examples would be of value to inform the EBMO in framing policy priorities and in planning the advocacy goals, objectives and actions to be pursued.
Task or job-level needs	A new position of Advocacy Manager was recently created.	The practical advice, tools and examples will help the EBMO to develop or revise the advocacy strategy and work plan to be pursued by the new staff member.
Individual needs	The recently recruited Communications and Advocacy Officer has extensive prior experience working as a journalist but is not clear on the distinction between lobbying and advocacy, nor has she any prior experience designing and implementing step-by-step advocacy campaigns. The Advocacy Manager needs less support in the area of communications and more support in the area of advocacy.	The training is designed for EBMO executives, directors and managers (those in decision-making positions). It is not certain if the ITC would accept the enrolment of the Communications and Advocacy Officer or that the officer would be able to fully participate in and benefit from the training because their needs are more practical and less strategic.

See the additional resources section for a template to use when conducting training needs analysis.

Learning objectives

Learning objectives are important in the training (and human resource management process) because they define how employees go from where they stand currently to a desired destination. They are the EBMO's guide in moving from the competency gaps that have been identified to successful capacity development. They guide the EBMO's choices, selection of content, methods and assessment tools.

Well-structured learning objectives ensure:

▶ tailored and relevant content is presented during the learning activity;

▶ tailored and efficient methods are used to support learners in developing their competencies;

▶ effective tools of assessment and indicators are in place; and

▶ learners have a clear idea of the purpose of the learning activity and can self-direct their efforts.

Human resource officers in the EBMO assist in determining the broad learning objectives that can then be broken down into more specific ones in each learning activity.

For guidance on defining learning objectives when designing training, see the ILO International Training Centre's *Guide on Training Methodology for EBMOs*.

Methods of training and development

The selection of a learning and development delivery method is determined by several factors that are both qualitative and quantitative in nature:

▶ type of learning required, such as skills, facts, broader knowledge, attitudes and behaviours;

▶ minimum type of knowledge is clarified;

▶ jobs being trained for;

▶ learning style preferences of the trainees;

▶ demographics of trainees, such as age, gender, cultural background, disability, impediments to learning, attitudes to learning and native language;

▶ variability and variety of delivery methods, for example, group or individual, location (including online), tutor-based or self-learning;

▶ physical, emotional or relational risk factors are clarified (Is physical harm an issue?);

▶ resources available to the organization, such as time, money, space, learning aids and facilitators; and

▶ whether training delivery is internal (within the EBMO for its staff) or external (by an outside provider and staff mix with other learners).

Understand employees' motivation to learn

As the ILO International Training Centre's *Guide on Training Methodology for EBMOs* points out, "Adults learn when they are willing to learn. Adult learner motivation is mainly driven by internal motives. External factors do not suffice. Each person develops their own methods of motivation based on their own reasons, for example, professional development or personal growth. In training contexts, be sure to offer contextualized learning experiences that can respond to the original motivation to learn."

The guide provides different strategies to make sure these principles translate into practice in learning contexts:

▶ Planning an analysis and assessment phase – Create and design your learning offer based on the learning needs assessments of the learners it is directed to. Analyse your learning offer with these principles in mind and ensure a learner-centred approach that supports the adult learning process.

▶ Use a collaborative learning approach – Create a space of participation by involving your learners as much as possible. Be aware of their motivations, expectations, learning needs and preferences. Encourage collaboration, opinions and discussion and ask for feedback on learning and tools provided.

▶ Facilitate and empower self-directed learning – Foster a learning space and experience that meets the adult learning need for autonomy. Always keep in mind that they are able to control, motivate, supervise and adjust their own learning.

▶ Contextualize the learning to ensure transfer to practice – Applicability and relevance are key components in adult learning. Build your course content upon real-world examples so learners can reflect on how to apply the new knowledge in their life.

▶ Problem-solving-oriented approach – Rather than presenting facts, engage adult learners in active problem-solving processes that relate to the competencies they are developing. Allow space for learners to manipulate and directly engage with knowledge and information, to explore the subject and learn from their mistakes. For example, use scenarios or case studies to prompt their exploration and to help them experience firsthand the consequences of their actions or behaviours.

▶ Experimentation is a crucial part of learning – As human beings, we are shaped by our experiences. For adults especially, experience is the main source of learning, and learning represents a way of making sense of experiences. Adults learn best when they learn by doing. In your courses and trainings, involve learners so that they experience the learning rather than being told and asked to memorize new knowledge and information.

See the interactive *Guide on Training Methodology for EBMOs* for its rich offering of additional guidance.

👉 Career development

Staff members tend to stay longer with an organization that provides them with opportunities for learning and growth and that invests in their career development.

EBMOs should aim to work in partnership with staff regarding their job and career development in order to align the organizational and individual needs. With the historical hierarchical progression routes becoming less typical, EBMOs will need to think more creatively about staff development opportunities. Giving staff access to a range of diverse experiences is becoming increasingly important for EBMOs to retain valuable staff.

EBMOs should also encourage staff to share their career development goals with managers. Because career paths are no longer static, it will be necessary to help employees grow their skills instead of focusing on them attaining a specific role. This may be achieved by:

▶ **Emphasizing continuous learning.** Although staff need to take charge of their own learning, managers need to provide encouragement and access to training. This may be in the form of creating team learning exercises, secondment to other organizations or institutions and mentor programmes, all of which can foster the continual learning process and building of intellectual capital in the EBMO. If an EBMO values career development, it should broadcast the support available to staff seeking such development, such as study leave, contributions to the cost of the education and availability of internal training opportunities.

▶ **Developing less-tangible skills,** such as intellectual curiosity and adaptability, gives staff transferable skills that can be applied in a variety of career fields.

▶ **Valuing the role of individual contributors.** High-achieving employees may excel because they are self-motivated and competitive but that does not necessarily mean that they can motivate others or establish a team environment. However, these staff members have valuable skills and experience and desire progression in their careers. A career track for individual contributors enabling growth in their areas of expertise without people management responsibilities should be considered.

▶ **Show staff how they fit into the EBMO.** Communicate the organizational goals, why they were chosen, why they are important and how staff contributions make a difference. Talk with employees about opportunities for development and help them to understand their value and their future with the EBMO.

See the additional resources section for a personal development plan template.

Global examples of a "further study" policy

The rules and regulations for study leave vary across different countries.

In Australia, the Victorian Chamber of Commerce has a further study policy that requires employees to pay back the cost of certain courses if they leave within six months after completing the course or 6–12 months after completion and when it is accredited study. Sometimes it is done on a subject basis rather than cost of the entire course. Once a team member submits a further study application and it is approved, the EBMO writes to the employee outlining the parameters and conditions of their approval and funding. The employee then signs off on it. It then clarifies the potential deduction in a situation in which an employee leaves the organization shortly after completion of the course or fails a subject or fails to attend the course.

*In Canada,** employers are not legally required to provide study leave to their employees. However, many companies offer paid educational leave to their employees as part of their benefits package.

*In New Zealand,** employers are required to provide up to five days of paid educational leave per year to employees who have been with the company for at least six months.

*In the United Kingdom,** employees have the right to request time off for training, but there is no legal requirement for employers to grant it. However, some companies offer paid study leave as part of their benefits package.

*In the United States,** there is no federal law that requires employers to provide study leave to their employees. However, some states, such as California and Massachusetts, have laws that allow employees to take time off for educational purposes.

*Source: See https://www.actiplans.com/types-of-leave-glossary/study-leave.

Succession planning

A succession plan focuses on what an organization may need to provide its employees in order for them to advance within the organization. Many EBMOs prefer to promote from within, and their staff benefit greatly from succession planning. EBMOs may undertake succession planning for the following reasons:

▶ ensure business continuity through human resource;
▶ mitigate against potential operational gaps within the EBMO; and
▶ provide career pathways for existing talent within the EBMO.

Every EBMO needs a retirement plan!

The most experienced employees usually create the most value in an EBMO. New staff who replace them usually take a reasonable amount of time to reach comparable levels of efficiency, productivity or identification with the EBMO culture.

It is therefore important to plan succession and identify staff members who potentially can occupy strategic positions in the future by succeeding those who will retire. It is desirable to coordinate mentoring programmes between applicable staff and their possible successors as a permanent activity within the EBMO.

A progressive EBMO may adopt an inclusive, whole-workforce approach to managing and developing talent by identifying business-critical roles at all levels within the organization. Moving through the stages of the succession planning process imparts many benefits to the employee-development efforts.

▶ **Reducing expenditure.** A succession plan sources candidates from within an EBMO, so fewer financial resources are spent on recruitment, onboarding and training.

▶ **Stronger internal hiring.** Because a good succession plan allows an EBMO to gauge aptitude and enthusiasm, it serves as a pre-filter for tapping staff members for advancement.

▶ **Long vacancies avoided.** It is difficult to predict when a suitable candidate will arrive to fill a vacancy, so by preparing staff in advance to move into new roles as they open, the EBMO may eliminate impacts on organizational growth or development.

▶ **A base for career development created.** Often a priority for the organization's younger candidates, a succession plan is a clear indicator that the EBMO is willing to invest in its staff and guide their development.

▶ **Increased employee engagement.** A succession plan shows that the EBMO values its employees, provides recognition and rewards high performers. A plan serves to provide staff with clear personal goals beyond the business objective.

▶ **Maximized performance potential.** A succession plan that incorporates cross-disciplinary training or skills development can expand the workforce's capabilities, thus increasing versatility and productivity and reducing the EBMO's vulnerability to absences.

Communicating with persons selected for succession makes sound business sense, both by establishing their interest level in opportunities that are available and by understanding their personal career objectives.

An EBMO's human resource manager should ensure that succession planning aligns with overall principles of fairness and diversity. Again, it makes sound business sense that in an environment of critical skills shortages and anxiety about future leadership, it is rational to explore all avenues to identify potential talent internally and externally.

Critically, succession planning establishes what knowledge or skills gaps will need attention in preparation for an employee assuming a higher-level role in the organization. This element of preparing for succession at the most senior level (that is, the chief executive officer) is a responsibility for the board of directors (executive committee) to consider and has implications for the effective governance of the EBMO. At the highest level – particularly in smaller EBMOs – knowledge transfer and transitioning to higher productivity and continuity are crucial and require board-level involvement.

Talent management

Talent management is the overarching term used to describe an organization's commitment to fostering as well as maximizing the potential and performance of its workforce and fits within the overall picture of development and career progression.

Talent management serves an EBMO by providing an identification, development and retention-based framework to apply to individual employees who are considered to be top talent. When performed well, talent management offers an EBMO a strategic toolkit for attracting, nurturing and deploying talented individuals that ideally also includes metrics.

EBMOs may find a talent management strategy advantageous for:

▶ providing a focus for investment in human capital;

▶ building a high-performance workplace;

▶ encouraging a learning culture;

▶ adding weight to the "employee value proposition" and an organization's credibility; and

▶ contributing to diversity management.

Talent management programmes often include a range of activities, such as formal and informal leadership coaching, mentoring and secondment.

Value work experience to mitigate turnover!

When a good employee is recruited by another organization or member company or they leave in search of better opportunities, it generates a double loss: That staff member takes their knowledge, experience and relational capital with them, which is costly to replace.

Their departure also necessitates outlays on recruiting and training a replacement. Hence, the importance of good career management within the EBMO, particularly in providing the staff with collective knowledge so that an internal candidate may assume the position.

In short, work experience can be seen as a form of capital that generates income to the extent that it can be transmitted to the rest of the EBMO's secretariat and to its "structural capital".

👉 Leadership development

"Leadership" is often used interchangeably with "management", as well as general management activities. It is commonly recognized that all managers, including first-line supervisors, need to demonstrate leadership qualities. Persons in formal managerial positions will have a human resource role that team leaders may not necessarily have – for instance, in conducting performance appraisals. In this case, it is necessary to take a broader view of management and leadership development together.

Leadership or management development is the structured process by which managers enhance their skills, competencies and knowledge via formal or informal learning methods to their benefit, to the benefit of the staff they manage and to the organization's benefit.

In terms of managerial roles in smaller EBMOs, there will be different priorities and needs than in larger organizations, where senior management development needs may relate to functional skills frequently provided by specialists.

Leadership development needs arise partly from the day-to-day activities of managers and from the imperative to change and shape the organization's direction as the organizational environment changes. The role of human resource, through its various functions, is to ensure that with an inclusive organizational culture there is a group of effective managers and leaders able to translate the EBMO's strategy, vision and values into action.

These managers and leaders must then encourage and nurture staff in the EBMO, ensuring that they, and the organization, continue to grow.

The importance of feedback

The leaders and managers in an EBMO must give and receive feedback that promotes and supports the elements discussed previously, such as training, development, career planning and succession planning.

Feedback in informal or formal ways promotes an engaged organizational culture and can also help to inform the organizational training plan.

In some cases, specific training for managers and leaders may be needed to facilitate effective feedback. Effective feedback at a minimum should be:

▶ timely and regular;
▶ accurate;
▶ relevant and in the correct context;
▶ non-discriminatory, avoiding speculation; and
▶ motivating.

But as the bwmarketing blog points out, "When it comes to giving employee feedback, there are many ways to go wrong and only a few managers do it well. Some managers only focus on the positive and gloss over the negative, hoping endless encouragement inspires their employees and magically eliminates areas where they underperform. Others only focus on the negative and fail to acknowledge when employees do a good job. A third set of managers simply give neutral feedback, offering neither criticism nor advice for doing better.

"All of these methods end up misleading your staff. Employees who receive the first type of feedback are never told how to improve and thus can't reach their full potential. Meanwhile, those in the second group feel overlooked and burnt out from the lack of recognition. People who receive the third type of feedback never progress and risk growing disengaged.

"The right type of feedback is a healthy blend of commendation and suggestions for improvement – that is, a good mix of positive and corrective feedback."

The bwmarketing blog offers a few examples, highlighted here, as guidance for making the feedback constructive.

Make the sting constructive!

BAD	GOOD
"You're a great person, therefore you're a good employee." "You're a horrible person, therefore you're a horrible employee."	"Here's how to improve your performance."
"Your numbers are on the rise, which is great, but we have noticed you tend to avoid collaborating with your coworkers. That said, you're also very punctual."	"We want you to collaborate more with your team. That said, your numbers are on the rise and you're very punctual."
"Your presentations are very confusing. We need you to write them better."	"Your presentations aren't as clear as we need them to be. Add concrete data to prove your point and try using bulleted lists to make things easier to read."
"You're too abrupt during your phone calls with clients. We need you to change."	"We've received feedback from clients saying you're too abrupt on the phone. How do you think you can be more approachable?"
"Thanks for your time – we'll review your progress again in 12 months."	"Thanks for your time. Let's talk again in a month or so and see where you stand."

Source: bwmarketing, *What Do I Say? Examples of Good and Bad Feedback*, 28 April 2022.

Management and leadership development practices

It is important to consider a variety of approaches for different management groups or individual managers and to adapt solutions accordingly. Formal learning approaches include:

▶ postgraduate university qualifications;

▶ qualifications and courses by management and leadership membership organizations;

▶ specialist courses; and

▶ management and leadership apprenticeships.

Given the size and resources of many EBMOs, internal growth opportunities are essential to retaining talent and critical for establishing a leadership pipeline. The following outlines examples of leadership opportunities within an organization.

▶ **Providing access to business challenges.** Potential leaders need access to the issues and an opportunity to develop and share ideas with senior management.

▶ **Forming talent peer groups (possibly with like-minded organizations).** Keep high-potential employees engaged by developing a group from different departments to collaborate on a long-term project, exposing them to strategic thinking, new connections and varied skills sets.

▶ **Changing the cultural mindset.** Professional development comes from a cultural mindset shift in the organization, not just from a programme. Create a workplace environment in which learning and growth are embedded in how the EBMO operates.

▶ **Providing exposure to the broader organization.** Establishing a regular rotation programme provides an opportunity for growth, whereby future leaders and managers can spend time in different teams (departments) of the EBMO to gain an understanding of how they interact with each other.

▶ **Communicating leadership potential.** Let the person perceived as having potential for advancement know that they have been noticed and explain that leaders find ways to continuously develop themselves formally and informally. Great leaders and managers will emerge from assuming ownership of their own development.

▶ **Assigning a mentor.** Potential leaders should find mentors.

▶ **Using stretch assignments.** Leaders learn and develop when exposed to new perspectives and assignments. Assigning potential leaders to longer-term projects exposes them to new thinking and helps them build new skills sets.

▶ **Secondment.** The temporary movement or "loan" of an employee to another part of the organization or another organization is widely recognized as valuable for both the employee and the organization's development.

▶ **Delegation.** Delegating real tasks to potential leaders enables managers to receive support through the allocation of work, which then becomes a development opportunity.

▶ **Building a succession plan.** Senior management must evaluate the talent they already have within the organization and build a succession plan to determine a pool of future leaders and managers.

Finding a mentor is a matchmaking tango!

Matching a mentor and mentee can be a complex process. Sometimes a mentor can be sourced internally within the EBMO or sometimes an external mentor may be required (for the CEO or senior managers, for instance). Professional networks of senior people within the EBMO can be a useful starting point for trying to match a mentee with an appropriate mentor.

Reverse mentoring

The practice of reverse mentoring pairs younger employees with executive team members to mentor them on various topics of strategic and organizational culture relevance. This can benefit an EBMO by:

▶ increasing retention of younger employees – programmes provide younger employees with the transparency and recognition that they seek from management;

▶ promoting the sharing of digital skills;

▶ driving cultural change within the organization;

▶ promoting diversity and inclusion – improving the leadership's understanding of minority issues, including those of gender, race, religion and disabilities.

For more examples of mentoring, go to www.togetherplatform.com/blog/examples-of-successful-mentoring-programs.

Shadowing

Having a shadow board of directors consisting of younger business leaders can assist an EBMO's senior leadership to keep up with changing market conditions and help navigate business model reinvention and cultural transformation. For more insights, see the 2022 ILO publication: *A Reference Guide to the Structure and Governance of Employer and Business Membership Organizations*.

Employee engagement

Employee engagement can be defined as an emotional commitment that an employee has to their work and organization. An engaged employee is one who aligns their behaviours and actions in the workplace with the EBMO's business goals and strategy to meet their role requirements as well as those of the team.

Employee engagement in human resource management aims to ensure that every employee is fully committed to the organization's mission, goals and values and that they remain encouraged and inspired to contribute to its overall success. The foundation of all staff engagement tactics is the intent to enhance the well-being of every employee.

The impact of effective employee engagement on improving staff retention, well-being, motivation and productivity is something that human resource teams focus on through strategic initiatives. An engaged workforce is also more likely to voice dissatisfaction, thus giving management an opportunity to improve aspects of the workplace environment. Many EBMOs are unable to compete with the higher salaries and compensation of other organizations in the private and public sectors, and staff are vulnerable to being poached with the lure of greater financial rewards elsewhere. This is a critical area where EBMOs must effectively listen, engage and develop their high-potential staff to minimize staff loss.

Engaged staff tend to be more connected with the EBMO and its goals and more willing to perform above and beyond the expectations of their roles. Reduced absenteeism is also a feature of a more engaged and productive workforce.

Typically, engaged staff have:

▶ a strong relationship with their manager or supervisor;

▶ a strong relationship with co-workers and colleagues, providing positive social and informal relationships;

▶ clear communication from management, promoting improved attitudes and problem-solving; and

▶ a clear path for focusing on outcomes, higher productivity, better organizational functions and achievement in providing higher levels of member satisfaction.

The role of human resource in engagement

The roles that a human resource team (or officer in this role) should strive to perform to improve employee engagement are multiple and connected.

▶ **Executive leadership.** As the leader driving employee engagement, the human resource manager (or officer with this role) should assume a leadership role in identifying and investing in ways to improve engagement tactics.

▶ **Employee engagement.** The human resource team has the responsibility of understanding the importance of methods that best drive employee engagement, how such engagement can be measured and what steps must be taken to continuously improve engagement approaches.

▶ **Training, guiding and coaching department managers in how they can better engage their staff.** Human resource managers need to maintain an open dialogue, addressing the causes that are preventing the success of employee engagement approaches and identifying and recognizing progress.

▶ **Activities.** By introducing, implementing and organizing employment engagement activities, human resource managers can foster a stimulating workplace that values the individual contributions of each employee and recognizes productive collaboration.

▶   **Measurement.** Regular surveys and other means of measurement help to develop and implement specific action plans. Human resource personnel must emphasize the specific dialogue and methods that positively influence employee engagement – not just data and analytics.

Actionable strategies

Practical employee engagement strategies that an EBMO can implement include:

▶   **Soliciting employee feedback.** When organizations listen to and act on employee feedback, staff appreciate it and are likely to invest more of themselves into the business. Examples of how to gather this feedback include a suggestion box, regular employee surveys and specific agenda items in team meetings.

▶   **Recognition and reward.** Encourage all staff, starting with the chief executive officer, to provide feedback and recognition frequently and in real time. These opportunities may be timed for formal team meetings or annual staff events and generated by supervisors, peers or senior management. By acknowledging staff promptly for desired behaviour and clearly linking recognition to that behaviour, these actions are more likely to be repeated.

NOTE: An issue that emerges when employee feedback is sought is that the employee does not believe that any action will be taken in response to the feedback. EBMOs should consider committing to making the results of any feedback survey or suggestions publicly available (within the EBMO) and make commitment to what actions will be taken.

▶   **Establishing great values.** People want to work for an organization whose workplace values speak to them. The culture and values of an organization are important to employee satisfaction. If staff buy into the organization's values (such as client and member service standards, community and social engagement) and see the board of directors (executive committee) and executives adhering to them, they are more likely be motivated to exemplify those values in their own work.

▶   **Consulting employees on workplace changes.** Some EBMOs have an obligation to consult with their employees on major workplace changes. It is vital that this consultation is not perfunctory because it can be an opportunity to hear from employees and to consider ideas that may not have otherwise been raised.

▶   **Prioritizing diversity and inclusion.** Fostering a diverse and inclusive workplace environment ensures that all staff members feel involved and supported regardless of who they are or what jobs they perform.

▶   **Incentivizing staff.** Linked to recognition and reward, incentives are rewards that promote hard work and positivity. Best practice suggests that survey staff should find out what incentives are most sought after and then tailor initiatives to match them.

▶   **Supporting employee well-being.** Happier and healthier staff are more dedicated to their jobs and outperform those whose physical and mental health is not optimal. Educate staff on healthy habits and then structure rewards for carrying through with them.

▶   **Encourage career development.** Encourage staff to think of working in the organization as a career choice and not just a job by establishing viable career paths so that all staff members have a clear means to advancement.

▶   **Training managers.** Some leaders in the organization may not understand the importance of employee engagement or what their role is for promoting it. Ensure that managers are aware of the benefits to the EBMO from employee engagement and provide training to build an engaged workforce.

👉 Measuring engagement

Organizations can use qualitative information (for example, employee feedback) or quantitative data (such as workforce statistics) to measure employee engagement and set benchmarks for the future. Before taking action, however, organizations should consider what it is specifically that they are seeking to measure.

The qualitative measurement of employee engagement in an EBMO can be achieved through engagement surveys. These can be conducted formally in an organization-wide survey or at a management level for teams or individuals.

Where possible, the surveys should:

▶ be anonymous;
▶ ask questions around each employee's role and work;
▶ ask questions about each employee's commitment to the organization and its success; and
▶ ask questions about the relationships each employee has with colleagues and managers.

After collating and evaluating the survey findings, it is important that the organization acts on the insights from the information and communicates what actions will be taken to address identified issues or deficiencies. Failing to act can result in further disengagement and a reduction in employee motivation.

> 🔍 See the additional resources section for a checklist for creating an employee engagement survey.

Reviewing hard data can also assist in determining employee engagement and motivation levels. Generally, a workplace with engaged and motivated employees will show more positive data and information via such metrics as:

▶ employee absenteeism (for example, low rates of unscheduled or personal leave);
▶ retention (for example, low turnover rates, positive exit interview comments);
▶ punctuality (for example, staff arrive on time and their designated work hours);
▶ productivity (for example, quality and quantity of output, staff meeting, key performance indicators); and
▶ safety (for example, low accident or incident rates and thus low compensation levels).

The organization may want to target workforce data to a particular work group or individual (manager or employee), depending on the choice of outcome for the evaluation.

Definitions and abbreviations

ACTEMP   Bureau for Employers' Activities, which is a specialized unit within the ILO.

Capacity-building   The process of developing and strengthening the skills, competencies, abilities, processes and resources that organizations and communities need to survive, adapt and thrive.

EBMO   Employer and business membership organization, which is the target audience of this manual.

HRM   Human resource management, which is the practice of administering policies and programmes that optimizes employee performance and advance an organization's business goals. The programmes include employee recruitment, training, compensation, benefits and professional development.

HR manager   Human resource manager, which is the person who leads and directs the routine functions of recruiting and interviewing staff, administering pay, benefits and leave and enforcing company policies and practices.

Human capital   The "asset" that employees bring to a business, including their expertise, qualifications and skills, that add value to the organization.

Inclusion   The process of valuing people's differences to enable everyone to thrive at work.

Inclusive leadership An authentic leadership style that treats everyone equitably, creates a strong sense of belonging for all staff and supports staff to reach their full potential. It also rules out discrimination, bias and favour based on colour, race and other protected characteristics and allows employees to feel valued for their own input.

Employment relations The management and analysis of the relationship between employers, employees and representative groups, such as trade unions.

ILO   International Labour Organization, which is part of the United Nations system.

Job description   The document that provides an overview of the tasks, duties, responsibilities, qualifications, competencies and experience required for a particular role.

KPIs   Key performance indicators, which are measurable values that demonstrate how effectively an organization is achieving organizational objectives and upon which the performance of employees is evaluated (for example, sales per month, customers served and units manufactured).

KSAs	Knowledge, skills and abilities, which are the proficiencies and competencies required for a particular position or role.
Mentoring	A process used to link junior employees with a mentor in a more senior position to provide coaching, training and development (which can be informal or formalized, through meetings and measured outcomes).
Mission statement	A statement that expresses what an organization does to achieve its purpose.
Organizational culture	The beliefs, morals, mission and attitudes shared by the organization and its staff.
Performance management	The process or system by which an organization measures and improves performance within its workforce and incorporates performance, remuneration, promotions, disciplinary procedures, terminations, transfers and development needs.
Performance review	A formal assessment of an employee's work performance that identifies their strengths and weaknesses, provides feedback and sets goals for future performance. Performance reviews are also called performance appraisals or performance evaluations.
Staff	Persons contracted to work for an organization (or business) in return for compensation. Staff are differentiated from other workers, such as contractors, in that they are an integral part of the organization, which has the legal right to dictate the conditions, hours and manner of work performed.
Staff retention	Organizational policies and practices that are designed to encourage staff to remain employed by the organization.
Strategic plan	How an organization defines its purpose and goals beyond the immediate future and the actions set forth to achieve those goals.
Succession plan	A plan that focuses on identifying staff with competencies who could advance to particular positions within an organization.
Workplace environment	Encompasses the physical conditions as well as the mental demands, social aspects and support levels between colleagues and management in the workplace.

Additional resources for tool 5

This section offers checklists, templates and guidance for improving how EBMOs further develop and train their employees as part of a culture of valuing structural and human capital and for better mitigating high turnover situations. It focuses on assessing training needs and creating an individual plan for each employee's further skill development. This section also can help in either compiling or updating a human resource management manual and the employee handbook.

Where you see "[EBMO]", "[purpose]" or "[xxx]", the idea is for you to insert the name of your EBMO or the appropriate phrasing if you decide to adapt this resource to your own human resource management manual.

Human resource management manual checklist

As the next step to producing a human resource management manual for your EBMO, this checklist can be used to compile the basic documents that should be included.

☐ Prepare the EBMO's employee development plan

☐ Prepare the EBMO's employee engagement survey

☐ Undertake a training needs assessment (this links to the first template tool that follows)

☐ Create a competencies assessment checklist

Training needs template

Training needs analysis can be a complex task and should be tailored to the organizational setting, the job being performed and the individual who is performing it. As a basic guide, human resource managers should follow these steps:

1. Analyse the job.
2. Analyse the employee's current skills and knowledge.
3. Decide on the skills and knowledge gaps (the gap is the difference between what is needed or desired in the organization as a competency and what already exists at the employee level or may exist due to imminent changes or opportunities).
4. Identify training solutions using this template.
5. Evaluate the performance after training.

Use this template in conjunction with the five steps above to conduct a training needs analysis.

Major tasks, skills or competencies of a position	Does a gap exist (now or imminently)?	Is training or skills development required? Y/N	If yes, identify what are the training needs	How will this be achieved? (on the job, external training)	When?	Who to organize? Training provider?	Cost
Example: End-to-end recruitment		Y	Use of recruitment systems, processes, familiarization with the recruitment policy, practice at conducting telephone screening, behavioural interviewing, reference checks	On-the-job training, short course on recruitment – in-house if available	July 2021 (once graduate programme is completed)	Sam Brown put forward interest; human resource team to facilitate enrolment and course session	TBC
Example: Well-developed oral, interpersonal and written communication skills, including negotiation and representation		Y	Need to improve on presentation, assertiveness and negotiation skills	Enrol in Toastmasters team (either internal or external group), undertake negotiation skills workshop	End 2021 (post-AHRI course)	Sam Brown	TBC

Combined with information from an employee's personal development plan, consider asking the employee:

- ▶ What do you want to achieve in the period ahead?
- ▶ Where can you see your career moving in the next two years?
- ▶ How are you going to make this happen?
- ▶ What will you need from our organization to assist you to reach your career goals?

Competencies assessment checklist and template

As part of a broader needs analysis or even recruitment tool, this checklist can assist you in determining "must-have" and "good-to-have" technical and social competencies in the EBMO.

This is best done on a joint basis involving the staff member and their manager or on the basis of self-assessment by the staff member. To undertake the joint review, both the manager and staff member should complete the form individually and exchange their findings.

To complete the assessment, an individual's current capacity should be rated against each of the competency descriptions. The areas where the competence falls short of the minimum desired level should be indicated at the end of the form. This information can then be used to discuss and establish a personal development plan for the individual concerned. Senior management or the human resource team are encouraged to incorporate specific technical skills for the role, as required.

Name: **Date completed:**

High priority or "must have" competencies	Expert	Good practical	Basic	+ or —
Personal effectiveness				
Ability to work effectively with people of different backgrounds and styles				
Active listening				
Effective presentation				
Networking and coalition building				
Negotiating ability				
Consensus-building				
Analysing complex subjects and situations				
Effective participation in meetings				
Explaining and defending compromise solutions				
Self-motivation				
Preparation				
Professional knowledge				
Knowledge of current labour law and practice in own country				
Knowledge of …				
Knowledge of…				

High priority or "must have" competencies	Expert	Good practical	Basic	+ or —
Technical skills				
Written and spoken English				
Electronic communication				

Desirable or "good to have" competencies	Expert	Good practical	Basic	+ or —
Personal effectiveness				
Relationship management				
Adaptability to changing circumstances				
Managing relationships with organization leaders and with decision-making bodies				
Presenting national problems in a [region] way				
Reporting back				
Desire to learn				
Reaching appropriate decisions based on analysis of orally presented, written and numerical data				
Meeting deadlines				
Action orientation				
Organizing and running effective meetings				
Managing interpersonal disagreements and finding solutions				
Writing reports for policymaking committees				
Writing assessments of alternatives				
Clear and concise written transmission of ideas in email, summary and "full-report" forms				
Development of a written mandate				
Professional knowledge				
Knowledge of [region] decision making procedures				
Linking theory to practice				
Ability to understand and interpret complex legal and quasi-legal documents				
Familiarity with national expert networks				
Knowledge of decision making structures in own country				
Knowledge of the regional Institutions				

Technical skills				
Mastery of basic packages – Word, PowerPoint, Excel, Adobe Reader				
Internet research capability				

Summary of areas for improvement template

In the template, list the areas where current competence levels need to be improved and specify the exact nature of the improvement required. For example, NETWORKING: "Needs to become more proactive in establishing and maintaining relationships with peers in other national social partner organizations"

	Competence area	Nature of the improvement required
"Must have competencies"		
"Good to have" competencies		

Employee development plan template

Use this template (following page) as a guide for working with each employee to, first, establish a kind of baseline of their ambitions for evolving their skills and capacities in the organization and in their role, ideally with their sights set on a higher level in the EBMO. This plan will then be vital for assessing performance periodically and ensuring that organizational staff development plans and support are aligned with individual needs and aspirations.

Instructions to the employee

Once you have completed your self-assessment and an assessment of your position and your work environment as outlined in the individual development planning process, you are ready to fill in the development plan form included here.

Individual development plan purpose

▶ Set priorities for your career development.
▶ Identify goals that are mutually beneficial to you and your employer.
▶ Select the best available activities and the resources needed to help you achieve your goals.
▶ Set a timeline for achieving your goals.

Individual development plan sections

1. Developmental goals for the coming year – What do you want to achieve?
2. Relationship of goals to the organization's goals – How will the organization benefit from your development goals?
3. Knowledge, skills and abilities to be developed – What will you learn?
4. Developmental activities – What are the best development activities for the goals that you have identified?
5. Resources – What resources are required for you to engage in the development activities – time, funds, help form others and so forth?

Development plan template

Employee name:

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

Employee's signature

Date:

Manager's signature
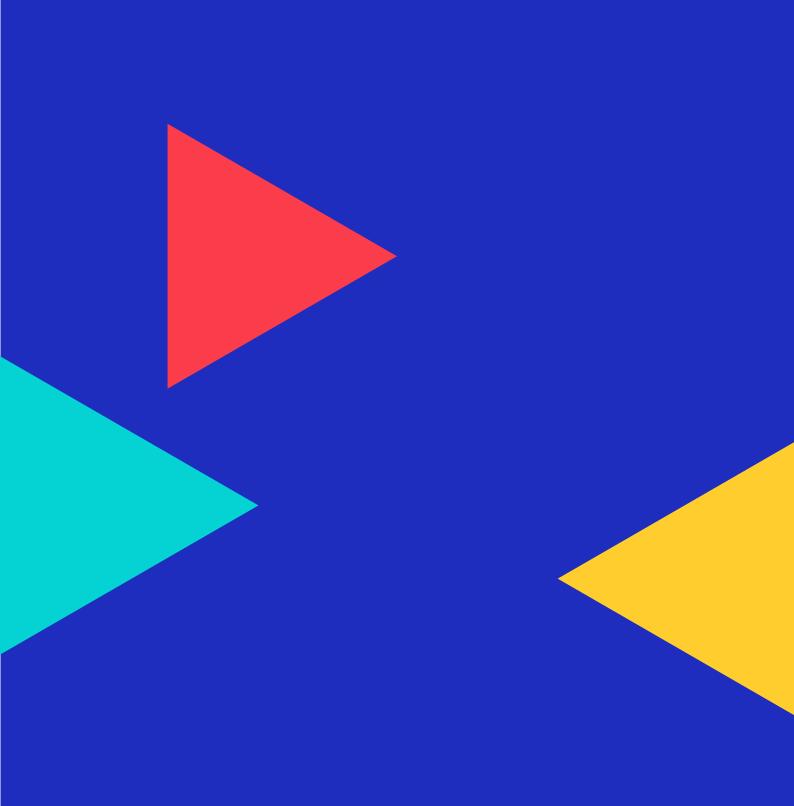
Date:

Employee engagement survey checklist

This checklist should be used once a year to assess employee engagement – as a gauge of staff morale and a check for any gaps or developing issues that could lead to conflict, turnover or disengagement. It will also help to set benchmarks for employee development and training commitments in the future.

Steps to follow in the engagement survey process

1. Define the purpose or outcome of the survey (what are you trying to achieve or answer?)
2. Determine the design of the survey based on individual business need or context (online or paper-based, open-ended questions or multiple choice or rating scale and so forth).
3. Develop the questionnaire based on desired outcomes – ensure that responses can be collected quickly and accurately.
4. Send staff the questionnaire for completion (set a time frame for completion).
5. Analyse the survey responses.
6. Prepare a summary report of the findings and recommendations, for review and discussion. (Ensure survey responses remain anonymous where possible.)
7. Prepare an action plan that includes who will be responsible for what, a timeline for action, the resources required and how success of an action will be measured.
8. Communicate regularly with staff (how the results will be used, reviewed and discussed).
9. Benchmark the survey results for a year-to-year comparison.

Suggested questions when a human resource officer talks with an employee when conducting a survey interview

Engagement factor	Questions to consider
Relationships	▶ Does your manager inspire you? ▶ Do you trust and respect your manager? Your colleagues? ▶ Do you feel valued for the work you do? By your manager? By your colleagues?
Strategy	▶ Do you know how your role contributes to the EBMO goals? ▶ Are you provided with an opportunity to contribute to decisions that affect you or your role?
Role	▶ Do you have the resources and tools required to effectively complete your role? ▶ Do you have the knowledge, skills and training required to effectively complete your role?
General	▶ Would you recommend the EBMO as a place of employment? ▶ Would you become a member if you were a local business? ▶ List five words that best describe how you feel about work. ▶ Do you feel proud telling people where you work and what you do? Why or why not? ▶ How likely are you to look for other employers and roles over the next year?