



Diversity & Inclusion Toolkit

September 2018

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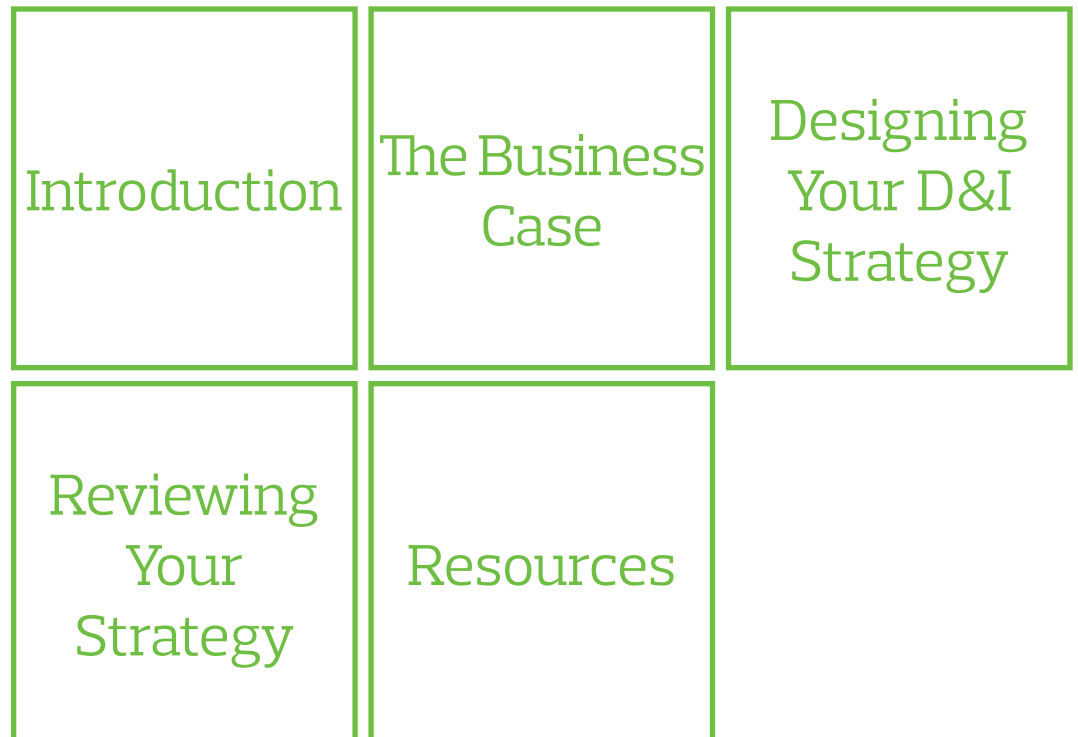
CREATING A DIVERSITY & INCLUSION STRATEGY

INTRODUCTION

This section outlines the steps to follow when developing a diversity and inclusion strategy for your company.

It begins by helping you to reflect on where your company is currently at, in terms of this topic, and how to build your business case aligned with your company strategy. It provides guidance on how to identify focus areas that can make a difference for your company. It also provides templates and tools to structure and summarise your strategy.

Using this toolkit will ensure you think strategically about Diversity and Inclusion and its relevance to your company.



THE BUSINESS CASE

CREATING A COMPETITIVE ADVANTAGE

Diversity simply means difference

Diversity is about differences, seen and unseen.

Inclusion is diversity in action

Inclusion creates an environment where people are valued, feel valued and are able to achieve and contribute to their full potential.

An inclusive environment improves interaction with employees, customers and our communities.



THE BUSINESS CASE

WHY DIVERSITY IS GOOD FOR BUSINESS

More diverse groups tend to be more innovative, creative, hard-working and better at solving problems.

Companies with female Board representation have been found to outperform those with no women on their Boards

Gender-diverse companies are 15% more likely to outperform competitors

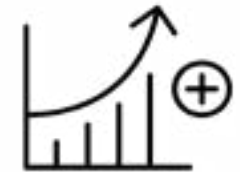
Deeper understanding of the consumer market, e.g. in the US, women direct 80% of consumer spending

The talent pool is shrinking. Every organisation is competing for the same talent

Ethnically diverse companies are 35% more likely to outperform competitors

THE BUSINESS CASE

DELIVERING COMPETITIVE ADVANTAGE



PEOPLE

- 82% of global HR leaders believe that the ‘war for talent’ will be a key business issue over the next 10 years
- 75% of employees who experience unfairness will not recommend or refer
- 67% of LGBT people believe it is important to work for a company that has equality and diversity policies
- 86% of millennials in Ireland research the culture of an organisation
- 72% of women in the workforce say diversity is important when evaluating job offers

REWARDS

- +53% return on equity – Fortune 500 (Diverse Boards)
- 45% increase market share
- 80% improvement in business performance
- +15% financial returns
- 50% increase in team collaboration, creative agility & problem solving
- 20% increase in employee retention

THE BUSINESS CASE

WOMEN WORKING IN IRELAND

51% of Irish population **VS** **10%** of Irish Corporate Boards

11 Female CEOs in the Irish Times Top 1000 companies

26% of Irish political representatives. Ranked 25 of 27 in the EU.

36% of Irish State Boards

14.6% pay gap between women and men for the same work

DESIGNING YOUR D&I STRATEGY

WHERE TO START

1. Audit existing practices & policies
2. Cultivate internal insight (data driven - quantitative and qualitative)
3. Define strategy, governance and actions
4. Execute and evolve (share best practice)

DESIGNING YOUR D&I STRATEGY

REVIEW YOUR BUSINESS - TEMPLATE

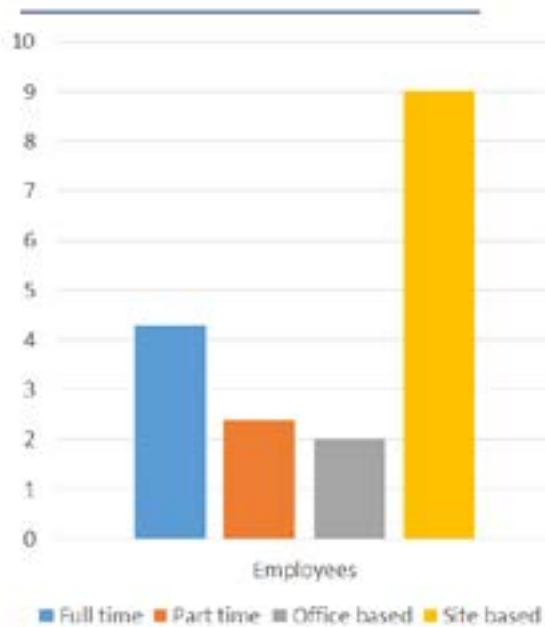
	DESCRIPTION OF GOAL	D&I IMPACT
[ENTER BUSINESS GOAL HERE] - SAMPLE	Grow revenue and market share	<ul style="list-style-type: none"> • Diversity of styles and thinking required to innovate and grow our business • Attraction and retention of talent to deliver this business goal • Appeal to a wide consumer base, diverse internal teams representative of the diversity of our consumer base
[ENTER BUSINESS GOAL HERE]		
[ENTER BUSINESS GOAL HERE]		

DESIGNING YOUR D&I STRATEGY

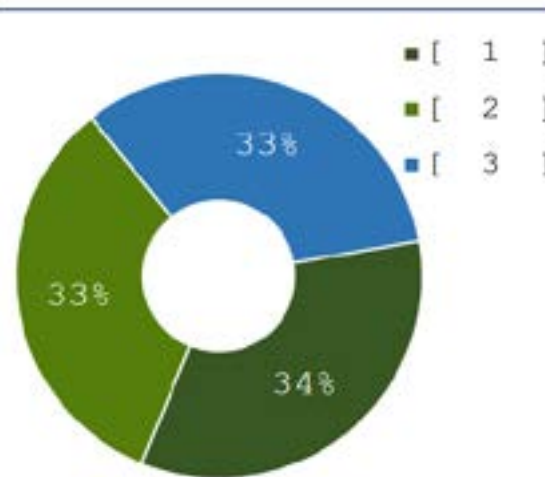
REVIEW YOUR EMPLOYEE PROFILE

This process will identify focus areas for your D&I strategy. Repeat these examples as appropriate for other dimensions.

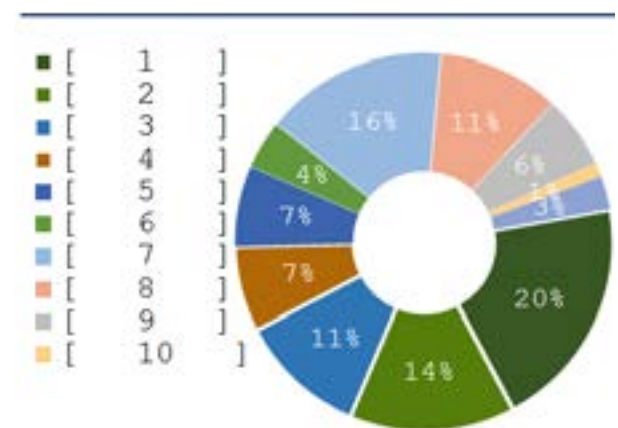
[Overall Employee numbers]



[Gender]



[Age Group]



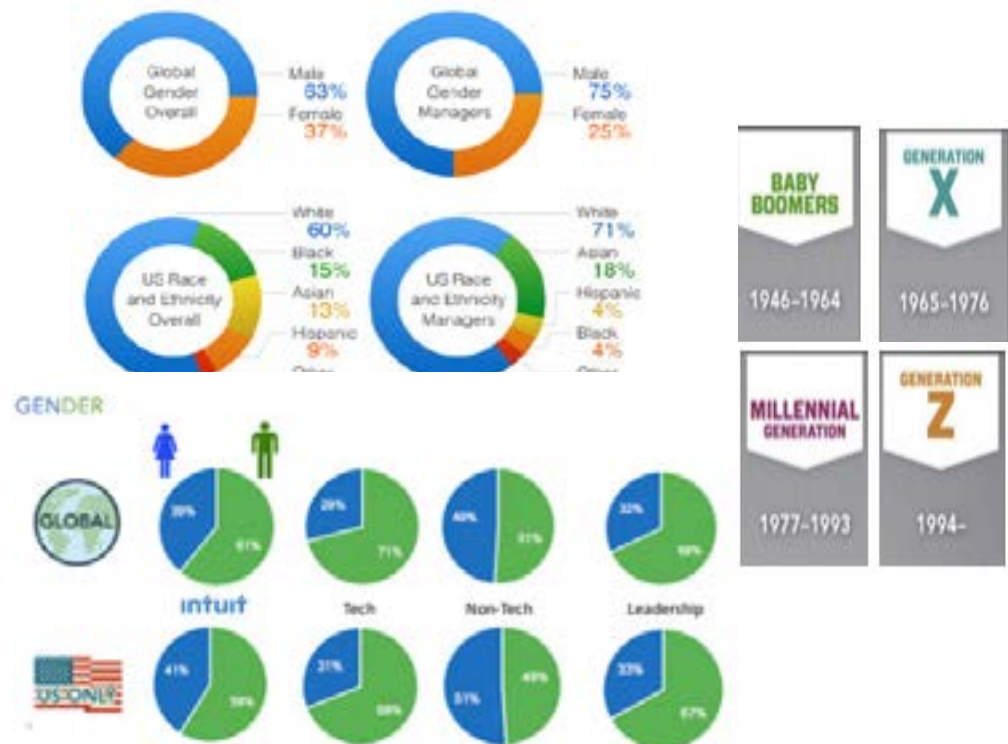
DESIGNING YOUR D&I STRATEGY

EMPLOYEE PROFILE IN MORE DETAIL

Display graphically the demographics for global/local/regional data.

- Gender overall and at different levels and in different functions
- Nationality at different levels
- Generations in the workplace as % of employees in each generation
- Voluntary turnover demographics by gender and generation
- Joiners, leavers, promotions, length of service by gender, nationality, generation

Data Display Ideas



DESIGNING YOUR D&I STRATEGY

REVIEW EMPLOYEE DATA ON FILE

Employee Engagement Surveys

- Analyse employee surveys for response rates on diversity and inclusion related questions.
- Analyse for difference in responses across gender, location, function, generation.

The following are some typical questions in employee surveys that measure D&I:

- People are treated equally and fairly in my workplace regardless of gender, age, nationality, sexual orientation, religion, disability
- I can be myself at work
- Where I work different views are valued
- Where I work difference is valued

Employee Focus Groups

If no employee data/survey information is available consider hosting focus groups or surveying employees to explore their views on diversity and inclusion using some of the questions above .



DESIGNING YOUR D&I STRATEGY

REVIEW EMPLOYEE REWARD DATA FOR DIFFERENCE

- Monitor the pay and bonuses (if applicable) of male and female colleagues doing similar roles to ensure it is comparable, taking account of individual experience, competence and performance in role.
- Where performance management is in place, compare the performance ratings for male v female or managers v non managers, or different nationalities. Are there any groups treated more favourably than others?
- Where talent management processes are in place, compare talent ratings of males and females and levels. Are there any groups perceived more favourably than others?
- Create an action plan for addressing any inequalities

DESIGNING YOUR D&I STRATEGY

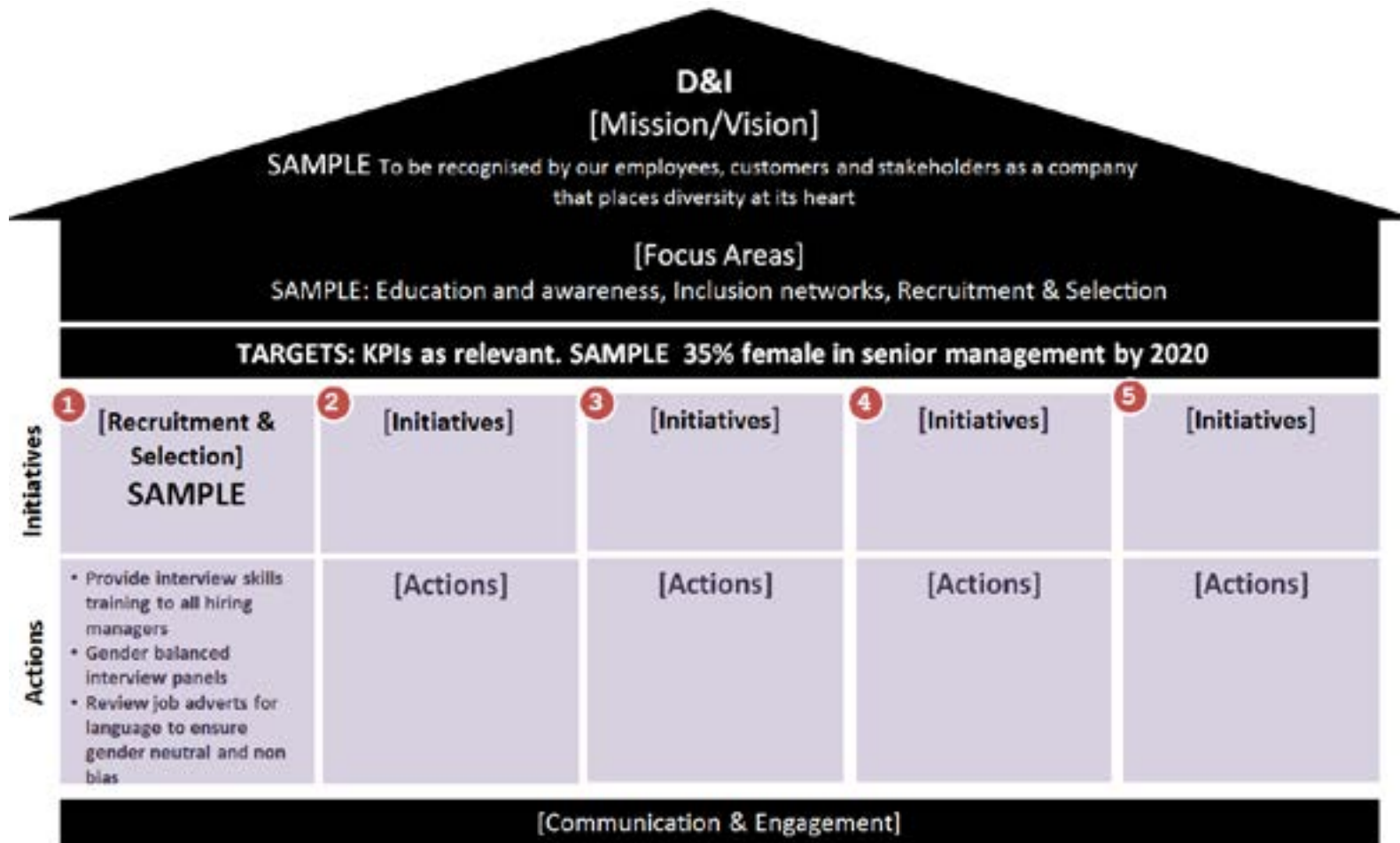
BUILDING YOUR D&I STRATEGY

Some questions to explore with your leaders to help prioritise focus areas for your business.

	QUESTION
BUSINESS ENVIRONMENT	<p>Grow revenue and market share</p> <ul style="list-style-type: none"> • In what ways is your environment changing and what new challenges does this pose for your company? What opportunities does it present? • In your view what are the 3 or 4 critical success factors for the business over the next 5 years as it implements and delivers on its strategy and business plan?
TALENT REQUIREMENTS	<ul style="list-style-type: none"> • What are the most important skills, competencies, ways of working that you need in your company to be successful? • Do these diverse skills, competencies, ways of working exist in your company already? • What is missing in the talent profile of your company? What does your company data tell you? • What do we want diversity to help us achieve? How can we attract top talent? • How can we drive more innovation and growth by leveraging the diversity of our people? • Where is the imbalance, what do you need to prioritise? (Gender, Nationality, Age, Family, LGBT, Disability)
STAKEHOLDERS	<ul style="list-style-type: none"> • What are the views of your management team? • What are your employees telling you? • What are potential employees looking for from your company? • What are the views of other stakeholders e.g. Board members, customers, investors?

DESIGNING YOUR D&I STRATEGY

DEFINING YOUR D&I STRATEGY



DESIGNING YOUR D&I STRATEGY

SAMPLE INITIATIVES

Communicating Diversity Imperative:

- Mission statement
- Communicate strategy
- Visible sponsorship
- Working group

Hiring Practices:

- Wording of job adverts
- Candidate short-lists
- Hiring targets
- Training hiring managers on unconscious bias
- Make-up of interview panels

Talent Development:

- Mentoring
- Coaching
- Talent & succession metrics
- M:F ratios in development programmes
- Women in Leadership programmes

Pay Equality:

- Pay Practices – assess equality between M:F or whichever diversity component is your priority

Raising Awareness & Understanding:

- Education on business value
- Creating understanding of unconscious bias
- Promoting key events e.g International Women's Day, International Men's Day
- Learning from other organisations

Flexible Work Practices:

- Return from maternity leave/ career break/carer's leave
- Flexibility on start and finish times
- Supporting technology
- Parental Leave, Part-time hours

DESIGNING YOUR D&I STRATEGY

SAMPLE KEY PERFORMANCE INDICATORS

Communicating Diversity Imperative:

- Company data & metrics
- M:F on Board, Mgmt Team, Senior Mgmt, by Business Area, by Function
- Continuous communication via internal channels and on company website

Hiring Practices:

- M:F make-up of candidate short-lists
- Hiring targets specific to certain role types
- % of hiring managers trained e.g. 'Licence to Hire'
- % of Interview panels with M:F balance

Talent Development:

- Number of mentors assigned to mentees
- Number of coaching relationships
- Talent & succession metrics
- Development Programmes M:F ratios
- Number of leaders attending relevant training

Pay Equality:

- Pay Practices e.g:
- M:F pay parity/difference by level/by role type

Raising Awareness & Understanding:

- Number of company offices/locations getting involved in global events such as International Women's Day
- Number of employees attending training events such as unconscious bias training

Flexible Work Practices:

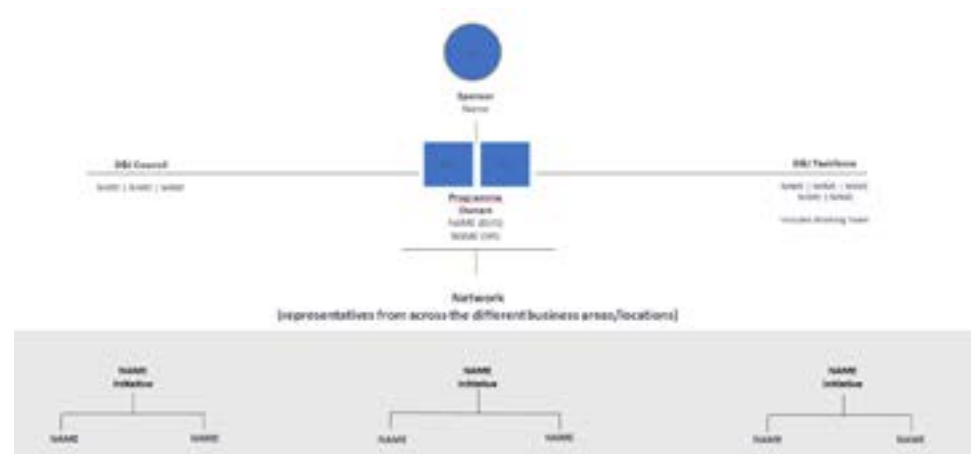
- Number of employees returning from maternity leave/career break/carers leave & support provided
- % of employees using Parental Leave, Part-time hours
- % of employees working remotely

REVIEWING YOUR STRATEGY

MOBILISING YOUR STRATEGY

- Your D&I strategy should be informed by your business strategy, what is the ‘burning platform’ in your company?
- Top team buy-in and visible sponsorship is absolutely critical for D&I to be taken seriously in your company
- Identify the key components of your D&I strategy that will drive change
- Create a ‘Mission Statement’ for what you are trying to achieve

CONSIDER A GOVERNANCE STRUCTURE



REVIEWING YOUR STRATEGY

MOBILISING YOUR STRATEGY

Consider creating a D&I Council (CEO level), a D&I Taskforce (mid to senior levels) and a D&I Network (grass-roots network of employees) who are passionate about D&I:

1. Sample Role of D&I Council	2. Sample Role of D&I Taskforce	3. Sample Role of D&I Network
Champion the D&I agenda from the top of the company	Represent the views of your respective business areas/teams	Be a passionate ambassador for the Diversity and Inclusion agenda
Hold the D&I Taskforce and Network to account in their roles, seek regular updates and recognise their progress	Bring your views, opinions, previous experience	Help to launch and drive D&I initiatives in your location
Ensure that D&I is strongly referenced within the company's business strategy and plans	Drive our diversity strategy	Participate in quarterly calls to stay informed about our Diversity and Inclusion strategy and to give us your views and feedback
Represent your company externally at relevant D&I forums and events	Be ambassadors for what we are trying to achieve	Devote a small percentage of your time to support our D&I initiatives
	Devote a small percentage of your time to the delivery of key components of the diversity strategy	Take on this role from X until Y date when you can opt in again or opt out

RESOURCES

KEY RESOURCES (CLICK TO READ / WATCH)

- [Why Diversity Matters, 2013 Catalyst report.](#)
- [Delivering through Diversity, 2018 McKinsey](#)
- [Five reasons why diversity and inclusion at work matters, 2018 CIPHR](#)
- [Diversity and Inclusion at Work, CIPD 2018](#)
- [When She Rises We All Rise, 2018 Accenture](#)
- [Millennial Survey, 2018 Deloitte](#)
- [Gender Equality Explained By Children, TED](#)
- [Michael Kimmel. Why gender equality is good for everyone; men included. TED](#)

DEVELOPING DIVERSE & INCLUSIVE RECRUITMENT PRACTICES

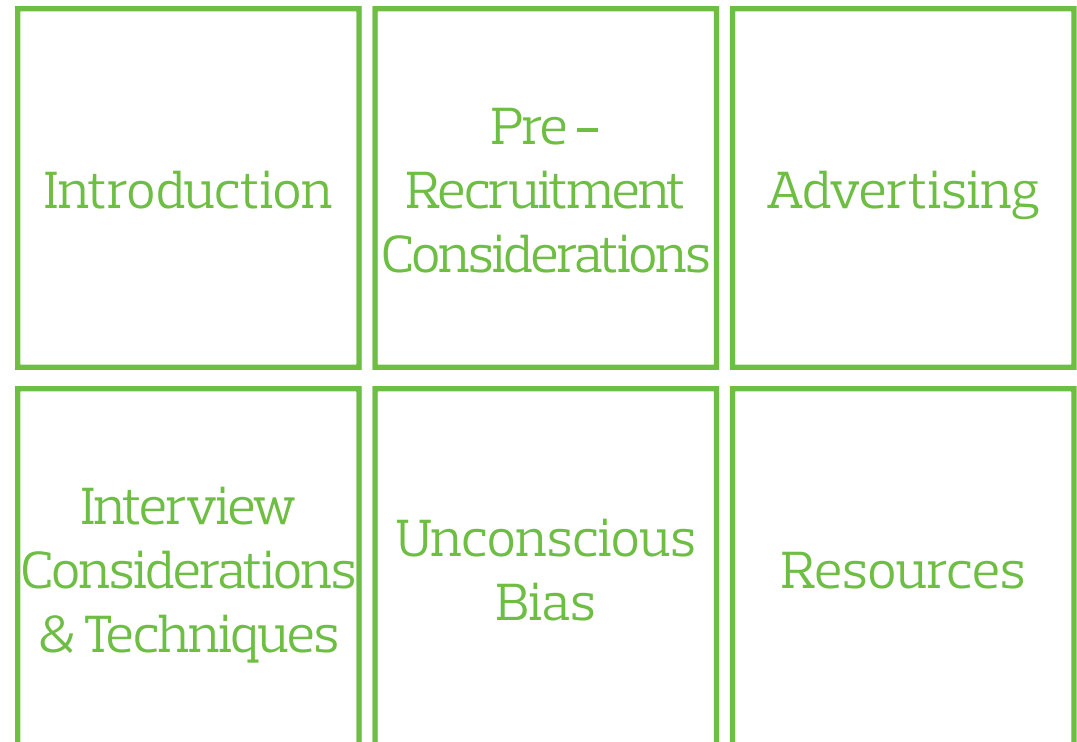
INTRODUCTION

Now that you have reviewed the Toolkit for Creating a Diversity & Inclusion Strategy, you will understand the benefits that a diverse and inclusive workforce brings to organisations. When implementing a Diversity & Inclusion Strategy for your organisation, an important starting point on your journey is recruitment.

Developing recruitment processes which encourage and motivate potential candidates from all walks of life to apply for roles within your organisation is vital. Equally as important is ensuring that hiring personnel understand the mechanism to achieve diverse and inclusive recruitment and the benefits attached to having a workforce where all individuals feel valued and free to be their true selves.

The aim of this Toolkit for Developing Diverse & Inclusive Recruitment Practices is to assist you in taking steps towards attracting diverse candidates to apply for roles in your organisation, shaping your recruitment agenda going forward and ultimately to developing a diverse and inclusive workforce.

Remember, the recruitment and selection process offers you the first opportunity to promote and sell your organisation. These slides will assist you in so doing in a fair and transparent manner.



PRE-RECRUITMENT CONSIDERATIONS

QUESTIONS TO ASK

- Is this a newly created role or a replacement for a colleague who has left the business?
- Traditionally what gender applies for this (or similar) roles/ who are our typical candidates?
- What could we do differently to attract more females to the role (advertisement/ flexibility etc)?
- How do we carry out the recruitment process?
- How might we improve on the recruitment process and/ or core parts of the role to ensure a more equal split of applications?
- What is the market for this role?

ADVERTISING

EFFECTIVE ADVERTISING

- Consider how internal or external agencies are engaged. What is their remit? Consider having any gender identifying information redacted in advance of onwards transmission.
- Set targets e.g. All Curriculum Vitae documents reviewed to be of equal weighting, with equal proportions of males and females to be interviewed

AVOID USING 'GENDER CODED' WORDS

Masculine

'Gender Coded' Words:

Active
Adventurous
Challenge
Confident
Decision
Driven
Independent
Objective
Opinion

Feminine

'Gender Coded' Words:

Agree
Commit
Cooperate
Depend
Honest
Interpersonal
Loyal
Support

INTERVIEW CONSIDERATIONS & TECHNIQUES

INTERVIEW CONSIDERATIONS

- Ensure that the interview panel has a range of males and females who are culturally and age diverse.
- Consider asking all candidates to complete the same sample work test question
- Standardise interviews by introducing a standard script of interview questions for specific roles and use a scorecard to rate the candidates
- Use the Star Method for more effective recruitment processes
- Remember: Having a scoring system in place when carrying out interviews can help to ensure that the assessment of candidates is objective and consistent.

SAMPLE SCORECARD OPTIONS

1. Failed to answer the question
2. Met few of the requirements
3. Met the majority of requirements
4. Met all requirements
5. Very strong response articulated well

INTERVIEW CONSIDERATIONS & TECHNIQUES

STAR METHOD

Situation

Explain the situation

Task

Explain your task or role

Action

What action did you take?

Results

What resulted from your action?



INTERVIEWING SKILLS & RETURN TO WORK

INTERVIEWING SKILLS FOR HIRING MANAGERS - 'A LICENCE TO HIRE'

If your managers regularly conduct interviews aimed at hiring new people into your company, you should consider providing training for them that covers a range of areas including managing conscious and unconscious bias. A typical programme should cover topics including those below and will provide interviewers with the competencies needed to conduct excellent interviews.

- Interview formats
- Selling your organisation and its employer brand
- Understanding conscious and unconscious bias through all stages of the selection process
- Awareness of employment equality and discrimination during interviews
- Reading and developing questions from CVs
- Developing competency-based interview questions
- Developing techniques and confidence in questioning candidates
- Clarifying roles of the interview panel
- Scoring criteria and how to write up an interview report
- Making the right hiring decision



INTERVIEWING SKILLS & RETURN TO WORK

WHEN EMPLOYEES RETURN FROM LEAVE - 'MIND THE GAP'

A positive Return To Work (RTW) experience following a period of absence (e.g. maternity leave) can be a critical factor in employee retention.

PRE LEAVE	DURING LEAVE	RETURN TO WORK
<ul style="list-style-type: none"> Put in place any reasonable adjustments to the day-to-day duties or working hours of the employee taking into account their physical safety and wellbeing. Identify agreed interim resource and structured handover process. Put in place agreed actions regarding email access, notification to others of forthcoming absence, return of company property, e.g. laptops and phones. Provide clarity about policy, pay and entitlements for the specific leave granted and obtain support from HR to answer individual concerns. Complete performance review prior to leave commencement. 	<ul style="list-style-type: none"> Maintain contact during period of leave, as agreed. This does not have to be rigid dependent upon the type of leave. Keep the employee informed of any opportunities for promotion which may arise during leave and allow them the opportunity to apply. Inform the employee of company developments such as significant team changes during leave. 	<ul style="list-style-type: none"> Give proper consideration to any application for flexible working such as part-time, flexibility regarding start and finish times and/or the option to work from home if the role allows. Consider making adjustments to the role if physical or mental fitness for the job needs time to rebuild. Consider phased return over a fixed period of time. Consider 'Keeping in touch' days – Employee works up to 10 days during leave and is paid for this time. Acknowledge and discuss the transition period with the returning employee. Make arrangements for practical support such as a breastfeeding room (where operationally feasible and reasonably possible).

UNCONSCIOUS BIAS

WHAT IS UNCONSCIOUS BIAS?

Research has shown that the beliefs and values gained from family, culture and a lifetime of experiences heavily influence how we see ourselves and others.

Information about people and objects is suppressed, grouped and placed into easy-to-use categories. Our brains are hardwired to rapidly categorise people instinctively and we use the most obvious and visible categories to do this: age, skin colour, gender, physical attractiveness etc. We also use many other less visible dimensions such as: accent; education; nationality; religion; sexual orientation; background; job title and organisation/workplace.

“The eye sees only what the mind is prepared to comprehend.”

- Robertson Davies

UNCONSCIOUS BIAS

WHAT IS UNCONSCIOUS BIAS?



These categories automatically assign a whole suite of unconscious characteristics, good and bad, to anyone categorised as being from that group. This social categorisation enables us to make rapid judgments about new people and situations without having to process in great detail everything about every individual and context.

We are hardwired towards bias, which can have disadvantages as our biases cause us to make decisions that are not objective and can result in us making ‘bad calls’ or missing opportunities.

Not all unconscious biases are bad, but becoming aware of them will increase the objectivity you bring to your decision making.

UNCONSCIOUS BIAS

UNCONSCIOUS BIAS TRAINING

Unconscious Bias Training typically focuses on the following:

- Engaging employees on the importance of diversity and inclusion to support business development and talent acquisition
- Examining how unconscious bias impacts leaders and their teams
- Addressing the importance of engagement with employees, sustaining a culture of meritocracy and driving a culture of inclusion to ensure the retention and development of talent
- Identifying specific elements required to build a culture of inclusion
- Specific areas of content differ by country but examples of content include unconscious bias, race, gender, sexual orientation, language and accent, cultural insensitivities, age/generational perspective, ethnicity/nationality, etc.



RESOURCES

KEY RESOURCES (CLICK TO READ / WATCH)

The publications included in the library below come from a variety of publishers and industries. All were selected based on the practicality of suggestions for fostering diversity and inclusion for SME's in the Food industry. Very few articles focusing specifically on diversity and inclusion in workplaces in the Food Industry were identified. Furthermore, no articles were found focusing in fostering diverse and inclusive workplaces in SMEs that were also food businesses. However, there are many useful suggestions, ideas and examples across industries that are also applicable to SMEs in the Food Industry.

How do you change behaviours in a small workplace? (A guide for leaders of SME's). Macquarie Financial Group.

Top Things a Company Can Do to Promote Diversity. Chron.com.

Best Practice – ensuring an LGBT-friendly workplace. Hoozin Today.

Equality and Diversity: Good Practice for the Construction Sector. Equality and Human Rights Commission, 2015.

Examples of Good Practice – Equality and Diversity (E&D). Considerate Constructors Scheme.

Flexible working in manufacturing is a better incentive than money, says HSBC study. HSBC.

Proven Measures and Hidden Gems for Improving Gender Diversity. The Boston Consulting Group.

Women in the food industry. McKinsey.

A Step-by-Step Guide to Cultivating Diversity and Inclusion Part 1: 50+ Ideas. Lever.

Diversity within small and medium-sized enterprises- best practices and approaches for moving ahead. European Commission.

Promoting Diversity and Inclusion Through Workplace Adjustments: A Practical Guide. International Labour Organization 2016.

Equality Works for SMEs. Irish Equality Authority.

Diversity & Inclusion Checklist Generator. Michael Page.

Privilege Walk (Video). As/Is, Youtube.

DEVELOPING A POSITIVE WORK ENVIRONMENT

INTRODUCTION

The term **work environment** is used to describe the surrounding conditions in which an employee operates and can be divided in two sections, the physical environment and the psychosocial environment.

The **physical environment** includes components of the tangible workplace environment that comprise an employee's working conditions. These include clean indoor air, safe drinking water, ergonomic work station designs, available technologies, disability management practices, the way work itself is designed, workplace policies and procedures, design and construction of the workplace.

The **psychosocial working environment** includes a multitude of aspects such as organisational climate and culture, work demands, work control, leadership empowerment and support, and co-worker support and collaboration.



DEVELOPING A POSITIVE WORK ENVIRONMENT

BUSINESS CASE - ADVANTAGES OF A POSITIVE WORK ENVIRONMENT

Create a Sense of Pride

When people feel a greater sense of belonging they are more likely to feel a greater sense of pride and commitment to the business and go above and beyond company expectations.

Prevent Negative Consequences

Negative working conditions can lead to team-conflict, hostility, underperformance, fears of dismissal, stress, unhappiness and depression.

Promote Innovation

Diverse teams are proven to be more creative and innovative. There's a productive tension created by different points of view which helps groups come up with better, more creative solutions to problems.

Reduce Destructive Stress

When individuals feel uncomfortable and stressed coming into work they are not able to perform at their best. They are also more likely to demonstrate negative behaviours in the workplace.

Attract & Retain Talent

People want to work for and stay with companies where there is a positive work environment. Engaged employees are happy to work for less money. These factors offer considerable cost savings.

Gain Competitive Advantage

Companies with above average diversity earn higher revenues from their newer products. Organisations that embrace diversity may be in a better position to understand customers and their market.

DEVELOPING A POSITIVE WORK ENVIRONMENT

PROMOTING A POSITIVE & INCLUSIVE WORK ENVIRONMENT

Communicate Your Diversity Imperative

- Mission statement
- Communicate strategy
- Visible sponsorship
- Working Group

Awareness & Understanding

- Education on the business case
- Creating understanding of unconscious bias
- Promote events e.g. International Women's / Men's Day
- Avoid highlighting differences, rather focus on similarities...

Nurture Talent

- Mentoring
- Coaching
- Talent & succession metrics
- Development Programmes
M:F ratios
- Women in Leadership Programmes

DEVELOPING A POSITIVE WORK ENVIRONMENT

PROMOTING A POSITIVE & INCLUSIVE WORK ENVIRONMENT (CONTINUED)

Flexible Working Practices

- Return from maternity leave/ career break/carer's leave
- Flexibility on start and finish times
- Encourage Paternity Leave
- Supporting technology
- Parental Leave, Part-time hours

Hiring Practices

- Wording of Job adverts
- Candidate short-lists
- Hiring targets
- Training hiring managers on unconscious bias
- Make-up of Interview panels

Pay Equality

- Assess your gender pay gap, or whichever diversity component is your priority

RESOURCES

KEY RESOURCES (CLICK TO READ / WATCH)

Promoting Innovation:

- Want a Team to Be Creative? Make it Diverse. B Comstock, Harvard Business Review
- How and Where Diversity Drives Financial Performance. R Lorenzo, M Reeves, Harvard Business Review.

Flexible Working:

- Better Ways of Working. Constructing Excellent in the Built Environment.
- Guide to Flexible Working. Australian Women in Resources Alliance.

Paternity Leave:

- 7 Ways to Support Employees on Paternity Leave. R Ayers, Hppy.
- New Dads Don't Want to Take Paternity Leave. Here's Why You Should Encourage Them. M Schneider, Inc.

Maternity Leave:

- 8 Ways to Retain Female Talent After Maternity Leave. K Zimmerman, Forbes.
- 8 Ways Return-To-Work Programs Help New Parents After They Take Leave. S Samel, Fairygodboss.

Bias in Hiring Practices:

- 7 Practical Ways to Reduce Bias in Your Hiring Process. R Knight, Harvard Business Review.
- 4 Highly Effective Ways to Eliminate Hiring Bias. L Adler, LinkedIn Talent Blog.

Accommodating Disability:

- Promoting Diversity and Inclusion Through Workplace Adjustments: A Practical Guide. International Labour Organisation.

Supportive Work Environments:

- How Can the Work Environment be Better for Both Women and Men? Swedish Work Environment Authority.

TALENT DEVELOPMENT

INTRODUCTION

This section deals with the development of talent within your organisation with information to assist with the planning stage through to designing training programmes. The benefits of investing in talent development are highlighted in much of the research conducted in this area. Improved employee recruitment and retention, creating a positive work environment, building the skills base within the organisation and better succession planning are among the top benefits.

Introduction

Development
Planning

Mentoring &
Coaching

Training
Design

Resources

TALENT DEVELOPMENT

DEVELOPMENT PLANNING - INDIVIDUALS: SAMPLE TEMPLATE

Name		Date				
GOAL		REALITY	OPTIONS		WRAP-UP	
Areas to Sustain / Develop		Agreed Action			Timeframe	What will success look like?
What skill/behaviour am I going to work on? Is it specific?	Why is this useful to me and to the company? Is it relevant?	How am I behaving now? (i.e. what would others observe?)	Involvement of others (20%) How can others help? (Who/ what way?)	How can I develop/ practice this on the job? (70%) Are these actions achievable? Ensure they are measurable (Who/ what way?)	Start date & Completion date Review dates?	How will I know when I've achieved this?
GOAL 1						
GOAL 2						
GOAL 3						

TALENT DEVELOPMENT

DEVELOPMENT PLANNING - INDIVIDUALS: INSTRUCTIONS

Once you have completed your Self-Assessment (Step 1) and an Assessment of Your Position and Your Work Environment (Step 2) as outlined in the Individual Development Planning Process, you are ready to fill in the IDP form (see next page for template).

Purpose of the IDP

- 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 your goals

Sections of the IDP

- **Developmental goals for the coming year**
What do you want to achieve?
- **Relationship of goals to the organisation's goals**
How will the organisation benefit?
- **Knowledge, skills, abilities to be developed**
What will you learn?
- **Developmental activities**
What activities will help you meet your goals?
- **Resources**
What resources are required for you to engage – time, funds, help from others etc
- **Date for completion**
IDPs are usually written for a one year period (short term). Some employees may prefer to set medium term (2 years) or long term (3 to 5 years) goals. Note that goals such as earning a degree will fit best into a long term IDP.

TALENT DEVELOPMENT

DEVELOPMENT PLANNING - INDIVIDUALS DEVELOPMENT PLAN TEMPLATE

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

MENTORING & COACHING

BUSINESS CASE

- Coaching & mentoring, both of which focus on the individual, can enhance morale, motivation, productivity, reduce staff turnover as individuals feel valued and connected with both small and large organisational changes. This role may be provided by internal coaches or mentors and, increasingly, by professional coaching agencies.
- Coaching and mentoring programmes generally prove to be popular amongst employees as coaching achieves a balance between fulfilling organisational goals and objectives whilst taking into account the personal development needs of individual employees. It is a two-way relationship with both the organisation and the employee gaining significant benefits.
- There is also an increasing trend for individuals to take greater responsibility for their personal & professional development and even those who are employed in large organisations are no longer relying on employers to provide them with all of their career development needs.
- There has been an increase in the number of individuals contracting coaches and mentors on a private basis. Some are looking for a career change, but many are also seeking to maximise their potential with an existing employer or achieve greater balance with their work and home lives.

MENTORING & COACHING

THE DIFFERENCE BETWEEN MENTORING AND COACHING

Mentoring, particularly in its traditional sense, enables an individual to follow in the path of an older and wiser colleague who can pass on knowledge, experience and open doors to otherwise out-of-reach opportunities. Coaching, on the other hand, is not generally performed on the basis that the coach has direct experience of their client's formal occupational role unless the coaching is specific and skills focused.

Coaching and mentoring use the same skills and approach but coaching is short-term task based and mentoring is a longer term relationship.

MENTORING & COACHING

WHAT IS COACHING?

Coaching is a useful way of developing people's skills and abilities, and of boosting performance. It can also help deal with issues and challenges before they become major problems.

A coaching session will typically take place as a conversation between the coach and the coachee (person being coached), and it focuses on helping the coachee discover answers for themselves. After all, people are much more likely to engage with solutions that they have come up with themselves, rather than those that are forced upon them!

Coaching is a positive support for helping people explore their goals and ambitions, and then achieve them.

Who is coaching for?

Coaching is primarily, but not exclusively, for those with direct reports. This is because coaching not only benefits the coachee, but the benefit is also felt among their teams.

There are a range of employees who can benefit from coaching, including:

- New people leaders who would like support as they begin their leadership journey
- Existing people leaders who would like to develop in a particular area or have a particular issue they wish to work on
- People leaders who are going through, or about to go through, a change programme
- Anyone who has completed a 360° review

MENTORING & COACHING

BENEFITS OF MENTORING

WHAT IS MENTORING?

- Offline help from one person to another in making significant transitions in knowledge, work or thinking (Clutterbuck & Megginson, 1999).
- Mentoring is probably the most powerful developmental process people can experience, and when it works, it develops two for the price of one (Clutterbuck & Megginson, 1999).
- Mentoring is a brain to pick, an ear to listen, and a push in the right direction (John C. Crosby).



FOR YOU IT...

Is an opportunity to talk to someone with experience as a sounding board

Opens doors to new networks

Helps the mentee understand the company better

Is an opportunity to get independent advice outside of a line management relationship

Promotes self-confidence and engagement

FOR THE COMPANY IT ...

Engages people by helping them succeed at the company

Helps develop competencies needed to deliver for the company

Deepens networks across the organisation

Promotes transfer of learning within the organisation

FOR THE MENTOR IT...

Provides an opportunity to practice mentoring/ refine skills

Gives the satisfaction of watching the mentee grow

Enhances reputation as a people developer

Is a learning opportunity as much for mentor as for mentee

MENTORING & COACHING

ROLE OF MENTOR AND MENTEE

Your role as a great mentee is to be:

- Committed to your own learning and development
- Responsible for driving the process
- Clear on what you want to achieve from the mentoring process
- Open to seeking development opportunities
- Prepared for meetings and have completed any actions from previous sessions
- Willing to fully contribute to the relationship
- Able to give and take open and honest feedback
- Diligent in applying what you have learnt from your mentor sessions and tracking progress over time

Your role as a great mentor is to:

- Build an open and honest relationship and create an atmosphere where your mentee feels safe to seek your advice
- Support and encourage your mentee's personal learning and development
- Help the mentee identify career obstacles and overcome them
- Tutor specific skills and effective behaviour
- Act as a sounding board for ideas and concerns
- Expand the mentee's network of professional contacts
- Help link the mentee with appropriate learning opportunities

MENTORING & COACHING

MENTOR VS LINE MANAGER RESPONSIBILITIES

LINE MANAGER RESPONSIBILITY	SHARED RESPONSIBILITY	MENTOR RESPONSIBILITY
<ul style="list-style-type: none"> • Performance review • Agree developmental goals • Help build relationships within team • Find opportunities to stretch learner's performance • Give constructive feedback through observation 	<ul style="list-style-type: none"> • Encourage and motivate to learn • Help learner build relationships outside their team • Find opportunities to stretch learner's thinking 	<ul style="list-style-type: none"> • Help learner develop insights into their own performance • Help learner integrate job, career and personal goals • Help learner build relationship with their line manager • Challenge learner's thinking and assumptions • Help learner accept and manage constructive feedback

MENTORING & COACHING

PREPARING FOR YOUR FIRST MENTORING SESSION

- Agree a date, time and location for your first meeting. Ideally, put a regular date in the diary for the coming year.
- Review your objectives for your current rotation.
- Think about how your mentor can help you achieve your goals. You may want to share these goals with your mentor in advance of your first meeting or at your first meeting so they understand the challenges you are facing.
- Based on your goals, consider the skills you may need to learn or improve. What do you want to change about your work style?
- Think about the questions you want to ask your mentor.

TRAINING DESIGN

CREATING AN EFFECTIVE TRAINING PROGRAMME

- When done properly, training can make workers more efficient – increasing production, revenue, and profits while decreasing costs, waste, and inefficiencies. Effective training can lead to increased compliance with regulations. It can even lead to a happier, more satisfied workforce, which in turn reduces turnover and costly onboarding. So the benefits are many.
- Creating effective training isn't easy. Common problems include creating training that does not support a true business goal - for a problem that training can't fix. It is important to first identify the purpose of the training and ensure you're not trying to cover too much information.



TRAINING DESIGN

WHO IS RESPONSIBLE FOR TRAINING AND DEVELOPMENT?

Employee training is the responsibility of the organization. Employee development is a shared responsibility of management and the individual employee. The responsibility of management is to provide the right resources and an environment that supports the growth and development needs of the individual employee.

For employee training and development to be successful, management should:

- Provide a well-crafted job description - it is the foundation upon which employee training and development activities are built
- Provide training required by employees to meet the basic competencies for the job. This is usually the supervisor's responsibility
- Develop a good understanding of the knowledge, skills and abilities that the organization will need in the future. What are the long-term goals of the organization and what are the implications of these goals for employee development?

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- Look for learning opportunities in every-day activity. Was there an incident with a client that everyone could learn from? Is there a new government report with implications for the organisation?
- Explain the employee development process and encourage staff to develop individual development plans
- Support staff when they identify learning activities that make them an asset to your organization both now and in the future
- For employee development to be a success, the individual employee should:
 - Look for learning opportunities in everyday activities
 - Identify goals and activities for development and prepare an individual development plan

RESOURCES

KEY RESOURCES (CLICK TO READ / WATCH)

MENTORING & COACHING

- Clutterbuck, D & Megginson D (1999). Mentoring Executives and Directors, p3.
- Parsloe, E (1999). The Manager as Coach and Mentor, p8.
- <https://new.coachingnetwork.org.uk>
- Life and Business Coaching Association of Ireland
- <https://www.thebalancecareers.com>
- <http://www.cimaglobal.com>
- <https://www.brefigroup.co.uk>
- <http://www.merc.ie/service/executive-coaching>
- Recognising and Challenging Our Unconscious Bias, Sample Training Pack. National Womens Council.

UNCONSCIOUS BIAS

- The Implicit Association Test (IAT). Harvard University, University of Virginia, University of Washington.
- How unconscious bias holds us back. Chu, T. The Guardian.

TRAINING DESIGN

- How to Create Effective Training Programmes. Convergence Training.
- Implementing an Employee Training & Development Program. Community Foundations of Canada.