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From HR Practitioner to HR Leader: Competencies Required

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You have your CHRP designation. Now as you begin to climb the ladder to success, what else must you learn to advance your career? One start is to develop the competencies you will need to become a true HR leader. But here the confusion begins. There are many different competencies and competency models proposed by various academics and associations. If you cannot determine with confidence which to trust, how can you decide where to invest your time, money and development efforts?

This article aims to reduce the confusion as much as possible in order to make your decisions easier. Let's begin by sampling the most important academic research into HR competencies.

Academic HR Competency Models

Dave Ulrich and Associates

Led by Dave Ulrich, the University of Michigan researchers in the Ross Business School undertook seven rounds of research surveys to identify the competencies needed by successful human resource leaders. Table One presents the results of each round of research. In each round, a carefully constructed survey and a large sample of participants from various industries, countries and companies of differing sizes lent credibility to the results. Furthermore, a major strength of the research is that it surveyed supervisors and peers as well as HR practitioners themselves, thus dramatically reducing bias from self-reporting. This research has been influential throughout both the academic and industry realms. Indeed, many organizations have used Ulrich's competency models to design their HR departments, and many educational institutes have based their courses them. However, for the aspiring HR leader making career development choices, there are several problems.

Table One - HR Competencies from the Seven Rounds of Research by Ulrich and Associates¹

Round 1 1987	Round 2 1992	Round 3 1997	Round 4 2002	Round 5 2007	Round 6 2012	Round 7 ² 2016
Business Knowledge	Business Knowledge	Business Knowledge	Business Knowledge	Business Ally		
			Strategic Contribution*	Strategic Architect	Strategic Positioner	Strategic Positioner
HR Delivery	HR Delivery	HR Delivery	HR Delivery	Operational Executor	HR Innovator & Integrator	Total Rewards Steward; Human Capital Curator
Change	Change	Change	*(Change & culture combined)	Culture & Change Steward	Change Champion	Culture & Change Champion
		Culture	HR Technology	Operational Executor	Technology/ Information Proponent	Technology & Media Integrator
	Personal Credibility	Personal Credibility	Personal Credibility		Credible Activist	Credible Activist
				Talent Manager & Organization Designer	Organization Capability Builder	Analytics Designer & Interpreter
						Compliance Manager
						Paradox Navigator

First, some of the competencies identified by the research changed in successive rounds, sometimes dramatically, as shown in Table One above, leading to the conclusion that the most critical HR competencies may change over time. Second, over the seven rounds, the categories of competencies have become more difficult to interpret from their titles. For example, what does human capital curator actually mean? One has to go to the more detailed description of this competency category to begin to understand it. The researchers defined it as “able to manage the flow of talent by developing people and leaders, driving individual performance and building technical talent”.³ From that description it is evident that the category encompasses competencies largely from the HR Delivery categories found in earlier rounds.

¹ Ulrich, Dave; Brockbank, Wayne; Ulrich, Mike; Kryscynski, David. (2015) Toward a synthesis of HR competency models: The common HR “Food Groups”. *People + Strategy*, 38(4), 56-65.

² Ulrich, Dave; Kryscynski, David; Ulrich, Mike; Brockbank, Wayne. (2017) Competencies for HR Professionals Who Deliver Outcomes. *Employment Relations Today*. Summer, 37-44.

³ Ulrich, Dave; Brockbank, Wayne; Kryscynski, David. (Feb 2016) HR Competency Study: Round 7 Insights. *HR Strategy and Planning Excellence Essentials*. Aurora.

That raises the question of whether the other competencies from previous HR Delivery categories, such as compensation, organization design and communication, are no longer important. If so, should HR departments and educational institutes discontinue efforts to develop them? Should the aspiring HR leader ignore them?

Third, the importance of some competencies has disappeared over time. For example, what happened to “Business Knowledge/Ally” over the course of six years? Is business knowledge no longer important for an HR leader? This category appears to have been superseded by the Strategic Architect/Positioner category. But it’s difficult to imagine that an HR leader could make a meaningful contribution to strategy creation initiatives without some level of knowledge of the major business disciplines of an organization.

Fourth, some categories seem to contain unrelated competencies. For example in Round 5, Talent Manager and Organization Designer have been placed together in the same category. For those who understand advanced statistics, this combination was generated because the individual items that comprise each were related in a factor analysis. (Ulrich explained this by stating that to be effective, talent must be positioned in an appropriately designed organization. This is a bit of a stretch.) Nevertheless, they are two very different competencies.

Fifth, the results may reflect what researchers call “recency bias”. The respondents may well have answered the survey questions with their most immediate challenges in mind – challenges which could have changed from a couple of years earlier. Ulrich himself suggested that the changing models evolved over time to fit changing business conditions. That may well be an alternative explanation, but neither explanation helps the present-day aspiring HR leader in his or her quest for development. Committing to educating oneself and acquiring skills from the latest list of competencies will not ensure success if much of the list becomes obsolete over the course of a few years.

Wayne Cascio

In partnership with SHRM (Society for Human Resources Management), Wayne Cascio interviewed CEOs and top HR leaders in 2005 and asked them what competencies were necessary for HR practitioners to add value to their organizations. The competencies identified were: ⁴

⁴ Cascio, Wayne (2005) From business partner to driving business success: The next step in the evolution of HR management. *Human Resource Management*, Vol. 44, No. 2, Pp. 159–163.

- a. Understanding the organization's business model. This includes understanding how it competes, constraints faced by managers, and the needs of internal and external customers;
- b. Basic business literacy. This includes finance, marketing, accounting, information technology and general management;
- c. Functional areas within HR (such as legal requirements, recruitment, staffing, training and development, performance management, compensation and benefits, labor and employee relations, occupational safety and health);
- d. Listening skills, as well as the courage to raise difficult issues with senior executives based on what you have learned by listening;
- e. Skills as a strategic business partner (creating an overall talent or people mind-set; creating an HR strategy that aligns people, processes, and systems; developing human capital metrics that are aligned with the strategy of the company; the ability to assess talent during the due-diligence phase of a proposed merger or acquisition; ensuring that ethical standards are actually practiced)

It's difficult to have confidence in the accuracy of Cascio's above list of competencies because the research on which it was based was not as broad or as carefully constructed as Ulrich's. A relatively small number of senior HR leaders was asked to talk about important competencies and the list was constructed from their transcripts. Nevertheless, Cascio is an experienced academic with deep knowledge of the field, and the list of competencies seems reasonable on its face.

But the first two categories of competencies would seem to indicate that our aspiring HR leader should undertake a mini MBA. Before making such an investment, he or she would want to be extremely certain that these competencies are truly required and would be rewarded.

Lawler and Boudreau

Led by Edward Lawler, the Center for Effective Organizations at the Marshall School of Business of the University of Southern California has reported on six rounds of survey research into various aspects of the HR function. In the fifth round of 2007,⁵ questions were included about the importance of a variety of HR skills and knowledge. The results are presented in Table Two.

⁵ Lawler, Edward E. and Boudreau, John W. (2012) *Effective Human Resource Management: A Global Analysis*. Stanford, California, Stanford Business Books.

Table Two - Importance of a Variety of HR Skills and Knowledge

HR Skill	Percentage of HR Executives who rated this skill as very important
HR technical skills	72.2
Process execution and analysis	68.8
Team skills	87.6
Interpersonal skills	85.6
Consultation skills	78.4
Coaching and facilitation	76.3
Leadership/Management	83.5
Business understanding	92.8
Strategic planning	61.9
Organization design	43.3
Change management	79.4
Cross-functional experience	40.2
Global understanding	42.3
Communications	80.4
Information technology	35.1
Metrics development	46.4
Data analysis and mining	45.4

The ratings for the 2007 competencies were made by HR Executives and their managers from 106 medium and large U.S. companies. From Table Two, we see that the most important skills (highlighted in the table) in descending order were:

1. Business understanding
2. Team skills
3. Interpersonal skills

4. Leadership/management
5. Communications
6. Change management
7. Consultation skills
8. Coaching and facilitation
9. HR technical skills

Lawler's six rounds of HR studies were not focused on competencies, but on analyzing the changes in the function and its effectiveness. Therefore, the competency categories rated in round five may not have been as carefully constructed or thought out as they were in Ulrich's studies. Nevertheless, we can isolate the commonalities from the three academics. All three found that HR expertise/technical skills and business knowledge/literacy/understanding were highly important skills. Skills in change management and communications were reported by two of the three. Beyond that, no commonalities emerged. This might be caused by the different time frames, by differences in the research designs or by other non-evident factors.

HR Association Competency Models

Next we will present the HR competency frameworks from four Associations:

- 1) the Society for Human Resource Management, SHRM (HR Competencies 2019);
- 2) the Chartered Institute of Personnel and Development, CIPD (CIPD Profession Map 2019);
- 3) the International Personnel Management Association, IPMA (Developing Competencies for HR Success, 2019); and
- 4) the Human Resources Professionals Association, HRP (Human Resources Professional Competency Framework, 2019).

Table Three - HR Competencies as Proposed by Four HR Associations

SHRM	CIPD	IPMA	HRPA
<p>Business Acumen (Strategic Agility, Business & Operations Logistics, Systems Thinking, Organizational Metrics, Sales & Marketing, Economic Awareness)</p>	<p>Core Knowledge (Business Acumen, Analytics & Creating Value, Digital Working, Change, People Practice, Culture & Behaviour)</p>	<p>Business Partner (Understanding of the organization’s mission, vision, values & business plan, Creating an environment for calculated risk-taking, Organizational development, Link HR initiatives to the organization’s mission and deliverables, Understanding of business process and how to improve efficiency and effectiveness, Build and sustain trust-based relationships, Think strategically and creatively.)</p>	<p>Business Acumen, Strategy, Strategic & Organizational Leadership, HR Metrics, Reporting & Financial Management</p>
<p>HR Expertise/ HR Knowledge (Strategic Business Management, Workforce Planning & Employment, Human Resource Development, Compensation & Benefits, Risk Management, Employee & Labor Relations, HR Technology, Global and International Human Resource Capabilities, Talent Management, Change Management)</p>	<p>Specialist Knowledge (People Analytics, Resourcing, Reward, Talent Management, Employee Experience, Employee Relations, Diversity & Inclusion, Learning & Development, Organisation Development & Design)</p>	<p>HR Expert (Demonstrated knowledge of Human Resource laws and policies.)</p>	<p>Total Rewards, Learning & Development, Health, Wellness & Safe Workplace, Workforce Planning & Talent Management, Labour & Employee Relations, Negotiation & Influencing</p>
<p>Critical Evaluation (Decision Making, Critical Thinking, Measurement & Assessment, Research Methodology, Inquisitiveness, Knowledge Management)</p>	<p>Core Behaviours (Commercial Drive, Passion for Learning, Insights Focused, Situational Decision-Making, Ethical Practice, Professional Courage & Influence, Valuing People, Working Inclusively)</p>	<p>Change Agent (Design and implement change by altering systems and procedures, Use return on investment and information technology strategies, Design, develop, and implement processes for all customer & deal with resistance, Design and deliver marketing programs for HR services)</p>	<p>Decision Making Skills, Critical Thinking & Analysis, Critical Legal Thinking, Research Skills, Quantitative Skills</p>
<p>Leadership & Navigation (Consensus Builder, Influence, Change Management, Mission Driven, Results and Goal-Oriented)</p>		<p>Leader (Utilize the contributions of a diversified workforce, Integrity and leadership behavior in all circumstances, Lead teams toward high performance, Communicate verbally and in writing, Analyze all presenting issues and reach collaborative solutions, Use negotiating skills, including consensus-building, coalition-building, and dispute resolution)</p>	<p>Organizational Effectiveness</p>

Global & Cultural Effectiveness (Adaptability, Openness to Various Perspectives, Cultural Awareness & Respect, Diversity Perspective, Global Perspective)			Project Management
Consultation (Problem Solving, Analytic Reasoning, Coaching, People Management, Project Management)			
Communication (Verbal & Written Communication, Active Listening, Feedback, Persuasion, Facilitation, Diplomacy)			
Relationship Management (Business Networking Expertise, Visibility, Customer Service (internal and external), People Management, Advocacy, Negotiation and Conflict Management, Credibility, Community Relations, Transparency, Proactivity, Responsiveness, Mentorship, Influence, Employee Engagement, Teamwork, Mutual Respect)			Relationship Management, Emotional Intelligence, Independence, Integration
Ethical Practice (Integrity, Rapport Building, Courage, Professionalism, Trust Building)			Professional Practices, Ethical Behaviours & Professionalism

It must be noted that although the associations rely mostly on their members to construct their competency categories, it is not always clear how many members were involved, whether they were surveyed, whether a panel of experts was used, etc. in all of the models. The previous SHRM competency model underwent a rigorous procedure⁶ in which focus groups generated a preliminary model. Next the model was tested by a survey of over 32,000 professionals. However, the HRPA model was generated by a panel of experts rather than a rigorous research methodology. It wasn't clear how the CIPD or the IMPA created their models; however the IMPA method seemed very casual and founded upon the courses it offers.

⁶ Alonso, Alexander; Kurtessis, James N.; Schmidt, Andrew A.; Strobel, Kari and Dickson, Brian. (2015) A competency-based approach to advancing HR. *People + Strategy*. 38(4), 38-44.

Even though the Associations represented in the above (non-exhaustive) table come from different countries (US, Canada, UK, international), they report many similar competencies. That gives one more confidence that some competencies are universal. For example, knowledge of basic HR functions such as reward/compensation and employee relations are mentioned in three of the four (although the IPMA category of HR Expert may imply these as well). The implication is that the HR leader must have mastery of the field of HR, including its parts.

Beyond that, what are the other commonalities? Table Four summarizes these commonalities, broadly interpreted.

Table Four - Important Competencies cited by HR Associations

All Four Associations	Three of Four Associations	Two of Four Associations
HR Expertise Business Acumen (implied in IPMA under Business Partner)	Strategic Management/Thinking Development (of people) Talent Management Change Management Decision-Making Skills Ethical Practice/Behaviour Negotiations Leadership	Technology Analytics Metrics (HR or organizational) Workforce planning Reward Employee Relations Critical Thinking Research Skills/Methodology Influence Consensus Builder Diversity Professionalism Project Management Communication Integrity Courage Trust Building Organization Development Relationship Management

All four of the HR Associations examined cited HR Expertise and Business Acumen as important in their recently published competency models (between 2012 and 2018). The first is no surprise as knowledge of the field is the basis from which any HR leader must build. Nevertheless, some acknowledged components of HR Expertise also appear as separate competencies as emphasized by two or three of the Associations. Does this mean they are currently more important? Or does this mean that our HR leader must develop deeper skills in these areas? Or both?

That the second item, Business Acumen, was emphasized by all four Associations is interesting, especially in light of the recent disappearance of Business Knowledge/Ally in Ulrich's 2012 and 2016 research rounds. Whether or not Business Knowledge/Acumen is still a critical competency seems to depend on who you ask. The Associations relied on their members, mostly HR practitioners, for their input, whereas Ulrich et al. surveyed peers and supervisors as well. So it seems that for advanced recognition and certification from an HR Association, an aspiring HR leader may wish to develop the skills and knowledge encompassed by Business Acumen. Counterintuitively, to impress peers and supervisors, perhaps it is not as necessary.

But what is business acumen in any case? The Associations define it differently. For SHRM, it is simply "The ability to understand and apply information to contribute to the organization's strategic plan." For CIPD the definition expands to "Understanding your organisation, the commercial context and the wider world of work". For HRPA, the definition is lengthy and more complex: "Maintain understanding of the organization's vision, mission, values, and goals. Apply sound business practices in carrying out the HR function. Participate with other business leaders in the development of organizational strategy. Direct the HR function towards realizing the organization's vision and goals. Adhere to the organization's values while carrying out its mission." The varying definitions imply differing competencies, some limited in scope and others quite far-reaching. Perhaps academic definitions can shed some light.

Parker defined business acumen as "knowledge of the business industry with the ability to identify key internal and external drivers".⁷ In 1995, Ulrich et al. wrote that "Business acumen requires knowledge, if not direct operational experience, in functional areas such as marketing, finance, strategy, technology and sales."⁸ Finally, Longenecker and Fink state that in order to demonstrate business acumen, HR leaders "need to have a strong and holistic understanding of the organization's external business environment, its value proposition, business model, customer base, competition and financial infrastructure".⁹ Depending on whose definition you take, business acumen could go from a few key areas of knowledge to another mini-MBA.

This examination of the various definitions of Business Acumen shows just how confusing the commonly used terms for competencies can be. While other competency categories may be somewhat more consistent across the HR Associations and the academics, all suffer from the same lack of consistent definition.

⁷ Parker, Phyllis Felton. (2013) *Evolving job competencies for the human resource professional in the 21st century*. Doctoral Dissertation, Capella University.

⁸ Ulrich, Dave; Brockband, Wayne; Yeung, Arthur K; Lake, Dale G. (1995) Human resource Competencies: An Empirical Assessment. *Human Resource Management*, 34(4), 473-495.

⁹ Longenecker, Clinton and Fink, Laurence S. (2015) Exceptional HR leadership rests on four foundations: Business acumen, trust, expertise and culture make up the cornerstones. *Human Resource Management International Digest*, Vol. 23 Issue: 1, pp.21-24,

Comparison of Academic and Association Research

Next, let's compare competing competency models from both sources to see if we can reduce the complexity and confusion. Table Five reports the number of times each competency category was cited in the academic and Association models analyzed.

Table Five - Competencies common to Academic and Association Competency Models

Competency	Number of Academics out of 3 (Ulrich, Cascio, Lawler)	Number of Associations out of 4 (SHRM, CIPD, IPMA, HRP)
HR Expertise	3 (if Ulrich's research before 2012 is included or if some recent categories are interpreted as HR Expertise)	4
Business Knowledge/Acumen	2 (3 if Ulrich's research before 2012 is included)	4
Strategic Management/Thinking	2	3
Change Management	2	3
Development (of people)	1 (not salient in latest Ulrich competency model)	3
Leadership	1	3
Ethical Practice/Behaviour	1	3
Talent Management	1 (may be implied in Cascio)	3
Reward	2	2
Communication	2	2
Negotiations	0	3
Decision-Making Skills	0	3
Technology	1	2
Analytics	1	2
Metrics (HR or organizational)	1	2
Employee Relations	1	2
Influence	1	2
Trust Building	1	2
Courage	1	2
Organization Development	1	2
Relationship Management	1	2
Critical Thinking	0	2
Research Skills/Methodology	0	2
Consensus Builder	0	2
Diversity	0	2
Professionalism	0	2
Project Management	0	2
Integrity	0	2
Workforce planning	0	2

Discussion

Our aspiring HR leader may now gain some clarity by an analysis of Table Five. Let's focus attention on those competencies that garnered the most consensus – those shown above the first heavy line in Table Five. First, HR Expertise is universally acknowledged as a critical competency. And reading down further in the table, two components of HR Expertise, talent management and people development are emphasized by Association research. This means they probably deserve special attention and deeper educational effort, at least in the near term.

Second, Change Management is almost universally acknowledged as a critical competency, and this result has remained stable over time. That means that HR practitioners without these skills should acquire them if they wish to advance.

Third, while Business Acumen is very important, trying to develop it involves complicated choices. How far and how deep to go may depend on country/area, size of organization and other subtle differences in context which are not obvious from the research cited here. Nevertheless our aspiring HR leader might be tempted to ignore this competency.

Why? Many HR practitioners are reluctant to develop business acumen because it does not fit their conception of themselves or HR work. Besides this, there are no courses on business acumen basics designed especially for them. Learning on the job, if and when they are given the opportunity, and/or private study appear to be the only readily available paths. This is a big hole in the offerings of the majority of academic institutions. Even the two-week program at the University of Michigan, Ross School of Business, entitled the Advanced HR Executive Program and led by Dave Ulrich, focuses only on linking HR to the business strategy and not on other business acumen competencies.

So that leaves the aspiring HR leader in a conundrum. Business acumen is important but difficult to develop. There are no short courses but most practitioners do not want to dedicate the time, effort and money to take executive or mini MBAs.

Fourth, the competencies shown above the second and third heavy lines in Table Five may be important in individual cases and the aspiring HR leader must decide whether or not to acquire them.

Fifth, the other competencies may not be as important and should receive secondary attention except where the individual's role demands them.

Conclusion

I hope this analysis of academic and Association research has helped you decide what is important for you and your career development as an HR leader.

About the Author



Dr. Carol A. Beatty is former Director of the Industrial Relations Centre at Queen's University at Kingston, Ontario, and an Associate Professor with Queen's School of Business, where she has taught in undergraduate, graduate and executive education programs.

An acknowledged expert on change management, strategy development, high performance teams and facilitation, Dr. Beatty focuses her consulting on human and organizational issues in modern organizations. She has studied the implementation of change for over 25 years, including technological change, strategic change, mergers and acquisitions, structural change, and employee buyouts.

An active researcher, she has recently completed a multi-faceted study on the key success factors of change management, comprised of a large-scale survey and several detailed case studies. She is also well-known for her major study of high-performance teams in which she isolated the three skill sets teams need to develop to be effective. Dr. Beatty's publications have appeared in such journals as the *Sloan Management Review*, *Human Relations*, the *California Management Review* and the *Business Quarterly*. She completed her MBA and PhD at the Ivey School of Business at the University of Western Ontario.

Carol is a sought-after consultant and speaker who has helped many private and public sector organizations become more effective. She is a trained facilitator in Future Search (Weisbord and Janoff) and Whole System Change (Dannemiller Tyson).

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