

Strategic Human Resource Management: A Practitioner's Point of View

An Interview with Debbie Bennett
V.P. Human Resources & Finance
Ottawa Citizen

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ISBN: 978-0-88886-551-9
©2007, Industrial Relations Centre
Printed and bound in Canada

Industrial Relations Centre
Queen's University
Kingston, Ontario
Canada K7L 3N6

Publications' Orders: 613 533-6709

Library and Archives Canada Cataloguing in Publication

Bennett, Debbie

Strategic human resources management : a practitioner's point of view : an interview with Debbie Bennett, V.P. Human Resources & Finance, Ottawa Citizen / [interviewed by Mary Lou Coates].

ISBN 978-0-88886-551-9

1. Personnel management. 2. Strategic planning. 3. Bennett, Debbie--Interviews.
I. Coates, Mary Lou II. Queen's University (Kingston, Ont.). Industrial Relations Centre
III. Title.

HF5549.B332 2007

658.3

C2007-900770-8



As an HR practitioner dedicated to the profession, Debbie Bennett, CHRP, currently serves as Vice Chair of HRPAO, having previously served for three years as Chair of the Professional Standards Committee where she was instrumental in the adoption of national standards. Debbie chairs the Governance Task Force and regularly attends the meetings of the Audit and Finance Committee. She is a past member of the Education Standards Committee and the Federal Government Affairs Committee. As with most members of the HRPAO Board, she previously served her local chapter through a variety of roles culminating in Chapter President. Prior to her move to Ontario, Debbie served on the Board of the British Columbia Human Resources Management Association.

Debbie has over 20 years of progressive experience in human resources. In her current position as Vice-President, Human Resources and Finance, she is a key player on the Executive Committee of the Ottawa Citizen, influencing decisions important to the future of the company. Debbie holds a Bachelor of Commerce (Honours), a Bachelor of Arts (Minor - Economics) and a Master of Industrial Relations from Queen's University in Kingston. She also has an eight-year-old daughter.



How has the business environment for your organization changed in recent years?

The business environment has changed considerably in the last number of years. The newspaper industry underwent a substantial amount of technological change in the mid-1980s and into the early 1990s. In more recent years, the biggest changes have been the changes in ownership within the newspaper industry.

For example, when I started working in this industry, it was with an organization called *Pacific Press* in Vancouver. *Pacific Press* was owned by the Southam family. In fact, the entire chain was a family-owned and operated entity, with all the intricacies that come with a family-owned organization.

In about 1994, the Southams decided to turn the business over to a professional manager. That lasted for about a year or two before Conrad Black acquired controlling interest of Southam. That was actually quite a big change because usually family-owned and operated businesses have a different feel than businesses run by a professional manager, which is in turn different from a business run by Conrad Black. Conrad Black has his own way of doing things.

Conrad Black had controlling interest in the Southam chain for probably four or five years, and then the Aspers bought us. *CanWest* didn't take controlling interest; they bought us, which was again different from our recent experiences.

All of these different leaders have had different impacts on the organization, predominantly in terms of probably making us much more focused on the bottom line, and making us more focused on our vision. The increased focus on vision was particularly apparent since we were acquired by *CanWest*. At this time, the newspapers stopped being part of a newspaper chain and started being a member of a multi-media chain with responsibility in broadcast, radio and newspaper. While we don't have direct responsibility for broadcast or radio, obviously there is a lot of cross-media promotion and opportunities to find synergies. After being a newspaper only for over 160 years, this represented a culture shift. Hence, the need to focus on vision.

How has the organization responded to these changes in technology and changes in ownership?

Most of the changes in technology occurred some time ago. The newspaper industry is obviously very heavily unionized, and because of the nature of the business, it probably is certified by some of the oldest and most-powerful unions. When it came time for a technological change, for the most part, management at the *Citizen* worked with the unions to ensure job security to the extent that we could. In most newspapers, trades were eliminated by technology - completely wiped out. Redundant tradesmen were given employment guarantees or job guarantees. In other words, employees who were regular full-time at the time of the introduction of the new technology were given a commitment that the company would continue their employment for a prolonged period of time, normally the age of retirement. In our case, and every newspaper had its own peculiarities, employees agreed to be retrained and relocated somewhere else in the business or within the building. The employees benefited from the provision of gainful employment and the *Citizen* benefited from the ability to re-deploy its human resources while simultaneously introducing new technology without the restrictions normally imposed by jurisdictional clauses, which were eliminated. It was a winning situation for management, the union and the employees.

The *Citizen* managed to find ways of offering employment guarantees for at least three bargaining units, but, in the final analysis, that proved to be a substantial amount of re-training and re-deployment over time. Eventually, management got to the point where other options, such as outsourcing and/or inter-corporate transfers, had to be explored. Emphasis was placed on outsourcing primarily non core functions, such as trucking and distribution. Reporters and sales reps are pretty vital to any newspaper and therefore not particularly attractive as a target of outsourcing. On the other hand, getting the paper from the *Citizen's* doorstep to the subscriber's doorstep is relatively easily outsourced without substantial impact on key service/success factors. Work previously done at call centres has been subject to inter-corporate transfer. In other words, when a subscriber calls in to put his/her newspaper on hold for two weeks while vacationing, s/he is not calling Ottawa anymore. This was a non-core function that is easily managed remotely.

Despite the fact we were no longer in a position to offer further employment guarantees, the *Citizen* tried to use a "pull" versus a "push" strategy. The "pull" strategy is based on the

premise that if employees are induced to leave voluntarily, or pulled out, the workplace/workforce will adjust to and adopt the business strategies much more easily than if pushed out of the workforce via layoff or termination.

In other words, very lucrative voluntary staff reduction programs were offered - much richer than what was required under the collective agreement. Obviously, strict adherence to the collective agreement was always a possibility but, by working with the unions, voluntary programs were designed and offered in conjunction with programs aimed at helping employees determine whether a buyout was attractive, what career options were open, etc. Once done, focus shifted to providing employees with the resources necessary to allow them to pursue the most attractive option in the opinion of the employee. For the most part, it was a fairly successful strategy.

That's not to say there have never been any layoffs at the *Citizen*, but very few. If the number of employees laid off is compared to the number of employees who left voluntarily, despite all the change, the success of the "pull" strategy is clear.

In terms of the Human Resources (HR) function, how is it structured within the organization?

There is a corporate HR group, plus HR departments at the local site. In terms of whether work is decentralized or centralized, this is a pendulum that swings back and forth dependent upon such things as the economy and the philosophical position of those at the helm. Generally speaking, the split between local and corporate HR is working quite well at the moment.

Corporate HR takes responsibility for areas such as pension and benefit administration. Because of the nature of the industry currently, *CanWest* has acquired many different properties. Therefore, there is a multitude of pension and benefit plans that have to be administered.

Corporate develops policies on topics that should have broad application across the chain, like the performance management/talent management system and general compensation guidelines. This makes a considerable amount of business sense. When the *Citizen* tries to recruit a colleague from another newspaper to work at the *Citizen*, our compensation system should not interfere with our interest in appropriate cross training and succession planning. Therefore, our compensation guidelines need to be chain-wide. They are more guidelines than they are requirements because, obviously, each market is different, and has its own economic, labour relations and employee relations reality. For example, recruitment for our papers in Alberta is extremely challenging which requires some flexibility in the compensation system in order to address the demands of a "hot market".

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I like the split because the type of work that gets the local HR team in front of the employees is mainly left with us. Local HR does the face-to-face training. We also work directly with managers when it comes to goal setting, performance management, and succession planning.

Labour relations (LR) is done by the local HR team. There are resources to help us at corporate in terms of labour relations research and advice but generally speaking, these functions stay within the local HR bailiwick, as opposed to going to corporate.

In terms of reporting relationships, it's a dual-reporting or matrix-reporting relationship. For anything related to the *Ottawa Citizen*, I report to the Publisher. On the other hand, when working with corporate on projects, I report to the Executive Vice-President (EVP), Human Resources. For example, I'm now on a Payroll Steering Committee which is oriented towards improving payroll processing *CanWest*-wide. For that purpose, I report to the EVP of HR at *CanWest*.

Do you have a formally documented HR strategy?

Corporate wide, I would say yes. I phrase it that way because despite the age of our industry, it's probably been in the last five or so years that we've seen a much-needed emphasis on the softer side of human resources. Before that, our strategy was very much focused on labour relations. We've had some really valuable additions to staff at the corporate level, and they have certainly brought a focus to attracting, developing and maintaining key talent, as appropriate to the size and needs of the organization. Of course, once you start to attract, develop, and retain, initiatives such as talent management, succession planning, and compensation management, are really brought into the forefront.

How does HR influence business strategy?

In my view, HR has always been a part of the executive team within the newspaper industry. It was always part of my life, so I never thought it was unusual. In this heavily unionized, labour intensive environment, it's almost impossible to develop strategy without involvement of LR/HR. HR is in the best position to determine how to accomplish the organization's objectives and/or to bring forward ideas to make the organization more efficient and effective.

As a member of the executive team at the *Ottawa Citizen*, I attend executive meetings twice a week. During these meetings, the executive discusses issues, opportunities, the state the business, and other relevant topics. It is highly productive in that there is sufficient interaction for ideas to be bounced around, and built upon, on a regular basis. It's a form of mini-brainstorming twice a week.

Do you see any changes in terms of that strategic focus?

The only change that I see currently is that the focus is shifting more to talent management

and succession planning. We didn't always just focus on outsourcing, labour relations, downsizing, and acquisitions, but that was our life for many years. Now that we've come through the other side of that process, we're looking more at ways to work on employee engagement and alignment - those types of initiatives that will bring the organization forward without necessarily changing the size of the organization.

What key factors would you say contribute to a successful strategic partnering role for HR and what makes for an effective HR department?

There are a couple of things which are probably fairly self-evident. To be an effective HR department, the various members of the HR team have to understand the business. It's really important to take the time to make sure that either you, or some of your staff that can complement you, understand the business very well. Some of my frustration when I see people graduating from various schools is that there's an extreme focus on HR courses and not a sufficient focus on other disciplines within the business. An increased concentration on other disciplines would help make for a more effective HR department.

The second thing is that HR can do a lot of "busy" work if they don't have a vision. Once you start focusing a vision – what is it that HR needs to do to support the organization; what is HR's *raison d'être* for this year, for three years or five years – then a lot of the "busy" work falls off because the HR team starts to become a lot more attuned to the projects that can or can't wait. I think those two are quite important things in making an HR department effective.

In terms of HR strategies, is there a focus on making sure they are aligned with each other?

Yes. A lot of work has been done in that regard, primarily through/by corporate. They have been working very closely with the field in order to develop a strategy that's going to work for the whole group. We've been focusing on performance management/goal setting, talent management, succession planning, developmental plans, and rewarding and recognizing the appropriate behaviours.

Of course, appropriate behaviour does not focus exclusively on the results. It is also about whether managers, supervisors, and others are acting in a way that's consistent with the organizational values. Adherence to values requires HR to devote time to developing the competencies that are expected by team members.

Once the various constituent members of the organization have set their goals, HR assists by reviewing the goals to ensure alignment among peers, such as the executive team, and between direct reports, to ensure the vision aligns horizontally as well as vertically.

And finally, what we are really trying to focus on is communications because, as with most situations, that's where it breaks down. HR is focusing on ensuring that employees understand the vision – and buy into it. The "buy in" is reinforced by the compensation

structure. I'm personally quite pleased to see that reinforcement goes all the way up to the top corporately. HR has support in ensuring that a considerable piece of variable compensation is dependent upon a person's dedication to HR goals and their people management.

How does HR add value and contribute to overall organizational performance?

I know labour relations is often overlooked, but to me it's one of the most visible means that you can have a tangible impact, not just in ensuring that the contract is appropriate to the organization, but also in the way the relationship is managed or facilitated. Labour relations can be quite fractious in the newspaper industry. I've been here 13 years and we had a bit of a rough start in that I arrived with a pile of grievances waiting for resolution.

There has been a substantial change since then. Although we had a labour dispute over 10 years ago, once past that admittedly difficult period of time, relationships improved. The *Citizen* hasn't had a grievance go to arbitration in roughly seven or eight years now. With our largest union, we've successfully pursued interest-based bargaining.

I'm a strong believer in developing the relationship, if at all possible, and to that extent, it's worked quite well. There has been some turnover within the union leadership quite recently, but it is our hope that these good relationships will continue. Both parties have spent a lot of time trying to make sure that we get to know each other enough that we are comfortable suggesting ways to resolve issues, rather than having someone else resolve them for us or having to resort to a labour dispute. Having gone through that once, I would not look forward to it twice.

Do you measure or evaluate the impact of HR practices on business results in any formal way?

The metrics that we concentrate on are labour savings, both in terms of cost and number of employees. When it comes to outsourcing, the focus is definitely on how many jobs were outsourced, at what cost and the savings attached to it.

The impact of HR is also measured through other standard metrics such as absenteeism, compensable and non-compensable accidents through WSIB, etc.

Can you describe the extent to which human resource management has become a line management responsibility?

Like the rest of the world, when downsizing occurs, opportunities to downsize in HR also have to be considered and this decreases available HR resources. At the same time, there is downsizing in the management/supervisory ranks so the hierarchy flattens. That said, the work has to go somewhere. To a considerable extent, it has shifted to the line managers who are expected to take on more HR responsibility.

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I am probably not much different than any other HR manager who tends to believe that the role of the HR practitioner is to help managers understand how to do their job, not do it for them. It's not really a change in my philosophy but it may be an enforced change in their philosophy and perspective. However, this is not something that can be accomplished by fiat. It involves a lot of training and communication.

Have there been changes in the size of the HR department?

Yes, there has been a change in the size of the department. When it comes time for downsizing or for outsourcing, it's hard to ask other departments to reduce staff if you're not willing to do it yourself.

When I arrived at the *Citizen*, I believe there were nine in the department. Three of them were devoted to our payroll function. HR voluntarily streamlined when an opportunity arose, and subsequently payroll transferred to Winnipeg via an inter-corporate transfer. Payroll is now consolidated in a central location in Winnipeg. The work is done by *CanWest* employees, but not *Citizen* employees which means, obviously, there was downsizing at the *Citizen* related to the inter-corporate transfer.

In terms of the *Citizen* as a whole, at one time the number of FTEs (full-time equivalents) was approximately 750, which would translate to about 1,000 employees. The current FTE complement is about 560 FTEs, or about 725 employees. Over time, as the number of staff decreased, when an opportunity arose, HR also downsized. I was probably happier with staff reduction when it was connected to outsourcing of payroll versus losing a staff member due to straight downsizing because opportunities to pursue more progressive HR initiative were undermined by the reduction in staff.

It was also difficult because in many ways, there's not that much difference in servicing 550 FTEs versus 750 FTEs. HR still has to write communiqués, conduct collective bargaining, ensure policies and procedures are up-to-date, appropriately written and developed for the organization as it develops, ensure legislative compliance, etc. There are not a lot of economies of scale between those 550 FTEs and 750 FTEs, and to the extent this is true, the loss of HR staff means some of the more progressive HR initiatives can no longer be prioritized as they otherwise would.

You mentioned outsourcing payroll. Are there other HR activities that have been outsourced?

Our benefits and pensions are largely transactional and they were always done somewhere else. Payroll was the only area that literally left the building. Most of the other changes were facilitated by technology. For example, an employee can go on the intranet now and look at their benefits. They don't have to come into HR to ask about this. A lot of those types of activities that have changed have lifted the transactional load off HR, but they haven't actually left the building.

The intranet has also come in handy for other things, not just benefits. *Citizen* policies, such as recruitment and selection, or anti-harassment, are also on the intranet. That's not to say employees can't come to HR if they don't understand something. HR is still here to help, but again, as much as I like to get "face" time with employees, there is little value-add in a conversation devoted simply to answering questions like "do I have coverage for physiotherapy".

Is the strategic role perceived as being of higher value than the more transactional role?

I have to admit that I think that the strategic, or even the tactical, are probably more important than the "busy" work - the straight, transactional, data input, etc. I don't see transactional aspects of HR adding a lot of value in terms of the company's relationship with employees. Employees barely know what occurs when it comes to payroll administration, which makes it difficult to imagine, except when it's wrong, how it impacts your relationship.

In terms of an employee advocate role, how do you see HR's role and responsibility with respect to employee issues? It's been said that HR can't champion or advocate or represent employees if it's part of a senior management team. Are there times when the focus on business results is at the expense of employee interests?

I'm definitely not one who thinks you can't be an advocate if you're on the senior management team. I don't see how you can be an advocate unless you have a big enough voice. And I definitely think there are times that the employee interests bow to the organization's interest. It is HR's job to try and find an appropriate balance between the employee and the organization's interests when the two don't align.

I don't think there is ever going to be a time – and I doubt I'd be supportive of it, even if there was – when employee interests were the only things that were being considered. For example, at the *Citizen*, there is a Wellness Committee. The company was lucky enough to find a couple of Ph.D. students who wanted some participants. The Ph.D. students conducted a rather sophisticated employee satisfaction/ organizational wellness survey and subsequently gave the employer a lot of feedback on where employees were happy and where they weren't so happy. As an organization, we were pleased to see that overall, we scored better than many public and private sector companies that had been similarly surveyed in the past. But as pleased as we were by those results, it didn't mean we hadn't any areas of improvement. Part of my job is to help employees understand how much we can do with the feedback we received. Some of the areas of improvement would have resulted in excellent initiatives, but they would have been extremely expensive. The likelihood that the capital budget would be approved to pursue these highly expensive initiatives or series of initiatives was low. Therefore, part of the job of HR employees is to focus on how else we can accomplish the objective. What other ideas are there to move us forward? Is that initiative really the highest priority on the list? What is the highest priority and how we can deal with that?

Generally speaking, I'm really quite blunt with the employees in terms of saying that I don't think certain solutions are realistic. However, the *Citizen* is very open to approaching the problem from different angles in an attempt to achieve the desired results.

As much as the parties try, though, there are times when some employees are not going to be happy. For example, it is hard to get a positive response when the word "layoff" is uttered. Again, at the *Citizen*, the objective has traditionally been to try to balance employee needs within business needs by offering enriched voluntary staff reduction plans rather than terminating so employees can choose to leave, if they so desire, to the extent possible. I firmly believe it has an impact on the way the remaining employees view the organization. When you go out of your way to minimize the angst associated with downsizing, it is recognized. But in the final analysis, downsizing often still has to occur.

In the labour relations area, can you just tell me briefly about the unions you deal with at the *Ottawa Citizen*?

There are three unions at the *Citizen*. The largest union is called the Newspaper Guild, and it is a unit that involves anything from editors, reporters, photographers, janitors, to clerks in the finance office. There's not a lot of homogeneity in the unit or in their interests. In that way, it is an interesting unit to deal with. It's also an interesting unit to deal with because the biggest department within the entire unit is the newsroom. Newsroom people are intelligent, articulate, and interested in philosophical points of view and philosophical discussions, and that will really flavour your discussion at the bargaining table. It's very complex. There is also a very long history. The certification dates back at least 50 years.

Another unit is the Teamsters which represents the pressroom. This is where the pressmen and paperhandlers work. Pressmen run the presses. Paperhandlers have an interesting job. Among other things, they put roughly one-ton rolls of paper on a running press, which is kind of tricky sometimes, especially when working to a deadline.

The issues arising out of the pressroom are usually fairly heterogeneous. They are tradesmen who have interests largely in the standard areas such as wages, working conditions, safety, and other similar issues.

The last unit is the Canadian, Energy and Paperworkers Union (CEP). The CEP represents employees working in the mailroom. The name "mailroom" is a little bit of misnomer in that it really has nothing to do with mail. These employees put the inserts, or flyers, into the paper. What is probably the most interesting about this unit is that, just before I arrived at the *Citizen*, they signed a 10-year deal. For the first 10 years of my tenure in Ottawa, I didn't negotiate with the CEP at all. That sounds good, until the end of 10 years when all that pent-up frustration shows up at the bargaining table.

How is collective bargaining structured?

First of all, newspapers are provincially regulated, so the *Ottawa Citizen* is the employer for the purposes of labour relations and we do the bargaining here. I do the bargaining predominantly. I'm told that at one time, the three units were in a joint council but they stopped working as a joint council well before I arrived at the *Citizen*. I usually try and ensure that I have one unit only to bargain each year.

How about the length of your agreements?

If there is any pattern at all, I'd say three years but that depends upon the environment and what the parties are looking for. The last Guild and the last Teamster agreements were five years in length. Obviously, the CEP, when they came off a 10-year agreement, wanted a short-term agreement. Probably the most predominant term is three years, but it can go all over the place.

Do you have a lot of discussion with the unions in between contracts?

It depends on the union. We have a very casual relationship with the Guild, and their President works within the building. If I have an issue, I just go and see her or she'll come and see me. The Teamster's bargaining agent works out of Montreal, so we tend to have more formal meetings and a relationship. The previous business agent just recently left the employ of the union and there's a new business agent which may introduce new dynamics. The CEP rep, who just resigned recently, was also a very capable woman with an excellent sense of humour, which always makes tense situations a little less difficult.

Have there been changes in the state of labour relations? How adversarial is the labour-management relationship? You mentioned that when you arrived there were a lot of grievances waiting to be resolved.

The relationships have not been adversarial for years. I wouldn't say they were particularly adversarial, even at the beginning. It was largely clean-up due to a gap in the departure of my predecessor and my arrival. That said, even clean-up can take time to work through. Issues boiled to the top because they weren't being dealt with and that had a negative effect that needed attention.

This was further complicated by the system being used within the Guild. For quite some time, the Guild had a practice whereby the President turned over on an annual basis so a relationship was barely established when a new President, often with new approaches and philosophy, was voted in. I found that very difficult although I got to know a lot of new people. I don't really know if the Guild deliberately changed their practice or they just found somebody who was willing to stay in the job longer but either way, they've had the same President now for five or six years. She's a very intelligent woman with a style oriented to

resolution of issues. In fact, it was because of her we got into interest-based bargaining. We had gone through one round of bargaining since she became President. As we approached another round, she came to me and said, "Isn't there a better way?" As soon as I started talking to her about interest-based bargaining, she was interested. It's worked well in terms of establishing the entire tone of the relationship with the Guild because it isn't something the parties do at the table and then stop doing once the deal is signed. Once it's ingrained in the way you behave with each other, it's ingrained.

Does interest-based bargaining take place across all the issues that would come up at the bargaining table, like pay issues?

Money's hard to interest-base.

What percentage of your workforce is unionized?

Our advertising department isn't unionized and neither is our IT department. About 60 percent of our workforce is unionized and 40 percent is not.

Do you follow the same HR priorities and strategies with the unionized as well as the non-unionized employees?

Pretty much. I would not do for union what I am unwilling to do for non union employees because I think it just sets up an unhealthy dynamic. It's hard sometimes to automatically translate between union and non union but when making decisions regarding compensation, for example, I try to use the same type of job evaluation system for unionized that I use for the non union employees. It aids in the pursuit of internal equity, to the extent it is possible. The *Citizen* also focuses on giving similar amounts when it comes to wage rate adjustments. Of course, there are three units to pick from when it comes to wage rate adjustments but the objective is to avoid "cherry-picking". In other words, unless there was a very good reason to do otherwise, non-union increments are consistent with the Guild wage rate adjustments because they are both predominantly white-collar employees with the most in common. It seems to be the most logical comparator on an ongoing, consistent basis, even if it occasionally would be more cost effective to use another unit as a comparator.

Is there a separate labour relations function?

No, but that's paper-specific. For example, when I worked at *Pacific Press*, there was a special labour relations group and I was part of it. One hundred percent of my time was devoted to labour relations in that organization. At the *Citizen*, I would say my job is 40 percent labour relations.

There is a separate labour relations executive at corporate. He is the person I was referring to earlier when I said there are resources that the local HR team can access at the corporate level.

If a particular demand on the table is common within the industry, it is more efficient to call a single corporate resource as opposed to calling every newspaper in the chain. My corporate contact, or someone working with him, would help us collect information instead of the *Citizen* doing the work, and then my counterpart at Montreal doing the work, and then my counterpart somewhere else doing the work, etc.

But my corporate contact's more valuable role is that he's a very seasoned labour relations practitioner himself with a lot of experience. The local HR negotiator can phone him and say, "What do you think? Does this make sense? Should we tip into conciliation? Is this the right timing? What do you think of this communication? Am I being too aggressive"? A valuable "sounding board" function is fulfilled this way.

Is line management involved in labour relations activities and part of the bargaining team?

Yes. I tend to like small teams. I think that's a reaction to my *Pacific Press* experience because there were eight to nine unions bargaining as a joint council there. When you went to the bargaining table, the council had about 30 team members. The employer had about 10 on its team. With 40 people in a room, progress is difficult. It was very painful, so as a result, I tend to go for a small team, which I find a lot more productive.

For example, I'm in negotiations with the Teamsters right now. I'm first chair. One of my HR managers is second chair, and we have two people from the pressroom who are there to make sure negotiators like me are dealing with reality and are ready to respond to the unexpected issues that often arise at the table.

How have business strategies of the organization impacted collective bargaining?

It's definitely had an impact. When the parties have gone through a lot of downsizing, job security language tends to show up at the table, obviously, from both parties. I'm not sure it's made it tougher, but again, that is likely due to the relationships that have developed between the parties over time.

This is an interesting question, though, because there isn't an answer. I think business strategies have sometimes impacted positively and sometimes negatively. It can be easier because when you demonstrate between contracts that you're willing to be more generous than the contract requires in order to ensure business strategies are implemented in the way most attractive to the general employee base, then people will probably react a little less negatively at the table.

For example, a few years back, the *Citizen* introduced some language that gave the employer the right to introduce buyout to individuals in the unit, to groups within the unit, and to the entire unit. There has always been some debate about management's right to introduce language that allows the employer to tap an individual or groups of individuals in the unit on

the shoulder, as opposed to going through the entire layoff procedure. It was fairly novel language to have accepted by the union and I don't think it would have been possible if the *Citizen* hadn't treated employees well during the implementation of various business strategies, including ones which required downsizing. Trust has built up.

There are probably other times when it made it a little harder. I know right now that at the table with the Teamsters, job security is very important. For the most part, they haven't had as much opportunity to take advantage of downsizing programs because there are contractually required manning levels in that room. In other words, if the employer bought someone out, that employee would normally have to be replaced immediately so buying out pressmen is a rare event. For that reason, they haven't had the same experience in terms of our willingness to work with people on issues such as this.

Would you say that there's a fairly healthy respect for HR from your line managers as well as your union counterparts?

Yes, I would say that's true. I don't think you have the type of relationship we have with our unions without a fairly healthy respect for each other. Among the three union counterparts that I've been accustomed to dealing with, I would pretty much take any of them at their word. I don't necessarily need to see it all written down. There's trust, and I think they feel the same way about me. If I've said something is going to happen, it's going to happen, don't worry about it. I'll get the paperwork done, mind you, but we don't fuss a lot between the time we agree and the time the mail arrives.

And obviously, the same applies equally to line managers. It is difficult to establish a track record of zero arbitrations for years if the line managers don't trust the HR team's advice when it comes to holding firm, or compromising.

How do you keep bargaining strategy consistent with business strategy during negotiations, given that there are three different unions, different personalities and a lot of dynamics?

Sometimes you have an interest-based bargaining approach and sometimes it has to be more adversarial. I think it's probably because of some of the things that we talked about earlier. As a member of the Executive Committee, I'm talking to my colleagues on a regular basis. We have meetings at least twice a week. We talk about anything from the future of the industry, to demographics, to what projects are on the go. For example, our response to online publications would be a topic under discussion at the current time. What are we going to do about that? What resources do we need? Do we need new products? How do we resource those products? How do we adjust our strategy in response to the market? By the time you have all those conversations, business strategy is so ingrained in everything you think and do that it would be odd to step away from that just because you're at the bargaining table.

Would there be a very good understanding on the other side of the table of what the business circumstances are at a particular time and the kind of cost pressures that the organization is facing?

It depends on the individual and the bargaining unit involved. Media loves to report on itself and most of our business agents are quite well-read. For example, in the last two weeks there have been a number of stories about how newspapers are responding to online publications and the fact that the younger generation is showing a preference for getting the news online. You just have to read any of those stories to understand the challenges that our industry is facing. The CEP is especially adept at communicating with each other as is the Guild. I don't know enough about the new Teamster rep yet but it certainly seems that the new Vice-President is well-versed when it comes to the challenges that the industry is facing.

Therefore, at that level I would think our unions understand the industry. They may not know the bottom line at *Ottawa Citizen* because we don't release our financials independently. *CanWest* consolidates everything and I'm not mandated to release that information at the table. But I try to translate it for people the best I can. For example, at the bargaining table with the Teamsters right now instead of saying that the newspaper industry is being pressured by various sources, I might say, "You can see the size of the press run; you run the presses every night and know the number of papers being produced. What do you think that means for our company, knowing that this is a trend in the industry?" I try to put it in a way that aids understanding, so that it is obvious I have a good point, even if I am not at liberty to reveal some of the financial details of the impact of these challenges.

Have you seen a change in the competencies that are needed for an HR professional, either in terms of competencies that an HR professional is required to have, or in their relative importance?

I see the need for HR professionals to be more competent in all areas of the business instead of just in the HR area. Within our industry, I am happy to see more emphasis put on competencies and behaviours. In the past, there was too much focus on results, results, results. So I am seeing a greater focus on appropriate behaviors as well as results and that means, in many ways, HR has to step up to the plate more to help people understand what's appropriate, why it's appropriate, why it's inappropriate, and help them understand the values of the organization more.

On a wider basis, I think most HR people have to be more strategically competent. Again, that goes back to our previous discussion about outsourcing. If you're outsourcing a lot of the transactional pieces, what's left? The HR professional has to have some basic understanding of the difference between tactical, and strategic, and transactional, and understand how to move the organization forward.

I also think organizations are taking corporate social responsibility a little more seriously than they have in the past. It's always been ingrained in newspapers because we're so connected to our community. We believe strongly in giving back to the community, so it's our way of exhibiting corporate social responsibility. But, again, I think that it's up to HR to help people understand those values, not necessarily do the program. We obviously support literacy, given the nature of our business. That initiative comes out of our Marketing/Community Relations Department, but I can help Marketing help the employees understand what we're focused on and why.

And in a world that is increasingly global, I think we have to start focusing a little more on global competencies. For example, how do you handle expats? How do you help them understand other cultures? How do you help them transition into those cultures, and transition back again? It's a specialized area.

In terms of career development, how does HR develop and skill up its own staff within HR? What do you look for when you're hiring someone into an HR position?

That's an interesting question. I've only had the opportunity to hire one person at the *Citizen*, which is a good thing because it means I don't have turnover. I did look for a business or related degree. I obviously looked for a Certified Human Resources Professional (CHRP).

In terms of developing HR staff, we use our talent management process to identify successors/succession plans and then create a developmental plan for individuals. A developmental plan gives the employee a good opportunity to take a look at where they want to devote their energies to grow. For example, one of our HR people said that she didn't know enough about the business. Given my pre-disposition, I was happy to help her develop in that regard. She identified a number of ways of addressing this. She proposed some shadowing in other departments and also wanted to attend the finance meetings. That was easy enough to do. She also wanted to take some courses. We try to make sure that there's a formal learning component and an on-the-job component. I don't find it is as rich a learning experience if it is all about going to a course. Finally, we try hard to make sure the people have an opportunity to participate in projects. *CanWest* has a lot of opportunities for projects, and they're great learning experiences. We combine all these ideas and draft formalized development plans annually.

How important is experience in a non-HR area? Some people might say give me somebody who understands the business and I'll train them in HR and someone else might say give me somebody really solid in HR, and I'll make sure they get the business training.

I don't think there is an answer on that one. In fact, there are individuals in our department who fit the former profile and others that fit the latter. One of our HR managers was working in the newsroom when I got here, and I induced her to come into this department. She's actually one of the employment-guaranteed employees that I previously referred to. She used

to be a compositor who has been re-trained and re-deployed. During her time at the *Citizen*, she has worked in the mailroom, the pressroom, the composing room, and the newsroom – and, of course, HR. She has had very broad experience. It's actually a perfect combination because others in the department have a lot of formal education and experience when it comes to HR. Those employees are very attuned to HR theory, practice, etc. Between the two types of people, we have most of the skills we need and we can cross-train, taking advantage of our respective strengths. I think this combined way of approaching it has a lot of positives. But of course, you can't be cavalier about then getting your employees the type of training required – business for the HR experts and HR for those best-versed in the business. Our employment guaranteed HR Manager has, for example, gone on to get her CHRP designation.

How important is professional certification in HR?

I believe it's very important. I'm incoming chair of the Human Resources Professionals Association of Ontario (HRPAO), but before that, I was chair of the Professional Standards Committee at HRPAO. I believe that you're not a profession if there's not a body of knowledge that you're responsible for knowing. I think HR needs to really focus on what that body of knowledge is.

When I chaired the Professional Standards Committee, we had a number of academics from various academic institutions who did research into the professional designation. What I was really pleased to see is that having a designation made a significant difference, something like 15 percent in terms of the amount of money that a person can earn. From an HR professional's point of view, that is a tangible benefit.

I also have to think that employers see some value in it if they're going to pay more for it. I have always kept my eye on how many employers are asking for the designation when advertising in the paper and that's gradually growing over time, based on the last couple of times I looked at it. I would think that it's important from an employer's perspective in terms of getting that body of knowledge. And if employers are willing to pay more on average and ask for the designation, presumably they see some value in it.

Can universities and colleges be doing a better job?

I think a good job is being done on the academic side. Where the practitioner or the new entrant would most benefit would be some practical experience. I understand that can be very difficult to accomplish, but I would say most of the time, it's just the seasoning they require. As valid as it is to be applying a theory that you hear, it doesn't always work in practice.

Looking to the future, what do you see as the most significant forces that will shape HR in the years to come?

I have to say that I think it's probably going to be demographics with all its attendant implications. It's not just coincidence that my and many other organizations are more focused

on talent management and succession planning. It's a big issue out there right now. I think that's largely because businesses are thinking that they are going to find themselves with a lot of employees leaving. There won't be a huge pool to replace from, and the competition for those resources will be tough. The elimination of mandatory retirement is also going to impact demographics. Employers are probably going to need to look at new Canadians a lot more seriously than in the past. Adjustments will need to be made to training and development, employee engagement, reward, compensation, not to mention expectations. Each one of these is, in some way, impacted by demographic shifts.

Retention will probably become increasingly difficult. I am not seeing the impact of it yet but our industry is rather peculiar because somebody who wants to retire from the newsroom may do so and then freelance for us, and others. That provides them with income, and with flexibility. But it is also a flexible arrangement for us – in many ways a win-win. As a result, we are accustomed to continuing our relationship with the now ex-employee. It allows the employee to ease into retirement but allows us to retain their services on terms workable for both parties. However, we're going to have to think more seriously about other ways to approach the continuation of that relationship in the future.

What do you see as factors that will make for an effective HR department and a successful HR leader?

Being an effective HR leader is mainly about having a vision instead of concentrating on the "busy" work. Obviously, the HR department needs to share that vision. But it's been my experience that as much as education and experience contribute, a key component is how engaged HR staff are in their job.

In our department we spend time trying to make sure that the person that gets assigned to a project is the one that prefers that type of work. If employees want to trade projects based on individual preferences, I am generally quite open to the concept. Obviously, I need to sort out the logistics of it, but for the most part, if the team is all pulling in the same direction, and there is a way to let the employees who are most engaged in that aspect of the vision work on that aspect of the vision, your expectations will probably be exceeded every time.

What advice would you give to somebody contemplating a career in HR?

Make sure you get a good grounding in business overall. I don't necessarily mean you need to know newspapers to work in the newspaper industry. I mean you need to understand finance, accounting, marketing, production, sales, etc.

And I hate to sound negative, but you're going to have to deal with some unattractive situations - somebody in your office who is being harassed or disciplined or is upset with their raise or lack thereof. They need you to understand, to be empathetic, and to listen. You probably aren't going to go home that day feeling like a ray of sunshine. There's a lot of tough

stuff in HR, so go in with the expectation that you're going to be dealing with really interesting, really challenging issues, but not necessarily easy or always pleasant issues. If that appeals to you, you have made the right choice.

What innovative or progressive HR practices have you been involved with in this organization?

I was very pleased with the interest-based bargaining that I mentioned a little earlier. Interest-based bargaining is something that is difficult to get people interested in in many instances. I find it works best either when people are just desperate or you have a really good relationship that you can take to the next level. I was lucky it was the latter and not the former, so I was able to introduce it. We went through a period of joint training, of coming together and agreeing on how we communicate with each other, to each other, and to the outside world. It was quite an intensive project and it had good long-term results.

I was also pleased with the wellness survey that I referred to previously. A well-done wellness survey can command considerable dollars and I didn't have the resources to do that. I thought it was a real coup when we found the opportunity to work with these two Ph.D. students. I talked to my own executive, and then I made sure the respective unions knew what I was doing because I wanted to invite them to come on board. But, as much as you think it's a great step forward, others don't always agree. The first thing people say is, "Aren't you raising expectations? What if the survey reveals issues we don't want revealed or that should be at the bargaining table?" That can come from members of your own team or from the union team.

I was really pleased when everybody got on board, and I've been pleased with the results. But don't get me wrong. It's not like out of the 20 issues identified in terms of employees' concerns, we've been able to deal with them all. We've probably dealt with five so far but they're issues we have all agreed are priority. It's one step at a time, but we're still moving forward, and it's had a positive effect.

How did you deal with competing interests or differences of opinion?

There was a lot of talking involved and a lot of persuading as well as a lot of commitments. For example, concern was raised that the survey would reveal something that should be dealt with at the bargaining table. It was necessary for me to give assurances that we were not going to deal with it unless I was given the green light by the union. Circumventing the union would have been a sure way to undermine my own initiative, which makes no sense. I was also pleased to see that the Guild President chose to make herself the representative on that Committee, so a lot of times we could just chat about issues. Often that would even broaden the discussion more.

Your title is Vice-President of Human Resources and Finance. Is that an unusual title and portfolio to have in this area?

Yes, it is unusual. I believe I'm the only one in the chain. Frankly, it happened a little bit by fluke. We had a vacancy for Vice-President, Finance. I pointed out to my then boss that the local site doesn't have responsibility for stocks, bonds, the treasury, taxes, depreciation, or amortization. In essence, we required someone with competence in management accounting, somebody with a good background in balance sheets, income statements and cash-flow statements. Having been at Queen's University for the Bachelor of Commerce, I fit that bill, albeit I wasn't really thinking of myself for the job.

During the first couple of years I had the portfolio, I spent a lot of time in the Finance department because I needed to understand it better. There are some complexities to the business that you don't understand if you don't get into the "nitty-gritty". Once I went through that process and understood it, I started letting more and more go to our controller. She knows what she's doing. She doesn't need me looking over her shoulder all the time. So I spend considerably less time in there now, but I understand considerably more about the business. It has significantly contributed to my ability to do my job.

Do you see a day when more CEOs will come from the Vice-President, Human Resources area? Is that happening now?

No, I haven't seen a lot of that happening now, unfortunately. There have been one or two come from the HR ranks. Within the newspaper industry, it's generally editorial to publisher or advertising to publisher. I think there's a potential for the publisher to come from HR, certainly within my industry. As I said, we have put our feet at the table for a considerable amount of time anyway so I don't think it's outside the realm of possibility that, if there is a publishership, they could look within the ranks of HR as well as within the other disciplines.

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