



**HUMAN RESOURCES GUIDE
FOR COMMUNITY SPORT:
MANAGING EMPLOYEES**



ABOUT THE HUMAN RESOURCES GUIDE FOR COMMUNITY SPORT

This Guide is a human resources handbook to support the professional development of local sport clubs and associations. Designed for club executive members and administrators to assist in the management of paid employees, the Human Resources Guide offers best practices, employment resources and numerous templates that may be used when required and adapted to suit any organization. By making human resources a key part of business operations, leaders invest in their most valuable assets – their employees and volunteers.



Reviewed and supported by the BC Human Resources Management Association.
<http://www.bchrma.org>



The Human Resources Guide for Community Sport is produced by 2010 Legacies Now in partnership with the Province of British Columbia.

2010 Legacies Now is dedicated to strengthening arts, literacy, sport and recreation, healthy living, accessibility and volunteerism in communities throughout British Columbia and Canada. As a not-for-profit society, 2010 Legacies Now is creating lasting legacies leading up to and beyond the 2010 Olympic and Paralympic Winter Games.

www.2010LegaciesNow.com
www.2010andBeyond.ca



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2010 Legacies Now also appreciates the advice and guidance from these representatives of provincial sport organizations, municipal recreation and community sport. They assisted in developing this guide as part of a long-term project to develop standards for local sport organizations across British Columbia:

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“The Ministry of Healthy Living and Sport is pleased to promote professional development in the sport sector through the Human Resources Guide for Community Sport.

This guide provides a best practices overview, as well as several practical templates that can be adopted by sport administrators as they manage people and volunteers within their organization. By sharing quality human resource ideas and methods, the workforce skills in sport clubs and associations will be elevated, helping community sport in the province to thrive and succeed.”

IDA CHONG

Minister of Healthy Living and Sport
Province of British Columbia

“Helping community sport create the best work environment possible is the goal of this Guide.

Initiated together with our sport partners at the provincial and local levels, 2010 Legacies Now believes the Human Resources Guide for Community Sport provides a wealth of tools, templates and theory to bring best practices to life.”

BRUCE DEWAR

CEO
2010 Legacies Now

1.0 INTRODUCTION

People are our most important assets

Some local sport organizations have had paid staff, often coaches, for years. Increasingly, local sport is employing a variety of resource people to support and extend the work of club volunteers – these include operating staff, managers and coaches. They are becoming more and more important to the smooth operation of the club, league or association.

At the same time, human resource management has become more complex and can make a significant impact on employee productivity and the bottom line. More organizations need to pay attention to human resources by ensuring their business planning process includes human resource issues. Whether you're implementing new technology, reducing costs, expanding, or experiencing a major change within your organization – all of these impact your human resources and should be addressed in your strategic plan.



Sound human resource practices for organizations of any size include:

WELL DEFINED AND CURRENT JOB DESCRIPTIONS

Club executives and directors need to know what skills, knowledge and abilities they need to hire; employees need to know what they're being hired to do; and supervisors and employees need to know what the job responsibilities and performance standards are that are being evaluated.

EMPLOYEE ORIENTATION

So often employers spend a lot of time and energy attracting new employees, only to leave them to their own devices once they're on board. The "sink or swim" mentality is common. If you don't engage an employee on their first day, they will not stay, which results in expensive turnover costs.

SOUND HIRING PRACTICES

Bad hiring decisions can be costly. Ensure you have fair and consistent recruitment practices in place to eliminate the risk of making poor hiring decisions.

PERFORMANCE MANAGEMENT

Employees need to receive feedback on how they're doing, and to provide input into how they believe they can improve on their performance. Goal setting that ties into the organization's overall business plan should also be part of this process. Ongoing coaching and mentoring is imperative to a successful organization.

EMPLOYEE GUIDELINES

Written employee policies and procedures provide guidelines to employees on various issues such as overtime, sick pay, hours of work, etc. They should be kept current and in compliance with the Employment Standards Act and applied consistently throughout the organization.

COMPENSATION

Ensuring you are paying market compensation rates will enable you to not only attract quality employees, but also retain the ones you have.

TRAINING AND DEVELOPMENT

Everyone benefits from ongoing learning, and this does not have to be a major expense. Training and development can consist of on-the-job training, lunch and learn sessions, relevant reading, online courses/workshops, external courses, etc. No matter how small your organization's commitment is to enhancing the knowledge of your employees, it will have a big impact on making them feel valued.

Realizing the full potential of your employees has a major impact on improving business results. We hope the contents of this HR Toolkit will assist you in developing HR policies and processes that will enhance your organization's effectiveness.



2.0 LEADERSHIP

Several factors determine why one organization evolves into a successful enterprise, while another organization languishes. However, two of the most important factors are having a solid business plan and strong and effective leadership.

Key elements of effective leadership include the following:

BUILDING A VISION

A leader must be able to look honestly at the realities of the organization and marketplace to determine if the organization has the skills and talent to meet customer demands, and determine what opportunities are available in the future. They must then develop the organization's vision, share the vision with employees, and ensure everything the organization does is working toward the achievement of this vision.

ADOPT A DISTINCTIVE AND PASSIONATE STYLE OF LEADERSHIP

Great leaders are visible and infuse courage and trust in employees in a variety of ways. They are fair, tell it like it is, make change exciting, and take risks on people. They don't shy away from difficult situations.

COMMUNICATE AT ALL LEVELS OF THE ORGANIZATION

No other single action is as crucial to winning employee trust and confidence. When communicating their vision, good leaders paint a picture, keep it simple, explain why, and take advantage of every opportunity to get their message across.

BUILDING A STRONG TEAM

The first step in building a strong management team is hiring the right people. Once that team is in place, promote learning, treat people with respect, and ensure that team members understand the value of their individual contributions. Work together as a team especially when things go wrong, and identify problems without blame. In addition, give people access to accurate information to avoid rumours and hearsay.

MOTIVATE OTHERS

Long-term business success depends on having an organizational culture where people are motivated to excel. Harness the creativity of employees by promoting the organizational vision, setting goals that broaden employees' abilities and believe that the team can achieve these goals. Provide opportunities for supporting employees who take risks. Recognition and reward should follow outstanding achievement.

BE DECISIVE

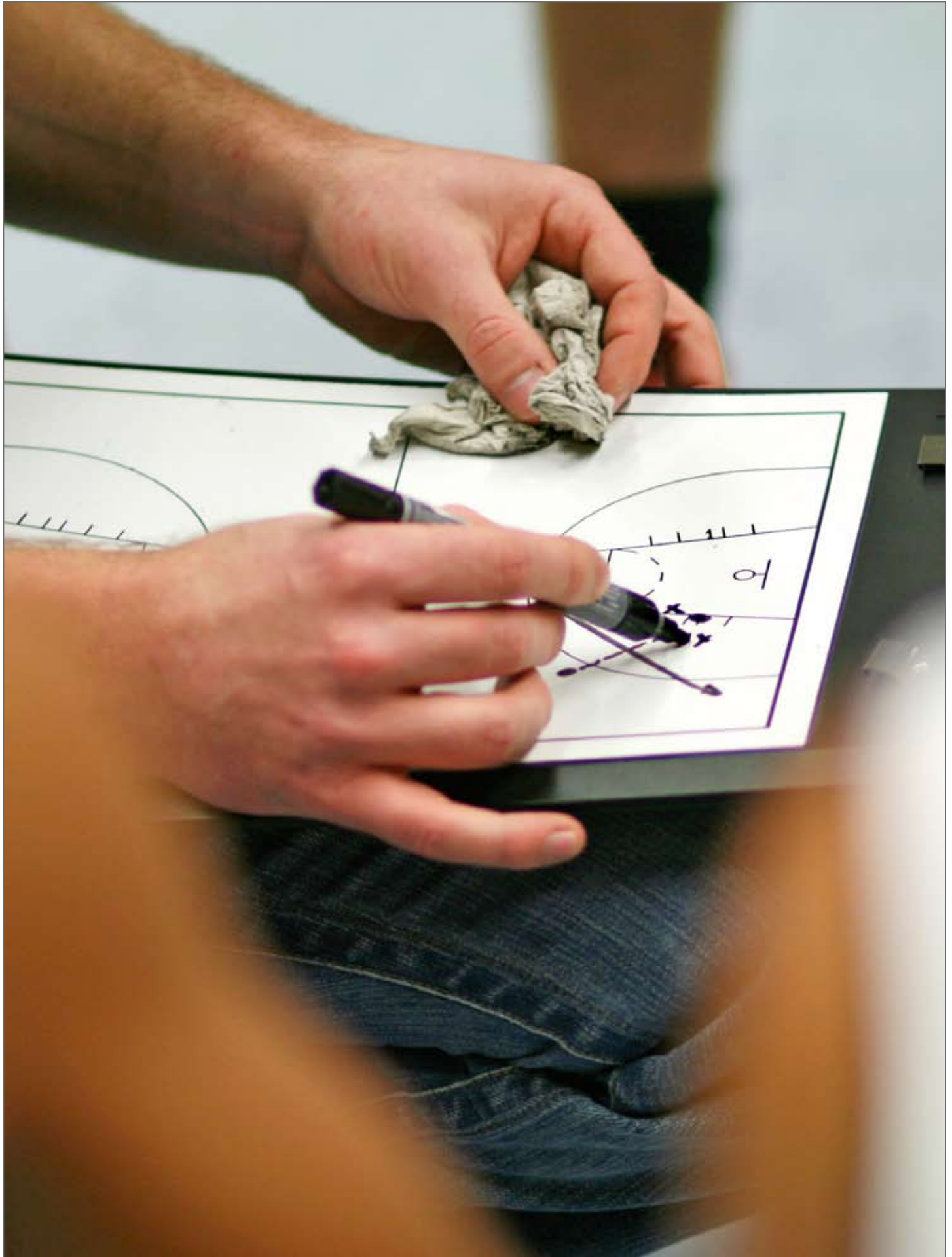
Strong leaders scrutinize every element of the organization and decide what needs to stay and what needs to be abandoned. They seek input from others, make decisions and then move forward.

DELEGATE RESPONSIBILITY

Good leaders surround themselves with a strong team and take advantage of their skills and authorities. They define tasks, offer suggestions, and then give their team the room to operate and the freedom to be creative. They reward and recognize success. Good leaders avoid questioning, analysing and second-guessing every decision made or action taken by the person they've placed in charge; they don't hover. Your own success as a leader is shown by how you develop your employees.

BUILD LEADERS

A sign of effective leadership is instilling leadership traits in your management team. True mentors focus on a person's strengths and potential, convince the individual that they have what it takes, and put aside their own agendas to help others express their unique talents.



3.0 STRATEGIC AND OPERATIONAL PLANNING

Strategic planning is the most important function of key decision makers in an organization. It determines where an organization should be going so that all organizational efforts can be pointed in that direction.

Key elements of the strategic planning process are:

- **DEFINITION OF THE ORGANIZATION'S PURPOSE AND VISION**
Why does the organization exist?
What do we do to fulfill our purpose?
- **STRATEGIC ANALYSIS**
Determine trends, strengths, weaknesses, opportunities and threats, by assessing external and internal environments. This is called a SWOT.
- **DEVELOPMENT OF A PRACTICAL VISION**
What will our organization look like five or ten years from now?
- **IDENTIFYING, ANALYSING AND OVERCOMING BARRIERS**
What obstacles will get in the way of realizing our vision?
- **SETTING STRATEGIC DIRECTION**
What broad directions will enable us to overcome the obstacles and allow our vision to be realized?

Operational planning is an essential part of strategic planning. Whereas the focus of strategic planning is on what the organization is and the direction in which it should be going, operational planning focuses very specifically on how the organization is going to get there. The timeframe for an operational plan is typically one to three years. The primary purpose of the operational plan is to achieve the results outlined for the first year of the strategic plan.

Key elements are:

- OPERATIONAL ANALYSIS
- INDICATORS OF PERFORMANCE
- ACTION PLANS
- KEY RESULT AREAS
- SHORT-TERM OBJECTIVES
- BUDGETS

By establishing and implementing effective operational planning processes, an organization is able to produce effective and functioning management and employee teams to establish or change to a desired culture, to respond to changing conditions, and to analyse and influence organizational personnel, systems, structures, policies and rewards. It involves the commitment of major financial, human and physical resources to enable the achievement of planned directional change.

Results management focuses on plan execution and focuses on reporting, controlling and modifying the plan to meet desired results.

Key elements include:

- CONTROL SYSTEMS
- ORGANIZATION RESULTS
- INDIVIDUAL RESULTS
- REWARD SYSTEMS
- MANAGEMENT REPORTS
- UNIT RESULTS
- CORRECTIVE ACTION
- RETURN ON INVESTMENT (ROI)



Human resources planning is the process of forecasting an organization's human resource needs to ensure it has the right number of individuals, with the right skills, at the right time, in the right position. It also provides management with the tools to control labour costs and evaluate employees and their future development potential. Effective human resource planning enables organizations to plan recruitment and selection and other human resource programs and ensures the organization can accomplish its current and future objectives.

Key elements of the human resource planning process are:

- **ESTABLISH** – organizational goals and objectives during the strategic and operational planning process.
- **FORECAST** – future human resource needs by analysing current requirements and projecting future requirements based on organizational changes/objectives, budgets and any planned changes in operations/activities.
- **ANALYSE** – the current skills, experience and qualifications of existing staff and project future human capital supply based on attrition and productivity changes.
- **PLAN** – human resource programs such as recruitment, training and development, succession planning, and job changes to enable the organization to achieve its human resource plan.
- **IMPLEMENT, MONITOR and EVALUATE** the human resource programs.

RESUME

Mr John Doe
The Company
Anothertown
Anothercity
12345

Dear Mr Doe

I am a junior majoring in Computer Science at University Jones, a Control Designer in your organisation. He recommended your resume to your attention. I would appreciate if you accept the aforementioned resume as an application for an intern position.

Over the past few semesters, I have taken several classes in digital design. These courses familiarized me with the background in digital design. These courses familiarized me to abstract and organize complex computational devices and their models. In addition, I gained experience in low-level techniques.

My last internship at Computer Corporation provided me with a significant contribution to a large, dynamic project. While on the team, I learned to coordinate my individual efforts with the team, I learned to coordinate my individual efforts with the people around me. I developed strong organizational and team confident that these abilities would serve me well on your design team.

As stated earlier, I am very interested in integrated circuits and contribute to the efforts of your design team. I would appreciate to discuss my qualifications and your summer employment opportunity. I can be contacted at 555-246-1234. I look forward to hearing from you.

Thank you.

Sincerely,

Ann Another

4.0 RECRUITMENT

4.1 Organization and Position Design

No matter how small or large an organization is, it is important to develop an organization chart as it provides a snapshot of the organization. Organization charts show the title of each position, the reporting relationship, and the leader in each technical area, department, unit or branch. They should be organized based on logical groupings of work, not the employees you currently have in the organization. An effective organization chart communicates to staff and volunteers where you plan to take the sport, how they fit into the organization, and shows options for career development.

There are four common organizational structures:

FUNCTIONAL

Used when the organization is small, geographically centralized, and provides few goods and services. When an organization experiences bottlenecks in decision making and difficulties in coordination, it has outgrown its functional structure.

DIVISIONAL

Used when the organization is relatively large, geographically dispersed, and/or produces a wide range of goods/services.

LATERAL RELATIONS

Used to offset coordination problems in functional and divisional structures. They typically use dotted line supervision, have liaison roles, temporary task forces or integration managers.

MATRIX

Used to reinforce and broaden technical excellence and can balance conflicting objectives of an organization. However, they often create confusion and require organizations to modify many traditional management practices.

A sample functional organizational chart is illustrated in [Appendix A](#) which would likely be the best option for most provincial sport organizations and member clubs.

Every employee should have a separate and distinct job that is designed to help the organization achieve its business goals and objectives in the most efficient and effective way. Job design is the process of defining and arranging tasks, roles, and other work processes. Analysing a job entails determining the duties and nature of the job, and the skills and experience of people who should be hired for them (not the skills and experience of those currently performing the job). This data is then used to develop a job description. In smaller organizations it is quite common for employees not to have job descriptions. However, a job description is a foundation document that is used to recruit, compensate, train and manage the human resources in your organization.

To assist with the development of job descriptions, we suggest you use the questionnaire in [Appendix B](#). This tool can be modified depending on the size and complexity of your organization. A sample job description is provided in [Appendix C](#).

4.2 Recruitment Best Practices

The first step in the recruitment process is to prepare and/or review the job description to ensure it accurately reflects current job duties and the required knowledge, skills and experience of ideal candidates.

Once the job description has been prepared or updated, you need to determine the most appropriate method of attracting suitable candidates and the related costs. Sources of candidates may include media advertising; web sites; government agencies; former athletes transitioning into new roles; professional and community associations; campus career fairs; employee referrals; external recruitment firms; etc.

To determine the best source of candidates, consider the desired skills and knowledge the position requires. For example, in the job description provided in [Appendix C](#) for a Club Administrator we suggest posting the opportunity on job sites of local community colleges offering administrative management programs; Charity Village; BC jobs; Craigslist; and relevant association websites such as the Canadian Society for Association Executives. Newspaper advertising can also be used; however ads can often be expensive and not yield the best quality candidates.

4.3 The Selection Process

Once resumes have been received from the various sources, they should be reviewed and sorted into “A” and “B” candidates. The hiring manager will conduct an initial telephone screening interview with “A” candidates to get an initial sense of why they want to work for the organization, their experience as it relates to the job description, communication skills and salary expectations. Candidates who appear to have the required skill set are then brought in for a face-to-face interview with the hiring manager and any other relevant individuals including direct supervisors and co-workers.

4.4 Potential Conflict of Interest

The potential for conflict of interest usually comes in the form of favouritism. When it happens, someone uses their position of authority or responsibility (e.g. coach, administrator, scheduler or Club President) to advance the interests of a family member or friend over other candidates. Unfortunately, perception is often stronger than the reality and, even if the staff member or volunteer’s actions are completely justified, once the perception of unfairness takes root, it becomes reality.

Effective management of allegations of favouritism and conflict of interest is critical to the health of the organization. Active listening involves hearing the complaint without passing judgement and paraphrasing to express understanding.

Anyone in a position of leadership and authority must hold themselves to a higher standard, and the organization can also help in some practical ways.

Some things to keep in mind when hiring staff and recruiting and appointing volunteers include:

- During the interview/recruitment process, be open about the potential for perceptions of conflict of interest.
- If necessary, consider establishing a policy where parent coaches are not allowed to coach a competitive team when they have a son or daughter on that team.
- Establish codes of conduct for paid and volunteer leaders that includes a clause relating to conflict of interest. Include a brief overview of the code of conduct as part of your new coach/volunteer orientation where you can demonstrate different ways of how conflict of interest might arise and how it should be dealt with.

To review Draft Human Resource Policies relating to handling potential conflicts of interest, see [Appendix U: Conflict of Interest](#).

4.5 Overseas Recruitment

If there is a shortage of qualified Canadian coaches, clubs may choose to recruit coaches from other countries under Service Canada's Temporary Foreign Worker Program.

As of January 1, 2009, certain temporary foreign workers are eligible for concurrent processing. This means that their work permit applications can start being processed before the Canadian visa office has received an approved Labour Market Opinion (LMO). This includes Coaches who are listed in the National Occupational Classification (NOC) at the B level under classification 5252 Coaches.

To be eligible for concurrent processing, the foreign worker must be applying for a work permit at a Canadian visa office outside of Canada.

WHAT THE FOREIGN WORKER MUST DO

Complete a work permit application <http://www.cic.gc.ca/english/pdf/kits/forms/IMM1295B.PDF> and include the following documents with the application:

- A letter to the visa office stating that you want concurrent processing of the work permit application and that you are aware that a positive Labour Market Opinion (LMO) issued by Service Canada is required before a work permit can be issued.
- A copy of the employer's application for an LMO, along with a copy of the job offer or contract in Canada.
- The application processing fee of \$150.

WHAT HAPPENS NEXT?

- The visa office decides if the application qualifies for concurrent processing. If it does, a file number is assigned, the cost recovery fee is paid, and instructions are sent to the applicant if a medical examination is required.
- The cost of the medical exam and the work permit are paid by the applicant and are non-refundable should their application be refused.
- The foreign worker then waits until you send him the approved LMO. They will then take this to the visa office and include their visa office file number.

WHAT THE CANADIAN EMPLOYER MUST DO

- You must advertise on the National Job Bank (<http://www.job.gc.ca>) for a minimum of 14 calendar days OR conduct similar recruitment activities consistent with the occupation such as advertising on recognized Internet job sites, industry journals, newsletters or national newspapers (or by consulting professional associations) during the three months prior to applying for a Labour Market Opinion.
- You must be prepared to demonstrate that you have met these advertising requirements by providing proof of advertisement and the results of your efforts to recruit Canadians or permanent residents, supplying information on the qualifications of Canadian applications and why they were rejected. Records of your efforts should be kept for a minimum of six years as stipulated in certain provincial and federal legislations, such as the Income Tax Act.
- Once you have fulfilled the required advertising criteria and have an accepted job offer from a foreign worker, you can then apply for a Labour Market Opinion (LMO) under the National Occupation Classification – 5252 Coaches.

- Submit an application to Service Canada. This can be mailed or submitted online http://www.hrsdc.gc.ca/eng/workplaceskills/foreign_workers/fwp_application.shtml.
- Service Canada ensures the job offer is genuine, the wages and working conditions are comparable to those offered to Canadians working in the occupation, that reasonable efforts were undertaken to hire or train Canadians for the job and that the foreign worker is filling a labour shortage.
- Once Service Canada approves the job offer, they will provide you with written confirmation. A copy of the Labour Market Opinion confirmation letter must be sent to the visa office as soon as it's received and should include the visa office file number.
- Once the work permit and LMO are approved, the foreign worker is then legally entitled to work in Canada. The duration of the work permits are usually two or three years. During this time, they are able to apply for Canadian Landed Immigrant status should they so choose.
- In some cases, you supply return plane tickets and accommodation.
- You should create a foreign worker specific orientation to help them link up with community and cultural services.

4.6 Drafting an Effective Advertisement/Job Posting

Ensuring you have the ideal advertisement for your vacancy is crucial to ensuring you get the ideal candidates to apply. Consider whether desired candidates will be coming from a similar job or from a totally different industry. Review the job description to determine what specific qualifications and experience candidates need to have.

Structure the ad with a strong heading that states the job and location and then have a “hook” line that grabs attention and gets people to read on. Include an employee value proposition that states what they will get by working with your organization (such as culture, experience, great benefits). Keep the ad concise and provide only a small amount of key information about the organization and main responsibilities and duties. Don’t put the entire job description in your ad. An example of a well laid out ad is as follows:

SAMPLE ADVERTISEMENT

CLUB ADMINISTRATOR – SURREY

**ARE YOU ORGANIZED, FANTASTIC WITH PEOPLE
AND LOOKING FOR A NEW CHALLENGE? ARE YOU LOOKING FOR
A FUN AND ENERGETIC WORK ENVIRONMENT?**

ABC is the largest swim club in the Lower Mainland offering recreational and competitive programs. Due to continued growth, we are seeking a Club Administrator to join our exceptional team and handle day-to-day operations of the club.

Reporting to a volunteer board, this varied and challenging role includes responsibility for:

- Program and schedule development
- Registration and office management
- Advertising and promotions
- Staff recruitment, supervision and training

Ideal candidates will have at least two years office management experience and enjoy working in a demanding environment where change is constant. If you have a strong commitment to customer service, are highly organized, and excel at problem solving, then we look forward to receiving your resume at abcclub@shaw.ca or 604-555-5555.

4.7 Principles of a Good Selection Interview

Individuals involved in the interview process should really know the job and what will constitute a high performing employee. An interview plan should be developed to ensure the hiring manager comes away with the information they need and to ensure all candidates are asked the same questions.

The key difference between effective and ineffective interviews are structure and focus. Too often interviews are unstructured and largely unplanned conversations that may or may not focus clearly on job-relevant factors. A structured interview consists of carefully planned job-related questions using a combination of open-ended, situational and behaviour-based interviewing techniques.

Open-ended questions can be useful to open an interview but they should be used sparingly. The remaining questions should be the behaviour-based type to focus on the applicant's past success with similar performance requirements. You may want to add one or two situational questions to see how well applicants can think on their feet (assuming that this is relevant to the job).

The main focus is to put your candidate at ease so they can provide the information you are looking for and learn about the job and organization.

4.8 Examples of Situational and Behaviour-Description Interview Questions

SITUATION QUESTIONS

- What would you do if one of the club members became angry during the course of a competition and started to become verbally abusive to the referee?
- How would you respond to an employee who accuses a fellow employee of theft?
- It's 3 p.m. and you have a report due to your manager at 5 p.m. Suddenly you have to deal with a crisis situation that requires your immediate attention. What do you do?

BEHAVIOUR-BASED QUESTIONS

- Think of a situation in which you were part of a team and another team member refused to pull their weight. Describe the situation.
What did you do?
What was the outcome?
- Please describe a situation in which attention to detail was very important.
What did you do to focus your attention and minimize errors?
How effective was it?
- An important part of this job is selling people on your ideas.
Describe an example of how you persuaded someone to accept your point of view?
What exactly did you do to accomplish this?
- Think of a case in which you missed a deadline.
What caused you to miss the deadline?
What happened as a result?

4.9 Interview Techniques to Avoid

Conducting effective interviews takes a lot of practice. To ensure you get the most out of the interview process, avoid the following:

- Dominating the interview and talking too much. Be comfortable with silence and give the candidate time to answer.
- Letting the applicant control the interview. Don't be afraid to direct a candidate back to a specific question.
- Getting into a debate with the applicant – keep the process neutral.
- Responding to interruptions – turn your phone off, shut your door.
- Using questions that can be answered yes or no.
- Leading the questioning by suggesting the proper answer.
- Overselling the organization or the opportunity.
- Not providing a realistic and balanced view of the job.
- Asking questions of a discriminatory nature (i.e. marital status, age, ethnicity).

4.10 Questions You Can't Ask

A person cannot be refused work, promotion, be fired or forced to work under different conditions because of:

- Age (19 and over)
- Race, colour, ancestry or place of origin
- Family status
- Political belief
- Marital status
- Physical or mental disability
- Religion
- Sex (including sexual harassment, pregnancy and transgendered discrimination)
- Sexual orientation (includes protection for heterosexuals, bi-sexuals, gay men and lesbians)
- Conviction for a criminal or summary conviction charge that is unrelated to the employment

This affects the questions you can ask applicants and what kinds of things you can take into account when you are deciding who to hire. When advertising for a position, you are not allowed to exclude any class or category of person from the advertisement unless the preference is based on a genuine occupational requirement.

When interviewing candidates, you can ask personal questions, but you cannot refuse to hire or promote on the basis of how candidates answer these questions. Unless it is imperative to know, it is best to avoid any questions related to the above.

4.11 Common Interviewer Errors

SNAP JUDGEMENT

Basing your selection on first impressions.

CONTRAST EFFECT

Giving an applicant higher than deserved ratings when they are interviewed immediately after a weak candidate, or lower-than-deserved ratings when they are interviewed after a strong candidate.

SIMILARITY EFFECT

Giving higher ratings to applicants who are like you.

OVER-GENERALIZING

Assuming that because a candidate behaves in a specific situation with one type of person they will act the same way with all types of people in all situations.

OVER QUALIFICATION

Focusing on the person with the highest qualifications who may not necessarily be the most suitable for the job.

VERBOSITY

Over-rating the candidate who speaks quantity rather quality.

HALO EFFECT

Basing your overall impression, either good or bad, on only a portion of the facts and applying this assessment to all other factors.



4.12 Effective Interview Format

The following is an effective interview format:

- Greetings/establish rapport.
- Introduction – introduce those involved in the hiring process or interview panel and reiterate the position.
- Review the interview process – discuss what will happen during the interview, how long the interview will be, when the candidate can ask questions and explain that you will be taking notes.
- Review the candidate's resume – ask them to summarize their education and career to date including reasons why they changed jobs (open-ended question).
- Review specific experience on the resume as it relates to the position you're hiring (open-ended questions).
- Ask behavioural-based interview questions to determine if they have the required personal attributes.
- Ask for specific examples that will illustrate the skills and competencies required to do the job (situation and behaviour-based questions).
- Probe for more information.
- Record answers.
- Describe the position, key responsibilities, challenges and opportunities for advancement.
- Provide applicant with a realistic overview of the job and who will they report to and work with.
- Clarify their salary expectations.
- Describe the organization and culture.
- Ask how much notice they have to give.
- Ask the applicant if they have any questions.
- Close the interview – explain next steps, how they will be notified, timing of possible second interview (if applicable).
- A sample Interview Outline with examples of situational and behaviour-based interview questions is attached as [Appendix D](#).

4.13 Reference Checking

The best way to predict a candidate's potential to perform well in any given position is based on obtaining information on their past and demonstrated experience in similar circumstances. Candidates should be asked to provide the names and contact information of previous or current employers, peer(s), subordinate(s), and if relevant, any external party. If a candidate is unable to provide their previous or current employers as a reference, this may be a red flag and should be questioned. It is recommended that you obtain written approval from candidates to conduct references. A sample Candidate Consent Form is attached in [Appendix E](#).

Always do a minimum of two reference checks.

During the reference process, the same questions should be asked of all references. Focus on any particular areas of concern that may have been identified during the interview process. It is also recommended that any professional designations and university degrees be verified, preferably at source, as documents can be forged. You can obtain verification by contacting the Registrar at the relevant educational institution and/or professional association.

A sample reference check template is attached in [Appendix F](#).

[Refer to Section 8.5](#) on how to handle providing references to other employers on current or former employees.

4.14 Employee Classifications

Full-time employees work the standard work week of 40 hours and receive full employee benefits and vacation time. The advantage of full-time employees is a stable workforce.

Regular part-time is less than full-time work by employees on an organization's payroll and is one of the fastest growing segments of employment. Working part-time enables people to balance their work and their personal life.

This type of employee classification reduces hiring and retraining costs and expands your talent pool to include employees unable to work full-time. Depending on your policy for eligibility to health benefits, this classification can help to control benefit costs and offers an employer the flexibility to control labour costs as market demands change.

Casual employees differ from regular part-time employees in that they do not receive benefits. This employment classification allows employers to determine whether an employee is the right fit and if so, you can encourage employee commitment to work towards achieving regular part-time status and eligibility for benefits.

Contract/term employees allow employers the greatest flexibility and many organizations use term employment as a job entry policy.

Contract/term employees enable an employer to establish a set period to determine whether the individual is a good fit. If the fit isn't right, the employer can communicate that the contract or term of employment will not be renewed. It also provides an out for the employee if they determine things aren't to their liking. One of the benefits of contract/term employees is that they often perform at their best knowing they are continually being assessed. However on the flip side, contract/term employees may feel unconnected and insecure which may affect productivity.

Temporary employees are usually accessed through an employment agency. However, more and more organizations are developing their own temporary pool with former or retired employees. Temporary employees are usually highly trained and there are no benefit costs.

4.15 Employee Versus Contractor?

Many organizations hire people as contractors when in fact they are employees. Just because someone is called an independent contractor or signs an independent contractor agreement, does not mean that they are. It is the reality of the work that determines if you are an employee or not.

Various tests have been developed by the courts, the Employment Standards Branch and CRA to determine whether or not someone is an employee or an independent contractor. These tests include:

Control – is the person under the direction and control of another regarding the time, place and way in which the work is done? Is the person hired, given instruction, supervised, controlled, or subject to discipline? Did the person answer a help wanted ad? Is the person told what to do, how to do it, and when to do it? The greater degree of control, the greater likelihood of the person being found to be an employee.

Ownership of tools – Does the person use tools, space, supplies and equipment owned by someone else? If so, this would indicate an employment relationship. However, it is recognized that some employers require employees to provide their own tools or vehicles.

Chance of profit – Does the person have a chance of profit? If their income is always the difference between the cost of providing the service, and the price charged for the service, the worker may be someone other than an employee.

Risk of loss – Is the person at risk of losing money if the cost of doing a job is more than the price charged for it?

Payment – Does the person receive payments of regular amounts at set intervals? Does the person receive payments regardless of customer satisfaction or customer payment? If so, this would indicate an employment relationship.

In general, the degree to which the party who pays for the service provided controls the supply of material and tools, and retains direction and control of the activities, increases the likelihood that the relationship will be found to be one of employer/employee.

A common misunderstanding is that one or the following factors establishes an independent contractor relationship – signs an agreement as an independent contractor; charges GST; no deduction for Income Tax, EI or CPP; works for several businesses; submits a bill for labour provided; drives his or her own vehicle/ provides own tools.

If it is determined that you have been paying someone as an independent contractor when in fact they are employee, it is the employer who is liable for any statutory deductions that have not been withheld plus any penalties. In addition, you may open yourself up to an audit to determine if there have been multiple violations – it's not worth it.

4.16 Employment Offers

Once the final candidate is selected and you have verified their references, the terms and conditions of employment are negotiated.

A written job offer is prepared that outlines the terms and conditions of employment and includes a copy of the job description. If the candidate accepts the employment offer they will be asked to sign the offer and return a signed copy to the organization immediately.

Offer letters can be simple or complex, depending upon the position and terms and conditions of employment. We have attached two samples of employment offer letters that have been vetted by legal counsel, in [Appendix G](#) and [Appendix H](#). It is recommended that legal counsel review any employment contract related to a senior position to ensure it reflects current labour law and the relevant terms and conditions of employment.

4.17 Probationary Period

Probation is intended to provide both the new employee and the organization with a reasonable period of time to evaluate the employee's suitability for the position.

The length of the probation period will be communicated in the Offer of Employment letter. Typically, new employees are considered on probation until they have completed three (3) months of continuous employment. During this period of mutual evaluation, the employee may resign without giving notice and, conversely, the Organization may release an individual without notice. Employees who have proven suitable during this period are retained on a permanent basis.

However, in some cases the probation period may be longer. Where more time for accurate assessment is required, the Supervisor or Manager may decide to extend the initial probationary period for an additional three (3) months. Such extensions must be communicated in writing to the employee prior to the expiration of the initial probationary period. The employee will remain ineligible for the benefit program until the expiration of the extended three-month period.

An employee who is unable to meet performance expectations, or is found to be unsuitable for their position following a probationary period that exceeds three (3) months may be released from employment. However, the Organization must provide notice or pay in lieu of notice as per the Employment Standards Act.

Supervisors and Managers are responsible for ensuring that orientation and on-the-job training is provided and the employee's performance, conduct, observance of policies and procedures and attendance are monitored and reviewed. Performance expectations and the performance review process should be discussed with the employee within the first month of employment.



5.0

EMPLOYEE RETENTION

The market for quality staff has become more and more competitive with demand exceeding supply in many areas of the economy. In addition, the cost of hiring new staff (advertising, training, impact on productivity, etc.) has increased substantially over the last decade.

A certain amount of turnover is natural and desirable. Desirable turnover occurs when good candidates are promoted into higher positions of responsibility; or poorly performing employees leave or are let go, ideally to be replaced by more productive ones. Undesirable turnover is another matter. When good talent leaves, the replacement costs are quite high. Reducing undesirable turnover typically results in a significant improvement to an organization's bottom line.

The top causes of employee turnover are:

- Compensation
- Career development
- Work hours
- Job fit (culture versus skills)
- Manager/employee relations
- Corporate culture
- Recognition
- Family obligations
- Physical work environment
- Employee communications
- Perceived unfairness of outcomes or processes
- Perceived lack of recognition and appreciation
- Perceived unfairness of personal treatment
- Lack of opportunity for advancement

To reduce undesirable turnover, leadership needs to conduct both stay and exit interviews to find out why good employees are leaving and then put in place cost-effective solutions to reduce it. Stay interviews are conducted during the course of employment. Exit interviews are conducted once an employee gives notice.

To mitigate employee turnover, consider the following:

HIRE THE RIGHT PEOPLE

Having the right people on board who fit the organization will dramatically increase the chances that they will stay for an extended period of time.

COMMUNICATE

Be sure that team members know their roles, job description, and responsibilities. Communicate any new policies or initiatives to make sure everyone is on the same page. Have regular staff meetings to share information and solicit employee feedback. Nobody likes to feel left out of the loop.

INCLUDE EMPLOYEES IN THE DECISION MAKING

Include team members in the decision making, especially when they will be affected by these decisions. This helps to create a culture of employee involvement and generates new ideas and perspectives that management may not have thought of.

ALLOW TEAM MEMBERS TO SHARE THEIR KNOWLEDGE WITH OTHERS

The highest percentage of information retention occurs when one shares that information with others. Have team members share what they have learned at a workshop or conference or create a process where more junior staff can be mentored by more experienced employees.

PROVIDE ONGOING FEEDBACK

Don't wait until performance review time to give feedback on how an employee is performing. Regular feedback keeps performance levels high and reinforces positive behaviour. Simply letting an employee know they're doing a good job on a current project can do wonders for morale and help to increase retention. Remember to thank employees on a regular basis for their efforts.

OFFER COMPETITIVE COMPENSATION

Everyone wants to feel they are paid fairly for the work being done. Research what other organizations are offering in terms of salary and benefits and make sure your compensation is competitive.

BALANCE WORK AND PERSONAL LIFE

Family is important. When work begins to put a significant strain on one's family no amount of money will keep them around. Small gestures such as allowing a team member to take the occasional extended lunch to watch a child's baseball game will likely be repaid with loyalty and extended employment with the organization.

PROVIDE OPPORTUNITIES FOR GROWTH AND DEVELOPMENT

Offer team members the opportunity to learn new skills and knowledge.

If someone appears bored or burned out, offer to train them in another facet of the organization where they would be a good fit, or assign them to a special project.

Nobody likes to feel stuck in a position with no chance for advancement.

RECOGNIZE HARD WORK AND LET STAFF KNOW THEY'RE APPRECIATED

This can be one of the single greatest factors affecting employee retention.

Everybody at all levels of an organization wants to know that their efforts are appreciated and recognized. Often a short note or simply saying thank you will suffice. Or you might include a mention in your newsletter or provide a gift certificate to a restaurant or movie – the possibilities are endless.

CLEARLY DEFINE WHAT IS EXPECTED OF EMPLOYEES

Having the right people on board who fit the organization will dramatically increase the chances that they will stay for an extended period of time.

THE QUALITY OF SUPERVISION AND MENTORSHIP

It is often said that people leave bosses, not their jobs. Supervisors play the largest role in an employee's development and ultimate success.

All employees want supervisors who are respectful, courteous and friendly. But more important they want supervisors who set clear performance expectations, deliver timely feedback on their performance, live up to their word, and provide an environment where the employee can grow and succeed. Failure to do this can cause an employee to start looking for greener pastures.

FAIR AND EQUITABLE TREATMENT

One of the surest ways to create animosity and resentment in an organization is to allow favouritism and preferential treatment of individual team members.

6.0

EMPLOYEE ORIENTATION



Employee orientation has become increasingly more popular in today's workplace because it's now more about retaining talent than simply getting people settled in their new office. A good orientation process is mandatory if you want an employee to be successful and to stay.

The concept of orientation is to make new employees feel welcome and comfortable in their new surroundings and to minimize the time before new employees are productive members of their new work group. By quickly building rapport with colleagues and assimilating into their work team, new employees experience a sense of purpose with their new organization and the transition is less disruptive. From the employer's perspective, orientation can help minimize the down-time typically experienced when bringing a new employee into a department. By sharing performance expectations right away, there can be a significant reduction in misunderstandings which can often lead to frustration and even the premature departure of a new hire.

An effective orientation process includes the following:

Prior to a new employee's arrival:

- Communicate the new employee's pending arrival to other staff and post an announcement on your club bulletin board or newsletter.
- Order name tag, required clothing, business cards, etc.

First day orientation checklist:

- Welcome the new team member and outline your orientation plans. Make sure they know what time to arrive, who to ask for and the acceptable dress code.
- Review their primary responsibilities and your expectations.
- Provide them with a copy of the Employee Manual.
- Complete payroll set up – void cheque, TD-1 form, etc.
- Provide keys, security card, etc. and review any security issues.
- Introduce the new team member to others.
- If applicable, provide them with their user ID and password for logging onto their computer and training on the organization's computer systems.
- Make contact with the new employee at the end of the day to ensure that things are going smoothly.

An outline of what constitutes an effective orientation process is outlined in [Appendix I](#).

In addition, all new employees must be provided with health and safety orientation. The requirements for this are outlined in Section 10: WorkSafeBC – Safety Orientation for New Employees.



7.0 GOAL SETTING



One of the most important things a business leader can do is share the organization's vision with their team. This communication is key to getting employees on-side and focused on the purpose of the business. After communicating the big picture, managers can embark on setting goals with their employees that tie their progress to the success of the organization.

Setting goals with employees is an essential element of effective human resource management. Employees often know what is required to increase productivity within their particular area. By involving them in the goal-setting process versus imposing goals, you eliminate the potential for resentment and increase employee buy-in.

Goals for new employees should be established within their first few months of employment. Thereafter, they should be reviewed and established annually as part of the performance management process. Goals should be established using the SMART approach.

That is, all goals should be:

Specific
Measurable
Achievable
Relevant
Timely

For example, setting a goal of “cutting costs in the office” is not Specific or Measurable. A SMART goal would be “identify at least four areas of reducing costs in the office and implement one by mid-year that will result in a 10 per cent cost saving.” This type of goal encourages all employees to work toward achieving the same goal and eliminates rivalry and competition. Employees will work together to reduce costs and will want to share information and help each other in attaining the goal.

The manager’s job is to ensure goals aren’t set too high. Goals should be realistic and attainable so employees stay motivated and don’t get frustrated.

Team goal setting has a multitude of benefits, including:

- Provides focus to employees by allowing them to establish goals that tie into what the organization wants to achieve overall.
- Increases employee awareness and focuses them on the purpose of the business.
- Enhances the organization’s chances of success by having everyone’s efforts channelled toward achieving short- and long- term goals.
- Measures employee achievements that are an important part of the appraisal process.
- Encourages teamwork by having everyone feel like they’re contributing toward the organization’s growth and success.

Goal setting is an important element of the performance management process. Without goals, it is difficult to measure employee achievements or provide any meaningful linkage to a bonus program.

Remember to check in during the year to review goals and their relevancy as business needs change.



8.0

PERFORMANCE MANAGEMENT



Each employee should have an up-to-date job description which clearly outlines their duties and responsibilities. It is the responsibility of each Manager and Supervisor to review this job description with the employee in their first few weeks of employment and to:

- Establish clear goals, expectations for performance and conduct, and the consequences if these are not met.
- Regularly monitor conduct and performance.
- Provide ongoing verbal feedback, both positive and negative, on an established schedule.

Employees need to be held accountable for meeting these established objectives. Any performance problems should be addressed as they happen – openly, honestly, promptly and with respect. Don't save them up until performance review time!

Performance management is a continuous and ongoing process and not a one-time event. Similar to coaching athletes to enhance performance, employees too need “coaching.” Effective performance management supports the organization's overall business goals by linking the work of each individual employee and manager to the overall operational plan. All employees play a key role in the success of an organization. How well you manage your employees directly affects not only the performance of the individual employee but also the performance of the entire organization.

The overall purpose of a performance evaluation program is to:

- Make performance expectations explicit through the establishment of goals and standards.
- Tie individual performance to strategic and operational business plans.
- Identify measurement or evaluation criteria for performance.
- Identify the status of the organization's staffing needs (e.g. employees to receive promotions, greater responsibility, or transfers).
- Identify gaps in knowledge or skills (competencies) required to achieve expectations.
- Provide written documentation of employee performance. This includes setting specific targets and the means for achievement.
- Serve as a tool to describe specific areas of employee development and outline an action plan for development.
- Act as a forum for individual career development issues.
- Serve as an information source regarding employee contribution to assist in salary reviews.
- Foster communication between the manager and employee.

An effective performance management process provides employees with objective feedback on how they are performing, creates opportunities for modifications and corrections in employee behaviour, and removes obstacles to allow optimum performance levels to be attained. Performance management is also linked to career development, and training and development. This is the time to discuss each employee's overall career aspirations and develop a training and development plan for the coming year that will work towards helping the employee achieve their goals. Of course, if the employee's expectations are unrealistic, this should be discussed honestly by their manager who can offer other options for career development that may be more achievable.

Sample Performance Evaluation Forms for supervisory and non-supervisory staff are attached in [Appendix J](#) and [Appendix K](#).

8.1 “Coaching” Employees to Improved Performance

No matter how effective you are in the hiring process, inevitably there are occasions where employee performance issues arise. One of the biggest mistakes employers make is not addressing concerns immediately as they occur. Instead, they wait until performance review time and then hit the employee between the eyes. Performance issues should be dealt with as they occur by providing constructive feedback and guidance that will hopefully lead to improved performance, whereas formal performance reviews should be future-focused and concentrate on the positive.

An under-performing employee is not going to improve unless they are made aware that there is an issue. To ensure a positive outcome, managers should have a face-to-face conversation and focus on the desired results versus the employee’s deficiencies. Before the meeting, practice what you are going to say and adhere to the following steps to provide constructive feedback.

- Be direct and state the reason for the meeting.
- Know exactly what occurred and don’t rely on allegations or rumours – do your research to ensure action is even necessary. Act on facts only.
- Describe what you witnessed or what your investigation into the problem revealed, and have specific examples of the behaviour.
- Clearly define performance expectations, describe the consequences of the continued behaviour and the impact on the business.
- State your personal concern with the problem and that you value the individual as an employee and want to see them succeed.
- Once you’ve stated your position, allow the employee to give their version of events and ask what you and the organization can do to help them improve their performance.
- Ask questions to ensure you understand the employee’s perspective and to clarify the sequence of events and specific actions.
- Determine what training and assistance may be required, and then communicate specific actions that must occur to resolve or improve the situation and the time frame in which this must happen.
- Outline how you will monitor the employee’s progress and specific timelines

to ensure the change in behaviour has occurred.

- Summarize the conversation and when the next follow up meeting will be.
- Advise the employee that you will confirm the discussion and what has been agreed to in writing and provide them with a copy to make sure there are no misunderstandings.
- Thank them for their input and let them know that you are available any time if they require further assistance or clarification.

This “coaching” approach is supportive of the employee, focuses on the desired outcomes, and will improve the chances of seeing a positive change in employee behaviour.

8.2 Progressive Discipline

Progressive discipline is used for less serious problems where there is a chance for the employee to correct their conduct or performance.

Correctable performance problems may include:

- Absenteeism or tardiness
- Performance not meeting quality or quantity standards
- Performance below the expectations for the employee’s level of experience
- Lack of sufficient results when compared with others doing comparable work
- Behaviour that adversely impacts the work environment

When discussing a performance problem with an employee consider the following:

- What has happened to indicate that performance is below expectations?
- Is the employee aware of the problem? How?
- Are your expectations consistent with others in the same job family?
- What are the chances that discipline will correct the problem?

Stages of Progressive Discipline

Step One: Verbal “Coaching”

The first step in progressive discipline is verbal “coaching” which should occur during your regular one-on-one communication with your staff. Feedback can also occur on an ad-hoc basis following first-hand observations. You should not be waiting until the annual review process before raising any issues. If you don’t address a problem now, it typically leads to the next step in the process. This verbal “coaching” should be a dialogue and not heavy-handed.

Step Two: Performance Improvement Plan

This step involves a discussion with the employee and a written evaluation of the problem with a specific plan to improve performance. It is used whenever performance falls below expectations and when inappropriate conduct has not been corrected. The intent of a Performance Improvement Plan is to get the employee back on track and must be included in the employee’s personnel file.

There are six key components of a Performance Improvement Plan:

- 1. Problem Statement** – Outline the problem with specific examples
- 2. Performance Expectations** – Reiterate performance expectations as they relate to the job description or organization policy
- 3. Training and Assistance** that will be provided by you and/or the organization
- 4. Measurement(s) indicating success**
- 5. Timeline for completion**
- 6. Specific consequences for failure to make sufficient progress**

Sample Problem Statement

(Problem Statement) – *Over the past month, you have been twenty or more minutes late for work on five separate occasions. (Performance Expectations) Office hours are 9:30 a.m to 6:00 p.m. and all employees are expected to notify their manager if they are going to be late for work. (Measurement Indicating Success) You will not be late more than three times over the next 90-day period, effective immediately. In addition, your manager needs to be notified a minimum of 15 minutes prior to your designated start time if you are going to be late and the reason why. (Timeline for Completion) You will be monitored over the next 90 days, beginning immediately. (Specific Consequences) Should you complete the 90-day period without being late more than three times, you will have successfully met the intent of this Performance Improvement Plan. If, however, you fail to establish an improved lateness pattern (per the guidelines), OR if you slip back into a late pattern after this 90-day period, you will be subject to further disciplinary action, up to and including termination.*

Employee Acknowledgement

Have the employee sign the Performance Improvement Plan to acknowledge they have received it. Their signature does not mean that they are in agreement with the documentation, only that they acknowledge its receipt. Put a copy of the signed document on the employee file.

If the employee disagrees with any of the information in the Performance Improvement Plan, take their perspective into account and make any appropriate changes, as necessary. If they refuse to sign the Performance Improvement Plan, explain that this will not stop the process.

Midpoint Performance Improvement Plan Evaluation

Verbal and/or written evaluation of the employee's progress should occur mid-way into the timeline of the Performance Improvement Plan. Feedback should be provided on progress to date and any open issues or problems still requiring resolution. If sufficient progress has not been observed, you may terminate the employee.

A copy of the mid-point evaluation must be written and included in the employee's personnel file.

Final Performance Improvement Plan Evaluation

Verbal and/or written evaluation of the employee's progress should occur mid-way into the timeline of the Performance Improvement Plan. Feedback should be provided on progress to date and any open issues or problems still requiring resolution. If sufficient progress has not been observed, you may terminate the employee.

A copy of the mid-point evaluation must be written and included in the employee's personnel file.

Step Three: Termination

Certain actions cannot be tolerated due to the adverse impact on employees, clients, the organization, or that are contrary to the organization's values. These actions might include willful violation of a organization policy, procedure, security or safety rule; insubordination or refusing to obey instructions issued by a supervisor pertaining to work; use of alcohol or controlled substance drugs while at work; theft; criminal conduct or acts of violence; dishonesty, fraud or embezzlement; harassment (sexual, racial or other).

Termination Considerations:

No employee should be terminated without prior approval from the most senior person in the organization. Before proceeding to termination, consider the following:

- What is the actual or potential impact involved?
- How does the mistake affect others?
- What is the possibility of recurrence?
- What is the employee's view of the facts?
- What is the employee's attitude (honesty, remorse, etc.)?
- What is the impact of taking or not taking action (precedence-setting)?
- Are there any extenuating circumstances (external stresses, substance abuse)?

You have the right to dismiss an employee without just cause, but must provide reasonable notice or pay in lieu of notice. The rationale for reasonable notice is to provide the terminated employee with a reasonable amount of time to find a similar position at a similar salary. Under BC Employment Standards, the requirement is for one week's notice after three months of employment, and two weeks notice after one year, up to a maximum of 8 weeks. Check with an employment lawyer as to a reasonable notice period. The burden rests with the courts to determine what is reasonable which may result in a higher settlement. Courts determine the length of notice by considering the employee's age, length of service, position, availability of similar employment in the market and whether the employee was induced away from secure work to work for you.

No notice or severance pay is required if the employee was terminated for just cause. However, even with just cause the courts seem to rule that some notice is required. Just cause may be constituted through serious misconduct, habitual neglect of duty, serious incompetence (hard to prove), breach of trust (theft), wilful disobedience (physical abuse of another employee), or excessive absenteeism. Grounds for just cause are not automatic grounds for dismissal without notice or severance.

Employers must give employees a chance. In addition, employers must show for each offence:

1. Culminating evidence – the courts want to see a series of events that resulted in the termination and relevant documentation that supports termination as the only resolution.
2. Progressive severity – the courts look for corrective discipline/progressive punishment.
3. Warning of consequences – the employer must provide evidence that the employee was advised in writing of the consequence of each action (signed letters of warning).

All wages owing, including termination pay, must be paid within 48 hours after the termination occurs. Notice or termination pay is not required if an employee is terminated for Just Cause or if the employee quits.

A sample termination letter is attached in [Appendix L](#), an employee release form in [Appendix M](#) and a working notice termination letter is attached in [Appendix N](#).



8.3 Termination Meeting Checklist

A termination meeting checklist for Supervisors and Managers is provided in [Appendix O](#). Employees leaving the organization, whether due to resignation or termination, must return all property to their Supervisor or Manager that belongs to the organization on their last day of employment. This may include:

- Security pass
- Keys to the premises
- Manuals
- Client contact lists
- Computers with all passwords
- Uniforms
- Cell phone

8.4 Exit Interviews

The main purpose of an exit interview is to gain organizational knowledge from a departing employee's perspective of what is working, what is not working, and what areas within the organization need attention, enhancement or refinement. Interviews are conducted with employees who voluntarily terminate their employment and not with those who have been terminated or downsized. They can be completed through face-to-face interviews, sending the departing employee a mail-in questionnaire or using an online exit management system.

A sample Exit Interview is included in [Appendix P](#).

8.5 Providing Employee References

The best way to avoid putting the organization at risk when providing references on former employees is to have a strict policy in place to handle such requests.

We recommend:

- Only one person in the organization has the authority to provide employee references.
- Using written reference requests to avoid any conflicts when providing confidential information and avoiding verbal references.

- Being consistent in providing the same information for every request by using a standard form.
- Having former employees sign a consent form authorizing you to disclose employment information and a release from liability related to the reference.
- Ensuring all managers and supervisors are aware of and adhere to the policy for providing employee references.

A sample policy could read as follows:

ABC Club may disclose personal information about a current or former employee in response to reference requests from prospective employers as long as all requests are in accordance with the following procedures:

- **All reference requests must be in writing on business letterhead and directed to (authorized person's name or title).**
- **All reference letters shall include employee name, employment status, job title and description of duties, salary range, date of hire and termination date, reason for termination (if applicable).**
- **A copy of all reference letters shall be included in the employee's personnel file.**
- **No references shall be issued to prospective employers without the written consent of the employee to whom a reference has been requested. Current and former employees must consent to the provision of references in writing by signing a consent form.**

We have provided in [Appendix Q](#) a sample Consent to Provide an Employee Reference template.

9.0 COMPENSATION

Effective compensation programs demonstrate the organization's recognition that employees must feel that there is a real or perceived fairness and equity in their compensation in comparison with other employees; ensures the organization remains competitive with other organizations; attracts qualified individuals to the organization; keeps employees satisfied; and maintains the overall stability of the organization.

Compensation refers to all financial rewards received by employees as a result of their employment relationship with an organization. It normally has three components – direct compensation in the form of wages, salaries, incentives or bonuses; indirect compensation in the form of benefits such as health and dental plans, life insurance, etc.; and non-financial rewards that are not easily quantified, such as flexible work schedules or more challenging work.

The need for and importance of equity is probably the most important factor. Real and perceived equity in the reward systems has a dramatic impact on employee satisfaction and performance. There are two types of equity – internal (job equity and employee equity) and external. Job equity means that jobs are paid according to their value which is determined by evaluating job content and skills, knowledge and abilities. Employee equity means that individuals who hold the same or similar jobs are compensated according to their contribution. External equity means that the organization's compensation levels compare favourably to that offered in other organizations.

The best source of salary data is what qualified candidates are earning that you want to hire. However, this information is attainable only if you're hiring. To ensure you are paying market salary rates, compensation data can be obtained from a variety of sources. Industry organizations often conduct annual salary surveys with member organizations. For example, Sport BC does a regular compensation survey of member sports and this information can be obtained through your provincial sport organization.

In addition, Watson Wyatt, Western Management Consultants, and Morneau/Sobeco, are other organizations that also conduct and publish annual salary surveys. These surveys contain compensation data for administrative and clerical staff, Executive Directors, Accountants and a variety of other management and

non-management positions in the public, private and not-for-profit sectors.

You can also get salary data online at Monster and other job sites but this information is often not accurate as it is based on job title versus job content.

Another consideration is to establish a group with representation from organizations similar to yours where you can meet on a quarterly basis to share compensation data and discuss HR issues and solutions you may all be facing.

9.1 Honorariums

An honorarium is a payment made to a person for their services in a volunteer capacity or for services where fees are not traditionally required. They are often used to pay coaches for their costs. Honorariums are considered salary and are therefore taxable income.

When a gift is being substituted for an honorarium, it is still classified as a taxable benefit by CRA. If the honorarium is being paid to an individual who is non-resident in Canada, tax must be withheld at a rate of 15% unless prior approval has been obtained from CRA.

9.2 Reimbursement of Coaches' Travel Expenses

Most clubs require their coaching staff to travel to out of town competitions. Reimbursement of travel expenses is usually outlined in the employment agreement as a clause such as:

It is agreed that the Organization shall reimburse out-of-pocket business expenses to the Employee properly incurred by the Employee in connection with the Employee's duties provided that such expenses are approved by an authorized officer of the Organization. The Employee shall submit an itemized expense account for all such expenses, together with receipts showing all monies actually expended by the Employee on behalf of the Organization and such other information as the Organization may request from time to time.

We suggest that you establish a travel policy with guidelines for air travel, automobile rentals, accommodation, meals and entertainment and personal vehicle use. Sample travel policies are attached as [Appendix R](#).

9.3 Health Benefit Programs

To recruit and retain skilled and experienced candidates, organizations must offer appealing compensation and benefits packages. Even if you can't match those offered by large employers, you may be able to provide benefits that are valued by prospective new hires by paying close attention to the perks that motivate today's workers and design a benefits package that is tailor-made for your employee base.

Organizations can provide supplementary health care plans, dental insurance, short-term disability, long-term disability and life insurance for their employees. Premiums for these various programs are either paid 100% by the employer or, in most cases, are shared between the employer and the employee on a percentage basis.

Payroll and benefits services are available through Sport BC (www.sport.bc.ca

Telephone: 604.333.3400 Fax: 604.333.3401 Email: info@sport.bc.ca).

Available to all non-profit sport and recreation associations semi-monthly, payroll services can be specially tailored to suit the specific needs of your organization.

A comprehensive group benefits plan is eligible to all registered full-time employees working 30 hours or more per week. Group plans include MSP, Great West Life and RBC Insurance.

The cost of employee benefit plans has risen dramatically in recent years. Therefore, we recommend you work with an independent broker who specializes in employee benefit plans to help you select the plan that's right for your organization.

10.0

WORKSAFE BC

If you have one or more employee and pay them on a full-time, part-time, casual or contract basis, then you are legally required to register for insurance coverage with WorkSafeBC. This coverage protects you against lawsuits from injured workers and also covers the worker's medical and wage-loss costs if they are injured while on the job. Injured workers are typically entitled to 90% of their average net earnings at the time of their injury, up to the annual maximum. In addition, any rehab and retraining costs needed to return a worker to work are paid for by WorkSafeBC.

Failure to register could put the organization at considerable financial risk as you could be held liable for all compensation costs associated with the claim of a worker injured on the job, plus any unpaid premiums.

All paid workers are insured under your account, including labour contractors not registered with WorkSafeBC, shareholders and officers who work for the club, and your children if they work for you and are paid by your club.

Premiums are based on the employer's business and not the occupations within the business. Premiums are paid either monthly or quarterly and must be paid on time or else you will incur a significant penalty.

Reporting a Claim

It is the responsibility of all employees to report to their employer if they are injured at work or have any symptoms of a work-related illness. A work-related injury is one that arises out of and in the course of employment or is due to the nature of employment. To be covered by WorkSafeBC, the employee must have been working when hurt, and the injury must have been caused by something to do with the job. The employer is not usually required to report to WorkSafeBC if the employee does not lose time from work and does not seek medical attention.

Any incident that results in an employee receiving medical attention or time-loss from work must be reported to WorkSafeBC.

- The employee must seek immediate medical attention and inform the doctor that the injury is work related. The club or association is responsible for the employee's transportation costs from the workplace to the doctor's office or hospital.
- The employer must submit an incident and injury report within three days of the injury's occurrence or within three days of becoming aware of the injury. Injury reports can be completed and submitted online by logging on to your employer's account at WorkSafeBC. http://www.worksafebc.com/claims/report_injury/incident_and_injury_report/default.asp
- Any fatal or serious injuries must be reported immediately to WorkSafeBC's Emergency Line at 1-888-621-7233.
- If the employee received first aid on site, the first aid attendant must complete a first aid record. This must be retained at the work site for a minimum of three years. If the employee was referred to and received treatment at a clinic or hospital, the employer must submit an Incident and Injury Report and send the Employer's Report of Injury or Occupational Disease to WorkSafeBC.

Failure to report an injury or coercing an employee not to report an injury or hazardous condition is an offence against the Act and can result in fines.

Worker Benefits

When a claim is accepted, the employee will begin receiving benefits from WorkSafeBC. The type and duration of these benefits depends on the nature of the injury and the work. The employer is responsible for the employee's wages on the day of injury, but the wage-loss benefits from WorkSafeBC start the first scheduled shift lost after the day of the work-related injury, and they also cover health care costs on the day of injury.

Employees receive wage-loss benefits until their case manager determines that they are able to return to work or have recovered from the injury. If an employer can provide light or modified duties, and it's safe for the employee to do them, they can return to work to those duties.

If an individual is working (e.g. a return-to-work program) and in receipt of WorkSafeBC benefits, the WorkSafeBC benefits are reduced according to the amount the employee is receiving for the work.

If an employer continues to pay an employee's full salary while the employee is disabled, the benefit amount is still calculated; however WorkSafeBC will send the compensation benefits directly to the employer.

Return-to-Work Programs

Return-to-work programs are a proactive way for employers to help injured workers stay at work or return to productive and safe employment as soon as physically possible. These programs are viewed as part of the therapy and recovery of the employee. They keep employees engaged in the workplace so they can return to work in their full capacity sooner.

Coordinate with the employee and WorkSafeBC to develop a suitable return-to-work plan. Identify modified or transitional work but make sure it's meaningful and productive. Make the program flexible so it can accommodate a variety of situations and educate employees and supervisors about return-to-work practices.

Providing a Safe Workplace

Employers are required by the Workers Compensation Act to protect the health and safety of their employees and to comply with WorkSafeBC Regulations. WorkSafeBC can determine which category your organization falls under.

If you employ 20 or more staff and have a workplace that is determined to create a moderate or high risk of injury, then you are required to have a formal Occupational Health and Safety (OH&S) program in place. If your workforce is less than 20, then you must maintain a less formal program by holding regular meetings with staff to discuss health and safety matters. We suggest that during regular staff meetings, matters concerning the correction of unsafe conditions and practices be discussed and recorded in the minutes as it is a requirement that a record of these meetings and the matters discussed be maintained.

Safety Orientation for New Employees

Regardless of whether you require a formal or informal program, you are required to provide all new employees health and safety orientation training specific to the workplace. This must cover the following:

- Name and contact information of their supervisor.
- The rights and responsibilities of both the employer and the employee under the Workers Compensation Act and the OH&S Regulation, including the reporting of unsafe conditions and the right to refuse to perform unsafe work.
- Workplace health and safety rules.
- Hazards to which the employee may be exposed including risk from confrontation, robbery, etc.
- Working alone or in isolation.
- Violence in the workplace.
- Personal protective equipment.
- Location of first aid facilities and means of summoning first aid and reporting illnesses and injuries.
- Emergency procedures.
- Instruction and demonstration of the employee's work task or work process.
- The employer's health and safety program, if required under the Regulation.
- WHMIS information requirements as applicable to the workplace.
- Contact information for the OH&S Committee or the employee health and safety representative.

A record must be kept of all orientation and training provided to new employees.

First Aid Requirements

WorkSafeBC has recently introduced minimum levels of first aid based on the risk of injury that may be incurred in the workplace, and proximity to a hospital.

A table is contained in the Occupational Health and Safety Regulation—[Schedule 3 - A Minimum Levels of First Aid](#).

<http://www2.worksafebc.com/publications/OHSRegulation/Part3.asp#SectionNumber:3.16>

A health and safety checklist that gives you an idea of the issues that need to be addressed to improve health and safety is attached as [Appendix S](#).



11.0

TRAINING AND DEVELOPMENT

Training and development is the process of enhancing and/or developing the knowledge, competencies, skills and abilities of new or existing employees in order to meet the organization's need to maintain and increase performance and the individual's need for further growth. There is an increased emphasis on organizations to use training as an employee retention tool, particularly as the labour market tightens. Employee training contributes to increased efficiency and productivity, decreased need for supervision and reduced turnover.

There are many ways to provide employee training.

These are:

NCCP – The National Coaching Certification Program (NCCP) is a coach training and certification program for 66 different sports and has three streams – community sport, competition, and instruction. It is the recognized national standard for coach training and certification in Canada.

The Coaching Association of Canada also offers a variety of workshops and an annual sport leadership conference for coaches, sport administrators, coach educators and sport scientists.

On-the-job training – teaches an employee how to do their present job. Training occurs during working hours in the exact working environment and is tailored to the needs of the individual. The downside is that the employee may learn bad habits from the trainer and productivity may lag in the work area while training is underway.

Computer-based (E-learning) – using technology, employees can participate in external online workshops or seminars or access in-house learning modules. This type of training is relatively inexpensive and enables the employee to control their pace of learning. However, some employees don't learn sitting in front of a computer screen.

Self-study – can take on many forms such as volunteering, reading, evening classes, distance education, self-paced learning, etc. Training can take place after working hours and employees learn at their own pace. However, there is no opportunity for question and answer periods or instructor/student interaction and again, some individuals may not learn best using this method.

In-house programs – these training programs enable an organization to control the content and design training specifically to the needs and culture of the work environment. The training can be delivered by an internal champion or external expert during working hours. Trainers may be co-workers who have performed the exact job being trained for and the employee receives training specific to the needs of the organization.

Mentoring programs – a mentor is often in a position that an employee would like to be in, and will take them “under their wing” to nurture the employee’s career quest. Mentoring programs are most effective when there is good chemistry between the individuals involved. Mentors can either be within the employee’s own place of employment or outside of it – some people even have more than one mentor. Mentors can help employees work through workplace problems by suggesting alternative approaches and providing a fresh perspective.

The Coaching Association of Canada offers an online mentor program for women coaches at all levels where they can receive feedback and exchange ideas with an experienced coach. To apply for the program, coaches must have completed at least one NCCP course and submit an application form which can be found on their website <http://www.coach.ca/eng/women/mentor/index.cfm>

One-on-one employee guidance – internal and/or external business coaches can supplement traditional methods of training. Particularly for more senior employees, it may be easier to admit areas of development to external or paid business coaches. Business coaching can often expose employees to best practices and knowledge of what other organizations are doing in a particular area.

Employee orientation – occurs during working hours and is often provided by the employee’s immediate manager or a senior staff member who is knowledgeable and can impart organizational knowledge and principles.



12.0

EMPLOYEE POLICIES



Many organizations resist the development of formal human resource policies for various reasons. One commonly cited reason is that it limits flexibility. In most cases, informal, unwritten policies are developed when needed. However, as organizations grow, well-developed policies can help to ensure consistency of decision-making across the organization and increase the understanding of the organization's position regarding various areas affecting the human resources of an organization.

The lack of formal policies creates uncertainty or lack of consistency with how issues are dealt with between employees. This can have a negative effect on morale. It is important to develop and document policies before they are needed.

A comprehensive employee manual should cover not only human resource policies but also policies related to office procedures, accounting, safety and security, information technology, etc. We have attached in [Appendix T](#) an overview of what a typical organization should include in a Policy and Procedures Manual and draft policies that cover some of the mandatory human resource topics that should be included in this manual.

These manuals are a work-in-progress and should be reviewed annually with employees or when a situation arises that indicates further clarification or development of a new policy is required.

13.0

SUCCESSION PLANNING

Succession planning is the processing of making long-range development plans to fill key positions in the organization in the future and could apply to both employees and volunteers. The process involves an integrated set of activities that includes current performance information and future potential.

With skill shortages affecting almost every industry, the importance of succession planning has heightened. Succession planning also:

- Draws on employee potential, reduces turnover and boosts overall job satisfaction. Succession of key employees creates interest (increased job satisfaction), learning (development) and retention of those employees. Succession planning is important even if you have a stable workforce.
- Reduces hoarding of employees and allows for healthy movement of talent within an organization.
- Promotes effective employee relations; employees will feel valued.
- Creates positive external public relations; becomes known as an organization that grows, develops and promotes employees from within.

When individuals think of succession planning, they usually see an organizational chart with a bunch of arrows pointing to who and where key employees should go next when someone gets promoted, terminated or voluntarily leaves the organization. This is only half of the picture.

Organizations must also ask the following questions about their present workforce:

- Are there incumbent positions that would expose the organization to risk if an employee were to leave?
- Who will succeed key employees and are they ready to move into the position now or do they require additional training and development?
- What is the depth of team leadership (eg. management, supervisory) or other specialized skills?
- How many employees are required to complete a work function?
- How many employees are required to complete a work activity?

- What are the department utilization rates? Are employees over-worked or under-utilized in areas? Do you have enough employees to achieve customer service standards? Do you meet organizational goals and objectives?
- Do you have the appropriate staffing levels to meet future needs? Do you have the talent internally or will you recruit externally for expertise?

The succession planning process:

1. Identify key positions within the organization
2. Finalize and update job descriptions
3. Initiate a replacement plan for each position
 - IDENTIFY candidates for succession
 - COMPLETE candidate discussions
4. Predict promotability
 - REVIEW each candidate's status (reject or accept)
 - DETERMINE availability (internally and externally)
 - PREPARE a qualified list of potential candidates
 - EVALUATE risk
 - PREPARE action plans
5. Assess training and development needs
 - ESTABLISH training/development format
 - PROVIDE rationale for costs associated with the training
6. Evaluate the succession process
 - REVIEW, revise and further the process
 - ENSURE replacement plan is continually maintained



14.0

LINKS TO ADDITIONAL SOURCES OF INFORMATION

There is an abundance of information available on the Internet on all topics of human resources.

We suggest:

- Developing Human Resources in the Voluntary Sector (HRVS). The goal of HRVS is to strengthen the capacity of organizations in the voluntary sector to attract, support and keep skilled and committed employees. The site is a work in progress and many new features will be added over time.
www.hrvs-rhsbc.ca
- BC Employment Standards Branch
www.labour.gov.bc.ca/esb/
- WorkSafeBC
www.worksafebc.com
- HR.com is a free website connecting employers to the knowledge and resources they need to effectively manage their people. Provides information on best practices, trends and industry news.
www.hr.com
- American Society for Training and Development – online learning resources
www.astd.org
- Salary Expert.com – provides compensation data, analysis and reports
www.salaryexpert.com
- Retired Worker is a resource for retired people who want to work on a part-time, temporary or contract basis. It also provides information for employers interested in hiring from this candidate pool.
www.retiredworker.ca
- Service Canada provides information on EI, job creation partnerships, targeted wage subsidies, work permits, and a number of other employment-related topics.
<http://www.servicecanada.gc.ca/eng/subjects/employment/index.shtml>
- Coaching Association of Canada
www.coach.ca

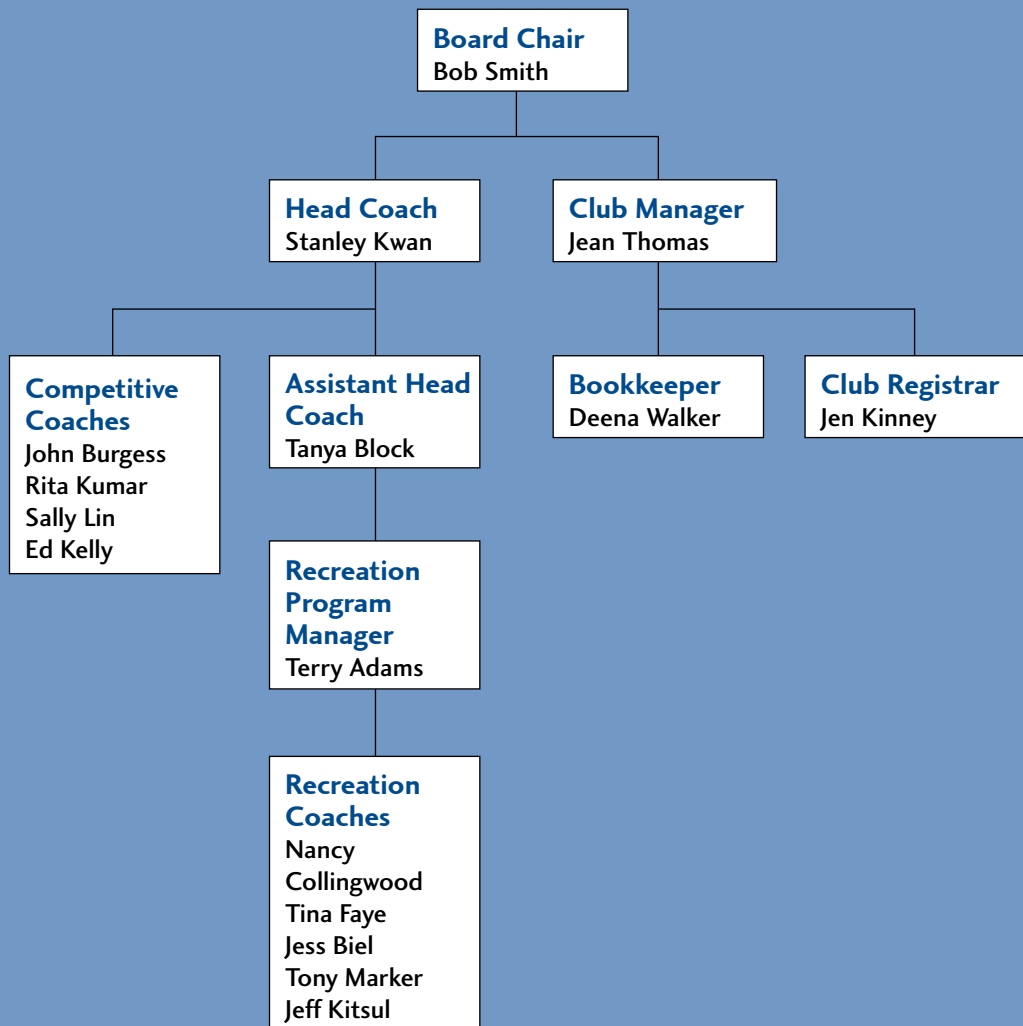
Consulting expertise can also be obtained through WestView Executive Search, the author of this HR Toolkit, on an as-needed fee-for-service basis by contacting:

Barb Schimnowsky at 1-877-859-8002 or
bschimnowsky@WestViewsearch.ca

APPENDIX



Sample Organization Chart



Position Description Questionnaire

This questionnaire is designed to help you describe your position concisely and accurately. It does not focus on your work performance, but rather asks you about what you do. Please take your time and attach extra pages if necessary.

1. Position Identification

Organization		Date	
Your Name			
Your Title			
Immediate Supervisor's Name			
Department & Location			
Supervisor's Title			

2. Overall Purpose Of Your Position

In one or two sentences, please describe the overall purpose and key objectives of your position.

3. Position Tasks & Activities

Outline the major responsibilities and/or activities carried out in this position (usually 3 to 5) (i.e. word processing, switchboard, filing, accounts payable, inventory management, etc.). Identify the approximate percentage of time spent performing each activity (to the nearest 5% – total 100%). If your work activities fluctuate, then consider your work over a one-year period. For each activity, list the tasks that are performed to complete the activity. In order to evaluate a job effectively, we must have solid information. Please use details and/or examples to help you describe your job. Attach additional paper if it is needed. Please write below the line on the next page.

Cont'd

Position Description Questionnaire Cont'd

List each activity and required tasks.	% Of Overall Job	Time To Complete (minutes/ hours)
Activity 1		
Tasks:		
Do you complete this activity yourself or is it passed on to someone else for completion? If so, who does this activity pass to?		
Activity 2		
Tasks:		
Do you complete this activity yourself or is it passed on to someone else for completion? If so, who does this activity pass to?		

Cont'd

Cont'd

Position Description Questionnaire Cont'd

List each activity and required tasks.	% Of Overall Job	Time To Complete (minutes/ hours)
Activity 6		
Tasks:		
Do you complete this activity yourself or is it passed on to someone else for completion? If so, who does this activity pass to?		
Activity 7		
Tasks:		
Do you complete this activity yourself or is it passed on to someone else for completion? If so, who does this activity pass to?		
Activity 8		
Tasks:		
Do you complete this activity yourself or is it passed on to someone else for completion? If so, who does this activity pass to?		
TOTAL	100%	

Cont'd

Position Description Questionnaire Cont'd

4. Education Required

a) What are the minimum educational and/or formal training requirements of this position? (Note: Do not comment on your own personal education level, but rather on what is necessary to competently perform the job.)

b) What training courses, vocational or professional certification are required?

c) Why is this training required?

Cont'd

Position Description Questionnaire Cont'd

d) Identify the professional designations, degrees and/or special licensing or certification required for this job:	
Preferred:	
Mandatory:	

5. Competencies	
A competency is defined as the skills, knowledge and behaviours important for an organization's success, personal performance and enhanced contribution.	
a) CORE COMPETENCIES are critical behaviours and skills generally relevant to all employees. Some examples are communication, critical thinking, commitment to service excellence and initiative.	
Core Competencies	Outline why this competency is required.

Cont'd

Position Description Questionnaire Cont'd

b) **TECHNICAL COMPETENCIES** are demonstrated knowledge in technical and professional areas that are required for success in a particular function area. Examples are numerical accuracy, detail orientation, technical knowledge of the game or sport, computer experience, proofing and editing and project management.

Technical Competencies	Outline why this competency is required.

Cont'd

Position Description Questionnaire Cont'd

6. Experience

a) Work experience means the length of time to learn the essential skills for a job that are not normally gained through formal education. Assuming you have the necessary level of education, in your opinion, what is the minimum **prior related work experience required** for a new employee to provide an acceptable level of competence in this job?

☐ Less than 1 month

☐ 7 – 12 months

☐ 4 – 7 years

☐ 1 – 3 months

☐ 1 – 2 years

☐ 7 – 10 years

☐ 4 – 6 months

☐ 2 – 4 years

☐ 10 years+

Please describe the types of experience required.

Outline the rationale for your above response.

7. Physical Demands

Type	✓	Please Explain
Sedentary Work (no lifting)		
Light Work (lift up to 10 lbs.)		
Medium Work (lift 11 – 50 lbs.)		
Heavy Work (lift 51 – 100 lbs.)		
Very Heavy Work (lift over 100 lbs.)		

Cont'd

Position Description Questionnaire Cont'd

8. Supervisory Responsibility

a) What is the nature of supervision/advice you provide to others? Please mark the appropriate boxes and provide additional narrative as required.

☐ **No supervisory responsibility**

☐ **Direct supervision:** Sets work standards, assign, schedule and review work, direct to appropriate resources, career planning and development, performance appraisal of staff, staff termination.

☐ **Limited supervision:** Advice on policy interpretations, motivate, provide safe place to vent/problem solve, coach in handling staff/collateral issues.

☐ **Internship/Practicum supervision:** Student practice/training sessions, standardized work assignments, checks work frequently, provides formal and informal training.

☐ **Expert technical advisory assistance:**
Describe the nature of the assistance.

Only those who have completed Section 8(a) should continue with section (b).

b) What is the scope of your supervisory responsibility?

Direct supervision:

You are responsible for full supervision and performance appraisal.

No. of staff reporting directly to you:

Types of positions?

Cont'd

Position Description Questionnaire Cont'd

Functional supervision:

A staff member to whom you may delegate and review work but who formally reports to someone else.

No. of staff whom you *delegate* and *review* work but do not supervise:

Types of positions?

Internship/Practicum supervision:

Number: How often?

Types of positions?

9. Performance Standards

Please describe the performance standards currently applied to the position. These may be formalized, written standards, or informal generally accepted standards.

Cont'd

Position Description Questionnaire Cont'd

10. Position Modifications

Understanding the future direction of the organization and the need for growth and development of the practice, please describe, in your own opinion, changes in any of the above areas that could assist in ensuring the organization will meet its future goals. These changes could be in the key objectives of the position, the specific activities and time allotments, competency requirements, etc.

11. Your Comments

Cont'd

Sample Job Description

POSITION TITLE:	Club Administrator
REPORTS TO:	President
DIRECT REPORTS:	Manager of Recreational Programs, Bookkeeper
DATE:	January 1, 2009
PURPOSE OF THE POSITION	The Club Administrator is responsible for the day-to-day operational business of the club to ensure smooth and timely operations.

PURPOSE OF THE POSITION

The Club Administrator is responsible for the day-to-day operational business of the club to ensure smooth and timely operations.

Responsibilities:

1. Oversees the office, ensures reporting deadlines are met, and establishes office hours to meet the demands of the club while being sensitive to the budget.
2. Works with the Bookkeeper and Treasurer to develop the club's budget and presents the budget to the Board of Directors for approval.
3. Oversees all expenditures, payroll and bookkeeping needs and monitors the budget for variances.
4. Assists the Head Coach in developing programs, and scheduling classes and staff.
5. Oversees all aspects of registration, birthday parties and other special events.
6. Continually monitors policies and procedures to ensure efficiency; drafts revised policies for review and approval by the Board and ensures successful implementation.
7. Develops advertising and promotional programs within the approved budget and monitors their effectiveness.
8. Conducts regular staff meetings and ensures there is adequate communication to staff, the Board, athletes and parents.
9. Attends all Board meetings and ensures they are provided with the required written reports; prepares and circulates minutes.
10. Works with the Head Coach recruiting, hiring and terminating staff and keeps the Board informed of any significant changes.
11. Identifies staff training needs.
12. Liaises with the public as an information source primarily through telephone inquiries.
13. Other duties as may be assigned.

Cont'd

Sample Job Description Cont'd

POSITION LINKS AND PROGRAM DIMENSIONS

- Works closely and cooperatively with the Head Coach in maintaining the day-to-day operations of the club.
- Liaises with other clubs, provincial sport organizations, etc. to collect and share relevant information.
- Works with staff and volunteers associated with the work at hand.

WORKING CONDITIONS/ SPECIAL REQUIREMENTS

- Requires ability to work in a highly dynamic and flexible client service environment.
- Located in a typical office environment where there are lots of interruptions.
- On occasion, is required to work irregular hours and be on-call for emergencies for time sensitive and priority issues.

TOOLS / EQUIPMENT

- Uses office tools and equipment such as computers, laptops, scanners, photocopiers, calculators, fax machines, telephones and sets up audio-visual equipment for meetings and training events.
- Proficient computer skills (MS Office, including Excel, PowerPoint and familiarity with database and desktop publishing programs).

CANDIDATE PROFILE

Education

Post-secondary diploma in administrative management is desirable.

Minimum 2 years office management experience.

Skills and Knowledge

- Positive attitude, enthusiastic, team player
- Superior written and oral communications skills
- Strong interpersonal skills and the ability to deal professionally with people over the telephone and in person
- Good problem solving skills
- Commitment to providing superior customer service
- High degree of initiative

Approved by Employee:

Approved by Manager:

Date:

Sample Interview Outline

OPENING THE INTERVIEW

Establish rapport. Introduce yourself and your position. Introduce the interview committee, if applicable.

Conduct the interview over the corner of the desk, instead of from behind it.

Explain to the candidate that the interview will consist of reviewing their resume, asking structured interview questions that will assess their behaviours and capabilities. Every candidate will be asked the same job relevant questions to create a "level playing field."

Advise candidates that you will be taking notes and at the end of the interview they will have time to provide any additional information and/or ask questions.

Remember, you should spend the majority of your time LISTENING, not talking.

Open the interview by asking, "Why are you interested in joining our organization?"

REVIEW RESUME

"I'd like to take a few minutes to review your resume. Why don't you summarize for me your education and work experience, working forward to your current position. Touch on the key achievements and accountabilities in each position, and the reasons why you changed employers or positions."

Take note of any trends related to why they changed jobs. For example, conflict with supervisor, job not challenging, etc. If there are areas of concern, get more details to understand the specifics and ask what type of reference they would get from their supervisor.

1. Describe a typical day in your current role.
2. What aspects of the job do you find most enjoyable? Why?
3. What elements of the job do you find least enjoyable? Why?

PERFORMANCE SKILL – INITIATIVE AND SELF-STARTER

- 1) Sometimes it isn't possible to apply existing methods to solve a problem.
Can you tell me about a creative approach you took in order to solve a problem?

Probing questions

- What was the problem?
- What did you do?
- What was the outcome?

- 2) Give me an example of a time you were able to identify a potential problem and resolve the situation before the problem became serious.

Cont'd

Sample Interview Outline Cont'd

PERFORMANCE SKILL – COPING AND FLEXIBLE

1) Tell me about a recent situation when you lost your patience. How did you handle it?

PROBING QUESTIONS

- Why did you find this situation particularly difficult to deal with?
- What impact did losing your patience have on others?
- Once you regained your composure, what steps did you take to ensure the situation didn't occur again?

2) Change is a reality at our organization. Things can happen in your day that are unexpected and can upset your schedule.

Give me an example of a time when you had to adjust what you were doing (or how you were doing it) in response to a change in your work environment or an unplanned request?

PERFORMANCE SKILL – ORGANIZATION AND PLANNING

1) Describe how you managed your work schedule the last time you had competing deadlines to meet.

PROBING QUESTIONS

- What steps did you take to make certain that you would manage your time most effectively?
- What was the end result?

2) Give me an example of a time in which you were effective in eliminating the constant emergencies and surprises in your work environment. How did your planning help you deal with the unexpected?

PERFORMANCE SKILL – INTERPERSONAL SKILLS

1) Building rapport is sometimes a very challenging thing to do. Give an example of a time when you were able to build rapport with someone at work, even when the situation was a difficult one and the odds were against you.

2) Tell me about a difficult customer (internal or external) with whom you had to deal with.

PROBING QUESTIONS

- Why was he/she difficult?
- What did you do?
- What was the end result?

Cont'd

Sample Interview Outline Cont'd

SELF-ASSESSMENT QUESTIONS:

- Looking back on recent performance appraisals, what are some of the areas where you've received high ratings?
- What are some of the areas that your supervisor considered developmental or required improvement? What actions did you demonstrate that would cause your boss to believe this was a developmental area? What have you done specifically to try and improve in this area?
- What type of work environment brings out the best in you?
- What do you want to avoid in your next position?
- What is your current compensation (include base salary and bonuses, etc.)
- What do you enjoy in your spare time?

CLOSING:

"I've asked all the questions, so now it's your turn. We've provided you with the job description but I'm sure there are questions you'd like to ask about the organization or the position."

Let the candidate know when he/she will be contacted next. Explain that we will not be contacting their references unless they are shortlisted for the position.

Consent for Collection of Reference Information

I, _____, authorize organization to collect information about me from appropriate references regarding employment dates, job responsibilities, attendance, salary history, and other job-related information. I understand that this information is required for the purpose of evaluating my suitability for employment with organization and that the information will be shared with the appropriate individuals within organization.

I accordingly authorize anyone contacted as a reference to disclose such information to _____ for that purpose.

Printed Name

Signature

Dated this _____ day of _____, 20 _____

Sample Reference Check Form

DATE	
CANDIDATE FIRST NAME	
CANDIDATE LAST NAME	
POSITION APPLIED FOR	
REFEREE'S NAME & POSITION	
REFEREE'S CONTACT INFORMATION	

	✓
How long have you known the candidate?	
What was your relationship with the candidate?	
Describe your overall impression of the candidate?	
Tell me about their interpersonal skills. How did they get along with others in the office?	
How were they at developing and maintaining relationships with the Board? Parents? Athletes?	
Describe their communication skills, both verbal and written.	
How are they at listening to others and taking different viewpoints into consideration?	
Tell me about their organizational skills and ability to multi-task and establish priorities.	
Are they able to meet deadlines or do they require follow up?	
Describe their attendance habits and commitment to the job.	
How would you describe their attention to detail?	
How many direct reports did they supervise? Describe their management style?	

	✓
Did they make good hiring decisions? Can you comment on their ability to discipline or terminate staff when required?	
How do they develop and motivate a team?	
What do you think personally motivates them?	
Describe their overall skills in ... (cover the skills required specific to the position as outlined in the job description).	
Describe their approach to decision making.	
Have you ever had a chance to see how they react under stress and pressure? What sort of behaviours did they demonstrate?	
Describe a situation of conflict and how they handled it.	
Describe their personality and temperament.	
Summarize their main strengths.	
What are their weaknesses?	
Why did they leave their position with your organization?	
Would you rehire or work with this individual again?	
Is there anything you'd like to add that we haven't touched on concerning their suitability to this position?	

THANK THE REFEREE FOR THEIR TIME.

Sample Offer Letter (Simple version)

Date

Mr. John Smith
321 Round Street
Vancouver, BC V3T 5W1

Dear John:

This letter will act as our offer of employment as _____ with our organization, effective _____. Your starting salary will be \$_____ per annum. A performance and salary review will be completed prior to _____ as the first three months of employment are a probationary period.

You will be entitled to three weeks annual vacation. Your entitled to vacation is based on 1.25 days for each month of service. If you desire vacation time before the actual days are earned, suitable arrangements can be made.

Your scheduled hours of work are 8:00 a.m. to 5:00 p.m. with one hour for lunch. We also have a policy of providing one flex day per quarter to all staff. The details and applications of this policy will be provided to you at a later date.

You will be offered full participation in our employee benefit program that includes medical and dental coverage, disability and life insurance coverage. This coverage is available to you after three months with the firm, following a medical examination, if applicable. There may be some benefit costs you must pay. In addition, the organization based on a mutually agreed need will pay for professional dues and any courses that are taken by you with the prior approval of the organization. Pre-approved course costs are reimbursed after successfully completing the course.

Organization has the right to change their policies and programs at any time.

We welcome you to our organization John, and look forward to a mutually beneficial relationship. We feel you will provide the expertise our organization requires to continue to be successful. Please sign and return one copy of this letter as confirmation of your acceptance.

Yours truly,

Organization
Nancy Jones
President

I have reviewed the above terms and hereby accept the offer in its entirety.

Date

John Smith

Sample Offer Letter (Complex version)

Date _____

Dear:

We are very pleased to offer you the position of _____ at Organization. We look forward to having you as part of ABC's team. This document will confirm our employment agreement. This agreement is entered into between Organization (hereinafter called "Organization") and Candidate (hereinafter called "Employee") made this _____ day of _____, 2 _____. It is agreed that the Employee shall act in the position of _____ effective _____.

JOB DESCRIPTION

The Employee shall have the duties, responsibilities, authority and reporting relationship as defined in the job description for this position (attached), which may be changed by the Organization in operational memoranda from time to time as mutually agreed upon.

COMPENSATION

It is agreed that the Organization shall pay via organization cheque to the Employee the amounts set out in [Schedule A](#), which is hereby incorporated by reference as if specifically set forth herein.

EMPLOYEE'S DUTIES – THE EMPLOYEE

- a) The Employee agrees to commit all of his time and energy to his employment. The Employee agrees to have no other employment during the duration of this agreement unless otherwise agreed upon in writing.
- b) The Employee shall keep secret and confidential, and not disclose to any person, organization or corporation whatsoever or use for his own benefit, unless authorized in writing by the Organization, any information including, but not limited to, business methods, materials, lists of clients and prospective clients, and any records related thereto.

VACATION

The Employee shall be entitled to three (3) weeks of vacation in _____. In _____, the Employee will be entitled to four (4) weeks of vacation. After five (5) years of continuous service, the Employee will be entitled to five (5) weeks of vacation.

EXPENSE REIMBURSEMENT

It is agreed that the Organization shall reimburse out-of-pocket business expenses to the Employee properly incurred by the Employee in connection with the Employee's duties provided that such expenses are approved by an authorized officer of the Organization. The Employee shall submit an itemized expense account for all such expenses, together with receipts showing all monies actually expended by the Employee on behalf of the Organization and such other information as the Organization may request from time to time.

EMPLOYEE REPRESENTATION

The Employee represents that he/she is not in possession of any confidential information from a previous employer that is protected by law and that can be used by the Organization for profit purposes.

Sample Offer Letter (Complex version) Cont'd

PROBATIONARY PERIOD

The Employee is subject to an initial probation period of three months (90 days), commencing on _____. If the Organization, or the Employee, decides at any time during the probation period that employment is not suitable, either party may terminate employment either during or at the end of the probation period, with one (1) pay period notice (two weeks).

TERMINATION

- i) Except where the Organization has cause to terminate the Employee's employment, the Employer may terminate the Employee by providing the amount of statutory notice in writing, or payment in lieu thereof, any statutory severance to which the Employee may be entitled according to BC Employment Standards legislation, except as provided for in paragraph (f).
- ii) Upon termination, the Employee shall return any and all confidential information provided to the Employee by the Organization or generated by the Employee during the period of employment with the Organization and copies of all lists, in any form or format, of clients or prospective clients of the Organization and any and all material related to the Organization's business methods, technical information, and any and all related information thereto.
- iii) Whether the Employee's employment is terminated with or without cause, the Employee shall not, directly or indirectly:
 - a. Make use or avail himself of any of the property or information acquired as a result of his employment with the Organization; and,
 - b. For a period of twelve (12) months, solicit clients or potential clients of the Organization; and,
 - c. Whether the Employee is terminated with or without cause, or the employee quits, the Employee agrees not to be employed directly or indirectly, by any of the Organization's clients or their affiliates, for a period of twelve (12) months from the Employee's termination date.
- iv) The Employee acknowledges and agrees that irreparable damage will result to the Organization in the event of the breach by the Employee of any of his obligations hereunder and is therefore understood and agreed that, in the event of any such breach by the Employee, the Organization shall be entitled, in addition to other legal and equitable remedies available to it, to an injunction to restrain such breach by the Employee.
- v) The Organization agrees to compensate the Employee, when terminated without cause, the following:
 - a. 0 to 3 months of service – 2 weeks
 - b. 4 months to 1 year of service – 1 month
 - c. 1+ year of service – 1 month for every year of service up to a maximum of 6 months

The separation allowance will be paid to the Employee in bi-weekly instalments, less statutory deductions and less any outstanding advances. This amount is inclusive of any statutory notice or severance pay entitlements. As well, upon termination, the Employee will be entitled to any vacation pay owed.

Should the Employee obtain new employment prior to the expiry of the severance allowance, the separation allowance will then cease as of the date the Employee begins new employment, and the Employee is entitled as such time to a lump sum payment equivalent to 50% of the separation payments from that date to the expiry of the severance allowance.

Cont'd

Sample Offer Letter (Complex version) Cont'd

As an option to receiving the separation allowance as salary continuation, the Employee may select a lump sum payment equivalent to 75% of the total payments throughout the separation period, less statutory deductions, and any outstanding advances.

- vi) Should the Employee resign from the Organization without cause, the Employee is required to provide the Organization thirty (30) days notice unless otherwise mutually agreed upon in writing.

GENERAL

- a) This agreement shall be governed by and construed in accordance with the laws of the Province of British Columbia.
- b) This agreement evidences the entire agreement between the parties hereto with respect to the subject matter contained herein and cannot be changed, modified or supplemented except by supplementary agreement executed by both parties hereto.
- c) This agreement supersedes and voids all previous agreements, negotiations and communications between the parties hereto.
- d) Should any part of this agreement, for any reason, be declared invalid, such decision shall not affect the validity of any remaining portion, which remaining portion shall remain in full force and effect as if this agreement had been executed with the invalid portion thereof eliminated and it is hereby declared the intention of the parties hereto that they would have executed the remaining portion of the agreement without including any such part, parts or portion which may, for any reason, be hereinafter declared invalid.

IN WITNESS WHEREOF the parties have duly executed this agreement this _____ day of _____ in the City of _____ in the Province of British Columbia.

Organization

Per:

Authorized Signing Officer

Employee

Witness

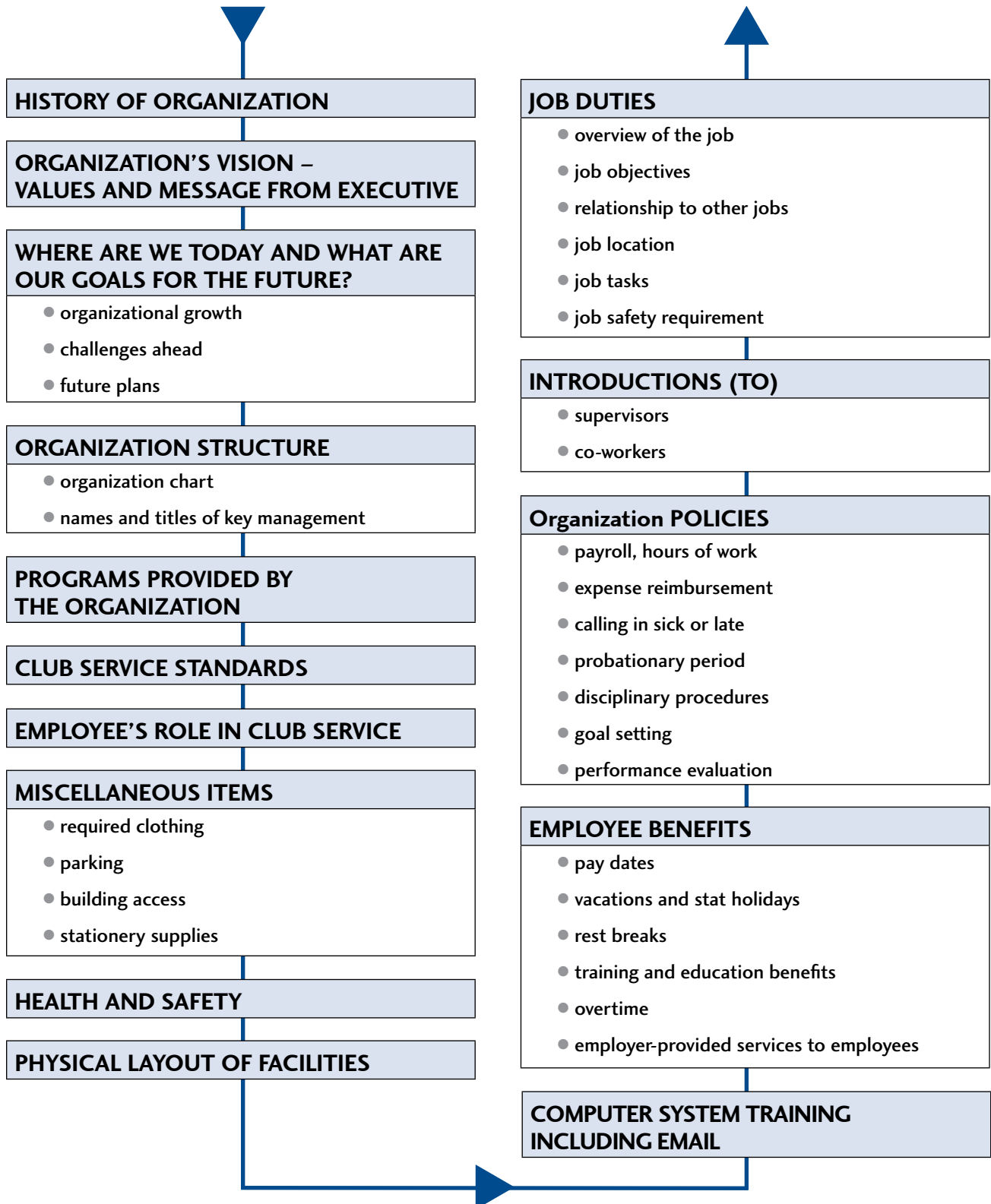
Schedule “A”

Will be reviewed on an annual basis.

COMPENSATION

- a) Base salary shall be in the amount of _____ dollars (\$ _____) gross annually, payable bi-weekly.
- b) The Employee shall not be entitled to participate in any Organization profit sharing or incentive plans available to other Organization employees.
- c) A quarterly bonus amount to an annual maximum of 50% of base salary will be paid to the Employee provided that Organization exceeds its annual financial plan (“Plan”) target pre-tax earnings. This pre-tax amount will be set annually based on the previous five year’s average earnings.
- d) The bonus amount will be determined and earned quarterly to a maximum of 12.5% of base, calculated at 10% of net margin in excess of the targeted pre-tax earnings. Payments of the bonus amount will be 60% of the earned bonus amount for the first three quarters with the balance remitted, less any adjustments, within thirty (30) days after the end of each quarter.
- e) For purposes of calculating the quarterly bonus amount, the financial plan target pre-tax earnings will be adjusted for the cost of any out of the ordinary payroll draws, bonuses, club dues, or other perquisites afforded any or all of the owners of the business. The total bonus amount paid to the Employee will be exclusive of the incentive plans paid to other Organization employees. Accounting for Organization will adhere to generally accepted accounting principles.
- f) The Employee is entitled to participate in the employee group insurance plan, and such benefits as may be presented therein and as may be modified from time to time. Such benefit package will be made available after ninety (90) days of continuous employment.
- g) The Organization and the Employee will review the compensation schedule on an annual basis. Subject to the Employee’s satisfactory performance, the annual base compensation will be increased to \$ _____ on _____ .
- h) Lease payments for a organization car will be provided to a maximum of \$ _____ per month. In addition, insurance costs and maintenance for the organization car will be the responsibility of Organization.

Components of an Effective Orientation Program



Performance Evaluation

Non-Supervisory/Management Staff

Employee		Position		
Supervisor		Current Salary		
Start date		Date of Last Increase		
Reason for Review:	Probation	Mid-Year	Annual	Other

PURPOSE STATEMENT

This performance evaluation provides a foundation for assessing results relative to the key strategic responsibilities for your position. It is also a tool for establishing personal and career development plans.

Performance management must be consistent with our vision and our operating principles.

The purpose of performance management is to:

- Achieve corporate goals and strategies.
- Ensure employee involvement and effort toward achievement of corporate goals.
- Ensure scheduled follow up of employee development.
- Reward performance.

PERFORMANCE RATINGS

Outstanding	Attains the highest level of performance across all key areas of the role; demonstrates exceptional capability in the role and displays a high standard of performance in both quality and quantity of work.
Above Expected	Demonstrates an above expected level of performance in most key areas of the role; achieves results well in excess of role expectations.
Fully Effective	Demonstrates fully effective performance in all areas of the role; consistently achieves all of the standards and objectives expected in the role.
Satisfactory	Meets most but not all of the requirements of the role; is under-achieving in some of the role requirements.
Improvement Required	Has significant performance shortfalls in a number of areas; requires dedicated improvement actions.

Cont'd

Performance Evaluation Cont'd

Non-Supervisory/Management Staff

TECHNICAL SKILLS	OUTSTANDING	ABOVE EXPECTED	FULLY EFFECTIVE	SATISFACTORY	IMPROVEMENT REQUIRED
Job knowledge Has skills and knowledge needed to meet standards required.					
Quality of work Is thorough and consistent in their approach to all tasks assigned and completes work accurately.					
Productivity Exhibits a high energy level and can handle the volume of work; completes tasks on a timely basis.					
Comprehension Is able to learn, grasp concepts essential to the work, and follow instructions and procedures.					
Organization Handles many projects simultaneously and prioritizes tasks effectively.					
Technology Is proficient with technology required to perform the job.					
Problem Solving Reacts to problems in a timely manner; gathers necessary data to make sound decisions and recognizes trends. Persists in resolving difficult issues.					

Cont'd

Performance Evaluation

Non-Supervisory/Management Staff

INTERPERSONAL QUALITIES	OUTSTANDING	ABOVE EXPECTED	FULLY EFFECTIVE	SATISFACTORY	IMPROVEMENT REQUIRED
Independence Works well with minimal or no supervision but knows when to ask for guidance.					
Teamwork Works well with coworkers and management; contributes toward creating a positive work environment.					
Customer relations Understands the customer's importance to us, and demonstrates concern for them. Is responsive to client needs and builds good rapport.					
Attitude Demonstrates a consistent positive and professional attitude; exhibits a "can-do" approach and takes pride in their work.					
Initiative Actively seeks ways to improve service delivery and efficiency.					
Flexibility/Adaptability Accepts and adapts well to change.					
Communication Openly communicates in all directions; shares information willingly; is succinct and direct.					

Cont'd

Performance Evaluation Cont'd

Non-Supervisory/Management Staff

PERSONAL QUALITIES	OUTSTANDING	ABOVE EXPECTED	FULLY EFFECTIVE	SATISFACTORY	IMPROVEMENT REQUIRED
Attendance					
Punctuality					
Appearance					

List specific goals that were mutually established during last review period and rate the progress of achievement.

List new goals and objectives for the coming fiscal year.

Cont'd

Performance Evaluation

Non-Supervisory/Management Staff

Training Needs and Development Plan

Prepare a development plan that will assist the employee to expand their technical skills, supervisory ability or other skills that will improve performance in a key strategic area.

Area for Completion	Action Plan Development	Target for Development	Completed	Date

Manager's Comments:

Employee's Comments:

Overall Performance Rating

☐ Outstanding ☐ Above Expected ☐ Fully Effective ☐ Satisfactory ☐ Improvement Required

Cont'd

Performance Evaluation Cont'd

Non-Supervisory/Management Staff

This appraisal was discussed with the employee on _____

Reviewer's signature _____ Date _____

I have read this appraisal and made my comments above.
My signature does not necessarily indicate that I agree with this appraisal.

Employee's signature _____ Date _____

Performance Evaluation

Supervisory/Management Staff

Employee		Position		
Supervisor		Current Salary		
Start date		Date of Last Increase		
Reason for Review:	Probation	Mid-Year	Annual	Other

PURPOSE STATEMENT

This performance evaluation provides a foundation for assessing results relative to the key strategic responsibilities for your position. It is also a tool for establishing personal and career development plans.

Performance management must be consistent with our vision and our operating principles.

The purpose of performance management is to:

- Achieve corporate goals and strategies.
- Ensure employee involvement and effort toward achievement of corporate goals.
- Ensure scheduled follow up of employee development.
- Reward performance.

PERFORMANCE RATINGS

Outstanding	Attains the highest level of performance across all key areas of the role; demonstrates exceptional capability in the role and displays a high standard of performance in both quality and quantity of work.
Above Expected	Demonstrates an above expected level of performance in most key areas of the role; achieves results well in excess of role expectations.
Fully Effective	Demonstrates fully effective performance in all areas of the role; consistently achieves all of the standards and objectives expected in the role.
Satisfactory	Meets most but not all of the requirements of the role; is under-achieving in some of the role requirements.
Improvement Required	Has significant performance shortfalls in a number of areas; requires dedicated improvement actions.

Cont'd

Performance Evaluation Cont'd

Supervisory/Management Staff

TECHNICAL SKILLS	OUTSTANDING	ABOVE EXPECTED	FULLY EFFECTIVE	SATISFACTORY	IMPROVEMENT REQUIRED
Job knowledge Demonstrates ability to implement key corporate strategies, answer questions and resolve problems.					
Quality of work Demonstrates strong work ethic in getting things done on time with high quality results.					
Productivity Exhibits a high energy level and can handle the volume of work; completes tasks on a timely basis.					
Planning Understands and embraces corporate objectives and translates these into projects to be completed within their area of responsibility.					
Organization Handles many projects simultaneously and prioritizes tasks effectively.					
Technology Has fully developed skills in the use of technology and embraces technological changes.					
Continuous Improvement Consistently seeks ways to enhance efficiency and productivity.					
Problem Solving Reacts to problems in a timely manner; gathers necessary data to make sound decisions and recognizes trends. Persists in resolving difficult issues.					

Cont'd

Performance Evaluation Cont'd

Supervisory/Management Staff

LEADERSHIP/MANAGEMENT SKILLS	OUTSTANDING	ABOVE EXPECTED	FULLY EFFECTIVE	SATISFACTORY	IMPROVEMENT REQUIRED
Planning Establishes and uses appropriate timelines and schedules with subordinates.					
Participates in the budgeting process and works within budget guidelines.					
Policy Implementation Understands and respects policies; performs within established boundaries.					
Leadership Visibly and consistently reflects the mission, values and goals established for the organization and ensures all members of the team have a clear understanding of these.					
Promotes teamwork, enthusiasm and professionalism.					
Ensures regular staff meetings are held to share information and address operational problems and concerns.					
Provides regular feedback and coaching to subordinates; listens to their concerns and responds promptly to their requests.					
Is effective in facilitating problem solving and troubleshooting with team members.					
Recognizes superior performance and deals with performance issues promptly and effectively.					

Cont'd

Performance Evaluation Cont'd

Supervisory/Management Staff

LEADERSHIP/MANAGEMENT SKILLS	OUTSTANDING	ABOVE EXPECTED	FULLY EFFECTIVE	SATISFACTORY	IMPROVEMENT REQUIRED
Identifies training needs and ensures appropriate training and tools are available.					
Explains projects clearly to subordinates; empowers others and delegates authority within defined parameters.					

INTERPERSONAL QUALITIES	OUTSTANDING	ABOVE EXPECTED	FULLY EFFECTIVE	SATISFACTORY	IMPROVEMENT REQUIRED
Teamwork Works well with co-workers and the executive; contributes toward creating a positive work environment. Is polite, courteous and friendly to team members.					
Customer relations Understands the customer's importance to us, and demonstrates concern for them. Is responsive to client needs and builds good rapport.					
Attitude Demonstrates a consistent positive and professional attitude; demonstrates integrity and honest and ethical behaviour.					
Initiative Actively seeks ways to improve service delivery and efficiency.					

Cont'd

Performance Evaluation Cont'd

Supervisory/Management Staff

INTERPERSONAL QUALITIES	OUTSTANDING	ABOVE EXPECTED	FULLY EFFECTIVE	SATISFACTORY	IMPROVEMENT REQUIRED
Flexibility/Adaptability Accepts and adapts well to changing priorities, responsibilities and work styles.					
Communication Openly communicates in all directions; shares information willingly. Prepares written material that is clear, succinct and well organized.					

PERSONAL QUALITIES	OUTSTANDING	ABOVE EXPECTED	FULLY EFFECTIVE	SATISFACTORY	IMPROVEMENT REQUIRED
Attendance					
Handles stress and/or busy situations well					
Presents a professional image					

List specific goals that were mutually established during last review period and rate the progress of achievement.

Establish new goals and objectives for the coming review period.

Cont'd

Training Needs and Development Plan

Area for Development	Action Plan Development	Target for Development	Completed	Date

[illegible][illegible]

Cont'd

Performance Evaluation Cont'd

Supervisory/Management Staff

This appraisal was discussed with the employee on _____

Reviewer's signature _____ Date _____

I have read this appraisal and made my comments above.

My signature does not necessarily indicate that I agree with this appraisal.

Employee's signature _____ Date _____

Sample Termination Letter (Complex)

TODAYS DATE

EE NAME

EE ADDRESS

EE CITY EE PC

Dear NAME:

RE: Termination of Employment

As per our discussion today, TODAYS DATE, this letter is to confirm that your employment with Organization is being terminated effective END DATE. The following conditions apply:

- You will be paid your salary up to and including END DATE. Your final pay includes earned but unused vacation pay up to END DATE.
- This period includes the one week notice period that must be provided to you under BC labour law.
- You will have access to word processing and the internet at your work location to facilitate in your job search during the three week notice period, providing you obtain permission from your supervisor before using organization property for this purpose.
- You will be given a reasonable amount of time to attend interviews during regular working hours over the period of your working notice.
- Any applicable benefit coverage ceases on END DATE. Please submit any healthcare or dental claims up to and including END DATE within thirty (30) days. If you have any questions regarding your group benefits, please contact _____. Some of your group benefits may be converted to individual coverage. If you wish to discuss your benefit conversion options you should contact _____.

You are required to return any organization property you may have in your possession including but not limited to keys, pass cards, computer equipment, software, files or data including computer and voice mail passwords by END DATE.

We take this opportunity to remind you that, during your employment with the organization, you had access to detailed confidential information of the organization, its clients and its associated and related businesses. You have a fiduciary obligation to Organization which obligation requires, among other things, that you not use or disclose any of the confidential information at any time in the future. Should you fail to return all of the organization's property or to abide by your fiduciary obligations to the organization, Organization shall exercise any legal rights that it may have.

Cont'd

Sample Termination Letter (Complex) Cont'd

Please sign and return a copy of this letter and the enclosed release to my attention, postmarked no later than ONE WEEK FROM TODAY'S DATE.

Organization would like to thank you for your contribution.

Yours truly,

Organization

SUPERVISOR NAME _____

TITLE _____

I, NAME, have read the foregoing letter and agree to the terms and conditions of my severance from Organization as set out in this letter.

Dated in the City of _____, this _____ day of _____, 2____.

NAME _____

Employee Release Form

I, (Employee Name), in exchange for consideration set out in the letter dated _____ from Organization (the "Organization") release the Organization and their respective affiliates and all of their respective officers, directors, employees and agents of the Organization (collectively the "Releasees") from all action, causes of action, suits, debts, demands, covenants, complaints, contracts, claims and torts (both intentional and unintentional) arising in any way, directly or indirectly, from my employment with the Organization or any other representations, arrangements or agreements whatsoever between the Releasees and myself. I also agree no to make any claims or take any proceedings in respect of the claims released against any person, corporation or other entity who or which might deem contribution or indemnity from the Releasees.

Without Limitation, I specifically covenant, represent and warrant to the Releasees that I have no further claim against the Releasees arising out of my employment or the termination of such employment including, without limitation, any claims for pay, notice of termination, pay in lieu of notice, severance pay, expenses, overtime pay, benefits, vacation pay and specifically include any claim under the BC Employment Standards Act or any other similar legislation. I further represent that the Releasees have complied with the BC Human Rights Code in respect of my employment and/or termination of such employment. If I should hereafter make any claim or demand or commence application for proceedings against the Releasees or any one or more of them, for or by reason of any cause, matter or thing, this document may be raised as an estoppel and complete bar to any such claim, demand, act, proceeding or complaint.

I have read the above Release and have obtained independent legal advice with respect thereto from my own independent legal counsel. I understand that this Release contains a full and final release from all claims that I have or may have against the Releasees relating to my employment or the termination of such employment and that there is no admission of liability on the part of the Releasees and that any such liability is denied.

All of the foregoing shall enure to the benefit of the Releasees, their successors and assigns and be binding upon me and my respective heirs, executors, administrators and assigns.

In WITNESS WHEREOF, I have duly executed this Release this _____ day of _____, 20____.

Employee Name

Witness

Working Notice Termination Letter

(Print letter on corporate letterhead)

Date

Mr. John Smith
101 Carlisle Road
Vancouver, BC V3G 2J8

Dear John:

It is with sincere regret that I must inform you that your employment with Organization will be terminated as of _____ (date).

In accordance with the terms of your employment contract, you will receive a lump sum severance equivalent to four months' salary less applicable statutory withholdings (this clause depends on whether an employment clause was included in the employee contract or if normal BC Employment Standards apply). You will receive a further payment which will represent your accrued and owing vacation pay. These payments, together with your Record of Employment will be delivered to you within five days of returning a signed copy of this letter and the attached Release Form.

Your BC Medical Services Plan and group insurance health insurance coverage, including extended health care, and/or dental will will expire on _____. Accidental Death & Dismemberment, Short Term Disability and Long Term Disability coverage will cease immediately.

Group Life Insurance coverage is in effect for _____ days after termination. You may convert it to an individual policy at the insurance organization's rates for such policy without medical examination in this 31-day period only. You may do this by contacting _____ and completing an application prior to the end the 31-day period. (This clause depends on your policy).

In accepting the severance outlined above, you agree that you will not at any time disclose, discuss, to or with anyone, other than your advisors, any of the confidential information you were privy to in your employment with Organization.

If the terms of this separation offer are acceptable to you, please sign below and return to me along with a signed and witnessed copy of the attached Release. Upon signing this letter, the terms will become a binding agreement upon you and Organization.

On behalf of Organization, I wish you well in your future endeavours.

Sincerely,

Doug Jones, Board Chair
Organization

Accepted and Agreed

Signature (John Smith)

Date Witness (Signed)

Name

Termination Checklist

TERMINATION CHECKLIST	✓
1 State clearly and briefly the reason and purpose of the meeting.	
2 Advise the employee that the decision is final and cannot be rescinded.	
3 Outline when the exact date of termination is to take effect (e.g. immediately or two weeks' working notice, etc.)	
4 Review the written benefits summary that may include: severance pay, vacation pay, sick time pay, health and life benefits continues and for how long, outplacement assistance, etc.	
5 Ensure final pay cheques, expense cheques and vacation payments are ready and provided to the employee.	
6 Request return of organization property, security and access cards, credit cards, computer passwords, etc.	
7 Inform the employee how to collect their personal belongings.	
8 Inform the individual that it is recommended that they leave the building immediately after they collect their personal effects.	
9 Close the meeting by indicating that they can call you if they have any questions regarding their severance document package and that you will be notifying them of any relevant matters (eg. benefits information).	
10 Wish them well.	
11 Inform the rest of the organization they are no longer employed to manage the risks.	

Exit Interview

Name		Date	
Starting date		Last day of work	
Supervisor's Name		Department	
Reason for Leaving			

What were the main activities and tasks you performed in your last position?

Was your workload (check one):

☐ too heavy ☐ too light ☐ just right ☐ varied

Did you have all the necessary tools to perform your job effectively? If not, did you make your Supervisor aware of this? What was the outcome?

Did you have a clear understanding of your role and responsibilities and how your performance was going to be measured? Suggestions?

Did you enjoy the job? Was it interesting? Comments

How would you describe the work environment within your department compared to others? What about the work environment within the organization as a whole? Suggestions?

Cont'd

Exit Interview Cont'd

Were you able to develop good relationships with your coworkers? Suggestions?

Do you feel that your training was adequate? Why or why not? Who provided your training? How was it determined if you needed training? Suggestions?

Were you given as much responsibility as you felt you could handle? Suggestions?

How do you feel you were managed during your employment with us?

What did you like most about working here?

How do you feel the organization is run?

What did you like least about working here?

Cont'd

Exit Interview Cont'd

Do you feel that the salary and benefits here are fair and competitive? Suggestions?

Do you feel that you were evaluated fairly during your employment here and that the areas you were evaluated in made sense? Suggestions?

What were the factors that impacted your decision to make a change in employment?

Under what conditions would you have stayed?

Would you consider working here again in the future? Why or why not? Suggestions?

Additional comments:

Consent to Provide an Employee Reference

I, _____ give consent to ABC Club to provide a letter of reference on my behalf if and when requested to do so. I understand that ABC Club may disclose personal information about me, including job performance and personal characteristics, in order to provide a letter of reference, or to respond to a reference check on my behalf.

I agree to the disclosure of this and other personal information to the following individual or organization:

Name of contact: _____

Name and address of organization:

In regard to all requests for references:

I hereby release ABC Club from any and all liability associated with the release of information related to my employment.

Employee signature: _____ Date: _____

Sample Travel Policy

A corporate travel policy has been developed to balance the club's need for cost effectiveness and the employee's need for quality services. Employee travel should be via the lowest cost alternative, consistent with good business practices. Neither luxury nor sub-standard modes of transportation and accommodations should be used. In order to obtain the best pricing, any planned trips should be booked at least two weeks prior to the date of travel.

Employee travel and the expenses associated with it must be authorized by the Club Manager in advance. Any expense submitted which does not comply with the travel policy will not be reimbursed, unless a valid exception is made by the Club Manager.

All travel arrangements must be approved by the Club Manager prior to booking.

AIR TRAVEL

Air travel will be via the most direct and economical means. Travel should be booked at the economy rate at least two weeks in advance, where possible, so that the lowest fares can be obtained. Use of "Non-Refundable" airfares is recommended as these fares are usually considerably less expensive. In most cases, if the travel must change or the trip is cancelled, the funds can be used as a credit toward future travel, less a service charge imposed by the airline.

Travel and cancellation insurance is not reimbursed by the club unless there is a pre-existing medical or personal condition that makes travel and/or cancellation insurance desirable. If this is the case, approval must be obtained from the Club President prior to incurring the expense.

AUTOMOBILE RENTALS

Payment for the car rental should be made with a credit card so that collision damage and personal liability insurance can be waived.

Employees may request either compact or intermediate size cars. Rentals for other types of cars are not permitted except with approval by the Club Manager. Wherever possible, employees must refill gasoline prior to returning the rental car for drop off to avoid any surcharges.

ACCOMMODATION

The Holiday Inn, Ramada Inn, Hampton Inn, Best Western, etc. are an acceptable standard of accommodation for all employees. All hotels will be guaranteed to a credit card. It is the employee's responsibility to cancel hotel reservations within the hotel's cancellation policy time frame. You must obtain a cancellation number when cancelling a hotel reservation. The club will not reimburse hotel "no shows."

Sample Travel Policy Cont'd

The club will reimburse all accommodation expenses excluding entertainment costs such as movies, room service and personal telephone charges. Any parking fees associated with the hotel room will be reimbursed.

Should an employee arrange personal accommodation with family or friends, they will be provided an allowance of \$25 Cdn per night for travel in Canada, and \$25 US per night for travel in the United States.

MEALS AND ENTERTAINMENT

Actual, reasonable and necessary costs for meals will be reimbursed. Reimbursement may include a gratuity of up to 15% of the bill before tax. The maximum amount that will be reimbursed for daily meals is \$62 tax included.

PERSONAL VEHICLE USE

When an employee is requested to use their automobile for Organization business, mileage will be reimbursed at the current prescribe CRA rate of 50 cents/km for the first 5,000 kms, and 46 cents/km for any mileage exceeding 5,000 kms in a calendar year.

Mileage from an employee's home to a regular assigned work location is not a reimbursable expense. However, if the employee goes from home to another work assignment other than their regular work location, and the distance is greater than the distance to their regular work location, the employee can expense the difference.

To be reimbursed for mileage, employees must complete an expense report specifying the purpose of the trip, start and finish odometer reading, point of origin, destination and time of trip. The employee assumes the responsibility for all parking and traffic fines.

Health and Safety Checklist

This checklist will give you some idea of the issues you need to address to improve health and safety.

WORKPLACE HAZARDS

- Do you have an effective method for identifying hazards? This includes checking equipment safety.
- Do you have effective methods for eliminating, controlling or minimizing hazards?

EDUCATION AND TRAINING

- Are you and your employees familiar with the health and safety regulations that apply to the business?
- Do your employees have information about hazards that they are, or could be, exposed to?
- Are your employees adequately trained in safety procedures for the operation? Is this information written and available to them?

EMERGENCY PREPARATION

- Are emergency procedures in place? Are you and your employees familiar with these procedures?
- Are emergency exits clearly marked?
- Are fire extinguishers properly located and regularly serviced? Do your workers know how to operate them?
- Do you have adequate first aid supplies? Do your workers know where to find and how to use them?

Cont'd

Health and Safety Checklist Cont'd

INCIDENTS

- Do you report all serious incidents to the Workers' Compensation Board?
- Do you investigate all incidents?
- Do you keep a written record of all incidents?

YOUR WORK ENVIRONMENT

- Are your employees adequately supervised in the safe performance of their duties?
- Are workstations designed to suit your workers' physical requirements?
- Do you train employees to prevent repetitive strain injuries?
- Are all work areas kept free of tripping and slipping hazards?
- Do you control noise at the source, where possible? Is loud machine noise controlled?
- Do your employees have access to current material safety sheets for all the chemicals that require these?
- Are all chemical containers properly labelled?
- Do your employees have access and know how to use appropriate personal protective clothing and equipment?

Content Outline for a Comprehensive Policy and Procedures Manual

ABOUT THE ORGANIZATION

- Vision and Mission
- Organization History
- Our Elevator Pitch
- Management Team
- Definition of Success – Competitive Excellence
- Service Philosophy

CULTURE

- Culture and Core Values
- Social Events
- Quarterly Meetings
- Lunch and Learns
- Status Reports
- Effective Email Communication

ORGANIZATION DIRECTORY

- Organization Chart
- Individual Employee Profiles
- Phone Directory

BUSINESS AND REGULATORY CONDUCT

- Code of Conduct
- Conflict of Interest
- Confidential Information
- Discrimination and Harassment
- Conflict Resolution Communication
- Workplace Privacy

PRIVACY OF PERSONAL INFORMATION

- Privacy Laws and Legislation
- Dress Code
- Drug Free Workplace
- Attendance
- Charitable Donations and Solicitation
- Gifts and Gratuities
- External Organization Communication
- Legal Inquiries and Actions

HUMAN RESOURCES

HIRING AND ORIENTATION

- Job Postings
- Referral Program
- New Hire Orientation Checklist
- Probation Period

COMPENSATION AND BENEFITS

- Our Compensation Philosophy
- Summary of Benefits
- Health Care Expense Claims
- Parking
- Employee Assistance Program
- RRSP

Cont'd

Content Outline for a Comprehensive Policy and Procedures Manual Cont'd

EMPLOYEE RELATIONS

- Problems, Concerns and Suggestions in the Workplace
- Discipline and Termination of Employment
- Resignations
- Checklist for Exiting Individuals
- Exit Interviews

ABSENCES AND LEAVES

- Statutory Holidays
- Sick and Personal Time
- Short Term Disability
- Vacation
- Personal Leaves of Absence
- Maternity Leave
- Bereavement/Compassionate Leave
- Family Leave
- Time Off to Vote
- Jury Duty

PERFORMANCE MANAGEMENT

- Providing and Receiving Feedback
- Performance Review Process
- Performance Review Form
- Performance Improvement Plan

TRAINING, EDUCATION AND MEMBERSHIPS

- Training and Development
- Education Assistance
- Memberships
- Tuition and Membership Reimbursement Form

FINANCE AND ACCOUNTING

EXPENSES, FISCAL RESPONSIBILITY

- Fiscal Responsibility
- Department Codes
- Expense Reporting
- Expense Report Form
- Travel Expenses
- Travel Guidelines
- Miscellaneous Expenses
- Personal Vehicle Use
- Expense Approval
- Cheque Request Form

PAYROLL, TIME OFF REPORTING

- Payroll and Payday
- Time Off Reporting
- Absence Approval

COMPUTERS AND OUR NETWORKS

- Computer and Network Use
- Remote Access
- Email Use
- Internet Use
- Logon ID and Passwords
- Virus Protection
- Back-ups and Offsite Storage
- Technical Support
- Printers
- IT Security

Content Outline for a Comprehensive Policy and Procedures Manual Cont'd

COMPUTERS AND OUR NETWORKS

- Computer and Network Use
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- IT Security

OFFICE SERVICES

OFFICE COMMUNICATION TEMPLATES

- Correspondence and Presentation Templates
- Letter Template
- Fax Template
- Memo Template
- Email Signature Confidentiality Waiver
- Email Signature Templates
- Logos and Branding Guidelines

OFFICE EQUIPMENT, PHONES

AND MEETING ROOMS

- Telephone System and Voice Mail
- Long Distance Calls
- Conference Call Procedures
- LCD Projector
- Scheduling and Booking Meeting Rooms

GENERAL

- Office Supplies
- Filing System
- Lunchroom
- Business Cards
- Mail and Couriers
- Faxes-Incoming and Outgoing
- Bulletin Boards

SAFETY AND SECURITY

- First Aid
- Injury at Work
- Emergency Contacts
- Building Access and Key Cards
- Visitors

Draft Human Resource Policies

EMPLOYEE COMPLAINT REPORTING AND BC CHILD ABUSE PROTECTION REPORTING

All employees are protected from discrimination and harassment in the work place by the BC Human Rights Code. Harassment or discrimination in any form is a serious offense and any allegations must be investigated by the club. A detailed complaint reporting procedure is outlined in [Appendix T](#).

Similarly, in the club's capacity dealing with children, it is the responsibility and legal duty of anyone who has reason to believe that a child has been or is likely to be abused or neglected to report the matter to the Ministry of Children and Family Development. Call the Helpline at 604-310-1234 when there is a concern about the safety and well-being of a child.

Any unlawful act of discrimination or harassment that is in violation of the Human Rights Code will not be tolerated. Through enforcement of this policy and by education of employees, we will seek to prevent, correct and discipline behaviour that violates the Human Rights Code. Prohibited conduct under this policy includes:

Discrimination - is any attempt to harass an individual, in matters related to employment including but not limited to opportunities, benefits or privileges, working conditions, or evaluation standards, on any of the following prohibited grounds: ancestry or place of origin, race, color, religious beliefs, physical disability, mental disability, gender, age, sexual preference, marital status, and family status, any other unlawful criteria.

Harassment - includes discriminatory or sexual harassment as prohibited by law, and means unsolicited or unwelcome conduct, comment, gesture, or contact which causes offence or humiliation to any individual, which engenders fear or mistrust, or which compromises an individual's dignity or sense of self-worth.

Sexual Harassment - is any sexual behaviour, which is unwelcome, personally offensive, undermines morale, and therefore interferes with work effectiveness. It includes: repeated offensive sexual flirtations, unwelcome advances, propositions, continued or repeated verbal abuse of an equal nature, and graphic or degrading verbal comments of a sexual nature about an individual or their appearance. The display of sexually suggestive written or graphic material or objects including calendars, photos or the use of degrading verbal comments creates an offensive atmosphere and is a form of sexual harassment.

In addition, no one should imply or threaten that an applicant or employee's "co-operation" of a sexual nature (or refusal thereof) will have any effect on the individual's employment, assignment, compensation, advancement, career development, or any condition of employment. This includes offering work related rewards. The organization considers harassment, in all its forms, to be a serious offence and shall take appropriate disciplinary measures up to and including termination against any employee who subjects any other individual to harassment.

The organization will investigate all reported incidents of harassment. Disciplinary action may be taken against both the offending party as well as any employee in a Supervisory or Managerial role who becomes aware of, but does not act on, a potential violation of the harassment policy.

Any employee electing to utilize this complaint resolution procedure will be treated courteously. The problem will be handled swiftly and as confidentially as possible in light of the need to take appropriate corrective action. Registering a complaint will in no way be used against the employee, nor will it have an adverse impact on their employment status. While reporting such incidents would be a difficult personal experience, allowing discriminatory or harassment activities to continue will most certainly lead to less desirable outcomes. For that reason, employees are strongly urged to utilize this procedure. However, filing groundless and malicious complaints is an abuse of this policy and is prohibited.

Cont'd

Draft Human Resource Policies Cont'd

Because discrimination and harassment are serious offenses, the organization may elect to have the allegation investigated by an external third party to ensure the investigation is unbiased and in the event that the issued may progress to legal action.

COMPLAINT REPORTING PROCEDURES

The employee who believes they are being harassed, is strongly encouraged to:

- Tell the harasser to stop and firmly state that the specific behavior is objectionable and unwelcome.
- Keep a record of incidents including dates, times, locations, possible witnesses, what happened, etc. and maintain a record of incidents which may strengthen an employee's case and help assist with recalling details if necessary.

If direct communication is ineffective or difficult, the complainant should speak to their Supervisor or Manager without fear of reprisal.

A course of action may be initiated by the employee by filing a written and signed complaint with the person responsible for human resources or the most senior person in the organization. No formal action will be taken against any person under this policy unless a written and signed complaint is on file containing sufficient details to allow the person responsible to determine if the policy may have been violated. If a Supervisor or Manager becomes aware that discrimination or harassment is occurring, either from personal observation or as a result of an employee coming forward, the Supervisor or Manager should immediately report it to the appropriate person.

The person responsible will investigate the complaint promptly to determine whether the complaint falls within the definition of discrimination or harassment. If the complaint falls within the definition of discrimination or harassment, the person responsible will:

- Advise the alleged offender, hereafter named the respondent, of the complaint received.
- Consult with the Supervisor or Manager in charge, investigate the complaint, and interview the complainant and the respondent and others, as appropriate. During these interviews the complaint will be explained, the organization's Discrimination or Harassment Policy will be reviewed, and the version of the facts given will be noted in detail.
- Conclude the investigation by documenting a report of findings with recommendations for resolution including appropriate disciplinary action up to and including termination, to the organization, the complainant and the respondent.
- If the complaint does not fall within the definition of this policy, the employee will be so advised and actions may be taken to resolve the issue as appropriate.

In all cases, facts must be written down so that the complaint can be substantiated, if necessary. The organization recognizes that employees may be concerned about the confidentiality of information they share, and will strive to preserve confidentiality to the fullest extent possible. The person responsible will retain all related documentation. If allegations are confirmed and disciplinary action is taken (including possible termination), the documentation will be placed on the respondent's file as part of that disciplinary action. If the allegations prove to be wholly without merit, and in order to protect the respondent's reputation, no documentation will be reflected in either personnel files and those individuals who were involved in the investigation will be advised that the complaint was unfounded.

Cont'd

Draft Human Resource Policies Cont'd

Employees are encouraged to report all incidents that they feel may be considered discrimination or harassment under this policy. Regardless of the outcome of a complaint, any employee who submits a complaint or provides related information will be protected from any form of retaliation from either co-workers or superiors.

Nothing in this guideline shall prevent the complainant or the respondent from pursuing formal legal remedies or resolutions.

The following policies cover some of the mandatory human resource topics that should be included in an Employee Manual:

PAID HOLIDAYS

The organization provides 10 paid statutory holidays annually. When a statutory holiday falls mid-week or on a weekend, office announcements will be made regarding observance. If a statutory holiday occurs during a staff member's vacation period, it is recorded as a statutory holiday and not a day of vacation. These statutory holidays are as follows:

- New Year's Day
- Good Friday
- Victoria Day
- Canada Day
- BC Day
- Labour Day
- Thanksgiving Day
- Remembrance Day
- Christmas Day

To qualify for statutory holiday pay, employees must have been employed for at least 30 calendar days before the statutory holiday **and** have worked or earned wages on at least 15 of the 30 days immediately before the statutory holiday. Employees who work under an averaging agreement or variance at any time in the 30 days before the statutory holiday do not have to meet the 15-day requirement. Vacation days count as days worked when determining entitlement to a statutory holiday.

If an **ineligible** employee works on a statutory holiday, they are paid as if it were a regular work day.

If an **eligible** employee works on a statutory holiday, they are entitled to 1^{1/2} times their regular rate of pay for the first 12 hours worked, and double-time for any work over 12 hours, **plus** an average day's pay.

When an employee is given a day off on a statutory holiday, or it falls on a regular day off, an eligible employee is entitled to be paid an average day's pay.

An employer and a majority of employees can agree to substitute another day off for a statutory holiday. If this is the case, the regulations apply to the substitute day as if it were the statutory holiday.

Boxing Day and Easter Monday **are not** statutory holidays. Therefore, if worked these are treated as working a regular work day.

MINIMUM DAILY PAY

An employee who reports for work must be paid for at least two hours, even if the employee works less than two hours. If an employee who is scheduled for more than eight hours reports for work, he or she must be paid for at least four hours. However, if any employee reports to work but is unfit to work, they are only paid for the time actually worked.

Draft Human Resource Policies Cont'd

FAMILY RESPONSIBILITY LEAVE

An employee can take up to five days of unpaid leave in each employment year to attend to the care, health or education of a child in the employee's care, or to the care or health of any other member of the employee's immediate family.

Employees are expected to give the organization as much notice as possible and provide sufficient information for the organization to understand the reason for the leave. Employees are not required to give notice in writing or disclose personal or private information.

BEREAVEMENT LEAVE

Upon completion of the probationary period, an employee is entitled to three days of paid leave on the death of an immediate family member. Additional leave without pay may be granted if extraordinary circumstances merit a longer leave.

Immediate family is defined as mother, father, husband, wife, common-law spouse, son, daughter, brothers, sisters, grandfather and grandmother and in-laws.

COMPASSIONATE CARE LEAVE

The Employment Standards Act was recently amended to allow workers in B.C. to care for their families during a serious medical crisis without fear of losing their jobs.

All employees are entitled to take up to 8 weeks of unpaid leave to care or support a family member within a period of 26 weeks. The definition of a family member is a member of the employee's immediate family, or the spouse, child, parent, guardian, sibling, grandchild or grandparent of an employee, and any person who lives with the employee as a member of their immediate family.

The family member must be suffering from a serious medical condition posing a significant risk of death within 26 weeks. The employee must produce a certificate from a medical practitioner confirming the family member's medical condition and significant risk of death as soon as possible.

Leave does not have to be taken all at one time. However, it must be taken in increments of one week or more. For example, if an employee needs two days of leave, it will be deemed that one week of leave has been used.

The Compassionate Care Leave will come to an end in three ways (whichever comes first) – when the family member dies; when the employee has had 8 weeks off within the period of 26 weeks; or 26 weeks after the leave begins, even if the employee has not taken 8 weeks of leave. If the family member does not die within the 26 week period, an employee may take a further leave after obtaining a new medical certificate stating that the family member has a serious medical condition with significant risk of death within 26 weeks.

While on leave, employment is considered continuous for the purposes of calculating annual vacation and termination entitlements, as well as for medical or other benefit plans. The organization will continue to make its share of premium payments to the benefits plan unless advised in writing by the employee.

Upon return to work, the employee will return to their former position, or a comparable one.

While the leave is unpaid, employees may apply for Employment Insurance (EI) benefits and be granted six weeks of special insurance benefits.

Draft Human Resource Policies Cont'd

VACATION

It is important that employees have a break from work to maintain their mental and physical well-being.

Vacation entitlement is based on completed months of service and is credited to your vacation account monthly.

Entitlements according to BC Employment Standards are two weeks after completing one year of employment, and three weeks after five years. In addition, Employment Standards does not require any carry forward of unused vacation days but most organizations will allow a week to be carried forward.

In today's busy world, many organizations recognize employees lives are stressful and often provide three week's vacation upon hiring or in the second year of employment.

Vacation entitlement **based on common practice** is as follows:

LENGTH OF SERVICE	ANNUAL ENTITLEMENT	MONTHLY ACCRUAL (based on each completed month of service)
Staff members with less than 1 year of continuous service	10 days	.83 days
Staff members who have completed 1 year of continuous service	15 days	1.25 days
Staff members who have completed 5 years of continuous service	20 days	1.67 days
Staff members who have completed 10 years of continuous service	25 days	2.08 days

- Newly hired staff will accrue vacation entitlement based on completed months of service beginning from the first day of employment. If a staff member joins at a time other than the first day of the month, the first month's entitlement will be prorated.
- Annual vacation entitlement increases with the number of years of continuous service to the Organization. Additional entitlement begins to accumulate on a prorated basis beginning from the first day of the month in which advancement to the next entitlement category occurs. For example, a staff member, who at July 1 has completed one year of service, will begin to accrue additional annual entitlement at the rate of 1.25 days per month commencing July 1.
- Staff are encouraged to use vacation entitlement in the year in which it is earned; however, a maximum of 5 days entitlement may be carried forward to subsequent years.
- Accrued entitlement in excess of 5 days' entitlement at December 31 (the vacation year-end) will be forfeited.
- Vacation entitlement will be paid out only in the event of leaving the organization. Vacation pay is 4% of the employee's total earnings from the previous year for the first five years of consecutive employment, and 6% thereafter. Vacation pay is not payable if employment is five calendar days or less.
- Each employee must complete 6 months of continuous employment to take vacation days and cannot be away continuously for more than 3 weeks.
- Management is responsible for balancing employee needs with the requirement that all departments must continue to operate satisfactorily throughout the year.

Draft Human Resource Policies Cont'd

VACATION PAY

It is critical to keep track of each employee's vacation time taken and vacation pay received to avoid any problems. Vacation pay should also be listed on an employee's pay stub.

Vacation pay is calculated at 4% of gross earnings after 5 days of continuous employment for the first five years, and increases to 6% thereafter. It is calculated from earnings and it does not matter if an employee is salaried or hourly. For salaried employees, most organizations simply pay them their regular amount of pay and this amount is deducted from their vacation pay accumulated account. If an employee is paid hourly, they will be paid out their vacation pay that has been accumulated to that point. Vacation pay is payable at least seven days before the start of an employee's annual vacation, or on regular pay days if agreed to in writing by the employer and the employee.

Some organizations may choose to pay an employee's vacation on each scheduled pay day. This must be mutually agreed to in writing by both parties. However, you are not obliged to do this unless it's part of a collective agreement and it may be problematic. You are required to ensure employees take the required two weeks off following their first year of work. If vacation pay is paid out on each payday, your employee may not have money saved to cover the time off.

Employers have the final say when an employee can go on vacation. However, once an employer tells an employee they can take time off, the employer could face consequences for revoking the decision later on without very good reason. Remember, a happy employee is a good employee and not allowing them to choose their vacation could have a negative impact on their productivity and morale.

An organization may choose to close down for a week or two and have employees take that as their vacation. If you plan to do this, provide as much written notice as possible and advise your employees they will be paid for the time as part of their vacation.

Employees do not have the option of being paid out vacation pay without taking the time off. Nor can an employee work through an annual vacation and be paid for this time as well as receive vacation pay.

If an employee is employed for more than five calendar days but less than one year, they are not entitled to vacation time but they still qualify for vacation pay.

Employees who voluntarily end their employment must be paid all outstanding wages, including any outstanding vacation pay, within six days. However, if an employee is terminated, they must be paid all outstanding wages, including any outstanding vacation pay, within 48 hours.

MATERNITY AND PARENTAL LEAVE

Unpaid maternity leave of up to 17 weeks is available to a birth mother or birth father through Employment Insurance (EI). Maternity leaves can commence no earlier than 11 weeks preceding the estimated date of birth. Request for maternity leave must be submitted in writing to the employee's immediate Supervisor or Manager and be accompanied by a certificate from a medical practitioner stating that the employee is pregnant and the estimated due date. During such leave, an employee may apply for and collect maternity benefits through Employment Insurance (EI).

An employee may apply for EI benefits up to ten weeks prior to the anticipated birth. However, the Record of Employment (ROE) will be issued with the employee's last pay.

Regardless of when maternity leave commences, the leave shall end no earlier than six weeks following the actual date of birth (unless the employee requests a shorter period). A request for a shorter period of maternity leave must be

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Draft Human Resource Policies Cont'd

submitted in writing at least two weeks prior to the date that the employee indicates she intends to return to work and must be accompanied by a doctor's certificate.

Unpaid parental leave of up to 35 weeks is also available to a birth mother or father through Employment Insurance (EI). This leave provision must be taken immediately following the maternity leave.

Combined maternity and parental leave shall not exceed a total of 52 weeks. However, a leave may be extended by up to thirteen weeks if the natural mother is medically unfit to work at the end of the maternity leave. Written notice of the employee's intent to return to work or apply for parental leave is required four weeks in advance of their expected return date.

During a maternity leave, the organization will continue to pay its share of premiums if an employee chooses to maintain coverage for benefits. On return from maternity leave, the organization will endeavour to place the employee in their former position; however, it cannot guarantee what the position will be.

Full-time employees on maternity/parental leave continue to earn vacation time.

ADOPTION LEAVE

Unpaid leave of up to a maximum of 37 weeks is available through Employment Insurance (EI) for adoptive parents. This leave may be extended up to five weeks if the child requires an additional period of parental care. Request for parental leave must be in writing and include proof of either the child's birth (birth certificate) or an adoption placement certificate.

TIME OFF TO VOTE

All employees who are legally eligible to vote are entitled by law to three consecutive hours for the sole purpose of casting his or her vote on a Federal Election Day, and four consecutive hours on a Provincial Election Day. If an employee's work hours do not allow for the required consecutive hours in which to vote before, during or after his or her normal working hours, then they will be permitted to paid time off to provide for the required consecutive hours away from the workplace to vote.

In the interest of providing the best customer service, it is preferred that voting occur at the beginning or end of the working day, or combined with a lunch break and should be scheduled with the employee's Supervisor or Manager to ensure adequate staff coverage is provided throughout the day.

This policy does not apply to an employee who has already voted in an Advance Poll or by Special Mail Ballot.

JURY DUTY

An employer is not required to pay an employee who is required to attend Court as juror. This is considered unpaid leave for the period of their jury duty.

However, many employers recognize it is everyone's civic duty to serve on a jury but do not want their employees to experience financial hardship. Therefore, in some organizations employees receive full pay for time off if they are called on to perform jury duty or subpoenaed as a witness (other than on their own behalf) for a period not to exceed 7 weeks. The Organization does not pay for additional transportation costs, parking fees, meals, or other expenses which may be incurred while on jury duty or acting as a witness. It is the employee's responsibility to ensure that any remuneration they receive for jury duty, or for acting as a witness, is remitted to the employer to compensate them for full coverage of the employee's regular pay.

Draft Human Resource Policies Cont'd

OVERTIME

Full-time non-managerial employees will be paid overtime at a rate of 1^{1/2} times the regular hourly rate. The employee must complete a minimum of 8 hours in the day and must also complete a minimum of 40 hours in the week to be eligible for overtime.

Part-time employees: hours may vary during a week, but shall not exceed 8 hours in the day or 40 hours in a week. If a part-time employee chooses to exceed these hours, these hours will be paid at the regular hourly rate. All overtime must be approved in advance by the immediate supervisor.

BANKING OF OVERTIME

At the written request of an employee, an employee may establish a time bank and credit the employee's overtime wages to the time bank instead of paying them to the employee. If a time bank is established, the employee may at any time request the employer to do one or more of the following:

- a) pay the employee all or part of the overtime wages credited to the time bank;
- b) allow the employee to use the credited overtime wages to take time off with pay at a time agreed by the employer and the employee;
- c) close the time bank.

The employer can close the employee's time bank after one month's written notice to the employee. Within six months of closing the time bank, the employer must pay to the employee all overtime wages credited to the time bank, OR allow the employee to use the credited overtime wages as time off with pay; OR pay the employee for part of the overtime wages credited to the time bank and allow the employee to use the remainder as time off with pay.

AVERAGING AGREEMENTS

An employer and an employee can agree to average scheduled work hours over a period of one to four weeks. Averaging agreements must be in writing and have a start and an end date. Overtime is payable after 8 hours in a day if extra hours have been added to an employee's schedule, or if the employee works more than an average of 40 hours in a week over the period of the averaging agreement.

SICK TIME

Employment Standards does not require employers to provide paid sick days. However, most organizations offer five (5) paid sick days each year. These days are to be used for sick time, doctors appointments, or staying home to tend to sick children. For absences lasting longer than five (5) days, no portion of the employee's salary will be paid. A note from a medical doctor explaining the reason for the employee's absence may be required.

Excessive sick time, regardless of whether it's paid or unpaid, can often be a burden for employers, particularly in a small office environment. You are able to terminate an employee while they're on medical leave as long as you pay the minimum required severance **HOWEVER**, the organization may become liable for a Human Rights Violation. The test for human rights is *whether or not their disability (in this case, excessive sick time) was a factor in an employee's termination of employment.*

You have the right to ask an employee to provide you with current medical information from a licensed medical practitioner outlining their condition and expected return to work date and continue to ask for written updates until the employee returns to their normal duties.

In order to be able to terminate the employee and not be liable under the Human Rights Act, you must prove undue hardship and this is quite difficult. To mitigate your risk, we recommend you seek legal advice on how to proceed with an employee termination under these circumstances.

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Draft Human Resource Policies Cont'd

EMPLOYMENT INSURANCE SICKNESS BENEFITS

Sickness benefits may be paid up to **15 weeks** to a person who is unable to work because of sickness, injury or quarantine. To receive sickness benefits, employees are required to have worked for **600 hours** in the last 52 weeks or since their last claim. A medical certificate must be obtained to confirm the duration of your incapacity.

A person who makes a claim for sickness benefits is not only required to prove to be unable to work but also that he or she would be otherwise available for work.

CONFLICT OF INTEREST

A disclosure procedure will help to deal with potential conflicts of interests such as accepting gifts, volunteering or working part time.

If an employee wishes to work part time or volunteer at other organizations, they may be expected to advise their manager or supervisor prior to accepting a position to ensure no conflicts exist.

The employer may consider establishing the role of ombudsman or a “conflict committee,” perhaps including a past President who is no longer involved in the day-to-day operations but who knows the organization well and understands the issues. This committee provides an unbiased group who can deal with situations that arise.

An organization may put a limit on what types of gifts may be accepted; for example, allowing employees to accept gifts of up to \$25 in value and donating gifts with a higher value to the club or association's charity of choice.

On a regular basis, the employer may ask for feedback from athletes and parents. By doing this, you will start to see if there are any trends, including coaches who are not performing or acting with the level of integrity and fairness that you expect.

REIMBURSEMENT OF TRAINING

Recognizing the critical importance of educational development, we will assist employees who wish to obtain additional education or training in order to further increase competence in their present jobs. Employees will be reimbursed 100% of their tuition fees for courses approved by management. An application for reimbursement must be approved by your Manager prior to the start of the course. Approved courses will be reimbursed 50% at the time of registration and the remaining 50% upon proof of successfully completing the course.

MEMBERSHIPS AND PROFESSIONAL DUES

Professional dues for memberships that are a requirement of the job will be paid for by the organization upon presentation of an invoice from the applicable professional body. However, should the employee terminate employment within three months of these dues being paid, the employee will be required to reimburse the organization any paid professional dues and memberships on a pro-rated basis.



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