

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