



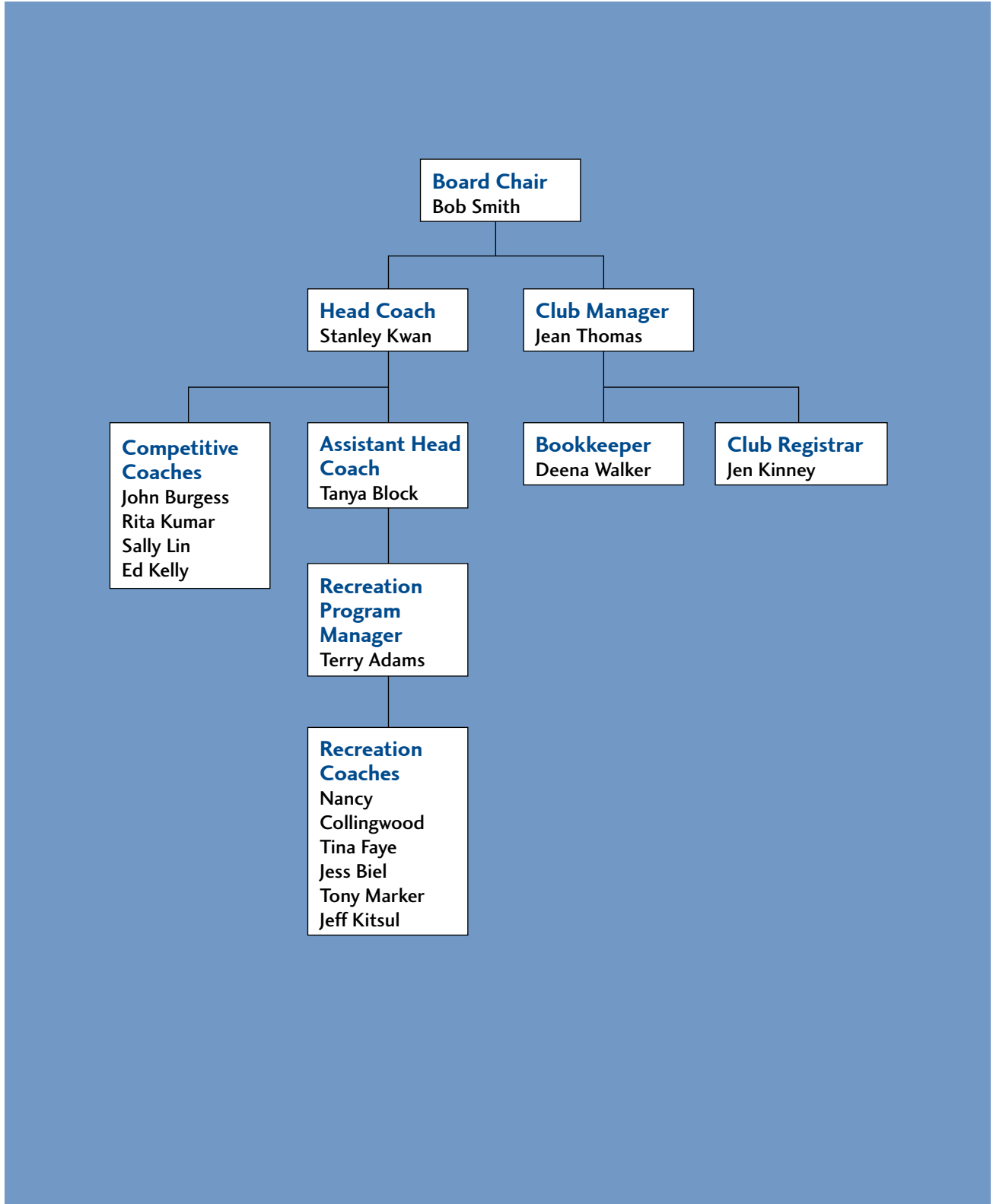
**HUMAN RESOURCES GUIDE
FOR COMMUNITY SPORT:
MANAGING EMPLOYEES**



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

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

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

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

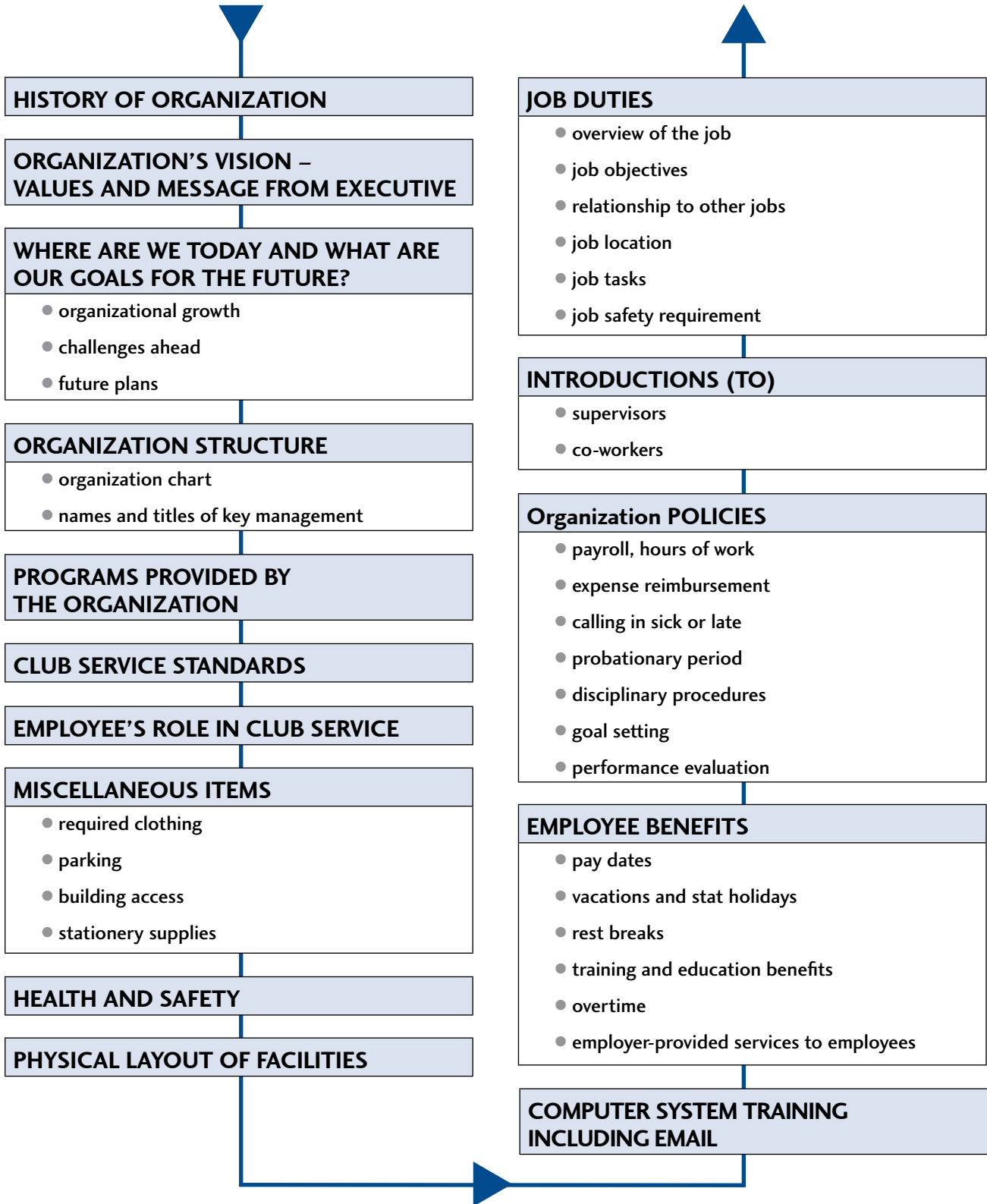
Schedule "A"

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

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

Performance Evaluation Cont'd

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 Development	Action Plan Development	Target for Development	Completed	Date

Manager's Comments (include any concerns or comments raised by the employee during the review and any solutions or suggestions made to resolve them.)

Employee's Comments:

Overall Performance Rating

- Outstanding
 Above Expected
 Fully Effective
 Satisfactory
 Improvement Required

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
- 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

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.

Cont'd

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

Cont'd

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 employer's 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.

Cont'd

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.



GET INVOLVED BE ACTIVE EXPLORE ARTS EMBRACE LEARNING INCLUDE EVERYONE

400-1095 WEST PENDER STREET VANCOUVER, BRITISH COLUMBIA V6E 2M6 WWW.2010LEGACIESNOW.COM