

POLICY MANUAL CHECKLIST

South East Sport, Culture & Recreation District

**HUMAN
RESOURCES
(STAFF AND
VOLUNTEER)**

Policy Manual Checklist

Human Resources (Staff and Volunteer)

This template policy manual includes samples of HR focused policies. Use the checklist on Page 4 to start building a policy manual for your organization.

Important notes

- You can't (or shouldn't) rely on these sample policies and procedures alone. They are a starting point, but you will have to adapt them.
- Most samples include both policies and procedures (the policies provide guidance on standards, while procedures give instructions on implementing standards). We recommend adopting policies at a board level, while procedures are developed/signed off by the Organization's CEO.
- We use the term 'board' to cover boards, committees of management, or any body that has final authority in your Organization. And, the term 'CEO' extends to executive directors, or your chief administrator.

Disclaimer: When developing policies and procedures for your own organization, it can be very beneficial to first review examples of these types of policies. Of course, your final version needs to reflect your board's actual practices, but it can be helpful to start with a pre-existing document for inspiration rather than beginning from a blank paper. Before implementing a new policy, have it reviewed by your organization's legal counsel for compliance with applicable federal and provincial laws. The samples provided here are for informational purposes only and do not constitute legal advice.

Type of Organization

	Board Governance	Staff, Administration & Operations
NEW	- Newly formed - Register as a non-profit with the ISC or created through municipal bylaw - Board being formed or relatively new	
TYPE 1 OPERATIONAL BOARD STRUCTURE	- The governance structure is operational. The board is responsible for all activities. - Vision and mission are clarified. - Observe fiduciary/ethical considerations as regulated by law	- No staff or limited part-time administrative assistance - Operating from a home or loaned office space arrangement - Assets are usually not significant.
TYPE 2 MOVING TOWARD A POLICY/GOVERNANCE BOARD STRUCTURE	- Board is still involved with operations but focusing on policy making and community leadership roles. - Committee are in place with the board. - Vision and mission are revised as needed. - Observe fiduciary/ethical considerations as regulated by law	- Staff in place, usually a full or part-time executive director, and some administrative, program and financial assistance - Office space is established in a rented or loaned space. - Assets are or are becoming significant.
TYPE 3 POLICY/GOVERNANCE BOARD STRUCTURE	- Board operates at as a governance board and is no longer involved in the day-to-day operations. - Vision and mission revised as needed. - Ensures administrative accountability including selection and hiring of CEO/Executive Director - Observe fiduciary/ethical considerations as regulated by law	- Have a full time CEO/Executive Director and specialized staff. - Office is well located, either leased or owned. - Administrative expenses are covered mainly by fees and operating income.

Adapted from the Community Foundations of Canada-Policy Guidelines and Template Manual

Use the checklist below to start building a policy manual for your organization. Review the type of organization you are above and check out the recommended policy areas below. Policies marked with x are ones you should likely make a priority. This is an extensive list but not exhaustive, spaces have been left for you to add additional policies to the list.

Human Resources (Staff and Volunteer)

Policy	New and Type 1	Type 2 and 3	Policy You Need (X)
CODE OF CONDUCT	x	x	
JOB DESCRIPTIONS	x	x	
CONFIDENTIALITY AND PRIVACY	x	x	
ORIENTATION/TRAINING POLICY	x	x	
ANTI-DISCRIMINATION POLICY		x	
CONFLICT RESOLUTION		x	
PROFESSIONAL DEVELOPMENT		x	
SAFETY AND OCCUPATIONAL HEALTH		x	
DRESS CODE POLICY		x	
DRUGS/ALCOHOL POLICY		x	
WORKPLACE DIVERSITY		x	
SUCCESSION PLANNING		x	
WHISTLE BLOWER POLICY		x	
VOLUNTEER POLICIES		x	
• VOLUNTEER RECRUITMENT (VOLUNTEER SCREENING)		x	
• VOLUNTEER RECOGNITION		x	
STAFF POLICIES		x	
• HIRING AND RECRUITMENT		x	
• STAFF RECOGNITION		x	
• OVERTIME POLICY		x	
• DISMISSAL AND TERMINATION		x	
• EMPLOYEE EVALUATION			
• VEHICLE USE POLICY			

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Conditions of Employment

Policy #	Policy Type: Human Resources
Approval date:	Policy Name:
Next Review date:	

The **Community** has two categories of staff: permanent and temporary. Permanent employees are those who are employed on a full time or part-time basis, who have been advised in writing that their probationary period is completed, and that their status has been changed to permanent. Temporary staff may be employed on a casual basis, on temporary government grants, or on a contract basis.

Upon the organization's acceptance of an applicant for employment, a letter will be given to the employee stating terms of employment, length of tenure (if applicable), hours of work, and conditions of termination. (Terms may be pre-determined and non- negotiable if an employee has been hired on a grant.) In the case of a temporary employee, Permanent Staff will sign this letter. In the case of a permanent employee, a representative of the Board will sign this letter. A copy of the job description and the Personnel Policy will accompany any letter to a permanent employee.

The final discretion for the hiring of temporary staff resides with the Permanent Staff who must ensure that the on-going operations of the co-op are served first.

Orientation:

All permanent and temporary staff shall be provided with the appropriate orientation and training. The training period may vary depending upon the nature of the position.

Vacations and Holidays:

Vacation for permanent employees shall be accrued at the rate of one and one-quarter days per month (3 weeks per year) for the first years of employment. Thereafter it shall accrue at the rate of one and two thirds' days per month (4 weeks per year).

Vacation times must be negotiated amongst all permanent staff and recorded in the minutes of the Board. Vacations may not conflict with the on-going operations of the **organization**. Scheduling of vacations shall be on the basis of seniority in the event of a scheduling conflict among employees. Vacations for temporary staff on government grants shall accrue as stipulated by the conditions of their grant.

All permanent employees are entitled to paid public holidays.

- New Year's Day
- Family Day
- Good Friday
- Victoria Day
- Canada Day
- Saskatchewan Civic Day
- Labour Day
- Thanksgiving
- Remembrance Day
- Christmas Day
- Boxing Day

Temporary employees will be paid for holidays occurring within their stipulated term of employment.

Sick Leave:

Permanent employees will accumulate paid sick leave at the rate of one day per month to a maximum of 12 working days. Sick leave beyond accumulated credits shall be unpaid unless a sick leave insurance plan is in effect. Payment in that case shall follow the directives of that plan.

The employee is to notify the Senior Staff or Board as soon as possible in the day if they are ill. If the employee is to be incapacitated for an extended period, the Senior Staff or Board must make alternate arrangements for the employee's work to be done.

Bereavement Leave:

Employees suffering the death of someone in the immediate family, or of a close friend, or some other pressing personal consideration, will be eligible for two paid, and up to three additional unpaid days of leave.

Discretionary Leave:

Permanent employees are entitled to five paid working days for leave within one year's time in the event of a dependant's illness. Dependant may be but does not have to be defined as a child.

Benefits:

Additional benefits will be added as they become feasible and may include dental and sickness and accident plans.

Overtime:

Overtime hours are to be worked only at the request of the Permanent Staff or Board, and they are to be compensated by equivalent time off. (check labour law)

Probationary Period:

Probation for new permanent employees shall be three months, at the end of which the employee shall receive a written evaluation from the Board. Employees may add written responses to their evaluation, which will remain a permanent part of their file. The Board with fifteen (15) days' notice may initiate dismissal of a permanent employee during the probationary period. The supervising permanent staff may initiate dismissal of a temporary employee with fifteen (15) days' notice.

Evaluations:

Performance evaluations will be conducted with all staff on a yearly basis. The Board of Directors will establish an ad hoc committee to conduct the performance evaluation of the Senior Staff Member. The Senior Staff Member shall have the responsibility for conducting an evaluation of all staff and volunteers within the operations of Community facilities and programs.

- All staff and volunteers shall be notified in advance of the date and time for the evaluation.
- Documentation of the evaluation shall be in written form.
- The evaluation process is an opportunity to involve two-way communication and mutual problem solving and to address areas for improvement.

Grievance Procedure:

Despite the best intentions to promote harmonious relations between Staff and Board, it is generally recognized that disputes might arise at any time, or that differences of interpretation of policy, job descriptions, or mandate might interfere with an employee's ability to perform his or her tasks efficiently. For this reason, the Board has initiated a grievance plan. It is hoped that most disputes can be settled simply and peaceably between the concerned parties, but it is further hoped that the grievance process will be initiated before any small dispute becomes a dangerous and destructive conflagration.

Should any party decide to proceed with a formal grievance, the following steps shall be observed: All complaints must be made in writing to the Board Chair. This person shall inform the other party of the complaint, and this party shall be given sufficient time to respond to the allegations. 'Grievance' shall mean any difference or dispute concerning the interpretation, application, administration, operation, or alleged violation of the contracts and/or personnel policy, or any conflict arising out of the work situation.

- **Step 1:** The grievance shall be discussed between the two parties within ten (10) days of its occurrence. All attempts should be made to arrive at a satisfactory solution.
- **Step 2:** A grievance committee shall be struck to consider the problem.

Each party to the dispute shall choose another person to represent and support them at the committee meeting. Either the President or designate shall serve as the Chair. The persons chosen should have a good understanding of artist-run film co-operatives, and they shall be expected to be sympathetic to the concerns of the employee who has chosen them. Their main duty, however, shall be to solve the dispute fairly, so they are expected additionally to give fair and just hearing to both sides of the complaint. This committee shall have ten (10) working days to solve the dispute.

Discipline and Termination:

A permanent employee shall only be disciplined and/or terminated for just cause (or in extenuating circumstances in the event of a major administrative restructuring). The burden of proving just cause shall lie with the Board. To express concern or dissatisfaction with an employee's work, the Board must report their concerns in writing to the employee. Dissatisfaction must be closely tied to the job description, violation of the personnel policy, or non-performance of agreed upon tasks. The employee may, upon receipt of the report, initiate a grievance procedure with the Board.

For just cause (e.g. failure to come to work, failure to complete agreed-upon tasks, etc.) an employee's service may be summarily terminated by notice in writing from the Board to the employee following the disciplinary procedure outlined above. For other than just cause (e.g. change in administrative structure, etc.), termination within the first year from date of hire shall be given one month's notice. During the second, and up to the fifth year, the employee shall receive two months' notice; thereafter, three months' notice.

In lieu of notice the employer shall pay the employee an equivalent amount to the salary, minus deductions, receivable by the employee during that period.

Resignation:

Resignation of an employee shall be by not less than one month's notice given in writing from the employee to the Board; such notice may be given at any time.

Contract Negotiations:

Employee contracts shall be negotiated annually one month prior to expiry. The employee shall make proposed changes to his or her contract in consultation with the Senior Staff Member, who shall consult with the **President and the Treasurer**.

Pay Increases:

Pay increases shall be reviewed annually, except in such cases as the job description alters materially during the year. Increases must be accommodated within the approved budget and cannot be expected to exceed a cost-of-living increase.

Layoff:

Layoffs shall only be initiated as an extreme measure in the event of significant budget reduction. Reduction in hours, programming or wages shall be considered before layoffs to ameliorate an emergency financial situation.

Professional Development:

Permanent employees are encouraged to pursue professional development through attendance at workshops, conferences, etc., the fees of which can only be borne when within the approved budget. The Staff and Board are encouraged to solicit outside funding or special grants, where applicable, to enable them to attend professional development courses.

Professional Conduct and Deportment:

Employees are expected to maintain high professional standards in the discharge of their duties for the Community. It is expected that matters relating to the business of the Community will be treated with the strictest confidence and that employees will always support the best interests of the Community as articulated in their job descriptions and in the Community's mandate and policies. Employees are expected to ensure that their work areas and personal grooming reflect positively on the reputation of the Community.

Review and Update:

The Board shall annually review, amend, and update the personnel policy to ensure that it reflects contemporary job titles and policies in place at that time.

Shift Changes

Policy #	Policy Type: Human Resources
Approval date:	Policy Name:
Next Review date:	

- Staff is required to work the shift they are scheduled for.
- A staff member requiring time off from a scheduled shift due to special circumstances will be required to give a minimum one week notice to the [Senior Staff Member](#).
- A shift change agreement such as changing shift with another staff member is to be completed prior to any shift changes.

Staff Schedules

Policy #	Policy Type: Human Resources
Approval date:	Policy Name:
Next Review date:	

Staff schedules will be developed in accordance with the weekly facility rental schedules and must be posted in the facility office weekly.

The Senior Staff Member has responsibility for implementation of this policy.

Dress Code

Policy #	Policy Type: Human Resources
Approval date:	Policy Name:
Next Review date:	

The shall ensure that all staff is clearly identifiable by having them wear uniforms while on duty.

This uniform may consist of a jacket and/or light duty coveralls. It is the responsibility of the employee to wash and repair these uniforms throughout their employment.

Uniforms will be replaced as required.

Staff is to always wear uniforms while on duty and should not be covered with any other type of clothing.

Staff Training and Development

<u>POLICY NUMBER</u>			<u>TITLE OF POLICY</u>
			Staff Training and Development
Approval	D/M/Y	Resolution #	
Amended			

Statement:

The (organization/town) is committed to the continuous education of its employees and supports ongoing employee training and development as an opportunity for improving the overall performance of the organization by preparing employees to meet current and future municipal needs.

Policy

The (organization/town) supports training that provides employees with the skill and knowledge to perform their current jobs and may prepare them for long term future employment opportunities with the Town. In addition, technical skill must be kept current and may be legislated by statute or required for certification standards.

Staff development may include formal education or courses, workshops, and educational conferences and seminars.

Employee Responsibilities:

Take the initiative in their own development by researching learning opportunities.

Ensure that approvals are obtained before registering for any course or development opportunity.

Maintain the professional and technical designations required by their position.

Furnish proof of successful completion of a training course (e.g. certificate, marks) to their supervisor for their employee record.

Town Responsibilities:

Provide reasonable opportunity, within available resources, for employees to enhance, develop or maintain their skill level.

Ensure that specific training and development activities identified as requirements for employees are met.

Ensure that budget planning includes requests for training and development as identified by department heads.

Support the employees while learning and integrating new skills into the workplace.

General Guidelines

Approved training must be relevant to the position currently occupied or to the Town as a whole.

Any cost related to the learning opportunity must be approved within the budget of the Town.

The costs of training may include fees, textbooks and other incidentals required for the program.

The Town will pay approved fees directly to the service provider(s) where feasible.

Travel and subsistence (if applicable) will be paid for each approved training session in accordance with the Travel and Expense Policy PE-15.

Professional Development Policy

Policy number	<<insert number>>	Version	<<insert number>>
Drafted by	<<insert name>>	Approved by Board on	<<insert date>>
Responsible person	<<insert name>>	Scheduled review date	<<insert date>>

Introduction

[Name of Organization] acknowledges that professional development is integral to personal job satisfaction, workplace productivity, reward, and recognition, and is critical to the achievement of the Organization's mission and continuous improvement in the quality of its programs and services.

[Name of Organization] is committed to providing a supportive and rewarding environment for employees and recognises that the quality, responsiveness, and professionalism of its workforce are linked to the further development of their skills and competencies.

[Name of Organization] is, as far as is feasible within its available resources, committed to providing employees with the opportunity to plan and develop skills, knowledge and attributes that complement Organizational and work unit goals.

The opportunity to participate in career development activities that extend and enhance their capabilities and capacity for advancement within the Organization.

Equity of access to professional development opportunities.

Purpose

This policy seeks to balance the needs of staff for professional development, the needs of the Organization for properly qualified staff, and the need to staff the Organization's services.

The purpose of this policy is to encourage and support employees in their professional and career development as part of their employment with the Organization; to provide administrative guidelines to facilitate fairness and equity in the application of these general principles.

Policy

1. Position-specific professional development

Where the CEO decides that it is necessary for a staff member to acquire a particular skill, to learn specific material, or to acquire specific qualifications in order for them to carry out the duties attached to their existing position, the Organization shall be fully responsible for all costs incurred in acquiring that skill, that learning, or that qualification, and the staff member shall, where necessary, be given permission to attend any such course within working hours.

It would normally be expected that any such requirements would have been considered in the drawing up of a position description and set out in the criteria for selection; it would thus seldom be the case

that continuing employees would be required to acquire new qualifications.

2. Non-position-specific professional development

In its performance review procedures, the Organization shall in every case encourage the person concerned to explore their available professional development options.

Where an employee wishes to pursue further education or training but the CEO has not required that person to acquire a particular skill, to learn specific material, or to acquire specific qualifications to carry out the duties attached to their existing position, the Organization shall endeavour to facilitate such education or training through permitting (at the discretion of the CEO, and taking into account the efficiency of the workplace) any rearrangement of working hours that would assist such development permitting (at the discretion of the CEO, and taking into account the efficiency of the workplace) any use by the person of the Organization's equipment or services that would assist in that development permitting (at the discretion of the CEO, and taking into account the efficiency of the workplace) any annual leave or unpaid leave arrangements that would assist in that development granting up to two days study leave as necessary to attend examinations.

Educational or training requirements involving reimbursement of fees or provision of paid study leave may also be negotiated as part of the contract of employment between the employee and the Organization.

Authorization

[Signature of Board Secretary]
[Date of approval by the Board]
[Name of Organization]

Family Friendly Policy

Policy number	<<insert number>>	Version	<<insert number>>
Drafted by	<<insert name>>	Approved by Board on	<<insert date>>
Responsible person	<<insert name>>	Scheduled review date	<<insert date>>

Introduction

[Name of Organization] is committed to helping its employees achieve their personal, family and relationship goals. As part of this endeavour, the Organization fosters flexibility in employment arrangements to achieve the optimum balance between work and family responsibilities for all employees.

Purpose

Work flexibility ensures that employees are able to balance work and family commitments while considering Organizational needs.

Policy

[Name of Organization] will mandate best practice employment arrangements in relation to

- Parental/maternity/paternity leave
- Personal/Carer's/Family leave
- Bereavement leave
- Flexible working arrangements

Staff are encouraged to voice their opinions about the availability, accessibility, and application of flexible work arrangements in their area.

Managers should

- become role models for flexibility, where possible accessing flexible work arrangements themselves.
- become knowledgeable about the range of flexibility options available and how to manage them.
- have the practical skills and confidence to lead a team with different working arrangements.
- track the career progression of staff who are working flexibly to ensure they have access to all training and other benefits and to ensure that they suffer no discrimination in opportunities for promotion.
- evaluate the outcomes of the arrangement and look for improvements; and
- seek appropriate training if lacking in any of the skills necessary to properly administer this program.

Documenting agreed family-friendly provisions enables both [Name of Organization] and its employees to have a clear understanding of the available provisions and how they can be accessed.

Acceptable use of Electronic Media Policy

Source: Policy Bank-Institute of Community Directors Australia, Retrieved April 8, 2021

Introduction

[Organization] recognises that Workers may need access to Electronic Media Systems and Associated Tools in order to successfully fulfill their role. In addition, [Organization] supports the right of Workers to have access to reasonable personal use of Electronic Media Systems and Associated Tools in the workplace.

Purpose

This policy sets out guidelines for acceptable use of Electronic Media Systems and Associated Tools by employees and volunteers of [Organization]. Access to Electronic Media Systems and Associated Tools is provided to [Organization] Workers and volunteers for the primary purpose of assisting them in carrying out the duties of their role.

Scope

3.1 This policy applies to the following, collectively referred to as ‘Workers’.

Employees	Directors	Officers	Contractors (including employees of contractors)	Volunteers
✓	✓	✓	✓	✓

Definitions

“Electronic Media Systems” includes, but is not limited to:

- Email
- Internet
- Intranet
- Voicemail
- Instant messaging and chat facilities, and
- Online discussion groups

“Associated Tools” refers to technology required to access the Electronic Media Systems such as:

- Phones
- Computers
- Tablets

Policy

Workers may use Electronic Media Systems and Associated Tools provided by [Organization] for:

- Any work-related purposes.
- Limited personal use (for details see Procedures, below).
- More extended personal use under specific circumstances (for details see Procedures, below).

Where Workers use Electronic Media Systems and Associated Tools belonging to or paid for by [Organization], whether on or off the premises (including when working remotely), properly authorised employees of [Organization] may access any of those tools or associated data to ensure that the Organization’s policies are being adhered to. Such Electronic Media Systems, Associated Tools and data should not be regarded as private in nature.

[Organization] may, at its discretion, monitor:

- Storage volumes.
- internet sites visited.
- downloaded volumes.
- suspected malicious viruses.
- [Optional] instant messaging.
- emails.
- computer hard drives.
- [Add or delete as appropriate].

Company equipment & property

All Electronic Media Systems and Associated Tools such as phones and laptops supplied by [Organization] to the Worker remains the property of [Organization] and must be maintained in good working order, subject to reasonable wear and tear.

[Organization] may, at its discretion, provide Workers with Associated Tools to perform their role, and may install programs or software to track the location and use of that tool. Such programs or software must not be removed from the Associated Tool by the Worker without prior written approval from [Organization].

[Organization] reserves the right to monitor use of its I.T. equipment at all times, including during any remote working arrangement.

Responsibilities

- It is the responsibility of the **CEO** to ensure that:
- Workers are aware of this policy.
- any breaches of this policy are dealt with appropriately.

It is the responsibility of all **Workers** to ensure that their use of Electronic Media Systems and Associated Tools conforms to this policy. Workers are expected to be respectful and professional in all communications using [Organization]'s Electronic Media Systems and Associated Tools.

Primary purpose

Access to Electronic Media Systems and Associated Tools is provided by [Organization] for the primary purpose of carrying out the tasks and duties associated with a particular role.

Limited personal use

Workers may engage in limited personal use of Electronic Media Systems and associated tools, whether or not they are provided by [Organization], in connection with work where it:

- Is infrequent and brief;
- Does not interfere with the duties of the Worker or his/her colleagues;
- Does not interfere with the operation of [Organization];
- Does not compromise the security of [Organization] or of its systems;
- Does not compromise the reputation or public image of [Organization];
- Does not impact on the electronic storage capacity of [Organization];
- Does not decrease network performance (e.g. large email attachments can decrease system performance and potentially cause system outages);
- Corresponds to the procedures outlined in the [Email Retention and Archiving Policy](#);
- Conforms to the practices for file management and storage outlined in the [Technology Procedures Manual](#);
- Incurs no additional expense for [Organization];
- Violates no laws;
- Does not compromise any of the confidentiality requirements of [Organization];
- Does not fall under any of the “unacceptable use” clauses outlined below.

Examples of what would be considered reasonable personal use are:

- Conducting a brief online banking transaction, or paying a bill;
- Checking social media during lunchtime.
- Sending a brief personal email or text or making a brief personal phone call.

Permitted extended personal use

There may be times when Workers need to use the internet or email for extended personal use. An example of this could be when a Workers member needs to use the internet to access a considerable amount of material related to a course they are undertaking. In these situations, it is expected that:

- The Workers member advises and negotiate this use with their manager beforehand in order to obtain the manager's approval.
- The time spent on the internet replaces all or part of a Workers member's break/s for that day, or that they adjust their timesheet accordingly for that day.

Access to electronic data

[Organization] may need to access any and all Electronic Media Systems and Associated Tools.

[Organization] may authorise particular Workers to inspect any files or messages recorded on its electronic media at any time for any reason. [Organization] may also recover information that a user has attempted to delete, and Workers should not assume that such data will be treated as confidential.

Unacceptable use

Workers may not use Electronic Media Systems and Associated Tools provided by [Organization] to:

- Create or exchange messages that are offensive, harassing, obscene or threatening;
- Visit websites containing objectionable (including pornographic) or criminal material;
- Exchange any confidential or sensitive information held by [Organization] (unless in the authorised course of their duties);
- Create, store or exchange information in violation of copyright laws (including the uploading or downloading of commercial software, games, music, or movies);
- Undertake internet-enabled gambling or gaming activities;
- Conduct a business or side-project;
- Conduct any illegal activities;
- Conduct any activities that are not in line with [Organization]'s values;
- Create or exchange advertisements, solicitations, chain letters or other unsolicited or bulk email.
- Play games.

Security

Workers must ensure that when not in use, Associated Tools are locked and stored securely. For security reasons, tools should not be left unlocked or unattended in public for any reason. Workers must not leave Associated Tools in a locked vehicle unless [Organization] has provided prior written approval for this to occur.

Breach of this policy

Any breach of this policy may result in disciplinary action up to the immediate termination of a Worker's engagement or employment.

Other disciplinary action that may be taken includes, but is not limited to, issuing a warning, suspension or disconnection of access to internet, email and computer use (whether permanently or on a temporary basis), and withdrawal of access to and use of Associated Tools.

Above and beyond provisions

Below is a list of provisions that go beyond the minimum and thus may help your Organization move into "Employer of Choice" territory. Consider if any of these might be appropriate for your Organization.

Delete or include these provisions as appropriate for your Organization.

- Who will be responsible for loss, damage or theft of associated tools?
- Will you pay telecommunication bills?
- Will you pay for online subscriptions?
- Will you allow personal use of online tools for non-work purposes?

Performance Review Policy

Reference: Policy Bank-Institute of Community Directors Australia

Policy number	<<insert number>>	Version	<<insert number>>
Drafted by	<<insert name>>	Approved by Board on	<<insert date>>
Responsible person	<<insert name>>	Scheduled review date	<<insert date>>

Introduction

[Name of Organization]'s Annual Performance Review process has been designed to provide a vital link between the Organization's Business Plan, its vision and guiding principles, and individual staff members. It is also designed to ensure that goals and objectives flow from the top of the Organization to the personal objectives of each individual. It is integral to fostering an engaged and productive workforce, recognizing, and rewarding good performance, and managing underperformance.

This Policy applies to permanent and part-time paid employees only. If requested, volunteer workers can participate in and have access to an annual review in order to obtain feedback regarding their position and performance.

Purpose

The purpose of this policy is to ensure that a consistent approach is followed for conducting Annual Performance Reviews, and that job-related skill and knowledge, and employee competencies and behaviours, are evaluated and compared against set standards and business objectives.

Policy

During the first month of an employee's commencement in a role, Managers will work with the employee to develop a Performance Plan which will be updated during the Financial Year Period. The Performance Plan will outline the employee's goals and objectives for a 12-month period in line with the Organization's Business Plan.

Similarly, a Development Plan will outline the individual's development priorities for the following 12-month period, as well as reviewing any for the previous 12 months. Consideration should also be given to the individual's long-term career objectives.

Managers will conduct a formal Annual Performance Review with each employee within the first six weeks of the new financial year for the review period from 1st July to 30th June of the previous financial year (or specified period or time frame). Progress reviews may be conducted on an informal basis more frequently throughout the financial year.

Periodic assessment and discussion of performance will be carried out throughout the course of the review period between Managers and each of their employees on an "as needed" basis.

Authorisation

<Signature of Board Secretary>

<Date of approval by the Board>

<Name of Organization>

Employee Performance Evaluation

<u>POLICY NUMBER</u>			<u>TITLE OF POLICY</u>
PE-04			Employee Performance Evaluations
Approval	D/M/Y	Resolution #	
Amended			

STATEMENT:

The (organization/town) requires a policy to formalize a process for conducting employee performance evaluations and addressing evaluation appeals.

Policy

All (organization/town) permanent full-time or permanent part-time employees shall be subject to performance evaluation reviews in order to measure on-the-job performance and to indicate future direction for the employee.

The performance evaluation review shall be completed within six (6) months after hire and annually thereafter. More frequent reviews may be required as determined by the Chief Administrative Officer.

The Employee has a right to appeal his/her review and shall do so in writing within ten (10) days of the completed evaluation, substantiating their reasons for appeal of the evaluation.

Council as a Whole shall form the Appeal Committee and will require a minimum of 4 members to form a quorum to hear any appeals.

The Performance Evaluation Form is attached

- END OF POLICY-

Employee Performance Evaluation

Employee Information					
Employee Name:				Date:	
Position:				Period of Review:	
Reviewer:				Reviewers Title:	
Performance Evaluation	Excellent	Good	Fair	Poor	Comments
Job Knowledge					
Productivity					
Work Quality					
Technical Skills					
Work Consistency					
Enthusiasm					
Cooperation					
Attitude					
Initiative					
Work Relations					
Creativity					
Punctuality					
Attendance					
Dependability					
Communication Skills					
Overall Rating					

Opportunities for Development:

Reviewers Comments:

By signing this form, you confirm that you have discussed this review in detail with your supervisor. Signing this form does not necessarily indicate that you agree with this performance evaluation.

Employee Signature

Date

Reviewers Signature

Date

Staff Conflict of Interest Policy

Reference: Policy Bank-Institute of Community Directors Australia

Policy number	<<insert number>>	Version	<<insert number>>
Drafted by	<<insert name>>	Approved by Board on	<<insert date>>
Responsible person	<<insert name>>	Scheduled review date	<<insert date>>

Introduction

When working for [Name of Organization], employees and volunteers should place the Organization's interests before any private interests they may have and should be seen to do so. Conflicts of interest, and the perception of conflict of interest, should be avoided.

For this reason, where an employee or volunteer may be seen as having a financial interest in any decision such that it raises the possibility that the employee or volunteer might be influenced by that financial interest, this interest must be notified to the supervisor of the employee or volunteer. The supervisor may issue instructions to the employee or volunteer regarding relevant workplace matters.

Where an employee or volunteer is in a relationship with any other person working or volunteering in or having dealings with the Organization, that relationship must be disclosed to the supervisor of the employee or volunteer where that relationship may cause or be construed to cause a conflict of interest. That supervisor may issue instructions to the employee or volunteer regarding relevant workplace matters.

Purpose

This policy has been developed to provide a framework for:

- all employees or volunteers in declaring conflicts of interest; and
- the CEO, when determining procedures to deal with situations of possible conflicts of interest.

Policy

A conflict of interest may occur if an interest or relationship influences or appears to influence the ability of the Organization's employees or volunteers to exercise objectivity.

[Name of Organization] places great importance on making clear any existing or potential conflicts of interest. Employees and volunteers must declare to their supervisor all such conflicts of interest, and the supervisor may issue instructions to the employee or volunteer regarding relevant workplace matters.

Authorization

[Signature of Board Secretary]
[Date of approval by the Board]
[Name of Organization]

Conflict of Interest Procedures

Source: Policy Bank-Institute of Community Directors Australia, Retrieved April 8, 2021

Procedures number	<<insert number>>	Version	<<insert number>>
Drafted by	<<insert name>>	Approved by CEO on	<<insert date>>
Responsible person	<<insert name>>	Scheduled review date	<<insert date>>

Responsibilities

The [CEO] is responsible for bringing this policy to the attention of employees and volunteers.

Employees and volunteers are responsible for complying with this policy.

Procedures

Where an employee or volunteer may be seen as having a financial interest in any decision such that it raises the possibility that the employee or volunteer might be influenced by that interest, the employee or volunteer must notify this interest to their supervisor. The supervisor may issue instructions to the employee or volunteer regarding relevant workplace matters.

Where an employee or volunteer is in a relationship with any other person working or volunteering in or having dealings with the Organization, that relationship must be disclosed to the supervisor of the employee or volunteer where that relationship may cause or be construed to cause a conflict of interest. That supervisor may issue instructions to the employee or volunteer regarding relevant workplace matters.

Any such disclosures to supervisors shall be held confidentially and may not be taken into account in any employment context other than the avoidance of conflicts of interest.

Authorization

[Signature of CEO]
[Name of CEO]
[Date]

Confidentiality

Source: SaskCulture HR Manual Sample, Retrieved April 8, 2021

Intent

(organization name) expects the highest standards of confidentiality to be maintained by staff, volunteers not only in regard to matters relating to (...) but also in all board, committee, staff, volunteer and member business.

Requirements

Staff will observe all appropriate related policies and established lines of communication. Related policies include the Code of Conduct (GP-10) and **Conflict of Interest (Policy GP-11)**, which are part of the (organization name) governance policies.

Staff will not divulge personal information regarding employees, Board of Directors and committees, both volunteer and paid, applicants, or service providers except as required by law or as authorized.

Confidentiality extends to past employees and volunteers as well as member organizations or organizations/individuals receiving and/or applying for funding or participating in programs offered by (organization name).

All breaches of confidentiality are grounds for dismissal. Breaches of this policy after separation may lead to legal action.

Personnel Records

Source: SaskCulture HR Manual Sample, Retrieved April 8, 2021

Intent

Personnel records are sensitive information, and appropriate measures will be taken to ensure the integrity and confidentiality of individual files.

At the same time, personnel records are a valuable tool in managing (organization) human resources and need to be comprehensive and accurate.

Requirements

There will be only one official personnel record for each employee, and this record will be kept in a secure area.

The personnel record will contain the following:

- material relating to recruitment including, documentation submitted by the employee, through application, offer of employment, and acceptance,
- job description (current noting any revisions),
- salary scale and current salary,
- reference checks conducted prior to hiring,
- performance reviews signed by the employee.
- any letters of commendation,
- any letters of discipline,
- copies of any correspondence from the employee or concerning the employee,
- basic personal data required to administer benefit plans, payroll, etc., and
- other material relevant to terms of employment and job performance.

All issues relating to performance, including probation records shall be filed, in writing, in the employee's personnel file.

With the exception of confidential references, the file is accessible to the employee upon reasonable notice.

Except as authorized by law, or for the purposes of internal administration of payroll and benefits, no information will be released from the file without the expressed written permission of the employee.

Access to the file is limited to the General Manager, Assistant General Manager, Administration Manager, the individual employee, and other employees as deemed necessary to manage the Human Resources function.

Storage of files on the local area computer network will recognize security and confidentiality needs.

Job Description Policy

<u>POLICY NUMBER</u>			<u>TITLE OF POLICY</u>
PE-08			Job Descriptions
Approval	D/M/Y	Resolution #	
Approved			
Amended			

Statement:

The (town/organization) requires a policy to formalize a process for providing a detailed position outline for each employee/volunteer of the (town/organization)

Policy:

The (municipal administrator/executive director) is authorized by (council/board of directors) to develop detailed Job Descriptions for the following positions:

List positions

Job Description Sample #2

Source: SaskCulture HR Manual Sample, Retrieved April 8, 2021

Intent

A job description for each staff position provided for the efficient operation of (organization name) by identifying the expectations of staff, volunteer performance, required qualifications and/or experience, and how the position impacts on the mandate of the organization.

Requirements

Job descriptions shall meet the current needs of the organization as reflected in the annual operating plan of (organization name). Staff with supervisory responsibilities will review the job descriptions of their staff at least once a year in conjunction with the staff person as part of the annual performance review.

Recommendations to revise a job description will be made to the General Manager, who has final responsibility for the content of all job descriptions.

A comprehensive review of all job descriptions will be conducted every three years in conjunction with a review of salary scales.

Job descriptions are intended to reflect the needs of the organization, not abilities and qualifications of the individual filling the position, and will include the following:

- Typical duties, tasks, and responsibilities of the position,
- Expected outcomes associated with the position,
- Minimum skills/experience required to do the job,
- Degree of accountability and responsibility as articulated in the Key Core Competencies and Job Specific Competencies for each position.

Duties assigned to any staff will be consistent with, but not limited to those outlined in the job description.

Job descriptions can be made public.

Job descriptions for all positions are provided in Appendix 3.

Criminal Record Checks

Each position in the organization will be assessed to determine if a criminal record check is required. Criteria may include positions:

- with responsibility for public money (financial officers, staff who accept or handle cash),
- with access to modify information technology systems,
- working with third-party organizations that require criminal record checks (programming staff who may be working in a partnership agreement with schools, day cares or senior centres); or
- with other special circumstances, on a case-by-case basis.

Workplace Health and Safety Policy

Reference: Policy Bank-Institute of Community Directors Australia

Policy number	[insert number]	Version	[insert number]
Drafted by	[insert name]	Approved by Board	[insert date]
Responsible person	[insert name]	on Scheduled review	[insert date]
		date	

Introduction

[Name of Organization] is committed to safeguarding the health, safety and welfare of all people who interact with the Organization and complying with its occupational health and safety obligations.

Purpose

[Name of Organization] recognises that workplace health and safety is integral to achieving excellence in [education, service provision etc.] and work performance outcomes. The purpose of this policy is to, as far as reasonably practicable:

- prevent workplace injuries and illnesses
- promote a safe and healthy workplace culture
- provide a framework for consulting, collaborating, and communicating with workers and health and safety representatives
- consider workplace health and safety in project planning and work activities
- allocate adequate resources to prevent health and safety risks and promote a safe and healthy workplace
- ensure that workers understand their rights and responsibilities, and can identify and control risks in the workplace
- drive continuous improvement in workplace health and safety.

Scope

This policy applies to the following, together referred to as **'workers'**:

Employees	Directors	Officers	Contractors (including employees of contractors)	Volunteers	Suppliers	Consultants
✓	✓	✓	✓	✓	✓	✓

Definitions

1. In this policy, **'workplace'** means places where people work in connection with [Name of

[Organization], whether on-site or off-site, including work-related conferences, functions, client events, retreats and social events.

2. **'Occupational violence'** refers to any incident where a person is physically attacked, abused, assaulted or threatened in the workplace.

Commitment to workplace health and safety

1. [Name of Organization] aims to safeguard the rights of all people to work in an environment that is safe and does not pose risks to health.
2. [Name of Organization] is committed to working in partnership with all workers to identify and address workplace health and safety issues. It encourages the formation of work groups and the appointment of health and safety representatives to represent employees on health and safety matters.
3. [Name of Organization] is committed to continuously improving its workplace health and safety practices through the ongoing development of systems and processes to:
 4. identify, assess and control workplace hazards
 5. reduce the incidence and cost of occupational injury and illness
 6. provide a rehabilitation system for those affected by occupational injury or illness.
7. [Name of Organization] is committed to ensuring all workers are free from bullying and occupational violence in the workplace.

Workplace Health and Safety Committee and representatives

1. Where a Workplace Health and Safety Committee is required by legislation, or where the [CEO/Management] otherwise deems it necessary, [Name of Organization] will establish a Workplace Health and Safety Committee in accordance with the applicable legislation.
2. Any Workplace Health and Safety Committee will meet at least quarterly. An agenda will be circulated by the head of the committee before the meeting. A designated note-taker will take minutes of the meeting.
3. Where required by law, or where deemed necessary, designated work groups shall each elect a workplace health and safety representative as their elected spokesperson. Representatives are encouraged to work with management to discuss workplace health and safety issues, and to work with management to improve health and safety standards.
4. Where the Organization is not required to establish a Workplace Health and Safety Committee, and does not otherwise establish such a committee, [Name of Organization] may conduct regular health and safety forums.

Responsibilities [delete/amend as appropriate]

The **CEO and other executive officers** will:

1. demonstrate a commitment to providing and maintaining a safe and healthy workplace
2. consult with workers about, and participate in, [name of Organization]'s workplace health and safety program
3. use risk identification, assessment and control principles to reach [name of Organization]'s health and safety objectives
4. ensure that all workers receive appropriate [training/information] on the policy and related

procedures, and on their obligations under occupational health and safety laws.

The Human Resources Department will:

1. demonstrate a commitment to providing and maintaining a safe and healthy workplace
2. ensure that all staff receive appropriate [training/information] on the policy and related procedures, and on their obligations under occupational health and safety laws.

The Workplace Health and Safety Coordinator will:

1. demonstrate a commitment to providing and maintaining a safe and healthy workplace
2. coordinate the identification, development, implementation and review of workplace health and safety policies and procedures
3. assist supervisors/managers to identify, assess and select measures to control hazards and risks to health and safety
4. assist supervisors/managers to monitor and evaluate hazard- and risk-control measures
5. assist supervisors/managers to identify, develop and provide appropriate workplace health and safety-related information, instruction and training
6. monitor and advise on legislative and technical changes relating to workplace health and safety
7. monitor and provide regular reports to the CEO and the Health and Safety Committee on [name of Organization]'s workplace health and safety performance
8. help employees and health and safety representatives to follow policies and safe work procedures.

The **Workplace Health and Safety Coordinator** is responsible for coordinating management of health and safety on behalf of the CEO. The Workplace Health and Safety Coordinator does not assume the responsibilities of supervisors/managers.

Supervisors/managers will:

1. demonstrate a commitment to providing and maintaining a safe and healthy workplace
2. review relevant workplace health and safety legislation to determine whether a Workplace Health and Safety Committee is required for the workplace and/or at any particular site
3. consult with workers about, and participate in, [name of Organization]'s workplace health and safety program
4. use risk identification, assessment and control principles to achieve [name of Organization]'s workplace health and safety objectives
5. provide [information/training] to workers on relevant policies, procedures and workplace health and safety obligations.

Employees and volunteers will:

1. demonstrate a commitment to providing and maintaining a safe and healthy workplace
2. participate in workplace health and safety training, actions and activities and support [name of

Organization in its efforts to achieve its workplace health and safety and, where relevant, rehabilitation objectives

3. follow lawful and reasonable workplace health and safety instructions from managers or supervisors
4. report any serious incidents, accidents, injuries or hazards in the workplace to supervisors or designated representatives
5. work in a way that does not endanger the health or safety of themselves or others
6. properly use and maintain safety equipment
7. make sure visitors follow safety rules in the workplace.

Contractors of, visitors to and volunteers of [name of Organization] will:

1. demonstrate a commitment to providing and maintaining a safe and healthy workplace
2. follow lawful and reasonable workplace health and safety instructions from [name of Organization]
3. report any serious incidents, accidents, injuries or hazards in the workplace to [name of Organization]
4. assess risks to their health and safety arising from the provision of [their services etc]
5. have control measures in place to address those risks, including complying with any relevant policies and practices.

The role of the Workplace Health and Safety Committee is to:

1. assist in developing, monitoring and reviewing health and safety policies and procedures
2. consider any proposed or actual changes to the workplace, policies, work practices or procedures which may affect the health and safety of workers
3. promote the importance of health and safety among workers
4. monitor [name of Organization]'s health and safety performance
5. monitor the rehabilitation of injured workers
6. assist in the resolution of health and safety disputes.

The role of health and safety representatives is to:

- represent employees from their work group in relation to workplace health and safety matters
- investigate health- and safety-related complaints before making representations to management
- make representations to management and report back to employees on any matter relating to workplace health and safety
- discuss with the employees any proposals or matters which may affect the health and safety of employees
- assist management in identifying hazards, assessing risks and implementing risk control measures
- assist in promoting adherence to health and safety policies and procedures
- assist in the monitoring of risk controls and health and safety policies and procedures.

Breaches

[name of Organization] takes its health and safety obligations seriously.

Any breach of this policy or associated workplace health and safety procedures may result in disciplinary action, which may include counselling, dismissal, or cessation of the person's engagement with [name of Organization].

First aid

A first aid kit is located at [insert location].

The qualified first aid officers at [name of Organization] are [insert individuals' names].

Emergency contact

It is important that [name of Organization] has details of the person/s whom each employee would wish to be notified in the event of any emergency at work. Details will be noted in each employee's personnel file. Employees should notify human resources of any changes.

Workers' compensation

Any worker who is injured at work should report the incident to their supervisor as soon as possible and consider whether to submit a worker's compensation claim.

Rehabilitation

[Name of Organization] is committed to facilitating the return to work of employees as soon as practicable after a work-related incident or illness.

Early return to work should be a normal expectation in this process. Where appropriate, rehabilitation programs will be individually developed by [name of Organization]'s rehabilitation co-ordinator in consultation with the employee, supervisor, provider and any other relevant party.

Hazard reporting

Reporting hazards helps prevent accidents from occurring. Any worker who sees a hazard in their work area must report it to their line manager or safety representative immediately in line with the Workplace Health and Safety Procedures.

Application to the workplace

This policy applies to any location where duties are performed (i.e. any workplace), as outlined earlier at 4.1.

Review

[Name of Organization]'s Workplace Health and Safety Policy and Procedures will be reviewed at least every [one/two] years. The review will involve assessing the effectiveness of the policy and procedures by (among other things):

- reviewing overall health and safety performance
- ensuring continued compliance with the relevant legislation.

Above and beyond provisions

Below is a list of provisions that go beyond the minimum and may help your Organization move into “employer of choice” territory. Consider whether any of these might be appropriate for your Organization. For example:

1. [name of Organization] is committed to ensuring its safety procedures exceed minimum statutory requirements.
2. [name of Organization] will provide the following additional benefits to help ensure a safe system of work:
 - a. Mental health days in accordance with its policies and procedures
 - b. Access to counselling via a dedicated employee assistance program
 - c. Access to workplace health and safety webinars, apps and resources
 - d. Fostering a people-oriented Organizational culture through supportive management.

Legislation and industrial instruments

Workplace health and safety laws do not operate in isolation, and other laws also regulate the conduct of employees and other stakeholders in the workplace. All officers, employees, contractors, suppliers and volunteers must observe and comply with all laws that relate to their engagement, including, but not limited to:

- Occupational health and safety laws that operate in each state and territory
- Workers' compensation legislation that operates in each state and territory
- Anti-discrimination laws (each Australian jurisdiction regulates discrimination on the basis of certain protected attributes including sex, race and age)
- Employment laws (including measures to address bullying at work under the Fair Work Act 2009).

This policy and associated procedures are not intended to override any industrial instrument, contract, award or legislation.

Workplace Health and Safety Procedures

Procedure number	[insert number]	Version	[insert number]
Drafted by	[insert name]	Approved on	[insert date]
Authorised person	[insert name]	Scheduled review date	[insert date]

Procedures

1. This procedure outlines the process that [Name of Organization] and its workers should use to raise workplace health and safety concerns, and how [Name of Organization] will respond.
2. Detailed work health and safety procedures are set out in [Name of Organization]'s

[Workplace Health and Safety Manual].

3. The Workplace Health and Safety Policy and related procedures will be displayed in the workplace and all employees and volunteers will be provided with a copy by their supervisor/manager. New employees/volunteers will be provided with a copy of the documents as part of their induction.

Emergency evacuation

1. Fires, bomb threats, gas leaks etc. are risks in all workplaces. [Name of Organization] will provide workers with information on emergency evacuation procedures.
2. It is imperative that all workers are aware of the procedures to follow in the event that evacuation is required.

Reporting

If a worker identifies:

- a workplace health or safety incident, accident, injury or hazard, including a near miss
- any non-compliance with [Name of Organization]'s Workplace Health and Safety Policy or Procedures, they must report it to their [manager] as soon as possible.

Where a hazard or near miss is identified and/or reported, the [worker] must submit an [incident report] to their supervisor/manager, who will work with the worker and the Workplace Health and Safety Coordinator to:

- identify, assess and select measures to control hazards and risks to health and safety
- monitor and evaluate hazard- and risk-control measures.

Incident reports are available [at/from] [insert location/person].

Workers' compensation

If an employee develops an illness or injury in connection with work, they should report the incident to their supervisor as soon as possible and consider whether to submit a worker's compensation claim.

Note: If the Workplace Health and Safety Policy has been separated from its related Procedures, copy and paste here the information under '17. Related Documents' and '18. Legislation & Industrial Instruments'.

Volunteer Screening Policy

Organization name is committed to creating an effective employee and volunteer screening process in order to protect its participants, volunteers, staff, resources and reputation.

Organization name, therefore, has a responsibility to screen, appropriately to the position, any person who is working, volunteering or acting on the Centre's behalf. As ABC's volunteers and staff may have access to vulnerable people, this responsibility is particularly important.

Definitions

Participants will be the common term used to refer to clients, learners, students and all other program participants throughout this policy.

Duty of Care is a legal principle that identifies the legal obligations of individuals and organizations to take reasonable measures to care for and protect their participants.

Vulnerable people are those who, because of age, disability, or other circumstances, are in a position of dependence on others or are otherwise at a greater risk than the general population of being harmed, by a person in a position of authority or trust relative to them. This includes children, youth, senior citizens, people with physical, developmental, social, emotional or other disabilities as well as people who are victims of crime or harm.

Directives

1. All volunteers, who apply for positions that provide direct service to participants, will go through a screening process that will help to ensure their suitability for the position and the safety of any vulnerable clients with whom they may have access.
2. Volunteers, who wish to provide support to Organization name that does not involve direct access to vulnerable participants, will be screened according to the type of position.
3. During the volunteer screening process, Organization name collects personal information from Police records checks and from other sources. This information will:
 - a. Be used only for the purposes for which it was collected
 - b. Be kept confidential and only disclosed to those who make decisions about hiring or refusing potential volunteers
 - c. Not be provided to any other person or organization without the specific approval of the applicant
4. Organization name will establish a risk-management committee that will conduct risk assessments on all volunteer positions. Job descriptions for each volunteer position will determine the type and intensity of screening required relative to the risk as per the chart below.

Volunteer Screening Process by Position Risk Level

Low Risk Position: 1. Application 2. Interview 3. Monitoring	Medium Risk Position: 1. Application 2. Interview 3. References 4. Supervision	High Risk Position: 1. Application 2. Interview 3. Police Records Check 4. References 5. Supervision
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When you are developing Volunteer Screening policies and procedures, a good place to start is Volunteer Canada's screening webpage (<https://volunteer.ca/screening>). A "must have" is the *The Screening Handbook* that can be downloaded from the list of resources at the bottom of their webpage.

Volunteer Management Policy

Reference: Policy Bank-Institute of Community Directors Australia

Policy number	<<insert number>>	Version	<<insert number>>
Drafted by	<<insert name>>	Approved by Board on	<<insert date>>
Responsible person	<<insert name>>	Scheduled review date	<<insert date>>

Introduction

[Name of Organization] relies heavily on the unpaid work of volunteers and values their contribution highly.

Purpose

This policy is intended to ensure that volunteers working at [Name of Organization] have work that is safe, significant, fulfilling, and appreciated.

Policy

All volunteers shall be treated with respect and gratitude for their contribution.

Volunteers shall carry out duties assigned by the management of [Name of Organization].

Authorisation

[Signature of Board Secretary]

[Date of approval by the Board]

[Name of Organization]

Volunteer Management Procedures

Procedures number	<<insert number>>	Version	<<insert number>>
Drafted by	<<insert name>>	Approved by CEO on	<<insert date>>
Responsible person	<<insert name>>	Scheduled review date	<<insert date>>

Responsibilities

It is the responsibility of the CEO of [Name of Organization] to appoint a Volunteer Coordinator.

The Volunteer Coordinator shall be responsible for organising the recruitment, training, and supervision of volunteers. The Volunteer Coordinator shall report to the CEO.

The Volunteer Coordinator shall assign supervisors to volunteers and shall monitor the work of the supervisor.

The appointed supervisor shall ensure that each volunteer is trained and capable of fulfilling their functions adequately.

The CEO shall report to the board regularly on the [Name of Organization] volunteer program.

Procedures

Recruitment

All volunteers are subject to the screening procedures set out in the appropriate section of [Name of Organization]'s Recruitment Policy.

Recruitment of volunteers shall also take into account [Name of Organization]'s commitment to cultural diversity under its Access and Equity Policy.

Induction

All volunteers shall be offered appropriate information and training to discharge their functions, and successful completion of this training shall be a condition of carrying out these functions.

Supervision

All volunteers shall receive appropriate supervision in the exercise of their functions.

Reimbursement

All volunteers shall be reimbursed for all pre-approved expenditure incurred in the exercise of their functions, as set out in [Name of Organization]'s Reimbursement of Expenses Policy.

Authorisation

[Signature of CEO]

[Name of CEO]

[Date]

Volunteer Satisfaction Survey

Surveying your volunteers is a practical and common-sense way of gaining feedback from those who have taken part in a volunteer-based partnership activity.

Feedback from surveys like these can be used not only to gauge reaction to certain aspects of the activity undertaken, but also to cater better for volunteers' needs and wants the next time an activity is planned.

The following is a sample survey. It can, of course, be varied to suit more specific volunteering tasks, but it provides a general guide to the sort of questions and comments you should ask of volunteers.

Remember to:

- Encourage the prompt return of the surveys.
- Stress to volunteers their responses to the survey will remain confidential and that they don't have to put a name to the survey if they do not wish.
- Encourage volunteers to answer as many questions as they want but say they don't have to answer them all.

SAMPLE SURVEY

Following the recent volunteer activity, you helped with, we would like you to take a few minutes to fill in as many questions contained in this survey as you can.

Your responses will remain confidential. We will study your responses, as well as those of other volunteers, to see if there are any ways in which we can improve the next volunteer activity we organise as part of our partnership.

Thank you for your time.

- Name (optional): _____
- How many times have you volunteered? _____
- Are you planning to volunteer again in the future? _____

- Why did you volunteer? _____

Training

- Was there any training needed for your volunteer role?

- If so, what sort of training was needed, and how many hours of training did you receive?

- Was this on-the-job training or a special training session?

- Was the training you received (Please circle one):
Excellent/Good/Fair/Poor/Received none
- Did your training prepare you for your volunteer role? (Please circle one):
Very well/Somewhat/Didn't relate/Received none
- If you have comments you'd like to share, please include them below.

Supervision

- Were you provided with a clear outline of what was expect from you?
YES/NO
- Did your direct supervisor provide adequate support?
YES/NO
- Did he/she make you feel like a valuable member of the team?
YES/NO
- Did you feel that the [Name of Organization], as a whole, supports volunteers?
YES/NO
- Did you feel that the [Name of Organization] got as much from your service as it could have?
YES/NO
- If you have comments you'd like to share, please include them below.

Recognition

- Did you feel that your efforts were being/have been recognized and appreciated?
YES/NO
- Did you receive recognition for your service? If so, what was it?

- Was the recognition you received sufficient?
YES/NO
- Were the efforts of volunteers recognised publicly, or in the media? If so, how?

Feedback

- Were your views on the [Name of Organization] program sought out?
YES/NO
- Were your views listened to?
YES/NO

Overall Satisfaction

- How would you rate your overall volunteer experience? (Please circle one):
Excellent/Good/Fair/Poor
- Were you treated properly and with respect?
YES/NO
- Did you enjoy working with other volunteers on the day?
YES/NO
- What was the highlight of your volunteering stint?

- Please use the space below to make any further comments about your experience that could help us improve the volunteer experience for yourself and others?

- Thank you for taking the time to complete and return this survey. Your answers are important to us and will be kept confidential. If you would like further information about this survey, please

provide your contact information below.

Reimbursement Policy

Reference: Policy Bank-Institute of Community Directors Australia

Policy number	<<insert number>>	Version	<<insert number>>
Drafted by	<<insert name>>	Approved by Board on	<<insert date>>
Responsible person	<<insert name>>	Scheduled review date	<<insert date>>

Introduction

Staff or volunteers may on occasion be required to pay expenses consequent on their employment out of their own pockets. Under certain circumstances, as outlined in this policy, these expenses may be reimbursed by the Organization.

Purpose

The purpose of this policy is to spell out under what circumstances reimbursement of expenses may occur on behalf of [Name of Organization], and the process for doing so. This policy relates to both staff and volunteers acting on authorized [Name of Organization] business.

Policy

[Name of Organization] will reimburse its staff (including volunteers) expenses incurred by them on behalf of [Name of Organization] or in the course of [Name of Organization] business so long as such expenses are:

- Reasonable and
- Authorised.

Reimbursement of reasonable but unauthorised expenses may be made on an *ex-gratia* basis at the discretion of the CEO in exceptional circumstances only.

Staff and volunteers incurring authorised expenditure must, wherever possible, receive, retain, and produce receipts, invoices, vouchers, tickets, or other evidence of such expenditure.

Authorisation

[Signature of Board Secretary]

[Date of approval by the Board]

[Name of Organization]

Reimbursement Procedures

Procedures number	<<insert number>>	Version	<<insert number>>
Drafted by	<<insert name>>	Approved by CEO on	<<insert date>>
Responsible person	<<insert name>>	Scheduled review date	<<insert date>>

Responsibilities

It is the responsibility of Management to ensure that:

- Staff and volunteers are aware of this policy;

- Any breaches of this policy coming to the attention of management are dealt with appropriately.

It is the responsibility of all employees and volunteers to ensure that their applications for reimbursement conform to this policy.

Procedures

Prohibited reimbursements

[Name of Organization] will not reimburse staff or volunteers for

- Unauthorised expenses
- Expenses claimed by an employee as a tax deduction
- Expenses normally recoverable from a third party
- Claims for purchases that are required to be made under a [Name of Organization] purchase order
- Expenses that are not incurred for business purposes
- Late payment interest on credit cards
- Parking, traffic, or other fines and penalties

Travel expenses

- Employees and volunteers will be reimbursed for the most direct and economical mode of travel available, considering all of the circumstances.
- Employees and volunteers will not be reimbursed for additional costs incurred by taking indirect routes or making stopovers for personal reasons.
- Use of an employee or volunteer's own vehicle for work-related travel will be reimbursed by way of an all-inclusive mileage allowance, as shall be determined by the Organization from time to time.
- Trip cancellation insurance is eligible for reimbursement.

Accommodation expenses

- Employees and volunteers will be reimbursed for moderate accommodation expenses, considering all of the circumstances.
- Employees and volunteers will not be reimbursed for items of a personal nature charged to a hotel account.
- When accommodation is provided by an employee's friend or relative, to whom the employee or volunteer gives money or a gift as compensation or as a sign of appreciation, the employee or volunteer may claim an overnight accommodation expense in accordance with per diem rates, as shall be determined by the Organization from time to time.

Meals

- Employees and volunteers will be reimbursed for reasonable and appropriate meal expenses

actually incurred while on [Name of Organization] business.

Provision of hospitality

- Employees and volunteers will be reimbursed for hospitality expenses incurred in the course of [Name of Organization] business, as appropriate.
- Appropriate hospitality charges include events hosted or sponsored for the purpose of promoting [Name of Organization]'s work or enhancing its image, and include meals that are related to the transaction of [Name of Organization] business.
- When [Name of Organization] employees and/or volunteers dine together while on [Name of Organization] business, it is appropriate for the **senior person** (if any) to arrange payment and submit the claim for reimbursement.

Advance payments may be authorised where appropriate. Such payments will be subtracted from the amount of any later reimbursements. If expenditure is, for whatever reason, not incurred then any advance payments made, or any unspent portion of such payments, must be returned.

Fixed *per diem* payments may be authorised where appropriate.

Staff are authorised to approve expenses to the amount specified in their individual job statement, and for expenditure above this level must seek specific authorisation from their supervisors.

Except where *per diem* payments have been authorised, staff and volunteers incurring authorised expenditure must, wherever possible, receive and retain receipts, invoices, vouchers, tickets, or other evidence of such expenditure.

Staff and volunteers incurring authorised expenditure must submit requests for reimbursement to the designated person (depending on the sum in question) on the standard form (see Appendix A, describing the nature and purpose of the expenses. The completed form must be signed by the applicant.

Except where *per diem* payments have been authorised, staff and volunteers incurring authorised expenditure must present all relevant original receipts, invoices, vouchers, tickets, or other evidence of such expenditure when seeking reimbursement. Where such evidence is for any reason lacking, statutory declarations may be sought.

Managers are responsible for determining if the expenses being claimed are reasonable given the circumstances, and for ensuring they are charged against the appropriate account, and that any requirements under the Fringe Benefits Tax legislation have been met.

Claims that have not been properly prepared, authorised, or supported by adequate documentation will be returned to the claimant and the reasons will be given for not processing the claim.

Acceptable Use of Vehicle and Equipment Policy

Reference: Policy Bank-Institute of Community Directors Australia

Policy number	<<insert number>>	Version	<<insert number>>
Drafted by	<<insert name>>	Approved by Board on	<<insert date>>
Responsible person	<<insert name>>	Scheduled review date	<<insert date>>

Introduction

Confusion as to whether employees or volunteers are entitled to make use of the Organization's vehicles and equipment is undesirable, and any misunderstandings and any ambiguity should be if at all possible avoided. The purpose of this policy is to ensure such confusion does not occur.

Purpose

The primary purpose for which vehicles and equipment are provided to [Name of Organization] staff and volunteers is to assist them in carrying out the duties of their employment.

This policy sets out guidelines for acceptable personal use of [Name of Organization] vehicles and equipment by employees and volunteers of [Name of Organization].

This policy is made up of specific policies governing the use of

- Mobile Phones; and
- Vehicles.

A separate policy has been formulated to deal with acceptable use of computers, internet and email.

Policy

[Name of Organization]'s facilities, vehicles, and equipment are to be used to support its mission. [Name of Organization] staff and volunteers may not use the Organization's resources (including any person, money, or property) under their control for personal benefit or gain, or for the benefit or gain of other individuals or Organizations, except as specified below.

Employees and volunteers are permitted limited use of vehicles and equipment for personal needs where such use does not interfere with [Name of Organization] business, involves minimal additional expense to [Name of Organization], involves minimal additional risk to [Name of Organization], and conforms with applicable Organizational procedures. Such permission may be revoked or limited at any time by the Board or the CEO.

[Name of Organization] believes that staff and volunteers should be given the tools needed to effectively carry out their assigned responsibilities. Allowing limited personal use of these tools helps enhance the quality of the workplace and helps [Name of Organization] to retain qualified and skilled workers.

This policy does not apply to those situations where personal use of [Name of Organization]'s equipment constitutes agreed remuneration under a contract of employment.

Authorisation

[Signature of Board Secretary]

[Date of approval by the Board]

[Name of Organization]

Acceptable Use of Vehicle and Equipment Procedures

Reference: Policy Bank-Institute of Community Directors Australia

Procedure number	<<insert number>>	Version	<<insert number>>
Drafted by	<<insert name>>	Approved by CEO on	<<insert date>>
Responsible person	<<insert name>>	Scheduled review date	<<insert date>>

Responsibilities

It is the responsibility of Management to ensure that:

- staff are aware of this policy;
- any breaches of this policy coming to the attention of management are dealt with appropriately.

It is the responsibility of all employees to ensure that their usage of [Name of Organization] equipment conforms to this policy.

Processes

Use of Mobile Phones

Employees and volunteers of [Name of Organization] whose duties necessitate use of a mobile phone may be assigned a phone or may be reimbursed for business use of a personal phone under the following circumstances.

Use of the phone may be approved by the CEO, or their duly authorised nominee, according to the following criteria:

- A requirement to travel frequently on business away from the office;
- A need for others to communicate with the employee about [Name of Organization] business when the employee is away from their office;
- A need for the employee to communicate with others regarding [Name of Organization] business when the employee is away from their office;
- A need for the employee to have access to mobile internet when away from their office;
- The employee supports or is otherwise responsible for programs, services or systems that necessitate frequent and immediate communications throughout the day or after working hours.

The lowest cost plan available to accommodate the particular Organizational need shall be used. The need for a phone must be reviewed at least once a year to verify that the

arrangement continues to be justified. The arrangement shall be terminated on resignation, separation or transfer of the employee.

Personal use of a [Name of Organization] mobile phone, where such use is likely to incur a substantial additional cost for the Organization, is highly discouraged. Employees are expected to fully reimburse [Name of Organization] for any extra costs incurred by the Organization as a result of such usage.

Alternatively, the employee may purchase their own telephone and submit a reimbursement request for Organization-related calls.

Use of Vehicles

[Name of Organization] vehicles must not be used other than for [Name of Organization] business.

Additional Policy Resources

There are many online resources to help provide guidance for policy development. Check out these useful and free resources:

Charity Central - Office in a Box - Policies (www.charitycentral.ca/office/AB-EN/Section6-AB-EN.pdf) Charity Central's Office in a Box, Chapter 6 is a resource of samples, templates, forms, etc. that was developed: to assist small and rural charities in improving voluntary compliance with the Canada Revenue Agency's (CRA) requirements; to help organize and archive an organization's important information; and to act as a source of information and a tools to educate members of boards. The whole "box" of office resources was developed by Public Legal Education of Alberta and can be downloaded at: www.charitycentral.ca/office_all

Imagine Canada - Sector Source has two pages in their *Managing an Organization* section. The first is a Staff Management Policies and Practices Page that offers links to a number of topics and samples of policies, practices and bigger picture studies that inform the development of any new policy. See <http://sectorsource.ca/managing-organization/staff-management/policies-and-practices>. The second is a Board Governance Policies and Planning page that provides guidance on strategic planning and a collection of standard policy examples every board should have in place. See: <http://sectorsource.ca/managing-organization/board-governance/board-policies-planning>

Ontario Ministry of Agriculture, Farming and Rural Affairs - Developing Policies and Procedures for Volunteer Organizations Fact Sheet - Provides steps to developing policies, a list of policies that you should consider, some samples and a template for policy and procedure development for volunteer organizations. See: www.omafra.gov.on.ca/english/rural/facts/08-063.htm

Carters Barristers and Solicitors' Legal Risk Management Checklist for Not-for-Profit Organizations - This publication has an extensive list of policies that you should consider to limit your organization's risks. See: www.carters.ca/pub/checklst/nonprofit.pdf

Institute of Community Directors, Australia - Although not a Canadian resource, the Policy Bank has samples on a wide range of valuable policy topics such as: values, governance, financial management, financial control, communications, volunteers and human resources. See: www.communitydirectors.com.au/icda/policybank