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sector
council nl**

HUMAN RESOURCES TOOLKIT **For The Paid Labour Force**

A Guide for Not-for-Profit Organizations: Newfoundland and Labrador

June 2024

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FORWARD

It is with great pleasure that [Community Sector Council Newfoundland and Labrador \(CSCNL\)](#) provides this HR Toolkit, a comprehensive resource designed to support human resources management in community organizations. This toolkit embodies the collaborative efforts of numerous individuals whose contributions have been invaluable as well as online learning resources, in particular HR Intervals, Imagine Canada and Sigma Assessment Systems Inc.

First and foremost, we would like to extend our sincere gratitude to HR Specialist Elizabeth Whitten, CPHR, MER, who dedicated her time and expertise to this project. Her deep understanding of HR principles, combined with her practical insights, has ensured that this toolkit is both theoretically sound and practically applicable. Her knowledge and experience have enriched the content and made it relevant to the dynamic and ever-evolving field of HR.

We would also like to acknowledge and thank all those who completed both our Compensation Benefits Survey and Pulse Survey, attended our Community Conversations and participated in our Organizational Continuance Transition Pilot Project. Your input, feedback and suggestions were instrumental in providing the practical insights necessary for the final product, ensuring it meets the HR needs of community organizations.

To the staff at CSCNL - Lori Johnson, Christine Snow, Earl Walker, Bettina Ford, Tiffany Drover, Stephanie Janes, Diana Franco, Elaine Woolridge - your guidance, expertise and support throughout the process was instrumental in the development of this toolkit. I also want to acknowledge the contributions of Penny Rowe who laid the foundations from which this work is built upon.

Finally, we extend our appreciation and thanks to the Government of Newfoundland and Labrador, Labour Market Partnerships Program for their financial support in bringing this project to fruition.

This HR Toolkit is a testament to the power of collaboration and the collective expertise of our community. We are confident that it will serve as a valuable HR resource for community organizations, helping you to navigate the complexities of HR and contribute to the success of your organizations.

Sincerely,



Colin Corcoran
CEO, Community Sector Council NL



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1. Introduction to the Human Resources Toolkit

This toolkit is intended to be used as a practical guide for not-for-profit organizations to assist in creating human resources policies, procedures, and related documents. It is recognized that each organization is unique, and that one size or approach does not fit all. It is recommended that any organization which uses this guide do so in conjunction with human resources and/or legal advice. Organizations also need to ensure all policies, procedures and practices are in compliance with applicable employment laws and regulations. Templates are provided in Word and PDF so organizations can edit as appropriate to meet their individual needs.

Disclaimer

This document is intended for use by small to medium-sized nonprofit organizations operating in Canada. While certain assumptions have been made in the creation of this toolkit, it is the responsibility of any organization to adapt, modify, and customize any document to meet the needs of their organization.

The content of this toolkit is provided for information purposes only. No legal liability or other responsibility is accepted by or on behalf of CSCNL, or its partners for any errors, omissions, or statements made within this document. CSCNL accepts no responsibility for any loss, damage or inconvenience caused because of reliance on such information.

All organizations are required to comply with applicable employment legislation. See [Section 2](#) for links to relevant Newfoundland and Labrador legislation. Organizations which fall under federal jurisdiction must comply with all federal employment legislation. Please see [Section 2](#) for links to relevant federal legislation. For organizations which are unionized, policies and practices must be in keeping with the provisions of the applicable collective agreement. Please note that regulations and referenced links periodically change, and users are encouraged to check applicable legislation as noted in the toolkit. It is current as of June 2024.

Sample templates are referenced throughout the guide and can be found in [Appendix A](#). Several useful web links are also provided, and additional links can be found in [Appendix B](#).

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2. Human Resources Policies

A. A Guide to Developing Human Resources (HR) Policies for your Organization

When developing HR Policies for your organization, the following best practices should be kept in mind:

- i. Define clear roles and responsibilities when initiating, writing, communicating, and rolling out HR policies.
- ii. Use simple and clear language. Do not use legal jargon. If you use acronyms, define them first.
- iii. Ensure the policies reflect the organization's culture and values.
- iv. Ensure the policies are in keeping with provincial or federal employment legislation. This legislation includes:
 - Newfoundland and Labrador Human Rights Act: [Legislation](#) | [FAQs](#)
 - Occupational Health and Safety Act and Regulations: [Regulations](#) | [OHS Information](#)
 - Workplace NL is also a good resource for employers, providing information on occupational health and safety policies, occupational health and safety committees or designates, occupational health and safety training requirements, and workplace violence prevention. Click [here](#) to access Workplace NL.
 - In January of 2020, the Government of Newfoundland and Labrador revised the Occupational Health and Safety Regulations to require employers to conduct a risk assessment and develop workplace violence and harassment prevention plans. More details on these requirements can be found [here](#).
 - Newfoundland and Labrador Labour Standards: [Legislation](#) | [Labour Standards Information](#) | [Labour Relations Board](#)
 - Federal Employment Standards: Click [here](#) to access Federal Employment Standards.
- v. Create and review HR policies using an equity, diversity, and inclusion (EDI) lens. While unintended, policies can create barriers or inequity for individuals and groups. Throughout the Toolkit, we will offer suggestions on ways to make your human resources practices more inclusive and to ensure your workplace will be welcoming to all. See [Section 3](#) for a guide on how to apply an EDI lens when developing or reviewing policies.

- vi. Policies should follow a standard format. Consider including the following sections in each policy:

- **Purpose**

The purpose sets out what the policy intends to do and/or the goal of the policy. For example, a health and safety policy may aim to ensure a safe and healthy workplace for all workers in compliance with the relevant health and safety legislation.

- **Scope**

The scope outlines to whom the policy applies. It may apply to all staff and workers or differentiate based on level, location, employment status, or department. If the policy also applies to volunteers, contract workers, and consultants doing work on behalf of the company, be sure to identify this. The scope should also identify exceptions to the policy.

- **Statement**

The statement is the actual rule or standard the policy needs to communicate.

- **Responsibilities**

Outline the responsibilities of the board, management, and staff regarding the policy and who is responsible for developing, maintaining, monitoring, and implementing the policy. If there are consequences for not following the policy, such as discipline measures, be sure to mention them. For example, "Failure to comply with this policy could result in disciplinary measures up to and including just cause for termination of your employment".

- **Definitions**

Clearly define any terms used within the policy. If you include the terms in legislation related to the policy, be sure to use the definitions from the legislation. Examples include disability, prohibited grounds, discrimination, harassment, and workplace violence.

- **Questions**

Identify the person or position employees can approach if they have questions.

- **References**

Reference any other policies, documents, or legislation that support the interpretation of this policy.

- **Effective Date**

Indicate the date the policy came into effect and the date of any revisions.

- **Review Date**

Indicate the date the policy is due to be reviewed. This will vary based upon the policy.

- **Approval**

Indicate who approved the policy and the date of approval (for example, the board, the human resources policy committee, the executive director).

- vii. Identify the necessary policies and ensure you include those which are required by law. Following is a list of possible Human Resources policies.

- **Compensation and Benefits**

- Payroll and Time Sheets
- Benefits
- Retirement Plan

- **Conditions of Employment**

- Hours of Work
- Flexible Work Arrangements
- Reporting of Absences
- Reporting during Inclement Weather
- Standards of Dress

- **Leaves and Vacation**

- ***Can be paid or unpaid depending on the type of leave, government regulations and organizational policies***
- Paid Leave
 - Statutory Holidays (Public Holidays)
 - Vacation
 - Sick Leave
 - ✓ This is addressed as unpaid leave in Labour Standards, but most employers that have a sick leave policy would have it as paid leave.
 - Family Responsibility Leave
 - ✓ This is addressed as unpaid leave in Labour Standards, but most employers that have a family responsibility leave policy would have it as paid leave.
- Unpaid Leave (can be paid at discretion of organization)
 - Bereavement Leave
 - Family Violence Leave
 - Pregnancy Leave
 - Parental Leave
 - Adoption Leave
 - Compassionate Care Leave
 - Critical Illness Leave
 - Crime-Related Child Death or Disappearance
 - Reservist Leave
 - Communicable Disease Emergency leave

- **Standards of Conduct**

- Respectful Workplace
- Code of Conduct
- Conflict of Interest
- Confidentiality
- Drug and Alcohol Policy

- **Occupational Health and Safety**

- Occupational Health and Safety Policy
- Occupational Health and Safety Committee or Designate
- Occupational Health and Safety Training
- Workplace Violence Prevention

- **Employee Performance and Development**

- Probationary Period
- Performance Reviews
- Recruitment and Selection
- Employee Learning and Professional Development

- **Information Technology**

- Acceptable Use Policy
- Security and Passwords

- **Property and Equipment**

- Access Cards and Keys
- Building and Property Security

- **Corporate Credit Cards**

- **Use of Company Property and Equipment**

- viii. Proofread policies and review them with employees and other stakeholders.
- ix. Ask an HR Specialist and/or legal counsel to review the policies.
- x. Have policies approved by the Board of Directors and Senior Management.
- xi. Provide employees with a hard or electronic copy of the policies and obtain acknowledgement of receipt.
- xii. Keep wording of policies flexible to allow for some discretion by the Board or Senior management if appropriate.
- xiii. Review policies on a regular basis.

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2. Human Resources Policies

B. Reviewing HR Policies with an Equity, Diversity, and Inclusion (EDI) Lens

Before we can ensure our HR policies and practices are inclusive, we need to understand what equity, diversity and inclusion mean.

Equity is both an outcome and an approach. It's about ensuring a level playing field and measuring our efforts to make sure that opportunities and advantages are shared by all.

Diversity is the variety of unique backgrounds, life experiences, qualities, and characteristics we possess as individuals. It is a combination of visible and invisible differences that shape our perspectives and views of the world. It can include differences in race, colour, place of origin, religion, immigrant and newcomer status, ethnic origin, ability, sex, sexual orientation, gender identity, gender expression, marital status, and age. While these are all prohibited grounds for discrimination under the Newfoundland and Labrador Human Rights Act, they are not the only characteristics which make us diverse. These elements can include level of education, socioeconomic status and many others.

Inclusion is about seeking to better understand and value the diversity of those around us. It's about creating a workplace culture in which everyone feels welcome and able to bring their whole self to work. In an inclusive workplace culture, differences are viewed as strengths and efforts are made to eliminate barriers which may prevent people from reaching their full potential.



Consider the following in developing your policies:

- Be very aware of language. Use language that promotes inclusion. This includes using gender-neutral language and refraining from using language which reflects stereotypes and biases.
- Try to remain current in your use of language. Some examples include:
 - Use the term 2SLGBTQI+¹ 'LGBTQ+' rather than 'gay' or 'lesbian'
 - Use the term 'BIPOC' or 'people of colour' rather 'ethnic minority.'
 - Use term 'mental well-being' or 'mental health condition,' which is more inclusive than the term 'mental illness.'
 - Use the term person who 'uses a wheelchair' or 'wheelchair user' instead of person 'confined to a wheelchair'
 - Use plain language and avoid idiomatic expressions (e.g. 'waiting in the wings') or colloquialisms (e.g. 'blacklist') that may have negative connotations for some groups and/or may not be understood by people from different ethnic backgrounds or for whom English is not a first language
 - Avoid terminology such as 'man-made' or 'man hours' (can use 'machine made' or 'synthetic', and 'hours of work' or 'person hours'
 - Use non-binary, gender inclusive language such as 'they' instead of 'he/she' and use 'spouse' or 'partner' instead of 'husband/wife'. When providing examples that involve relationships include same sex relationship examples.
 - Use 'person(s) with a disability' instead of 'disabled person or people'
 - Avoid terminology such as 'suffers from' when referring to a person with a particular type of condition.
 - Capitalize the proper names of peoples such as First Nations, South Asian, Trans, etc.
 - Be sure to create a Respectful Workplace Policy
 - Align your paid holiday schedule to allow for culturally appropriate/relevant holidays that reflect the diversity of your workforce.
 - Be aware of your duty to accommodate employees with disabilities and ensure your policies reflect this.
 - Allow for remote, hybrid or other flexible working arrangements where the nature of the position allows this.
 - Create a policy on leave for domestic violence.
 - Ensure parental benefits are available to all parents, including biological or adoptive parents.

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¹ This is the acronym used by the Government of Canada to refer to the Canadian community. 2S: at the front, recognizes Two-Spirit people as the first 2SLGBTQI+ communities; L: Lesbian; G: Gay; B: Bisexual; T: Transgender; Q: Queer; I: Intersex, considers sex characteristics beyond sexual orientation, gender identity and gender expression; +: is inclusive of people who identify as part of sexual and gender diverse communities, who use additional terminologies.

2. Human Resources Policies

C. Additional Resources

There are many resources employers can use to assist them in developing inclusive policies. Click [here](#) for information on prohibited grounds of discrimination and what an individual can do if they believe they have been discriminated against in terms of employment.

There are many organizations in the province which support employers in making their places of employment more accessible and inclusive for people from various underrepresented groups. Please note that the following list of organizations and resources is not complete, but does include a number of supports which not-for-profit employers may find useful in assisting them to build a respectful and inclusive workplace.



The **Association for New Canadians** provides several training programs and other supports for employers in cultural diversity, including training on *Culturally Inclusive Hiring Practices* and *Culturally Inclusive Workplaces*. [Click here](#) to learn more.



The **Autism Society of Newfoundland and Labrador** provides programming and supports to neurodiverse individuals and offers education to organizations on autism understanding and acceptance. [Click here](#) to learn more.



The **Canadian Centre for Diversity and Inclusion** has developed several inclusion guides and a comprehensive glossary of terms. [Click here](#) for the guides and [click here](#) for the glossary.



The **Canadian Mental Health Association-NL** offers several training programs beneficial to employers in supporting the mental health of their employees, including *Mental Health First Aid* and *Applied Suicide Intervention Skills Training (ASIST)*. [Click here](#) for additional information.



The **Coalition of Persons with Disabilities NL** provides a directory of employment-related resources that employers may find useful. [Click here](#) to explore the resources available.



First Light NL offers Indigenous Cultural Diversity Training for workplaces. [Click here](#) for details.



Sample Policies: For examples of HR Policies for not-for-profit organizations, please refer to **Imagine Canada's** website. [Click here](#) to view the sample policies.



Under the umbrella of Empower NL, **Inclusion NL** provides supports, services, and information to businesses in Newfoundland and Labrador on accessibility, inclusion, disability confidence, and inclusive employment. [Click here](#) for more details.



A resource guide to creating inclusive HR policies, created by the **Mentor Ability Canada Project Team** with support from the Government of Canada, offers valuable insights on the employment of persons with disabilities. [Click here](#) to access the guide.



There are many organizations that support the advancement of women in non-traditional roles, including **Equiforce (formerly Women in Resource Development Corporation)**. They offer a variety of training sessions, including *Creating an Inclusive Workplace* and *Inclusive Leadership*. [Click here](#) for more information.

Appendix A: Template 1 shows a sample of an **Employee Code of Conduct**. Feel free to customize this template to align with the specific policies and values of your organization. Additionally, ensure that all employees receive a copy of the Employee Code of Conduct, understand its contents, and can ask questions or seek clarification.

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3. Job Descriptions

Job or position descriptions are another important HR tool. They form the foundation for the recruitment and selection process. They are helpful in doing the following:

- i. Clearly articulate the job duties and responsibilities.
- ii. Identify performance expectations to assist in evaluating whether an employee is carrying out the job duties at an acceptable level.
- iii. Identify the necessary skills, education and experience required to satisfactorily perform the job.
- iv. Enable potential job seekers to determine whether the job may be a good fit for their skills, experience, interests etc.
- v. Evaluate the level of responsibility, decision-making, etc. to determine an appropriate level of pay for the position.

If you do not have a job description for a position in your organization, it may be helpful to interview the incumbent in the position to understand the main tasks and responsibilities associated with the position, along with what skills and qualifications may be needed if you were required to hire someone new for the position. It can be a good starting point to develop a job description. [Appendix A: Template 2](#) illustrates a template for a [Position Description Questionnaire](#).

Once you have completed the questionnaire, the next step is to draft a job or position description.

When setting qualifications and requirements for jobs, it is important that they be bona fide occupational requirements (BFOR's), or in other words, be essential to the job. An employer must differentiate between the essential and absolute job requirements and the optional or flexible job tasks. Posting job requirements that are not essential may prevent otherwise qualified candidates from applying to a job that they would be capable of doing. For example, if having a "valid driver's license" isn't necessary for the job, it is not a *bona fide occupational requirement* (BFOR) and should not be included in the job description or job posting. Unless it is a regular requirement in the job, you should not set a requirement of "ability to lift 25 pounds" as it is not a BFOR.

[Appendix A: Template 3](#) provides a [Position Description Template](#). Sample position descriptions for an [Executive Director](#) and a [Bookkeeper](#) are provided in [Appendix A: Template 4](#).

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4. Recruitment and Selection

A. Recruitment and Selection Process

Recruitment and Selection refers to the process by which you look for and make decisions on hiring to fill vacancies within your organization. This may be done internally within the organization, externally or a combination of both. Recruitment involves sourcing, attracting, and identifying candidates for vacant or upcoming positions. Selection involves assessing these candidates' qualifications, experience and fit for the role. Your goal is to attract the largest and most diverse pool of qualified candidates and ultimately to hire the best person for the role.

The recruitment and selection process typically involves the following steps:

- i. Create a descriptive and appealing job ad (based on an up-to-date job description). The job ad should be visually appealing and grab the reader's attention. It should include a brief description of your organization, an overview of the position you are seeking to fill, the required qualifications, and a contact number to call if a potential candidate wants to obtain additional information or requires an accommodation in the job application process. Make sure your job ad uses a large font which is visible to applicants with vision loss and written in plain language. See [Appendix A: Template 5](#) for a [Sample Executive Director Job Ad](#) of a not-for-profit organization.
- ii. Advertise your job broadly on platforms likely to offer the most visibility. This may include job boards and sites such as Indeed, LinkedIn, Career Beacon, the CSCNL job board, post-secondary institutions, as well as your organization's website and social media pages, and industry-specific websites. Additionally, utilize the [Government of Canada Job Bank](#). Don't underestimate the power of word of mouth, as research shows it is a powerful recruitment tool in the nonprofit sector.
- iii. Choose your selection panel. The selection panel is typically made up of the hiring manager, an independent human resources representative (if available) and in the case of a not-for-profit organization, maybe one or two members of the Board. Try to ensure diversity on your selection panel from the perspective of gender, ethnicity, background etc.
- iv. Develop screening criteria which are relevant to the job duties and responsibilities, and which link back to the requirements in your job ad.
- v. Screen resumes thoroughly, using the screening criteria. To avoid any possibility of bias, a best practice is to screen the resumes without looking at the employee's name or other identifying information. Shortlist to a reasonable number of candidates, whom you wish to interview.

- vi. Develop interview questions which relate to the job ad and the screening criteria. Use a combination of behavioural ², knowledge-based ³, and situational ⁴ type questions. Questions should be related to the key roles and responsibilities of the position. To the extent possible, identify what you are looking for as a desired response for each question, to help you evaluate them objectively. Have a reasonable number of questions for the time allotted for the interview. Remember that all candidates should be asked the same questions. Please see [Appendix A: Template 6 - Sample Interview Questions \(for Leadership Position\)](#).

Do not ask personal questions which may touch on the prohibited grounds of discrimination under the Newfoundland and Labrador Human Rights Act. For example, do not ask questions such as "Do you have children?", "Are you married?" or "Where were you born?". It is ok to confirm that a candidate is legally permitted to work in Canada.

- vii. Schedule the interviews. A best practice is to provide at least two (2) business days' notice to come in for an interview. Another best practice is to ask candidates if they require any type of accommodation in the interview process. This could include providing a large font copy of the position description, accommodating hearing assistance technology, scheduling the interview after normal work hours etc.
- viii. Conduct the interviews. Ensure the interview setting is private and make every effort to make the candidates as comfortable as possible. Let the candidates know how long you expect the interview to take and endeavour to stick to your timelines.
- ix. Each panel member should individually evaluate and rank the candidates who were interviewed, using the pre-set criteria. Then, as a panel, discuss and arrive at a consensus of your short-listed candidates.
- x. Depending on the outcome of the first-round interviews, you may decide to do second interviews with short-listed candidates. A second interview may include the Chair of the Board and CEO/ED and will typically be shorter than the first interview.
- xi. Keep all candidate information confidential, but keep candidates informed as to when they can expect to hear back on the outcome.

² Behavioural questions are often asked to determine how candidates approach their work and how they think about the important decisions they will make as part of their role. Questions may focus on how they have overcome challenges, achieve their goals, or make challenging decisions.

³ Knowledge-based questions are designed to assess technical or professional expertise in knowledge-specific areas.

⁴ Situational questions ask candidates to explain how they would react to hypothetical situations.

- xii.** Depending on the nature of the role, some employers use various tests such as a personality test, knowledge test, psychometric test or technical skills assessment. Be sure that candidates are notified of this requirement and given appropriate time to complete the assessment. Make sure the assessment is relevant to the role you wish to fill.
- xiii.** It is a best practice to check at least two work-related or professional references on any short-listed candidate before making them an offer of employment. The candidate's permission should be obtained before contacting any references. See [Appendix A: Template 7 - Sample Reference Questions \(for Leadership Position\)](#).
- xiv.** Once you have decided upon your preferred candidate, the next step is to make a verbal offer of employment. This should be followed up with a written letter of offer or employment contract.

Some employers prefer to use an employment contract as opposed to a letter of offer or letter of employment. It should be noted that both are considered legally binding contracts. In many not-for-profit organizations, employment contracts are renewed on an annual basis, based on funding availability. While the employment term may be stated as one-year, recent legal cases in various parts of Canada have determined that in some situations in which there have been continued renewals of contracts on a year over year basis, this may be considered an indefinite contract of employment. In such cases, notice of termination may be required as if the employee was a permanent employee and length of continuous employment will determine the amount of notice required. It is also important to renew contracts on an annual basis before the previous contract expires. Employers are recommended to carry out their due diligence and may wish to have employment contracts legally reviewed if they are using them. See [Appendix A: Template 8 - Sample Letter of Offer \(Leadership Position\)](#).

- xv.** Once the candidate has accepted the position, contact the other candidates to thank them for their interest and to let them know the position has been filled.

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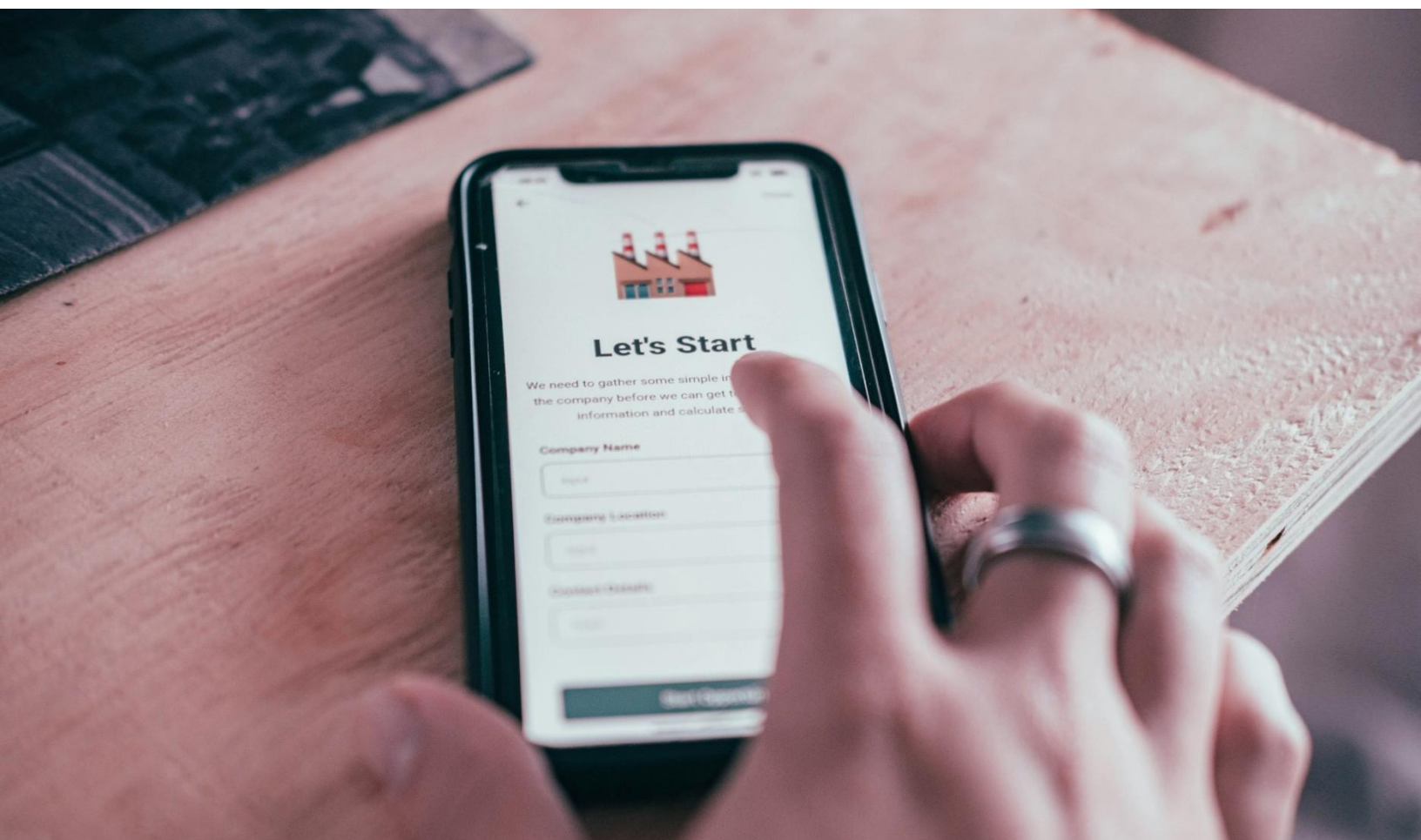
5. Onboarding

A. Overview

Onboarding refers to the process of introducing a newly hired employee into an organization. It is an important part of helping employees understand their new position and job requirements and learn the organizational culture. An effective onboarding program helps new employees integrate comfortably with the rest of the organization and feel part of the team. Onboarding begins with the new employee's first exposure to the organization and can continue up to the end of the first year.

A comprehensive effective onboarding program should contain an **Onboarding Checklist**, to be completed with the employee by their supervisor. This checklist is an important tool to ensure all the necessary paperwork is completed and is a tangible reminder of the various tools and supports which should be put in place for all new hires. See [Appendix A: Template 9 - Sample New Employee Onboarding Checklist](#).

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5. Onboarding

B. Employee Handbook

Ideally, each organization should have an **Employee Handbook**, which may be paper-based or electronic. Every new employee should be given a copy or access to the Employee Handbook. Below is a suggested list of topics you may wish to consider including in your Employee Handbook. This would likely be similar to your HR Policies.

i. Compensation and Benefits

- Payroll and Time Sheets
- Benefits
- Retirement Plan

ii. Conditions of Employment

- Hours of Work
- Flexible Work Arrangements
- Reporting of Absences
- Reporting during Inclement Weather
- Standards of Dress

iii. Leaves and Vacation

- ***Can be paid or unpaid depending on the type of leave, government regulations and organizational policies***
- Paid Leave
 - Statutory Holidays (Public Holidays)
 - Vacation
 - Sick Leave
 - ✓ This is addressed as unpaid leave in Labour Standards, but most employers that have a sick leave policy would have it as paid leave.
 - Family Responsibility Leave
 - ✓ This is addressed as unpaid leave in Labour Standards, but most employers that have a family responsibility leave policy would have it as paid leave.
- Unpaid Leave (can be paid at discretion of organization)
 - Bereavement Leave
 - Family Violence Leave
 - Pregnancy Leave
 - Parental Leave
 - Adoption Leave
 - Compassionate Care Leave
 - Critical Illness Leave
 - Crime-Related Child Death or Disappearance
 - Reservist Leave
 - Communicable Disease Emergency leave

iv. Standards of Conduct

- Respectful Workplace
- Code of Conduct
- Conflict of Interest
- Confidentiality
- Drug and Alcohol Policy

v. Occupational Health and Safety

- Workplace Violence Prevention

vi. Employee Performance and Development

- Probationary Period
- Performance Reviews
- Recruitment and Selection
- Employee Learning and Development

vii. Information Technology

- Acceptable Use Policy
- Security and Passwords

viii. Property and Equipment

- Access Cards and Keys
- Building and Property Security
- Use of Company Property and Equipment

ix. Corporate Credit Cards

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5. Onboarding

C. Stay Interviews

Doing regular check-ins with a new employee throughout the first year can be an important part of your retention strategy. In addition to formal performance reviews, which we'll talk about in Section 8, it's a good idea to have regular, informal check-ins.

Stay interviews are an excellent way for employers to gain insight into their employees' satisfaction and potential areas for improvement. Stay interviews can be conducted at any time of the first year of employment or even after. They can be done one on one or in a small group setting. Here are some sample questions you might consider asking during a stay interview:

- What initially attracted you to this organization, and what keeps you here?
- What aspects of your job do you find most fulfilling or rewarding?
- Are there any specific challenges or frustrations you're currently facing in your role?
- How well do you feel your skills and talents are utilized in your current position?
- What support or resources do you feel you need to succeed in your role?
- How would you describe the organizational culture and its impact on your work experience?
- Are there any opportunities for growth or development that you would like to pursue within the company?
- Is there anything the organization could do differently to better support you and your colleagues?

These questions can help foster open communication and demonstrate to employees that their feedback is valued, ultimately contributing to improved employee retention and job satisfaction.

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5. Onboarding

D. Exit Interviews

If, despite your best efforts, an employee decides to leave your organization, it is good practice to ask the employee to do an **exit interview**. Exit interviews are crucial for gathering feedback from departing employees to understand their reasons for leaving and to identify areas for improvement within the organization. Following is a list of common exit interview questions you might consider:

- What prompted your decision to leave the organization?
- Were there any specific factors or events that influenced your decision to resign?
- How would you describe your overall experience working here?
- What did you enjoy most about your role and the organizational culture?
- What aspects of your job or the work environment could have been improved?
- Did you feel supported by your manager and colleagues during your time here?
- Did you encounter any challenges or obstacles that hindered your ability to perform your job effectively?
- Is there anything the organization could have done differently to retain you?
- How would you rate the communication within the organization?
- Did you feel your contributions were recognized and valued?
- Were there any policies or procedures within the organization that you found particularly frustrating or inefficient?
- How would you describe the leadership style within your team or department?
- Did you receive adequate training and resources to fulfill your job responsibilities?
- Were there any opportunities for professional growth and development that you felt were missing?
- What suggestions do you have for improving employee satisfaction and morale?
- Do you have any feedback on the organization's benefits package, compensation, or work-life balance initiatives?
- Would you consider working for the organization again in the future? If not, why?
- Is there anything else you would like to share about your experience here or any final thoughts you have as you leave?

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5. Onboarding

E. Exit Checklist

Before the employee finishes up work, it's a good idea to complete an **Exit Checklist** to ensure that all necessary paperwork is completed, and the employee returns any property or equipment belonging to the organization. See [Appendix A: Template 10 - Sample Employee Exit Checklist](#).

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6. Compensation and Benefits

Compensation refers to the total rewards, both monetary and non-monetary, that employees receive in exchange for their work and contribution to the organization. It encompasses various elements designed to attract, retain, motivate, and reward employees effectively. Total compensation can be made up of:

- **Base Salary/Wages**

This is the fixed amount of money paid to employees in exchange for their work on a regular basis, typically expressed as an annual salary or hourly wage. Base salary is often determined by factors such as job role, level of experience, education, and market rates for similar positions.

- **Bonuses and Incentives**

Some organizations offer bonuses and incentives to reward employees for exceptional performance, meeting specific targets, or achieving organizational goals. Bonuses can be discretionary, performance-based, or tied to individual or team accomplishments. Bonuses and incentives are often used in the private sector but less frequently in the not-for-profit sector.

- **Benefits**

Employee benefits can include health and dental insurance, retirement plans (such as pensions or group RRSP's), life insurance, disability insurance, paid time off (such as vacation days, sick leave, and holidays), employee assistance programs, wellness programs, and other perks such as tuition reimbursement or flexible work arrangements. These benefits are designed to support employees' physical, financial, and emotional well-being.

- **Variable Pay**

Variable pay programs, such as profit-sharing, stock options, or commissions, provide employees with additional compensation based on the organization's overall performance or individual performance. These forms of compensation tie rewards directly to outcomes and can motivate employees to work towards shared objectives. Variable pay is rarely seen in the not-for-profit sector.

It is important for organizations to ensure internal equity and consistency in pay within their own organization. Salaries and salary ranges should differ according to job roles or level within the organization, considering factors such as job responsibilities, experience, and skills. While increases in pay in the not-for-profit sector are normally linked to funding increases, other factors can include cost of living increases, length of time in the position and level of performance in the position.

To attract and retain the best employees, it is important for organizations to ensure their total compensation is competitive with similar organizations in their marketplace. Some organizations conduct market research and explore salary standards to ensure that their compensation packages remain competitive within their industry and geographic region. This involves analyzing salary surveys, industry reports, and labour market trends to determine appropriate compensation levels for various positions. In the next section, we will provide details from a compensation and benefits survey carried out in December 2022 by CSCNL and the Portage Group, for the Newfoundland and Labrador job marketplace and released in the spring of 2023.

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6. Compensation and Benefits

A. Understanding Compensation within the NL Context

Understanding compensation within the community sector in Newfoundland and Labrador involves a dynamic interplay of a variety of factors such as the specific organization, the role, experience, qualifications, and funding availability. Determining the appropriate level of compensation for an individual or position is a mixture of science and art. It requires drawing on relevant comprehensive and representative data to define benchmark benefits and compensation (salaries, retirement benefits, health benefits, etc.) for various staffing levels and also benchmark HR policies (i.e., vacation allowance, maternity leave, sick leave, etc.). Further, it requires significant work on the part of the organization to understand its internal philosophy and goals when it comes to compensation. Issues surrounding pay equity, vacation time, organizational structure, and culture are all factors that will influence how an organization chooses to compensate its employees.

The following are several factors' organizations may wish to consider when examining compensation:

- **Non-Profit Organizations**

Many community sector roles are within non-profit organizations. Compensation in these organizations might include a mix of salary and benefits. Salaries can vary widely depending on the size of the organization, its budget, and the responsibilities of the position.

- **Government Funding**

Some community sector organizations receive funding from government grants or contracts. In such cases, compensation might be influenced by the terms of those grants or contracts, which could include specific guidelines on salaries and benefits.

- **Voluntary Sector**

Newfoundland and Labrador likely has a strong tradition of volunteerism, and compensation might not always be monetary. Some community sector roles may be filled by volunteers or part-time workers who receive stipends or honorariums rather than traditional salaries.

- **Salary Scales**

Larger community organizations or those affiliated with provincial or national bodies may have established salary scales based on factors such as education, experience, and job classification.

- **Benefits**

Benefits can vary but might include health insurance, retirement plans, paid time off, professional development opportunities, and flexible work arrangements.

- **Educational Requirements**

Positions that require higher levels of education or specialized skills may offer higher salaries.

- **Location**

Compensation can also vary depending on the cost of living in different parts of Newfoundland. For example, positions in more urban areas like St. John's might offer higher salaries compared to those in rural communities.

- **Unionization**

Some community sector organizations may have unionized employees, which can influence compensation structures and negotiations.

- **Contract Work**

Some roles in the community sector may be offered on a contract basis rather than full-time employment, which can affect compensation and benefits.

It's essential to research specific organizations and roles to get a better understanding of compensation in the community sector in Newfoundland and Labrador, as it can vary significantly depending on the factors mentioned above. Additionally, networking with professionals already working in the field can provide valuable insights into salary ranges and benefits.

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6. Compensation and Benefits

B. CSCNL Community Sector Compensation and Benefits Survey 2023

CSCNL Community Sector Compensation and Benefits Survey 2023 provides comprehensive documentation of compensation and benefits currently provided to community sector staff in Newfoundland and Labrador. This report investigates all aspects of compensation and is useful in determining the appropriate level of compensation and benefits for community sector staff.

A number of limitations must be kept in mind when interpreting the results of this study:

- Results are based on survey responses and depend on the accuracy of the data provided by participants.
- The survey used a list of CSCNL contacts, not a random sample, so the results might not fully represent the entire community sector in Newfoundland and Labrador. They reflect the views of participating organizations.
- While the overall results are reliable, subgroups with small sample sizes should be interpreted cautiously.

[Appendix C: CSCNL Community Sector Compensation and Benefits Survey 2023](#) provides an overview of the methodology employed, definitions for the six occupational categories and a summary of the survey results. Highlights are noted below:

Highlights:

- Compensation generally increases with seniority, as evidenced by the following average cash compensations: Chief Executives (level 1) receive \$69,619, Deputy CEO/EDs (level 2) average \$62,463, Management (level 3) at \$60,351, and Supervisory (level 4) at \$48,175. Non-management roles see lower compensations, with Program Staff (level 5) at \$37,578 and Support Staff (level 6) at \$33,166.
- Bonus compensation is not common in the community sector in Newfoundland and Labrador with only 8% to 14% of staff receiving some form of bonus compensation above their base salary.

- Registered charities offer the highest average cash compensation for Chief Executives (level 1) and Deputy CEO/EDs (level 2), while Management (level 3) and Supervisory (level 4) positions see similar compensation across registered charities and other registered nonprofit organizations. Compensation tends to be lower across all levels, except for Support Staff, in organizations focusing on arts, culture, or heritage. Organizations operational for over 20 years generally offer higher compensation than those in operation for 20 years or less. As jurisdiction size increases, average compensation for management roles also rises up to the provincial level.
- St. John's boasts the highest average compensation across all levels, while Eastern Newfoundland reports the lowest. Larger cities generally offer higher average compensations. For the most senior roles, compensation peaks with 20 staff before declining, while Management sees compensation growth with staff numbers from six onwards. For Support Staff, compensation is highest in smaller organizations with 1 to 5 staff, with no clear relationship observed between Supervisory and Program Staff.
- Age generally increases with seniority, compensation tends to rise with age for Chief Executives and Management Staff, with a positive correlation also observed for Support Staff, though not statistically significant.
- The nonprofit sector in Newfoundland and Labrador is predominantly female, ranging from 60% at the Chief Executive level to 85% at lower staff levels, with 1% to 2% identifying as non-binary. Notably, males earn higher average compensations than females across all levels, with the gap widest at the Chief Executive level.
- Compensation generally increases with education. Experience correlates positively with compensation for Chief Executives, Management, and Support Staff, with mixed results for other levels.
- Less than half (45%) of organizations offer retirement benefits, with Chief Executives and Support Staff being the least likely recipients. Retirement Savings Plans (RSPs) are the predominant retirement benefit, with matched contributions being more common than simple contributions. The average value of retirement benefits is around \$4000 (5%) of base compensation for upper-level staff, while lower-level employees receive benefits ranging from 3.6% to 4.9% of their base salary.
- With respect to health benefits 3 out of 5 organizations offer them to at least one staff level, with Management staff most likely to receive them. For Chief Executive Officers (CEOs), the mean expenditure on health benefits amounted to \$3,385 (4.1%) of base pay. At subordinate levels, this figure fluctuates between 4.1% and 5.6% of base salary. The cost of health premiums is typically shared between employers and employees.

- Fringe benefits are provided by 82% of organizations, the most common fringe benefits provided in Newfoundland and Labrador include:
 - Conference registration and travel
 - Professional development
 - Cell phone/laptop provision
 - Professional dues coverage
 - Home office equipment allocation
- Paid Vacation/Paid Sick Time. Paid vacation is more common among upper management, with 80% to 91% receiving an average of 3.8 weeks, compared to only 53% of program staff who receive an average of 1.8 weeks. Additionally, level 3 and up staff average 11.1 to 14.1 paid sick days per year, while support staff average 9.1 sick days annually.

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7. Performance Management

A. Fundamentals of Performance Management

Performance management is an important HR process which can effectively support employee engagement, retention, organizational productivity, and effectiveness. While performance discussions should be happening informally on a regular basis, it is important to periodically review and document an employee's work on a more formal basis. This provides an opportunity to offer feedback about their strengths and challenges, as well as get feedback from the employee about what is going well from their perspective and suggestions they may have. Performance reviews, also called "performance assessments," "employee appraisals" or "employee evaluations", allow individuals to reflect on their work and set goals for improvement. The most common time interval for formal performance reviews is annual.

Many managers tend to avoid performance discussions, particularly if there are areas of concern or a need for an improvement in employee performance. If done well, even a performance review when constructive feedback is required can be a positive experience for both the employee and the supervisor.

Following are some tips to help ensure the performance review process will be as effective as possible.

- Keep up to date information about each employee's position. Be clear yourself and let the employee know what the expectations for their position are.
- Keep regular notes on employee performance. This may include getting feedback from other supervisors or others with whom the employee regularly interacts.
- Consider asking employees to complete a self-evaluation first, identifying their achievements and success in the review period.
- There should be no surprises in the performance review meeting. If there were significant achievements or significant concerns during the review period, these should have been discussed as they occurred. Regular check-ins should be happening informally.
- When meeting with the employee, provide direct and specific feedback. Provide specific, tangible examples of what the employee has done well, along with examples of areas in which improvement is needed.
- Where improvement is needed, offer guidance and support to help the employee reach the acceptable level of performance.
-

- Make sure the conversation is two-way. Ask the employees how they feel things have gone, as well as their thoughts on how you and the organization can effectively support them. If the employee completed a self-assessment, this could form the foundation for the discussion.
- Don't rush the process. Make sure you allocate enough private, uninterrupted time to have a meaningful and thorough discussion.

It is important that an initial performance review be done prior to the completion of the **probationary period**. If performance is not meeting acceptable standards in the probationary period, and improvement is not seen, even after coaching and additional support, a decision may need to be made that the employee will not continue employment after the probationary period. See [Appendix A: Template 11 - Sample Probationary Performance Review Form](#).

The length of the probationary period may differ from one organization to another, but the most frequent are three (3) or six (6) months.

In evaluating employee performance, it is important to identify the **critical competencies** on which an employee is going to be evaluated. In 2018, CSCNL worked with *Training Works* to conduct a survey of the community sector in NL and identified several common leadership competencies. Through their work, they identified the following leadership competencies.

- **Strategic, Big Picture Thinking**
 - Strategic Thinking spans financial management, human resources development, stakeholder co-ordination and development, emerging opportunities, etc., and allows the connecting of a long-term vision to the work that occurs daily within an organization.
- **Operational Excellence**
 - Operational excellence involves the effective alignment of people, processes, structures, and technology to run the operations of an organization. It includes the behavioural attributes for day-to-day operations, and program planning and execution.
- **Human Resource Management**
 - Many leaders within the community sector have the responsibility to recruit, lead, develop, and motivate teams of people, both paid and unpaid.
- **Business Acumen**
 - Business acumen is understanding how a business or organization achieves its goals and objectives. It includes an understanding of an organization's value proposition to stakeholders, profitability, and organizational value. It also includes an understanding and awareness of how to think about, and successfully make the right business decisions, to ensure the economic success of an organization.

- **Adaptability**

- In a world of rapid change and limited resources, leaders within the community sector must demonstrate a positive attitude, resilience, and openness to changes in their organizations and sector. They must also be able to adapt their approach as the requirements of a situation change, be comfortable in ambiguous situations, and be able to work effectively within a variety of situations and with a diverse group of individuals.

- **Collaboration and Strategic Partnering**

- To ensure organizational growth and effectiveness, strategic partnerships were identified as essential within the community sector.

- **Trends in the Community Sector**

- It is becoming more important for leaders within the community sector to have a complete perspective of the "big picture" of the sector provincially, nationally and internationally. This includes a thorough understanding of all the issues related to the sector and the forces and factors impacting it.

- **Conflict Resolution**

- Community sector leaders must balance the needs of a diverse group of stakeholders. Having the ability to help others through emotional or tense situations, tactfully being able to resolve disagreements amongst individuals and teams, and facilitating enhanced communication is critically important in any organization, but especially in the community sector.

- **Strategic Financial Management**

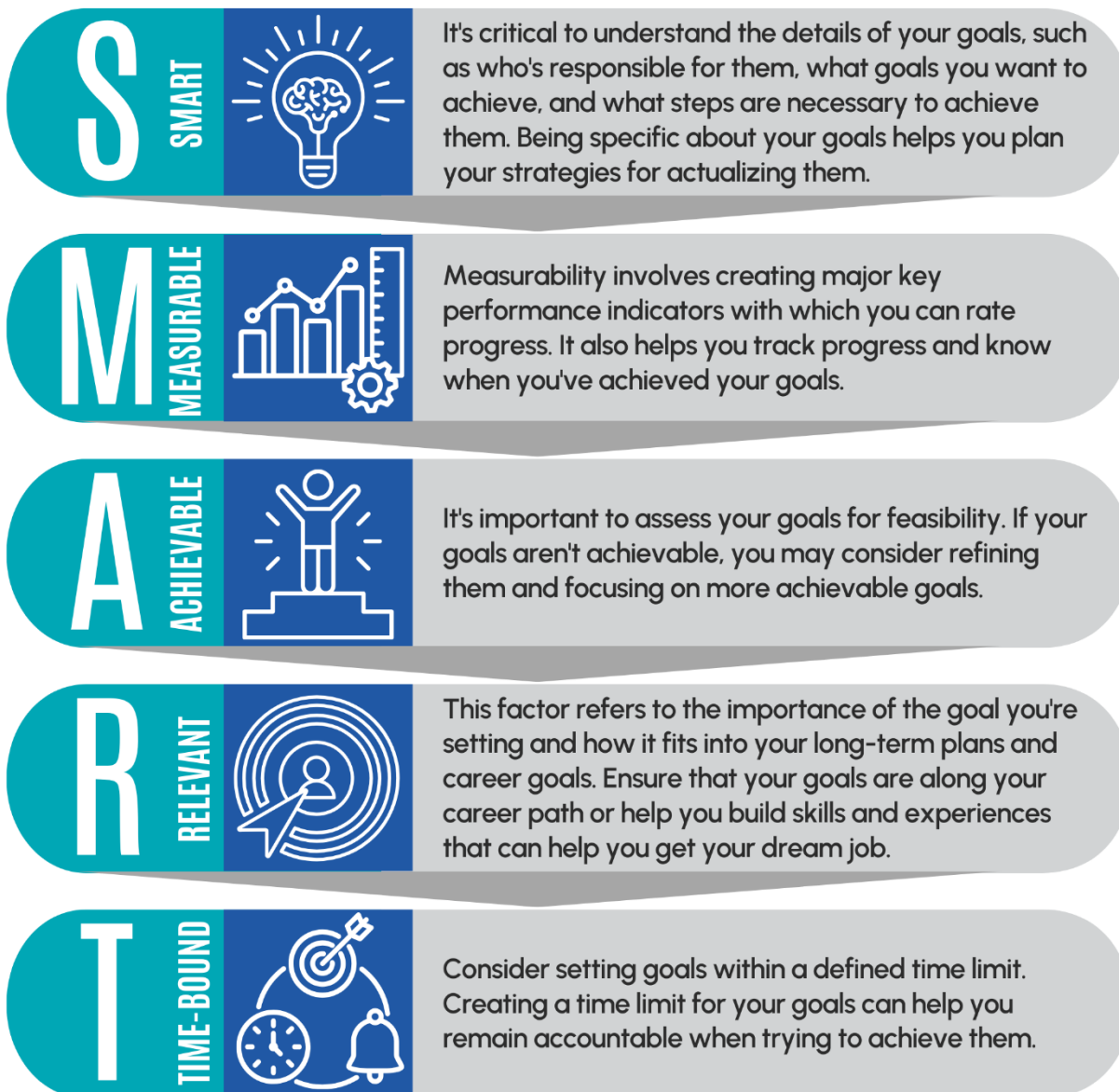
- Within the community sector, a leader must understand the rules, policies, regulations, and procedures for financial administration as they apply to their organization. This requires a solid understanding of their organization's assets and investments; management procedures, like financial authority level and approval process; as well as financial accounting procedures, budgeting, projecting, financial auditing, and more. They must also be able to apply the procedures required to safeguard and use financial resources effectively and economically.

- **Evaluation**

- Across all organizations - regardless of budgetary size - evaluation of programs and services was consistently rated as one of the top tasks for organizations. Technical evaluation skills are fundamental to ensuring high-quality evaluations and confidently using their results informing program and policy decisions.
- Within the community sector, the use of Theories of Change³ and Logic Models are effective tools to evaluate programming, people, and strategies. Specifically, Theories of Change helps define long-term goals, mapping backwards to achieve the desired outcomes, while Logic Models allow groups to plan visually, taking all possible outcomes into account. These tools are invaluable in determining the value of programming, planning events and funding, and for building sustainable social change.

These competences may provide a starting point for identifying leadership competencies in your organization. The full report can be found at [CSCNL – Core Competencies for Leadership Report](#).

When setting goals and objectives for the next performance review period, it is important that they be SMART goals. SMART goals are:



See Appendix A for:

- [Template 12: Performance Review For – Management](#)
- [Template 13: Performance Review For – Staff](#)
- [Template 14 Employee Self-Assessment](#)

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7. Performance Management

B. Performance Improvement Plan

A performance improvement plan (the plan) may be used to formalize and facilitate constructive discussions between an employee and their supervisor in situations in which the employee's work performance is not meeting acceptable standards. The plan may be used in conjunction with or in addition to the annual performance review process.

The supervisor should review the following items with the employee when meeting to discuss and complete the plan document.

- i. State performance to be improved; be specific and provide examples.
- ii. Clarify the level of performance expected and explain this level is required on a consistent basis.
- iii. Identify the supports and resources you will provide to assist the employee to reach an acceptable level of performance. This may include policies and procedures, training manuals, on-line courses, mentoring by a more experienced employee etc.
- iv. Communicate the plan for providing feedback to the employee. Specify how often you will meet and meeting times. Check in meetings should take place a minimum of monthly but may be more frequent, depending on the length of the plan.
- v. Advise the employee how long you anticipate the plan will remain in place. This could vary from 6 weeks to 12 months.
- vi. Specify possible consequences if performance standards are not met.

See [Appendix A: Template 15 - Performance Improvement Plan](#).

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8. Succession Planning

Succession planning refers to the process where organizations recruit, train, and develop employees so that they can fill one or more specific key roles in the future. It involves identifying high potential employees, evaluating their performance, developing their skills and preparing them for advancement.

Succession planning is an important HR process in all organizations but has specific implications for not-for-profit organizations. It can be helpful for the following reasons:

- Avoid vacancies in key position(s) and help ensure the stability and sustainability of your organization
- Plan for future development and change within the organization
- Be prepared for expected and unexpected vacancies
- Develop a diverse and skilled workforce by looking at the future direction and make-up of the organization
- Ensure critical organizational knowledge is documented and shared
- Increase retention and job satisfaction by providing meaningful development opportunities for existing employees

While many community organizations recognize the importance of succession planning and are thinking about it, many do not focus much time and attention on succession planning. The reasons can include:

- Too busy focusing on operations
- Discomfort with change
- An attitude of "Don't fix it if it's not broken"
- Perception that it is too costly
- Senior leaders' strong connection to the organization and its mandate. They simply cannot imagine the organization continuing without them.

In thinking about Succession Planning, it is useful to consider a simple model, which is made up of three stages, each of which contains several simple steps. See Figure 1 for the model:



Figure 1:
Succession Planning Model

A description of what should be considered in each phase follows, along with blank tables which can be found in [Appendix A: Template 16 – Succession Planning](#). It may provide a useful guide in putting together your organizational succession plan. Content was developed from a number of different sources; additional information can be accessed through the [Succession Planning Template Library](#).

Phase 1

- **Conduct an environmental scan (SWOT- Strengths, Weaknesses, Opportunities, Threats)**
- **Identify critical roles and consider the following:**
 - Urgency- How soon is position likely to become vacant?
 - Impact- How immediately and significantly will a vacancy impact the organization?
 - Skills- Does the role require specialized education, skills or knowledge?
 - Internal Talent- Do you have internal candidates ready for the role or who have potential to fill the role?
 - External Talent- Will it be difficult to hire externally?
- **Identify key competencies for critical roles.**
 - Consider what are the skills, abilities, and experiences needed for success in these roles now and in the future?
- **How are the competencies developed?**
 - Courses
 - Certifications
 - Experience

Phase 2

- **Identify Succession Candidates (Internal/External). Consider:**
 - Education/Qualifications/Certifications
 - Work History/Experiences
 - Critical Traits
 - Skill/Experience Gaps
 - Readiness/Interest in Promotion
 - Professional Development Opportunities
- **Create and Implement Employee Development Plans. Consider:**
 - Link to performance review process
 - Discussions with high potential staff about their career aspirations
 - Development plans can include formal courses and training, mentoring, special projects, stretch and temporary assignments, on the job training and job shadowing

Once the list of potential succession candidates has been developed, a development plan should be completed for each candidate. The performance management meeting is good opportunity to discuss with these candidates whether they are interested in promotion, identify any skills gaps and identify opportunities for development. [Appendix A: Template 17](#) illustrates an [Employee Development Plan](#).

Phase 3

- **Develop a Communications Plan**
 - Engage the succession planning team
 - Introduce to leaders and board members and explain why you are doing this
 - Inform candidates of their role in the process
 - Inform funders and other stakeholders and explain why
 - Provide approximate timelines
- **Evaluate Progress and revise the plan if necessary**
- **Promote and/or hire externally**

It is a best practice to put all elements of the succession plan into a written document. An organizational succession plan could contain the following sections.

- i. Introduction and Background
- ii. Succession Planning Process Overview
- iii. Identification of Organizational Changes/Challenges
- iv. Identification of Critical Roles
- v. Identification of Key Competencies
- vi. Identification of Potential Successors
- vii. Employee Development Plans for Potential Successors
- viii. Next Steps

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APPENDIX A

Sample Templates



Template 1: Sample Employee Code of Conduct

Date of Policy	
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Purpose

[Organization Name] is committed to maintaining a positive work environment where all employees are treated with respect, dignity, and fairness. This Employee Code of Conduct outlines the standards of behaviour expected from all employees to ensure a professional and productive workplace.

Scope

The Code of Conduct applies to all employees, contractors and volunteers with our organization.

Statement

All employees, contractors and volunteers with our organization are expected to always comply with the Code. Following are the responsibilities under the Code of Conduct.

Responsibilities

1. Compliance with Laws and Regulations

Employees must comply with all applicable laws, regulations, and company policies in the performance of their duties. This includes but is not limited to laws related to discrimination, harassment, workplace safety, confidentiality, and ethical business practices.

2. Professionalism

Employees are expected to always conduct themselves in a professional manner when representing the organization. This includes treating colleagues, clients, and customers with courtesy, respect, and honesty.

3. Confidentiality

Employees must maintain the confidentiality of sensitive information, including but not limited to customer data, proprietary company information, trade secrets, and employee records. Unauthorized disclosure of confidential information is strictly prohibited.

4. Conflict of Interest

Employees must avoid any actual or perceived conflicts of interest that may interfere with their ability to perform their duties objectively and impartially. This includes refraining from engaging in activities that may compete with the interests of the organization or accepting gifts, favours, or other benefits that could influence their decision-making.

5. Workplace Harassment and Discrimination

[Organization Name] is committed to providing a work environment free from harassment, discrimination, and retaliation. Employees must treat all colleagues with respect and refrain from engaging in harassment or discrimination based on race, color, religion, gender, sexual orientation, age, disability, or any other protected ground.

6. Drugs and Alcohol

Employees are required to report to work fit for duty and must never report to work while under the influence of illicit drugs, alcohol, cannabis, or other mood-altering substance. Employees who have taken prescription or over the counter medication which may impact their ability to work safely must inform their manager or supervisor before reporting to work.

7. Use of Company Resources

Employees are expected to use company resources, including equipment, facilities, and time, responsibly and for legitimate business purposes only. Unauthorized use of company resources for personal gain or other improper purposes is prohibited.

Reporting Violations

Employees have a responsibility to report any violations of this Code of Conduct or suspected unethical behavior to their supervisor, human resources, or other appropriate channels. Retaliation against employees who report violations in good faith is strictly prohibited.

Consequences of Violations

Violations of this Employee Code of Conduct may result in disciplinary action, up to and including termination of employment. The severity of the consequences will depend on the nature and severity of the violation, as determined by [Organization Name].

Acknowledgment

By signing below, I acknowledge that I have received, read, and understand the Employee Code of Conduct of [Organization Name], and agree to always comply with its provisions during my employment.

Employee Name:	
Employee Signature:	
Date:	

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Template 2: Position Description Questionnaire

Position Description Date:	
Position Title:	
Organization:	

Position Summary

Brief overview of job purpose. (Why does the job exist? What is the main function or overall purpose of the job?)

Major Responsibilities

- **Responsibilities**

Identify 8-10 major job responsibilities.

- **Essential**

Place an "X" in the left column of responsibilities which are Essential functions of the position.

All functions may not be considered essential. An essential function is defined as:

1. Job tasks that are fundamental and not marginal, or the reason the position exists is to perform that function, OR
2. The number of employees available to perform that function is limited, OR
3. The function may be so highly specialized that the person in the position is hired for their expertise or ability to perform the particular function.

ESSENTIAL	RESPONSIBILITIES
X	Example: Develops Annual Business Plan
X	Example: Develops and submits funding proposals to Government and other potential funders
	OTHER DUTIES AS ASSIGNED

Qualifications

- Education**

Check the **minimal** educational background, certification and licensure **required** to competently perform the essential responsibilities of the job.

	No formal education requirements
	High School diploma or General Education Development (GED) test
	College Diploma (indicate specific field, if required)
	Bachelor's degree (indicate specific field, if required)
	Bachelor's degree or equivalent experience (indicate specific field, if required)
	Master's degree (indicate specific field, if required)
	Certification, professional license, or credential (specify)
	Valid driver's license (indicate required class)
	Other:

- Experience**

Indicate below the **minimum** number of years and type of experience **required** to perform the essential responsibilities of the job.

- Specialized Skills**

List special skills and/or behavioral competencies **required** to perform the essential responsibilities of the job. (e.g. Financial management, program evaluation, report writing, sound decision-making etc.)

- Optional**

Indicate preferred education, experience or specialized skills.

Supervision

	The position does not have any regular responsibility for overseeing or supervising the work of other employees
	The position has immediate oversight of employees while most of the time performing the same or directly related work as those the position leads.
	The position supervises or manages the work of at least two full-time employees or the equivalent. The position includes decisions or recommendations regarding personnel actions such as hiring, disciplinary action, overtime, changes in pay and terminations.

# of Employees supervised (FTEs):	
# of Students supervised (If the position supervises students):	

Budget

- Indicate the annual dollar budget over which the incumbent has responsibility.

\$	
----	--

- Describe funding sources for the organization.

Tools And Technology

- Describe the tools and technology used to accomplish the job responsibilities.

Working Relationships/Interactions/Contacts

- List the primary organizations and individuals with whom the position interacts to carry out the primary responsibilities of the position.

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Template 3: Position Description Template

Organization:	
Job Title:	
Reports to:	
Department:	
Jobs Reporting in to:	
Date:	

Primary Purpose

- Short, high-level statement describing the main reason why the position exists and its primary purpose.

Key Responsibilities

- It is not necessary or recommended to list every task the position is responsible to carry out. This section should include a list and short description of the 10-12 key responsibilities of the position. You may wish to list the most important responsibilities first.

Required Qualifications

- List the education, experience, knowledge, skills, abilities, and other requirements of the position.

Education	
Experience	
Knowledge/Skills/Abilities	
Other Requirements (e.g.): Valid Drivers' License Clear Certificate of Conduct Vulnerable Sector Check	

Budget

- In this section, identify the annual budget for which the position is responsible.

Tools and Technology

- In this section, list the primary software, hardware and other technology which the position is required to have a working knowledge of and to use on a regular basis.

Working Relationships/Interactions

- In this section, list the primary contacts, partners and stakeholders, both internal and external to the organization, with whom the position interacts on a regular basis.

Level of Responsibility

- In this section, make a statement describing the level of responsibility of the position.
- For example, "This is highly responsible work which involves managing large dollar value projects and complex systems. This position has significant decision-making authority and directs and supervises the work of ten (10) staff".

Working Environment

- In this section, make a statement about the working environment, which may include the physical environment, volume of work, number of personal or telephone interactions etc.
- For example, "The position requires multitasking, problem-solving and adhering to tight timelines. Work outside the office and after normal business hours is often required."
- Or "The position involves spending considerable time outdoors and interacting with people who may be experiencing various types of social, financial and mental health issues."

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Template 4A: Sample Position Description

Executive Director

Organization:	ABC Community Services Inc.
Job Title:	Executive Director
Department:	Senior Management
Reports to:	Chair, Board of Directors
Jobs Reporting in to:	Director of Operations, Director of Fund Development
Date:	April 2024

Primary Purpose

The Executive Director serves as the chief executive officer of ABC Community Services Inc. and is responsible for providing strategic leadership, direction, and vision to achieve the organization's mission and goals. This position reports to the Board of Directors and works closely with board members, staff, volunteers, donors, community partners and other stakeholders to ensure the effective operation and growth of the organization.

Key Responsibilities

1. Strategic Leadership:

- Develop and implement strategic plans in to support the organization's mission and objectives.
- Lead the organization in identifying emerging opportunities, challenges, and trends within the community and the sector.

2. Organizational Management:

- Oversee all aspects of organizational operations, including program development, administration, finance, human resources, and fundraising.
- Foster a positive and inclusive organizational culture that values diversity, equity, and inclusion.
- Ensure compliance with relevant laws, regulations, and ethical standards.

3. Financial Management:

- Develop and manage the organization's annual budget in collaboration with the Board of Directors.
- Oversee financial planning, reporting, and auditing processes to ensure fiscal sustainability.
- Cultivate relationships with donors, grant-making institutions, and other funding sources to secure financial support for programs and operations.

4. Community Engagement and Advocacy:

- Represent the organization in the community and serve as a spokesperson for its mission and initiatives.
- Build and maintain effective partnerships with stakeholders, including government agencies, community organizations, and other nonprofits.
- Advocate for policies and practices that advance the organization's mission and address the needs of the communities served.

5. Board Governance:

- Work collaboratively with the Board of Directors to fulfill its governance responsibilities, including recruitment, orientation, and support of board members.
- Provide regular updates and reports to the board on organizational performance, progress toward goals, and emerging issues.

Required Qualifications

- Bachelor's degree in business, social work or other relevant area; advanced degree preferred.
- Minimum of 10 years of experience in nonprofit management or relevant field, with 5 years in a leadership role.
- Demonstrated success in strategic planning, organizational development, financial management and social enterprise.
- Strong interpersonal and communication skills, with the ability to build and maintain effective relationships with diverse stakeholders.
- Commitment to diversity, equity, and inclusion, with a track record of promoting these values within an organization.
- Knowledge of the not-for-profit sector, including relevant laws, regulations, and best practices.
- Knowledge of current practices in social enterprise.
- Passion for the organization's mission and a desire to make a positive impact in the community.
- A clear Certificate of Conduct and Vulnerable Sector Check

Budget

The Executive Director is responsible for oversight of a \$750,000 budget, which is made up of federal and provincial funding and grants, combined with revenues from the ABC Community Café.

Tools and Technology

The incumbent regularly uses and is expected to have a strong working knowledge of Microsoft 365, Sage Accounting, Google Workspace and LAMPPS.

Working Relationships/Interactions

The Executive Director regularly interacts with and is required to maintain positive working relationships with funders, staff, board members, clients, peers and other stakeholders.

Level of Responsibility

This is highly responsible work which involves managing large dollar value projects and complex systems. This position has significant decision-making authority and directs and supervises the work of ten (10) staff.

Working Environment

This position requires multitasking, problem solving and adhering to tight timelines. Work outside the office and after normal business hours is often required.

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Template 4B: Sample Position Description

Bookkeeper

Organization:	ABC Community Services Inc.
Job Title:	Bookkeeper
Department:	Administration
Reports to:	Executive Director
Jobs Reporting in to:	None
Date:	April 2024

Primary Purpose

The bookkeeper is responsible for maintaining financial records, managing accounts payable and receivable, processing payroll, reconciling bank statements, and preparing financial reports for our organization. This position reports to the Executive Director and is a key member of the administrative team.

Key Responsibilities

- Maintain Financial Records:
 - Record day-to-day financial transactions, including purchases, receipts, sales, and payments.
 - Ensure accuracy and completeness of financial data by reconciling entries and comparing system reports to balances.
- Accounts Payable and Receivable:
 - Process invoices and payments in a timely manner.
 - Monitor accounts receivable and follow up on outstanding payments.
 - Coordinate with vendors and clients to resolve payment discrepancies.
- Process payroll and related remittances.
- Reconcile bank statements with internal accounts and resolve any discrepancies.
- Record and monitor transactions related to bank deposits, withdrawals, and transfers.
- Financial Reporting:
 - Prepare monthly, quarterly, and annual financial reports.
 - Assist in budget preparation and variance analysis.
 - Generate financial statements for management review and decision-making.
- Compliance and Documentation:
 - Ensure compliance with relevant accounting regulations and standards.
 - Maintain organized financial records and documentation for audits.
 - Assist with tax preparation and filings as needed.
- Process Improvement:
 - Identify opportunities to streamline accounting processes and improve efficiency.
 - Implement best practices to enhance accuracy and effectiveness of financial operations.

Required Qualifications

- Bachelor's degree in accounting, Finance, or related field preferred.
- Proven experience as a bookkeeper or similar role.
- Proficiency in accounting software such as QuickBooks, Sage Accounting, or similar platforms.
- Strong understanding of accounting principles and practices, including payroll.
- Excellent attention to detail and accuracy.
- Solid analytical and problem-solving skills.
- Ability to prioritize tasks and meet deadlines.
- Effective communication and interpersonal skills.
- Knowledge of Government funding processes and project accounting
- Knowledge of relevant regulatory requirements and compliance standards.
- Ability to work independently and collaboratively within a team environment.
- Adaptability to learn new software and technologies as needed.
- Knowledge of current practices in social enterprise.
- Passion for the organization's mission and a desire to make a positive impact in the community.
- A clear Certificate of Conduct and Vulnerable Sector Check

Budget

The Bookkeeper has contributory responsibility for a \$750,000 budget, which is made up of federal and provincial funding and grants, combined with revenues from the ABC Community Café.

Tools and Technology

The incumbent regularly uses and is expected to have a strong working knowledge of Microsoft 365, Sage Accounting, Google Workspace and LAMPPS.

Working Relationships/Interactions

The Bookkeeper regularly interacts with and is required to maintain positive working relationships with funders, staff, vendors, clients, peers and other stakeholders.

Level of Responsibility

This is responsible work which involves accounting and financial reporting on large dollar value projects and complex systems.

Working Environment

This position requires multitasking, problem solving and adhering to tight timelines. Work after normal business hours is occasionally required.

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Template 5: Sample Executive Director Job Ad

Job Title: Executive Director
Organization: [Name of the Not-for-Profit Organization]
Location: [City, Province]
About Us: [Provide a brief overview of the organization, its mission, and its impact on the community it serves.]

Job Description:

The Executive Director serves as the chief executive officer of [Name of the Not-for-Profit Organization] and is responsible for providing strategic leadership, direction, and vision to achieve the organization's mission and goals. This position reports to the Board of Directors and works closely with board members, staff, volunteers, donors, community partners and other stakeholders to ensure the effective operation and growth of the organization.

Responsibilities:

1. Strategic Leadership:

- Develop and implement strategic plans in to support the organization's mission and objectives.
- Lead the organization in identifying emerging opportunities, challenges, and trends within the community and the sector.

2. Organizational Management:

- Oversee all aspects of organizational operations, including program development, administration, finance, human resources, and fundraising.
- Foster a positive and inclusive organizational culture that values diversity, equity, and inclusion.
- Ensure compliance with relevant laws, regulations, and ethical standards.

3. Financial Management:

- Develop and manage the organization's annual budget in collaboration with the Board of Directors.
- Oversee financial planning, reporting, and auditing processes to ensure fiscal sustainability.
- Cultivate relationships with donors, grant-making institutions, and other funding sources to secure financial support for programs and operations.

4. Community Engagement and Advocacy:

- Represent the organization in the community and serve as a spokesperson for its mission and initiatives.
- Build and maintain effective partnerships with stakeholders, including government agencies, community organizations, and other nonprofits.
- Advocate for policies and practices that advance the organization's mission and address the needs of the communities served.

5. Board Governance:

- Work collaboratively with the Board of Directors to fulfill its governance responsibilities, including recruitment, orientation, and support of board members.
- Provide regular updates and reports to the board on organizational performance, progress toward goals, and emerging issues.

Qualifications:

- Bachelor's degree required; advanced degree preferred.
- Minimum of [X] years of experience in nonprofit management or relevant field, with [X] years in a leadership role.
- Demonstrated success in strategic planning, organizational development, and financial management.
- Strong interpersonal and communication skills, with the ability to build and maintain effective relationships with diverse stakeholders.
- Commitment to diversity, equity, and inclusion, with a track record of promoting these values within an organization.
- Knowledge of the not-for-profit sector, including relevant laws, regulations, and best practices.
- Passion for the organization's mission and a desire to make a positive impact in the community.

Application Process:

- To apply for the position of Executive Director, please submit a resume, cover letter, and list of references to [Contact Information]. Applications will be reviewed on a rolling basis until [Closing Date]. We encourage candidates from diverse backgrounds to apply. If you require accommodation in the interview process, please feel free to contact us at [Phone number].
- [Include any additional information about the application process, such as salary range, benefits, or specific requirements.] Provide name and contact for person who can be contacted for additional information about the position.

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Template 6: Sample Interview Questions (for Leadership Position)

Introduction

1. Welcome & Introductions
2. Provide brief overview of your organization
3. Provide overview of the position being filled

Main interview

Personal Suitability:

4. How would you describe your leadership style? Please share an example of life experience that demonstrates your leadership style.
5. What is your vision for our organization?
6. Where do you see yourself professionally 5/10 years from now?
7. What do you think will be your greatest challenge if you are hired for this this position?

Knowledge-Based Questions

8. Please describe how your experience, skills and education make you the best candidate for this position.
9. What does leadership mean to you?
10. What do you feel are some of the most significant challenges facing our organization right now? How would you begin to address these?
11. What steps would you take to build a successful team?

Behavioural Questions

12. Tell us about our most significant career achievements to date? How did you accomplish this?
13. Tell us about a time you were involved in a conflict at work and how you resolved this situation.

Situational Questions.

14. If you were the successful candidate, what are the first things you would take on in your new role?
15. If you had an employee who was not demonstrating the required level of productivity in their job, how would you approach this situation?

Wrap Up

16. What questions do you have for us?
17. You may wish to provide an overview of compensation and benefits, or this can be left to the next stage.
18. Thank the candidate for coming, describe the next steps in the process and let the candidate know when they can expect to hear from you.

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Template 7: Sample Reference Questions (for Leadership Position)

Reference checks for a leadership position in a nonprofit organization should focus on assessing the candidate's ability to lead, manage, and inspire within the unique context of a mission-driven environment. Following are some reference check questions you may wish to consider for a leadership position.

- Can you confirm the candidate's previous role and responsibilities within your organization?
- How would you describe the candidate's leadership style?
- In what ways did the candidate demonstrate their commitment to the mission and values of your organization?
- Can you provide examples of how the candidate motivated and inspired their team to achieve organizational goals?
- How did the candidate handle challenges or conflicts within the team or organization?
- Can you speak to the candidate's strategic vision and their ability to develop and execute plans to achieve long-term objectives?
- How did the candidate engage with stakeholders, donors, and partners to further the organization's mission?
- Can you describe any instances where the candidate demonstrated effective decision-making in high-pressure situations?
- Can you discuss the candidate's ability to foster a positive and inclusive organizational culture?
- What areas for growth or improvement would you identify for the candidate in their future leadership roles?
- How did the candidate manage resources, including budgeting and fundraising efforts, to support the organization's mission?
- Can you share any specific accomplishments or successes that the candidate achieved during their tenure in your organization?
- How did the candidate prioritize and manage competing demands and responsibilities?
- Can you describe the level of collaboration and teamwork the candidate fostered within their team or across departments?
- Lastly, would you rehire the candidate for a similar leadership position, and if so, why?

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Template 8: Sample Letter of Offer (Leadership Position)

Date

Personal and Confidential

Dear _____:

We are very pleased to confirm our offer of full-time/part-time employment in the position of _____ with _____.

This letter constitutes our employment agreement with you, and we ask that you read it carefully and thoroughly. Your starting annual salary will be \$_____. You will report to the Chair of the Board of _____. Your start date will be _____, 20____, or a date to be mutually agreed between you and the Board.

In this position, you will be entitled to the following benefits:

- **Vacation leave:** State number of days/weeks
- **Group Insurance:** If applicable
- **Retirement Savings Plan:** If applicable
- **Sick Leave:** If applicable
- **Statutory Holidays:**
- **Other:**

Normal office hours are from ____ am to ____ pm Monday to Friday. Normal hours of work for employees are ____ hours per day or up to ____ hours per week, with a lunch break of ____ minutes per day. It is recognized that, due to the nature of the work, your schedule must remain flexible. In your position of _____ you will be expected to work the hours necessary for the successful completion of your objectives. If you work additional hours for travel, evening meetings, etc. you will be permitted to take time off in lieu of this additional time worked, as discussed with, and approved by the Chair of the Board.

The Board requires that you act with the highest level of integrity and professionalism in the relationships you foster with our stakeholders, clients and members.

You will be required to serve a _____ month probationary period. Your performance will be reviewed by the Board Chair before the end of the probationary period, and on an annual basis thereafter. While we are confident that our employment relationship will be a success, _____ reserves the right to end your employment without notice at any point during this _____ month period for reasons of unsuitability.

In the event you decide to resign from this position, you are required to provide a minimum of _____ weeks/months notice.

We have enclosed a copy of _____'s Human Resources Policies and the position description, for your review. The Human Resources Policies contain additional information about the terms and conditions of employment.

If the terms outlined in this letter are acceptable to you, please sign and return a copy of this letter. I look forward to your acceptance and welcoming you to our organization. If you have any questions, please feel free to contact me at _____.

Sincerely,

Board Chair

ACCEPTANCE

I accept your offer as contained in this letter.

Signed: _____

Date: _____

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Template 9: Sample New Employee Onboarding Checklist

The supervisor is required to complete the following checklist for all new hires. Once the checklist has been completed, it should be placed in the employee's personal file.

Before the employee starts, ensure you have received the following for the employee's file:

- ☐ Letter of Offer/Employment Contract (signed by both parties)
- ☐ Social Insurance Number
- ☐ Work Permit (if applicable)
- ☐ Driver's License (if applicable)
- ☐ Completed Certificate of Conduct and Vulnerable Sector Check (if applicable)
- ☐ Copies of diplomas/degrees/certificates
- ☐ Banking information
- ☐ Credit Check (if applicable)
- ☐ Personal Contact Information
- ☐ Emergency Contact Information

Provide the following to the employee before they start work and get back signed copies before or as they start work:

- ☐ Copy of job description
- ☐ Employee Handbook
- ☐ Tax Forms
- ☐ Group Insurance Information and Enrollment Forms (if applicable)
- ☐ Employee Code of Conduct and other Human Resources Policies

The day the employee starts, provide the following:

- ☐ Tour of work area
- ☐ Introduction to supervisor and coworkers
- ☐ Orientation to the organization
- ☐ Computer or laptop (if applicable) with necessary software loaded
- ☐ Cell phone (if applicable)
- ☐ Access codes, keys, and system log in information
- ☐ Assign a peer mentor or buddy and ensure employee has someone to have lunch with
- ☐ Let other employees know employee has started
- ☐ List of required training and details on how to access it
- ☐ Overview of workspace including printing, meeting areas etc.

After first day and week:

- ☐ Do informal check-ins regularly with the employee, including asking them how things are going and if they have suggestions
- ☐ Set up a 30/60/90-day formal check in plan
- ☐ Do probationary review at 3 or 6 months
- ☐ Introduce the employee to the annual performance review process, employee and career development opportunities

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Template 10: Sample Employee Exit Checklist

Employee name:	
Organization:	
Termination date:	

Type of termination

- ☐ **Voluntary/Retirement:**
 - ☐ Received employee's resignation/retirement letter. (If verbal resignation, provided employee with a written confirmation of resignation).
 - ☐ Acknowledged employee's resignation/retirement letter
 - ☐ Exit interview scheduled.
 - ☐ Exit interview completed.
- ☐ **Involuntary:**
 - ☐ Provided employee with a termination letter.
 - ☐ Provided employee with severance agreement if eligible.
 - ☐ Received signed severance agreement (if applicable)
 - ☐ Obtained legal release (if applicable)

Benefits

- ☐ Provided employee with termination/continuation of employment insurance benefits information (e.g., Health and life insurance, supplemental insurance, etc.), if applicable.
- ☐ Checked vacation and overtime balance and informed employee of any remaining leave and how it will be processed at termination of employment.
- ☐ Informed employee about retirement plan account options, if applicable.

Compensation

- ☐ Provided notice of policy regarding any outstanding balances for money owed to company (e.g., educational loans/pay advances).
- ☐ Notified payroll department to process final paycheque and record of employment.
- ☐ Informed payroll of any unused but earned vacation or other paid time off due to the employee.
- ☐ Notified payroll to process severance pay and whether lump sum or salary continuation, if applicable.

Contracts/legal

- ☐ Provided written notice to employee of any legal obligations that continue post-employment (e.g., noncompete/confidentiality agreements/employment contracts).

Records

- ☐ Pulled employee file to be stored with terminated employee files.
- ☐ Obtained written authorization from employee to respond to employment verification requests.

Information technology

- ☐ Disabled e-mail account and transferred to replacement, if applicable.
- ☐ Removed employee's name from e-mail group distribution lists; internal/office phone list; website and building directories.
- ☐ Disabled computer access.
- ☐ Transferred or disabled landline or cell phone extension.
- ☐ Disabled voicemail.
- ☐ Obtained list of email contacts.

Financial management

- ☐ Retrieved, reconciled, and cancelled corporate credit card, if applicable.
- ☐ Removed/changed signing authority on bank account, if applicable.
- ☐ Obtained list and contact information of suppliers and customers.

Facilities/office management

- ☐ Disabled security codes, if applicable.
- ☐ Changed office mailbox
- ☐ Removed access to post office box or retrieved post office key, if applicable
- ☐ Cleaned work area and removed personal belongings.
- ☐ Ensured transfer of electronic and paper files and records belonging to the organization.
- ☐ Collected the following items:
- ☐ Keys (☐ office ☐ building ☐ desk ☐ file cabinets ☐ other)
- ☐ ID card
- ☐ Building access card
- ☐ Business cards
- ☐ Nameplate
- ☐ Name badge
- ☐ Company cell phone
- ☐ Laptop
- ☐ Uniforms
- ☐ Tools and equipment
- ☐ Other _____
- ☐ Other _____

Form completed by:	
Date:	

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Template 11: Sample Probationary Performance Review Form

- To be completed by the Human Resources Committee of the Board for the Executive Director or by the Supervisor for staff positions.
- It is recommended that the review form be completed and discussed with the employee at the end of the first three (3) months and again prior to the end of the first six (6) months.
- These ratings will represent your evaluation of the employee's actual job performance during the probationary period. To help you make an objective evaluation, please consider the following suggestions:
 1. Review the employee's job description and performance expectations and base your ratings on the requirements of the job as described. The job description and performance expectations should be reviewed with the employee at the commencement of their position.
 2. Evaluate the employee's demonstrated and observable on-the-job performance.
 3. Consider one rating factor at a time so that your rating in one aspect will not influence your rating in another.
 4. Upon completion, check your ratings and comments. Discuss your ratings with the employee and encourage them to make comments.
 5. A copy of this form should be provided to the employee and the original should be retained in the employee's personal file.

Ratings:

Exceeds Expectations	Performance consistently exceeds the essential requirements of the job. Performance competencies, in almost all areas, are well developed and consistently applied.
Meets Expectations	Performance consistently meets the essential requirements of the job. Performance competencies are developed in most areas and are consistently applied.
Development Needed	Performance sometimes but does not consistently meet the essential requirements of the job. Performance competencies are not consistently applied.
Unsatisfactory	Performance does not meet the expected standards and requirements of the job. Consistently performs below job requirements.

Employee Information

Employee Name:	
Position Title:	
Name of Individual Completing:	
Start Date:	
6-Month Probationary Period End Date:	
Date of Review:	

	INTERIM Progress and Performance Review (to be completed no later than halfway through the probationary period)
	FINAL Progress and Performance Review (to be completed before the end of the probationary period)
	OTHER Please specify:

PART A: PERFORMANCE ASSESSMENT

APPROACH TO WORK	Consider the extent to which the employee demonstrates initiative, flexibility, adaptability, and resourcefulness while fulfilling the duties of their position. Consider the way the employee accepts new and varied work assignments, assumes responsibility for their completion and makes suggestions for improvements.
☐ Exceeds Expectations ☐ Meets Expectations ☐ Development Needed ☐ Unsatisfactory	
Comments/examples:	

JOB KNOWLEDGE/ QUALITY OF WORK	Consider the extent to which the employee demonstrates the required knowledge and skills to effectively carry out the position. Consider administrative, financial, promotional and marketing skills, or other relevant skills, as well as technical and program knowledge. If the employee is missing any of the required technical skills, accreditations or qualifications, ensure this is addressed in the goal-setting section of this document.
☐ Exceeds Expectations ☐ Meets Expectations ☐ Development Needed ☐ Unsatisfactory	
Comments/examples:	

PLANNING AND ORGANIZATION/ TIME MANAGEMENT	Consider the extent to which activities are planned and prioritized and time is managed effectively to achieve goals and deliverables. Consider the accuracy, thoroughness and effectiveness of the work performed. Consider the volume produced, and how promptly assignments were completed.		
☐ Exceeds Expectations	☐ Meets Expectations	☐ Development Needed	☐ Unsatisfactory
Comments/examples:			

COMMUNICATION/ INTERPERSONAL SKILLS	Consider the ability of the employee to express themselves clearly, respectfully, and professionally both verbally and in writing. Consider their ability to exercise tact and diplomacy and to represent the organization effectively in interactions with board members, members, other stakeholders, and members of the public.		
☐ Exceeds Expectations	☐ Meets Expectations	☐ Development Needed	☐ Unsatisfactory
Comments/examples:			

JUDGEMENT/ DECISION-MAKING	Consider the extent to which the employee demonstrates independent thinking and effective problem-solving skills. Consider the extent to which the employee makes appropriate decisions after adequately considering available courses of action.		
☐ Exceeds Expectations	☐ Meets Expectations	☐ Development Needed	☐ Unsatisfactory
Comments/examples:			

PART B: TRAINING PLAN/GOAL SETTING

Please bring forward any developmental goals/objectives established at the previous probationary review (if applicable) and list as many goals as is appropriate.

Developmental Goals/ Action Items	Achievement Plan	Check-in dates

PART C: OVERALL ASSESSMENT

Rate the employee's total performance, taking into consideration the most important factors of the job. Provide the employee with an overall summary of their performance. Highlight the employee's strengths and development needs as they relate to performance.

☐ **Exceeds Expectations**
☐ **Meets Expectations**
☐ **Development Needed**
☐ **Unsatisfactory**

Comments/examples:

IF THIS IS THE FINAL REVIEW, PLEASE COMPLETE THE FOLLOWING:

- ☐ The performance of the employee met expectations during the performance period. The employee has successfully completed the probation and is confirmed as a regular employee.
- ☐ The employee has not yet demonstrated the ability to meet the performance expectations. An extension of the probationary period has been requested.
- ☐ The performance of the employee did NOT meet expectations during the probationary period.

REVIEWER'S SIGNATURE:

DATE:

EMPLOYEE'S COMMENTS (OPTIONAL)

EMPLOYEE'S SIGNATURE:

DATE:

Please retain a copy of this form for each of the Employee and the Reviewer

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Template 12: Performance Review Form - Management

Employee Name:	
Position Title:	
Anniversary Date:	
Period covered by this appraisal:	

Performance Management Guidelines: Please see definitions and descriptions below for each number rating.

Rating	Number Rating	Definition
Significantly Exceeds Expectations	5	Performance consistently exceeds the essential requirements of the job. Incumbent is performing at a level higher than expected for the position. Performance competencies are well developed and consistently applied in all areas.
Exceeds Expectations	4	Performance consistently exceeds the essential requirements of the job. Performance competencies, in almost all areas, are well developed and consistently applied.
Meets Expectations	3	Performance consistently meets the essential requirements of the job. Performance competencies are developed in most areas and are consistently applied.
Development Needed	2	Performance sometimes but does not consistently meet the essential requirements of the job. Performance competencies are not consistently applied.
Unsatisfactory	1	Performance does not meet the expected standards and requirements of the job. Consistently performs below job requirements.

Provide a rating for each competency area and then provide examples and/or comments as to why this rating was selected.

Competency	Rating					Examples /Comments
	5	4	3	2	1	
Strategic Thinking						
Operational Excellence						
Administration						
Financial Management						
Marketing and Promotion						
Collaboration and Strategic Partnering						
Business Acumen						
Stakeholder Relations						
Technical Knowledge						
Overall Leadership						
Other:						

Insert objectives which were agreed to at the beginning of the year, as part of the employee's work plan, and assign a rating based on the degree to which each objective was completed. Provide comments/details to justify each rating.

Objectives for this year	Rating					Comments
	5	4	3	2	1	

List key accomplishments for the year, including any which may not have been associated with a particular objective.

Key Accomplishments for the Year

In discussion with the employee and taking into consideration any competencies in which further development is required, identify any personal and professional development needs, along with potential plans to address these development needs. The plan could include courses, mentoring, a special assignment etc.

Personal and Professional Development Needs/Plans

Discuss with the employee what their career goals/aspirations are and ask them to provide some comments on these goals.

Career Goals

Supervisors Comments:**Employee's Comments:****Acknowledgements/Signatures**

Employee Name	Signature: I acknowledge I have read and discussed this evaluation with the reviewer. My signature indicates I have been advised on my performance and does not necessarily imply that I agree with the contents of the review.
Reviewer Name:	Signature:
Date of Next Review:	

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Template 13: Performance Review Form - Staff

Employee Name:	
Position Title:	
Anniversary Date:	
Period covered by this appraisal:	

Performance Management Guidelines: Please see definitions and descriptions below for each number rating.

Rating	Number Rating	Definition
Significantly Exceeds Expectations	5	Performance consistently exceeds the essential requirements of the job. Incumbent is performing at a level higher than expected for the position. Performance competencies are well developed and consistently applied in all areas.
Exceeds Expectations	4	Performance consistently exceeds the essential requirements of the job. Performance competencies, in almost all areas, are well developed and consistently applied.
Meets Expectations	3	Performance consistently meets the essential requirements of the job. Performance competencies are developed in most areas and are consistently applied.
Development Needed	2	Performance sometimes but does not consistently meet the essential requirements of the job. Performance competencies are not consistently applied.
Unsatisfactory	1	Performance does not meet the expected standards and requirements of the job. Consistently performs below job requirements.

Provide a rating for each competency area and then provide examples and/or comments as to why this rating was selected.

Competency	Rating					Examples /Comments
	5	4	3	2	1	
Organizational Knowledge & Judgment: Demonstrates knowledge of the standard operating procedures and processes, uses sound judgment to resolve issues, and Involves others in the decision-making process as needed.						
Quality of Work: Work is completed thoroughly and accurately.						

Competency	Rating					Examples /Comments
	5	4	3	2	1	
Technical Skills: Possesses the knowledge, skills and expertise to effectively perform the assigned duties. Demonstrates interest in learning and mastering new skills.						
Productivity & Dependability: Demonstrates effective time management; ensures assigned tasks are completed efficiently and on time.						
Communication: Demonstrates appropriate verbal and written communication and listening skills.						
Initiative: Demonstrates resourcefulness, innovation and creativity.						
Client focus: Maintains high levels of client engagement and satisfaction.						
Team Focus- Demonstrates strong interpersonal skills and is willing to help and support other team members						
Other:						

Insert objectives which were agreed to at the beginning of the year, as part of the employee's work plan, and assign a rating based on the degree to which each objective was completed. Provide comments/details to justify each rating.

Objectives for this year	Rating					Comments
	5	4	3	2	1	

List key accomplishments for the year, including any which may not have been associated with a particular objective.

Key Accomplishments for the Year

In discussion with the employee and taking into consideration any competencies in which further development is required, identify any personal and professional development needs, along with potential plans to address these development needs. The plan could include courses, mentoring, a special assignment etc.

Personal and Professional Development Needs/Plans

Discuss with the employee what their career goals/aspiration are and ask them to provide some comments on these goals.

Career Goals

Supervisors Comments:

Employee's Comments:	
Acknowledgements/Signatures	
Employee Name	Signature: I acknowledge I have read and discussed this evaluation with the reviewer. My signature indicates I have been advised on my performance and does not necessarily imply that I agree with the contents of the review.
Reviewer Name:	Signature:
Date of Next Review:	

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Template 14: Employee Self-Assessment

Name:	
The date of your Performance Appraisal:	
Please submit this completed form to your direct supervisor by (Insert Date)	

Purposes of the Performance Review Process:

- Assess level of work performance
- Provide an opportunity for discussing work performance
- Celebrate successes and achievements
- Offer feedback to supervisor
- Identify areas of opportunity
- Develop goals for next year
- Support and promote growth and development

Self-reflection is important for learning and continued development. Please take time to think about your work and contributions over the past year. We will review this document as part of the discussion at our performance review meeting.

MY ACHIEVEMENTS (What went well this year)

WHAT I WASN'T ABLE TO ACCOMPLISH (and why):

MY GOALS FOR NEXT YEAR:

MY PROFESSIONAL DEVELOPMENT NEEDS AND CAREER GOALS:

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Template 15: Performance Improvement Plan

Employee Name:	
Position Title:	
Date:	

The purpose of this performance improvement plan is to notify you that your work performance is not at satisfactory level, identify areas of concern, reiterate expectations, and to allow you the opportunity to demonstrate improvement in and commitment to your work performance.

Areas of Concern
List specific concerns with the employee's performance:

Observations, Previous Discussions or Coaching
Identify specific behaviours which have been observed and note previous discussions and coaching which have taken place:

Goals to accomplish/expected results	
List the specific goals/expectations related to areas of concern to be addressed and improved:	
1.	
2.	
3.	
4.	
5.	
6.	

Steps and activities to achieve goals

List specific steps or activities which must be taken to reach each goal, including timelines for each:

Goal #	Activity	How to accomplish	Completion Date

Resources

Identify resources which will be provided to assist the employee to achieve the expected results/goals. This may include time with the supervisor or other mentor or resource person, training or other materials or supports:

Expectations

Effective immediately, you are being placed on this performance improvement plan for ____ months. We will meet a minimum of once every 30 days to review and discuss your progress. During this time, you will be expected to make regular progress on the goals outlined in this plan and to bring your performance to an acceptable level. Failure to meet these expectations may result in further consequences, which could include termination of employment. Should you have any concerns or questions regarding this plan, please follow up with me directly.

Dates for progress review check-ins

--

Progress/Notes: First Check-in

--

Progress/Notes: Second Check-in**Progress/Notes: Third Check-in****Employee Signature:****Date:****Supervisor/Manager Name:****Supervisor/Manager Signature:****Date:**Back to [Page 35](#) | Back to [Table of Contents](#)

Template 16: Succession Planning

Critical Roles for Replacement

Name	Position	Department	Age	Years of Service	Possible Retirement	Urgency

Key Competencies for Critical Roles

Position	Department	Key Skills Competencies	Required Qualifications

List of Potential Succession Candidates

Position	Department	Potential Successor	Current Position	Estimated Readiness

Once the list of potential succession candidates has been developed, a development plan should be completed for each candidate. The performance management meeting is good opportunity to discuss with these candidates whether they are interested in promotion, identify any skills gaps and identify opportunities for development. [The Appendix A: Template 17](#) on the next page can be used to create a development plan.

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Template 17: Employee Development Plan

Employee Development Plan

Succession Planning Candidate Profile	
Name:	
Current Position:	
Potential Role:	
Age:	
Date Completed:	
Education/Qualifications/ Certifications	
Work History	
Leadership Traits	
Relevant Experiences	
Skill/Experience Gaps	
Readiness for Promotion	
Development Opportunities	

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APPENDIX B

Additional References and Resources



APPENDIX B

Additional References and Resources

- For strategies on developing HR policies and procedures, see this [article from HR Reporter](#).
- Guidance on drafting HR policies is available in this [HR Intervals guide](#).
- Assess employment-related legal considerations with resources from [Law for Nonprofits](#).
- Insights into giving performance feedback can be found in this [Indeed article](#).
- Learn how to write SMART goals with this [Indeed Career Advice guide](#).
- For an overview of succession planning, refer to this [HR Intervals guide](#).

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APPENDIX C

CSCNL Community Sector Compensation and Benefits Survey 2023



APPENDIX C

CSCNL Community Sector Compensation and Benefits Survey 2023

CSCNL Community Sector Compensation and Benefits Survey 2023 provides comprehensive documentation of compensation and benefits currently provided to community sector staff in Newfoundland and Labrador. This report investigates all aspects of compensation and is useful in determining the appropriate level of compensation and benefits for community sector staff. The study was carried out by The Portage Group, a full-service management consulting firm that specializes in providing research and consulting services to associations.

Methodology

Beginning in November 2022, CSCNL sent email invitations to community sector organizations within the province to participate in an online survey, receiving responses from 226 organizations by the end of January 2023. The survey allowed respondents to provide information on compensation, benefits, and demographics for staff members across various positions, including full-time, part-time, seasonal, and contract roles. Compensation data for part-time positions was adjusted to a full-time equivalent based on hours worked. Respondents could report data for individual staff or groups of employees in specific positions, resulting in 677 positions reported and 1,803 employees represented.

The survey also included definitions for different position levels and the corresponding number of positions and employees at each level. Here's a summarized version of the provided staff level job descriptions:

Level 1: Chief Executive

- Common Titles: Executive Director, CEO, President, Artistic Director (reporting to the board).
- Role: Most senior staff overseeing the entire organization.
- Reports to: Board of Directors.
- Positions: 154 reported, 154 represented.

Level 2: Deputy CEO/ED

- Common Titles: Vice President, COO, CFO, Operations Manager, Artistic Director (not reporting to the board).
- Role: Second-in-command supporting the Chief Executive.
- Reports to: Chief Executive, sometimes to the Board.
- Positions: 29 reported, 29 represented.

Level 3: Management

- Common Titles: Vice President, Senior Manager, Director, Finance Officer, HR Director.
- Role: Oversee specific areas or divisions, ensuring strategic goals are met.
- Reports to: Senior Executive and/or Chief Executive.
- Positions: 72 reported, 97 represented.

Level 4: Supervisory

- Common Titles: Manager, Team Leader, Supervisor.
- Role: Responsible for specific areas within a function or division.
- Reports to: Senior Manager or Chief Executive.
- Positions: 86 reported, 149 represented.

Level 5: Program Staff

- Common Titles: Coordinator, Program Administrator, Actor, front-line service delivery roles.
- Role: Carry out organizational work or front-line services.
- Reports to: Supervisor or Manager.
- Positions: 241 reported, 979 represented.

Level 6: Support Staff

- Common Titles: Receptionist, Administrative Assistant, Data Entry, Bookkeeper, Caretaker.
- Role: Provide support for smooth organization operation.
- Reports to: Supervisor or Manager.
- Positions: 95 reported, 395 represented.

This summary highlights the hierarchy and roles across six staff levels.

Limitations

A number of limitations must be kept in mind when interpreting the results of this study:

- Results are based on survey responses and depend on the accuracy of the data provided by participants.
- The survey used a list of CSCNL contacts, not a random sample, so the results might not fully represent the entire community sector in Newfoundland and Labrador. They reflect the views of participating organizations.
- While the overall results are reliable, subgroups with small sample sizes should be interpreted cautiously.

The following figures highlight:

- Cash Compensation
- Cash Compensation by Organization Characteristics
- Cash Compensation based on Demographics
- Retirement Benefits
- Health Benefits
- Fringe Benefits

Cash Compensation

Cash compensation serves as the primary benchmark for evaluating compensation packages in the community sector of Newfoundland and Labrador. Compensation generally increases with seniority, as evidenced by the following average cash compensations: Chief Executives (level 1) receive \$69,619, Deputy CEO/EDs (level 2) average \$62,463, Management (level 3) at \$60,351, and Supervisory (level 4) at \$48,175. Non-management roles see lower compensations, with Program Staff (level 5) at \$37,578 and Support Staff (level 6) at \$33,166.

AVERAGE TOTAL CASH COMPENSATION BY LEVEL

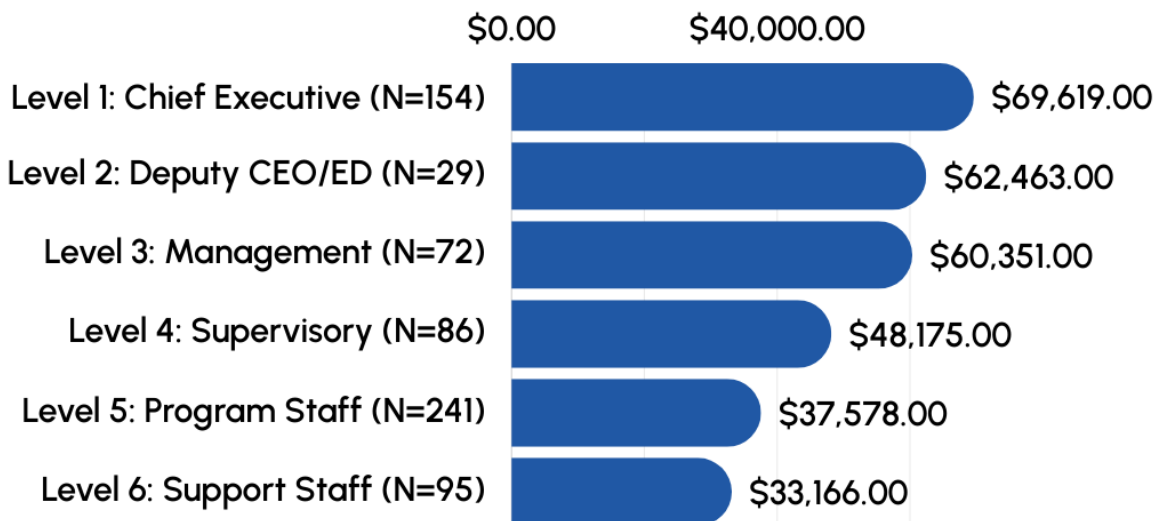


Figure 2:
Salary by Level

Over the past year, compensation changes ranged from 1.8% to 3.6%, with increases typically below 3%. Looking ahead, anticipated changes for the next year are expected to be between 1.4% and 2.2%, generally lower than the previous year's changes. Bonus compensation is not common in the community sector in Newfoundland and Labrador with only 8% to 14% of staff receiving some form of bonus compensation above their base salary.

Cash Compensation by Organization Characteristics

In terms of organization type, registered charities offer the highest average cash compensation for Chief Executives (level 1) and Deputy CEO/EDs (level 2), while Management (level 3) and Supervisory (level 4) positions see similar compensation across registered charities and other registered nonprofit organizations.

Notably, other nonprofit organizations provide the highest average compensation for Program Staff (level 5) and Support Staff (level 6). Compensation tends to be lower across all levels, except for Support Staff, in organizations focusing on arts, culture, or heritage. Organizations operational for over 20 years generally offer higher compensation than those in operation for 20 years or less. As jurisdiction size increases, average compensation for management roles also rises up to the provincial level.

St. John's boasts the highest average compensation across all levels, while Eastern Newfoundland reports the lowest. Larger cities generally offer higher average compensations. Interestingly, compensation for Management (level 3) is higher in organizations with revenues of \$250,000 or less compared to those with revenues between \$250,001 to \$500,000. For the most senior roles, compensation peaks with 20 staff before declining, while Management sees compensation growth with staff numbers from six onwards. For Support Staff, compensation is highest in smaller organizations with 1 to 5 staff, with no clear relationship observed between Supervisory and Program Staff.

Compensation based on Demographics

Compensation within the community sector in Newfoundland and Labrador was also found to vary based on personal demographics, including age, gender, education, and experience. Age generally increases with seniority, compensation tends to rise with age for Chief Executives and Management Staff, with a positive correlation also observed for Support Staff, though not statistically significant.

The community sector in Newfoundland and Labrador is predominantly female, ranging from 60% at the Chief Executive level to 85% at lower staff levels, with 1% to 2% identifying as non-binary. Notably, males earn higher average compensations than females across all levels, with the gap widest at the Chief Executive level.

Compensation generally increases with education, and while relevant certifications can boost earnings for certain roles, they may reduce average compensations for Chief Executives and Support Staff. Experience correlates positively with compensation for Chief Executives, Management, and Support Staff, with mixed results for other levels.

Employment Benefits and Policies

Retirement Benefits

In addition to cash compensation employment benefits can also play a significant role in the overall value of a compensation package. Less than half (45%) of organizations offer retirement benefits, with Chief Executives and Support Staff being the least likely recipients. Retirement Savings Plans (RSPs) are the predominant retirement benefit, with matched contributions being more common than employee only contributions. The average value of retirement benefits is around \$4000 (5%) of base compensation for upper-level staff, while lower-level employees receive benefits ranging from 3.6% to 4.9% of their base salary.

RETIREMENT BENEFITS PROVIDED

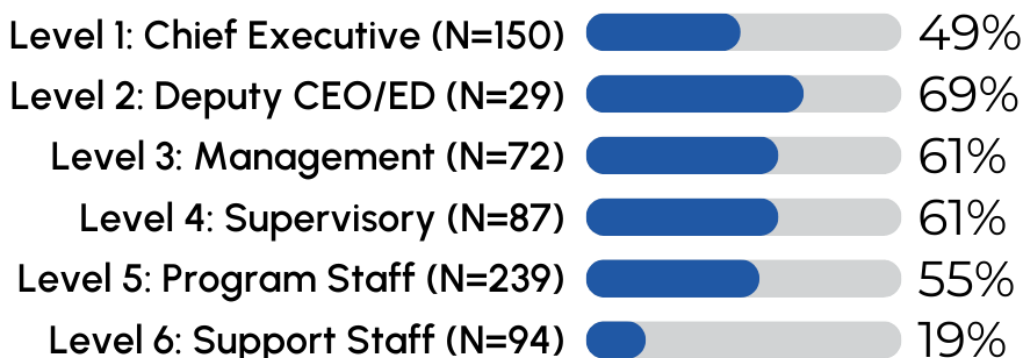


Figure 3:
Retirement Benefits

Health Benefits

With respect to health benefits, 3 out of 5 (60%) of organizations offer them to at least one staff level, with Management staff most likely to receive them. For Chief Executive Officers (CEOs), the mean expenditure on health benefits amounted to \$3,385 (4.1%) of base pay. At subordinate levels, this figure fluctuates between 4.1% and 5.6% of base salary. The cost of health premiums is typically shared between employers and employees.

HEALTH BENEFITS PROVIDED

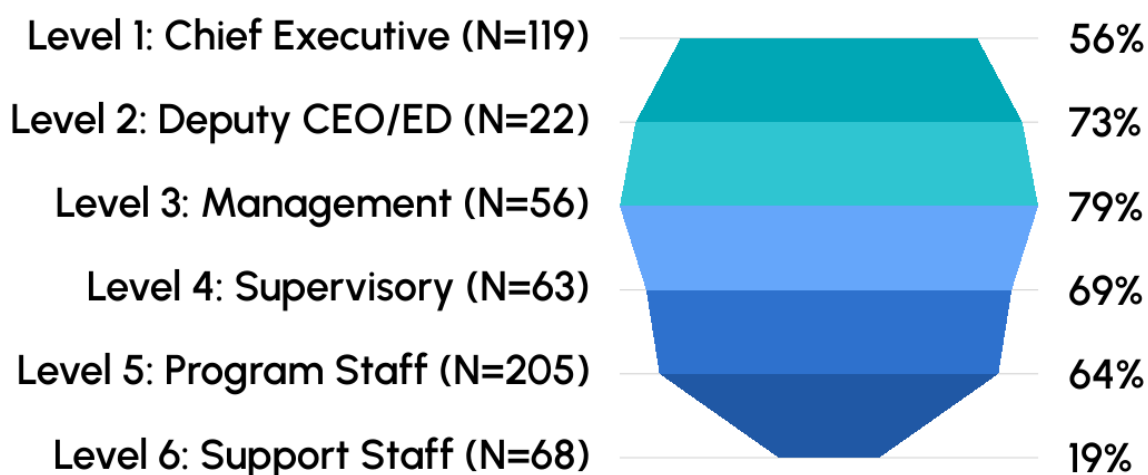


Figure 4:
Health Benefits

Fringe Benefits

Fringe benefits are provided by 82% of organizations, the most common fringe benefits provided in Newfoundland and Labrador include:

- Conference registration and travel
- Professional development
- Cell phone/laptop provision
- Professional dues coverage
- Home office equipment allocation

Paid Vacation/Paid Sick Time

Paid vacation is more common among upper management, with 80% to 91% receiving an average of 3.8 weeks, compared to only 53% of program staff who receive an average of 1.8 weeks.

Additionally, level 3 and up staff average 11.1 to 14.1 paid sick days per year, while support staff average 9.1 sick days annually.

[CSCNL's Community Sector Compensation and Benefits Survey 2023](#): offers a detailed look at the compensation and benefits provided to community sector staff in Newfoundland and Labrador. It examines various aspects of compensation to help organizations determine appropriate levels for their staff. The report breaks down compensation by organization type, role, and jurisdiction, highlighting differences in average pay based on these factors. It provides valuable insights into the nuances of compensation and benefits in the region, serving as a useful benchmark for organizations to assess their compensation packages.

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