HR PLAYBOOK

viaSPORT
BRITISH COLUMBIA

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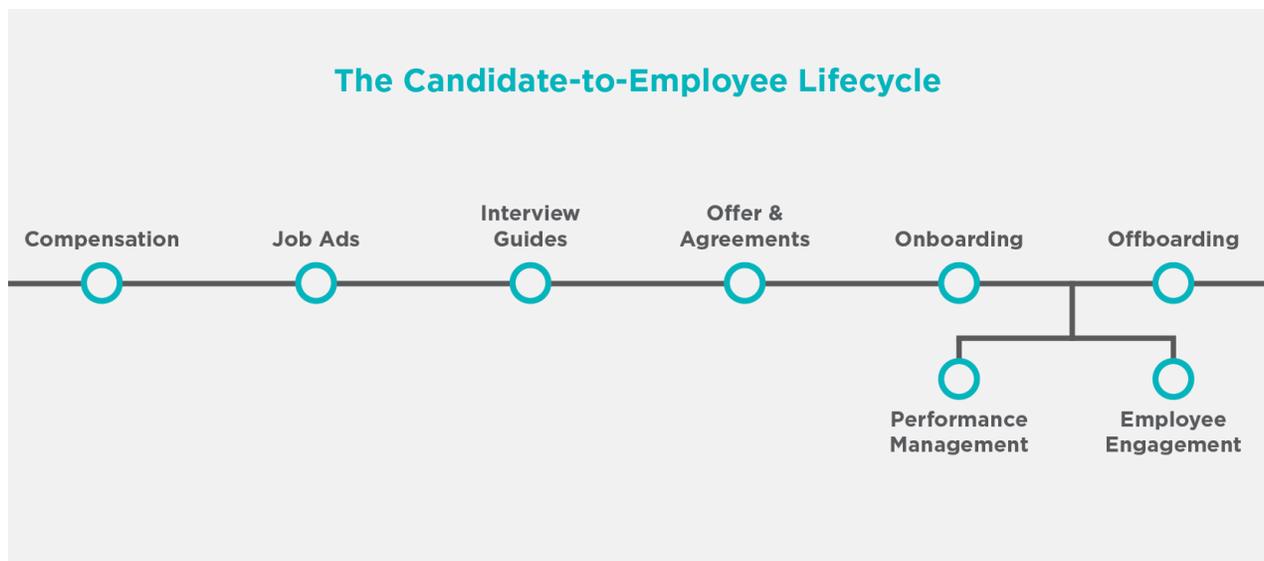
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INTRODUCTION

viaSport developed this HR Playbook, in collaboration with Beacon HR, to provide information, guidance, best practices, and checklists / templates / sample documents where appropriate, on the key areas of Human Resources. Organizations under viaSport are encouraged to use this Playbook as a reference guide and starting point to create HR documents, processes and practices that are tailored to their specific needs.

The sections of this Playbook are organized in the order of the candidate-to-employee lifecycle. An important part of optimizing HR resilience is to ensure a consistent candidate and employee experience while maximizing opportunities to reinforce your organization's core values, workplace culture and employer brand every step of the way as you attract, retain and engage the most passionate talent in the field.

The Candidate-to-Employee Lifecycle

Compensation — Job Ads — Interview Guides — Offer & Agreements — Onboarding — Offboarding

Performance Management

Employee Engagement

Note: This document is intended for informational purposes only and does not constitute legal advice or an opinion on any issue.

COMPENSATION

The purpose of this section is to help provide a strong, fundamental foundation to compensation, and its importance in your overall people (and organizational) strategy. Each element discussed in this document aims to offer a transparent, thoughtful framework that will allow you to make meaningful decisions around compensation, and ensure it aligns with your organization's core values and beliefs.

Compensation Philosophy

A compensation philosophy is simply a formal statement documenting the organization's position about employee compensation. It explains the "why" behind employee pay and creates a framework for consistency. Employers use their compensation philosophy to attract, retain and motivate employees.

Compensation philosophies are typically developed by the human resources department in collaboration with the senior leadership team. The design of a compensation philosophy is based on many factors, including:

- the organization's financial position;
- the size of the organization;
- the industry;
- organizational objectives;
- market salary information;
- the level of difficulty in finding qualified talent; and
- the unique circumstances of the organization

Your compensation philosophy should be reviewed periodically and updated based on current factors affecting the organization. For example, market conditions may make

it difficult to find qualified talent in a particular specialization, and an employer may need to pay a premium for these candidates. If the employer's current compensation philosophy does not support this value, then the organization may need to change its philosophy to meet its current needs.

Most compensation philosophies seek to:
- Identify the organization's pay programs and total reward strategies
- Identify how the pay programs and strategies support the organization's business strategy, competitive outlook, operating objectives and human capital needs
- Attract people to join the organization
- Motivate employees to perform at the best of their competencies, abilities and skill sets
- Retain key talent and reward high-performing employees
- Define the competitive market position of the organization in relation to base pay, variable compensation and benefits opportunities
- Define how the organization plans to pay and reward competitively, based on business conditions, competition and ability to pay
- Ensure equal pay for equal work, with allowable pay differences based on factors not prohibited by law

An effective compensation philosophy should pass the following quality test:
- Is the overall program equitable?
- Is the overall program defensible and perceived by employees as fair?
- Is the overall program fiscally sensitive?
- Are the programs included in the compensation philosophy and policy legally compliant?
- Can the organization effectively communicate the philosophy, policy and overall programs to employees?

- Are the programs the organization offers fair, competitive and in line with the compensation philosophy and policies?

While an HR department usually leads the development of an organization's compensation philosophy and policy, success lies in collaboration with the leadership team to obtain valuable input, direction, and buy-in.

Compensation Overview

Compensation can be provided in a number of ways, but can be grouped into two categories:

- **Direct Compensation:** Monetary rewards directly paid to employees for time worked or results obtained.
- **Indirect Compensation:** Non-monetary rewards that provide some additional benefit or value to an employee

Direct Compensation	
Hourly	Compensation paid to workers for every hour worked. Hourly pay is common for part-time employees, paid interns, temporary employees, and contractors.
Base Salary	Compensation paid to workers for time worked, generally represented as an annual amount, and used in other calculations. Most full-time, permanent employees will have a base salary.

Indirect Compensation	
Benefits	Benefits can include any employer-paid offerings that employees can access in exchange for services. This can include: ● Health & Dental services ● Professional Medical Services (e.g. Dieticians, Massage Therapists, etc.) ● Vision Care ● Employee Assistance Programs ● Health Spending Accounts ● RSP Matching Programs Benefits are typically only made available to employees of organizations. For legal reasons, independent contractors should not receive benefits.
Allowances & Perks	Compensation offered to employees as a reflection of an organization's values and culture. These are rewards that are intended to improve an employee's quality of life at work (or at home), and serve as retention tools. These can include: ● Generous vacation entitlements ● Free lunches / snacks ● Travel / Office travel subsidies ● Professional Development allowances ● Paid Family Leave (including Maternity / Paternity Leaves) ● 4-day Work Weeks / Flexible work schedules Once again, most allowances and perks are usually reserved for employees, and are not typically accessible to contractors.

Compensation Structures & Procedures

SALARY BANDS

Salary bands refer to the minimum and maximum amount an organization is willing to pay someone within a particular job profile (or Job Level). For example, a level-one HR professional might be eligible to earn between $50,000 to $70,000. Meanwhile, a level-four employee — let's say a Director of HR — may have a salary band ranging from $100,000 to $130,000, as visualized below.

Example Salary Bands

HR Level 1 $50K-$70K

HR Level 2 $60K-$90K

HR Level 3 $80K-$110K

HR Level 4 $100K-$130K
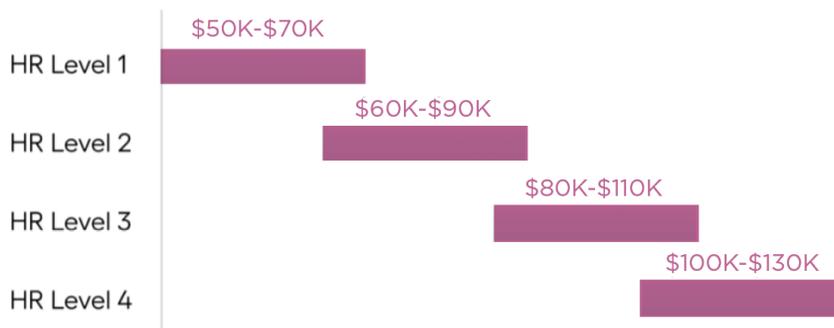
EXTERNAL BENCHMARKING

An external benchmark is a compensation exercise that compares your organization's internal salary bands against those offered by competitors or other organizations of a similar profile. These can be done across a group of positions, or individual positions, based on the organization's needs.

The overall goal of an external benchmark is to assess your organization's competitiveness to the external market.

Here are the basic steps to complete an external benchmarking exercise:

1. Review salary bands for positions of interest
    - Salary bands should contain and minimum and maximum range
2. Target a market percentile for analysis
    - 50th percentile is a safe, reliable metric that captures a majority of the talent market
3. Provide comparisons against available benchmark data
    - Analyze the findings and make recommendations / conclusions
4. Results should be clearly be below, at, or above the target percentile
    - In an ideal comparison, your internal data should ideally mirror the market

External market data can vary extensively based on how it is aggregated. While there is a lot of free data available online that can provide general insight about how your organization's salaries compare to others, the most accurate data you can find comes from looking at organizations that are most similar to yours. This means reviewing salary data that come from organizations that are similar in:

- Industry/Sector
- Organization Size
- Organization Revenue/Funds
- Geographical Location

Triangulating this information is generally not possible on your own, but there are many organizations that are able to isolate salary data to this level of specificity for you at a cost. Requesting salary information from a third-party is as simple as providing some metrics around the bulleted list above, and paying the costs for that data, which is usually provided in a spreadsheet or PDF form.

Some of these organizations include:

- PayScale
- ERI (Economic Research Institute)
- Mercer
- Aon Hewitt

Specific to the non-profit sector, Charity Village is another option where companies can access compensation data.

INTERNAL BENCHMARKING

An internal benchmark is a compensation exercise that compares the individual salaries of your employees against the internal salary band established for their job position. An employee who is closely aligned to the salary you expect them to have for their level of experience, seniority, and skill level is considered to have "high internal equity". That said, while internal benchmarks can be done on an individual level, they can also be used to assess internal equity across multiple dimensions such as gender, geographical location, race, and others – assuming you have the employee data available.

The overall goal of an internal benchmark is to assess your organization's internal equity and ensure that employees are being properly compensated based on the criteria you've outlined in your compensation philosophy and strategy.

Here are the basic steps to complete an external benchmarking exercise:
1. Collect salary information on all employees of interest
   - Salaries provided should be broken down between base and variable (if applicable)

2. Conduct a *compensation ratio analysis* to determine salary spread
   ○ The compensation ratio will determine how far or how close the employee is from the competitive range
3. Analyze findings. Highlight major discrepancies
   ○ Flag any employees outside of the competitive range. Comparative ratios (compa-ratio) can provide a number of valuable insights.

COMPENSATION RATIOS

If you are not familiar with the term, a compensation ratio (also called compa-ratio) is found by dividing the actual salary paid to an employee by the midpoint of the salary range for that job. Here is the compensation ratio calculation:

$$\frac{Actual\ Salary}{Midpoint\ of\ Salary\ Range} \times 100 = Compensation\ Ratio\ (percentage)$$

Compensation ratios are one of the most common metrics for looking at the placement of an individual's salary within a range. Compensation ratios allow organizations to compare an individual employee's salary to the midpoint of a given salary range. This easy-to-calculate statistic can be used in many ways to guide decisions about compensation in your organization. This is because they can help provide valuable context to evaluating not just a person's current compensation, but also their level of experience when compared to others in the same position.

Specifically, a compensation ratio of 1.0 means that the employee is paid at the exact midpoint of the range, which would suggest they are perfectly competent in their current role. Similarly, if the compensation ratio of an individual is higher or lower than 1.0, it indicates they are above or below the midpoint, which may suggest individuals who are less experienced, or more experienced in their role, respectively.

Please see the below diagram for a better visualization of how compensation ratios can help evaluate an individual's salary within a particular salary band:
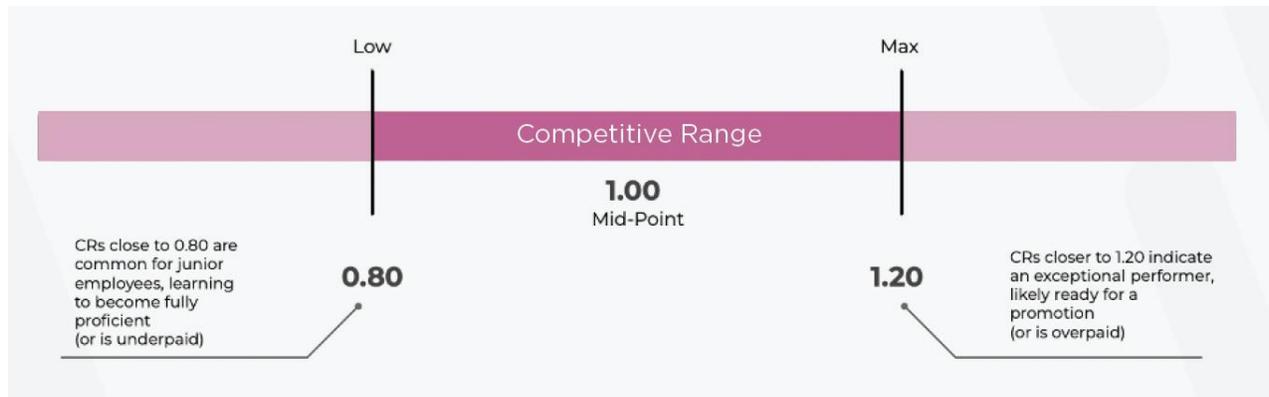
COMPENSATION DECISIONS

Compensation can be determined by a number of factors, including location, skill level, years of experience, and employment type (e.g. full time vs. contractor vs. part-time). For certain positions, certain relevant skills or certifications may also be factored in (e.g. professional designations, certifications). All compensation decisions are typically made by an organization's senior leadership team, or any individuals who may be responsible for departmental budgets.

Compensation changes can vary depending on the organization. This can happen annually, semi-annually, and also 'off-cycle' as needed. In general, however, planned compensation changes should follow the end of a performance review cycle.

Promotions	A promotion is a change from one position to another within the same ladder
Performance Adjustments	A performance adjustment is an increase in compensation within a salary band for the same position.
Market Adjustments	A market adjustment is an increase in compensation resulting from an update to our salary bands or new external market data.

LATERAL TRANSFERS

Lateral Transfers	If a team member transfers to a different position within the organization that would otherwise not be considered a promotion, their compensation will be adjusted to reflect our rate for their new position in that location.

COST-OF-LIVING ADJUSTMENTS (COLA)

A cost-of-living pay adjustment refers to an increase in income based on an estimation of how much money is needed to maintain a standard of living. This pay adjustment can be applied to a variety of income that includes salaries, benefits and more. It is given in order to make up for inflation. Therefore, if the cost of living rises, you can award an employee with a cost-of-living pay adjustment. For example, if your employee lives in Toronto and the cost of living rose by 10%, you could increase your employee's base salary by 10%. There will be times when matching the COLA may not be feasible, in which cases offering a modest COLA increase is still recommended.

Here are some tips and best practices for awarding cost-of-living pay adjustments:

Keep an employee's salary commensurate with their living expenses - As an employer, it's important to offer reasonable salaries and wages to your employees. A reasonable yet competitive salary based on the cost of living in your organization's city is appealing to both applicants and current employees. It also promotes a healthy work-life balance when your employees are able to afford basic life necessities

Give regular raises - Raising your employee's salary on a regular basis is a good practice to keep. This can be given based on their added experience, to keep up with your competitors and more. Regular raises will not only help you retain employees, but will also help them keep up with their various living expenses. In regards to the former, if the cost of living gets too high for them, it's possible they might begin to search for new employment elsewhere. If you're offering a competitive salary or providing them with regular raises, you increase the likelihood of them staying at your organization.

Research market rates - Researching market rates can be helpful in determining what positions are making more money in a given area. For example, if the market rate rises for a given profession, you should offer a pay adjustment for those with that profession at your organization.

Offer an increase when earned - Rather than offer a pay increase for no reason, do it when an employee has earned it. This can include rewarding them for their increased experience, a certain performance level they achieved and more. If they're awarded an increase for no reason, they can come to expect unearned increases at any moment.

JOB ADS

A job ad serves a very specific purpose – to advertise a job opening in your organization. Just like any other form of advertisement, a job ad should capture the attention of the target audience, provide them with just enough enticing details to get them interested, and ultimately encourage them to take action – which in this case is to apply for the job.

An effective job ad goes far beyond describing a vacancy and listing its skills requirements. It should tell the story of your organization and what you stand for. It should clearly communicate what makes the opportunity challenging and rewarding, what it's like to work for you and with your team, and why the advertised position is a great opportunity. A well written job ad should get your target candidates excited to apply and leave them hoping to get a call for an interview.

> **What a job ad is:** For most candidates, your job ad is the first point of contact they would have with your organization. This is where they will form their first impression of your organization as a potential employer and what it might be like to work with your team.
>
> **What a job ad is not:** A job ad is not a job description. While the two are related, they should not be treated as interchangeable. A job description is just that – a description of a role and the responsibilities. A job ad is an advertisement for an opportunity. These are two distinct documents that serve very different purposes.

Key Components of a Good Job Ad

● **Search engine optimization (SEO)-friendly job title**	Keep the job titles straightforward and consistent with the language typically used in your field. Steer clear of creative titles like "Wizard" or "Guru". Remember that your goal is to craft a job title that will match your target candidate's search query as closely as possible.
● **Your story**	Paint a picture of who you are as an organization, your mission for the community you serve, your proudest achievements, and how you live and breathe your mission, vision and core values everyday. Go beyond the boilerplate "about us" blurb and highlight the things that differentiate your organization from other, similar organizations in the area.
● **Role description**	Provide a realistic description of the role and how it contributes to the success of the organization. Talk about the impact they will make and why it will give candidates a real sense of purpose in their work. Highlight what makes the role challenging and rewarding, and the types of skills they can expect to hone in the role. Include details of who they would work with and the type of industry exposure they could gain in the position.
● **Responsibilities**	Use bullet points to list the day-to-day responsibilities and expectations of the role.

● **Qualifications**	Consider whether each requirement on the list is actually essential, or if it might be creating unnecessary barriers for otherwise highly capable candidates (e.g. Consider removing university education requirements or adding "or a combination of education and experience, or equivalent"). Keeping your requirements to what's really essential will allow you to appeal to a wider pool of applicants. Studies have shown that women tend only to apply for a job if they meet 100% of the requirements, while men apply when they meet only 60% of them. Skills and knowledge that can be learned on the job relatively easily should be removed. If you'd still like to call out certain desired skills, you can soften the language with "familiarity with ___ would be an asset" or "bonus points for ___".
● **Benefits and perks**	Candidates want to know what's in it for them. Highlight your benefits and perks, especially ones that may not be uncommonly offered by similar organizations (e.g. Three weeks' paid vacation to start, parental leave top-up, RSP matching, etc.)
● **Your employer brand and "personality"**	You might be doing an incredible job showcasing your employer brand on your careers page and social media with colour themes and carefully curated images, but not every applicant is going to visit your website or find you on social media to see all of that. Make sure your employer brand comes through in your job ads, so that candidates *will* want to look up your website to learn more.

● **Your workplace culture**	Help potential candidates envision themselves working with your team by describing the team environment and workplace culture. Shine a light on how you support your team members' work-life integration, training and development, and career growth.
● **Application process**	Go beyond the "how to apply" and add details of the interview process so that candidates know what to expect.

Best Practices When Crafting Job Ads

Use inclusive language - Pay attention to the use of gender-coded vocabulary in your job ads. Studies have found that job descriptions with "masculine" words made women less interested in the job, even though it didn't make them feel less qualified. Use a tool like this to help remove or neutralize the content of your job ads to appeal to a wider pool of applicants.

Highlight your commitment to diversity, equity and inclusion (DEI) - Emphasize your organization's commitment to DEI and include an equal opportunity employer statement in all of your job postings (Example from viaSport: "viaSport is an equal opportunity employer. We recognize that a diverse workforce is critical to accomplishing our vision and are committed to fostering an inclusive environment for all employees.")

Make your words count - Short job posts (less than 300 words) tend to do better than medium ones (301-600 words). Concise posts help keep the most important information top-of-mind for candidates. That said, long job posts (more than 600 words) also tend to do better than medium ones. So, if you use the longer word count to share more details about the role, candidates will stick around to read them.

Watch your tone - The tone you use should give candidates an authentic feel for the atmosphere at your organization, or it risks giving candidates the wrong impression which can lead to unrealistic expectations later on.

Formatting matters - Job seekers tend to skim job postings, so it's crucial that yours is easy to digest. Keep sections well organized so the content flows well, and use headers bullet points where appropriate to guide their eyes to the sections they're looking for.

Pay attention to the details - Run a spellcheck and consider having a second set of eyes to review a job ad before posting. Don't let careless typos ruin a first impression.

Time your posts - Post early in the week for the most traction (job seekers are most active on Monday and both views and applications tend to dip over the course of the week). And refresh your posting once every two weeks (unless there is a clear application deadline and/or start date in the job ad, applicants might be hesitant to apply to a job ad that was posted more than two weeks ago.)

Don't oversell - Keep it positive, but keep it real too to avoid future disappointment. The only thing worse than an unfilled role is a bad hire you need to replace a few months down the line.

Include government-required language around equal opportunity - For example: "viaSport is an equal opportunity employer. We recognize that a diverse workforce is critical to accomplishing our vision and are committed to fostering an inclusive environment for all employees."

INTERVIEW GUIDES

Interviews are one of the most important tools we have for determining whether a candidate is qualified and suitable for a position in an organization. However, interviews can also be a place where our conscious and unconscious bias can come into play and influence our thoughts and result in bad hiring decisions.

Therefore, it is important to structure interviews to focus on the most relevant questions specific to the organization and position, so as to increase your chances of systematically identifying the right candidates for the job, while reducing bias and ensuring your entire hiring team is on the same page. Having standardized interview guides and sticking to them helps enforce objectivity throughout the interview process.

Structuring Your Interviews

1. Align your assessment with the role's requirements

Based on the essential qualifications you have listed on your job posting and the key competencies for the role, define a set of criteria in terms of the soft and hard skills required for someone to be successful in the role. From there, determine the interview questions you would need to ask (along with skills tests and any other evaluations you will need to conduct) in order to gain insight into whether a candidate has mastered those soft and hard skills.

There will likely be some questions that you would want to ask regardless of the position a candidate is being interviewed for (e.g. Questions about what they are

looking for in the next step of their career, or questions about what they know about your organization.) These will form the basis of your interview guide template. From this, you can build multiple versions of interview guides for the key types of roles you typically recruit for by adding role-specific questions.

> ***Behavioral vs. situational questions:*** *Use a mix of behavioral and situational questions to assess a candidate's skills and experience. Behavioral questions like "Tell me about a time when you had to . . ." can give you an idea of how a candidate has tackled similar challenges in the past, while situational questions such as "What would you do if…" would allow you to assess their hard and soft skills.*

2. Divide the interview questions based on your interview process

Once you have a list of all the questions you need to assess a candidate for a role, split them up based on the number of interviews you have in the hiring process.

A typical interview process has several steps / components (of course, this varies depending on industry and the nature and complexity of the role). Decide which questions should be asked during the pre-screen, which questions are better suited for the deeper dive interview, and which questions should be saved for the culture interview. This way you can ensure you're covering all your bases and the candidates don't find themselves answering the same questions repeatedly with multiple rounds of interviews.

Interview steps can be consolidated as needed for sectors or organizations where capacity may be limited and a multi-step interview process may not be feasible.

Pre-screen	Deep Dive Interview	Culture Interview
This is typically a phone conversation with the candidate that serves as an introduction and to obtain some basic information about them.

This is where you want to ask housekeeping questions that could reveal deal breakers to disqualify them earlier rather than later in the process (e.g. Eligibility to work in Canada legally, ability to commute to the work location, salary expectations, etc.) | This is typically the most in-depth step of the interview process where you would ask about the candidate's past experience and assess their soft and hard skills.

This is where the bulk of the interview questions will be asked, through a combination of behavioural, situational, analytical and technical questions to assess candidates' capabilities, experience, knowledge and qualities specific to the role. | This conversation typically focuses more on assessing candidates on whether their core values and ethics would be aligned with your organization's priorities.

This step typically involves broader, higher-level questions about the candidate's preferred style of work, what motivates them to do what they do, etc. to find values alignment between the candidate and the organization. |

What finding the "right fit" should look like: *Finding candidates whose values, passion and ethics are aligned with the tenets your organization has been built on.*

What finding the "right fit" should not look like: *Finding candidates who may think like you or be fun to hang out with outside of work*

because of hobbies or lived experiences you share.

Rethink "culture fit" and opt for "culture add" instead
A candidate who is a culture add is someone who not only aligns with your values, but also brings new skills and perspectives to the table.

Figure out what you are looking for with your culture interviews. Be intentional about defining what it is and what it is NOT. Share that with everyone who's involved with the interview process.

3. Use scorecards

Scorecards provide a simple, standardized evaluation method for interviewers to share their feedback. They also help reinforce the key criteria that interviewers should be using to assess the candidates.

Use Likert scales for interviewers to rank each candidate on predetermined categories, and add a space where they can include any additional comments.

Scorecards will make it easy for you to see how the candidates are positioned against your key requirements. This is especially helpful should interviewers have different opinions about a candidate, or if you end up with multiple top candidates. You can also leverage the scorecards to set parameters for hiring decisions, e.g. A candidate must score at least a minimum score of x in categories a, b and c in order to move to the next round, or they must have a total score of at least x in order for us to consider extending an offer.

Interview Best Practices

Limit the size of interview panels - While panel interviews can help streamline the process, large panels can be intimidating for candidates, not to mention difficult to schedule. A good number of interviewers is often agreed to be 3 to 5, with those conversations arranged over 2 or 3 steps.

Leave time for interviewer feedback - It may be tempting to schedule back to back interviews in the name of efficiency, but always leave time at the end of each conversation for interviewers to fill out the scorecards and write down their comments while it's fresh in the mind and before speaking with the next candidate.

To test or not to test - Written tests or take-home assignments can be an effective way to assess specific tactical skills, while giving candidates the opportunity to showcase their strengths beyond a static resume and Q&A-style interviews. It may even help them evaluate how much they would enjoy the work. To get the most from them, make sure you respect the candidate's time investment, clearly communicate what you're asking for, and provide feedback to learn from the experience.

Find out what they want, too - Remember that candidates are interviewing you at the same time. Besides assessing their fit for your organization and the role, pay attention to what they are looking for in things like compensation, flexibility, industry exposure, learning opportunities, professional growth, etc., and be realistic about the mutual ability for expectations to be met both ways.

Proactively and promptly communicate timelines, next steps and decisions - Provide candidates with a clear timeline and next steps at every step of the interview process before the candidate even asks. It shows them that you respect their time and

that you recognize your candidates are likely interviewing for other opportunities at the same time. Schedule next steps as quickly as possible and don't keep candidates in the dark. If a candidate has been rejected, communicate the decision to them so they don't have to keep waiting. The way you communicate with candidates, including the ones who are rejected, is part of your employer brand.

> *See this set of sample interview guides we put together for a digital marketing manager role.*

OFFER LETTERS

An offer letter should exist as a separate document from the employment agreement. This is the first official communication you will be sending to your prospective new hire, and it sets the tone for the relationship they can expect to have working with you. This is a momentous document as it signifies your invitation for them to take the next step of their career at your organization, to become part of your team and to grow with your team presumably for years to come. This letter should at once convey your excitement in extending the offer and elicit their excitement in accepting it.

Unlike an employment agreement, the offer letter doesn't have to be very formal at all. This is a great opportunity to be creative, think outside the box and have some fun with it. Inject your brand voice and values, to get the candidate excited about joining your organization. For example, your offer letter can be a slide deck with images, graphics and even videos instead of a text document to make it more visually appealing. This is a great opportunity to showcase the fun side of your organization and also reinforce your employer brand.

Like with most other invitations, the content of an offer letter should be short and sweet. Include key details such as the position title, start date, etc., but other than that the focus should be on the things that are the most important to your candidate at this point – i.e. what's in it for them. Leave out other things that are secondary at this point in time and would be much better reflected in elaborate paragraphs on the employment agreement anyway.

> **What to include in an offer letter:** *Job title, position type (e.g. Full-time, permanent), who the position reports to, start date, end date (if applicable), work hours, work location, flexible work options, salary,*

> *bonuses, vacation entitlement, extended benefits including dental and vision (if applicable) and any additional perks.*
>
> ***What not to include in an offer letter:*** *Job description, probation period (unless it's not the typical 3 months), termination clauses, HR policies, or anything else that would be much better reflected on the employment / contract agreement.*

Offer Letter Best Practices

Add details where it matters - Your candidate may be weighing multiple offers against each other, so the details could become deciding factors. For example, if you offer RSP matching, include the max amount or percentage; if you offer an education fund, include the annual amount; if you regularly organize team activities outside of work, include examples. Anticipate what kind of details your candidate would want to know at this point and include them so as to avoid going back and forth with clarifying questions.

Be clear about sign back requirements - Specify the date and time by which a candidate must send back the signed offer letter and to whom, to indicate their acceptance.

Include important conditions of the offer - For example, criminal record check (note: policy in this area is a mandatory element of being a PSO), reference checks, etc. Indicate that the full employment terms and conditions are in an employment agreement, so that the candidate understands a separate, formal employment agreement would follow.

*For inspiration, see this **sample offer letter** or download the **template**.*

EMPLOYMENT AGREEMENTS

The employment contract establishes the key terms of the employment relationship, including the employer's obligations and the employee's rights. The contract clarifies expectations around key terms such as a start date, salary or hourly wage, benefits, hours of work and termination pay.

This document outlines basic terms in employment contracts in *non-unionized* workplaces for employees covered by the *Employment Standards Act* ("ESA").

Compliance with Applicable Laws

The terms in an employment contract must comply with the requirements of applicable laws. While numerous laws apply, employers need to be particularly conscious about requirements under the ESA, *Human Rights Code* and occupational health and safety legislation.

For example, employers must provide their employees with *at least* the minimum benefits prescribed by the ESA. Some of these requirements are referenced below.

Consideration

A contract is formed any time two parties mutually agree to exchange something of value. The legal term for this "something of value" is called "consideration". The parties to a contract can be individuals, companies or other types of organizations.

An employment contract is generally reached when an employee agrees to work in exchange for getting paid from their employer. In this scenario, both the employer and the employee are receiving something of value (i.e. consideration). The employer

receives the benefit of the employee's labour, and the employee receives compensation.

For a contract to be valid and legally enforceable, the consideration needs to be "fresh" i.e. something of value that is *new* to which the party is not already entitled. By signing onto a new contract, the employee is agreeing to new terms of employment. This holds true for employees that are already working for an employer. If they agree to new terms of employment, e.g. signing onto a new employment agreement, they need to be provided with something of value that is also new (for example, a one-time bonus paid upon signing the contract). Note that a performance bonus that was already promised, earned or paid will not be new, because it is something the employee was already entitled to receive.

Basic Terms in Employment Agreements

Position – The specific role that the employee is being hired for. This term may include who the employee will report to.

Term – There are at least three components to this:
1. When the contract becomes binding: a contract is entered into when both parties agree to it,
2. The employees first day of work, often called the Start Date, and
3. When the employment ends.

Regarding the third, most employment contracts are for an indefinite duration. Fixed-term contracts are sometimes used for temporary assignments and for senior level employment.

In all instances, the contract should provide the employer and employee the right to terminate the employment earlier (see Termination below).

Duties – The specific duties and responsibilities that the Employee must perform in their position.

Conflicts of Interest – Conflicts of interest exist when an employee's personal interests could influence their decisions or ability to act in the best interest of their employer. Because all employees have a duty of loyalty, good faith and fidelity to their employers, conflicts of interests (both perceived and actual) should be avoided. To what extent will often vary by the employee's position and the nature of the conflict.

Hours of Work – How many hours the employee must work under the contract. This includes scheduled breaks and if / how overtime will be paid.

Under the ESA, there are rules that regulate hours of work. Some examples include:
- Standard work hours are 8 hours in a day and 40 hours in a week. A week is from Sunday to Saturday.
- Employees must be scheduled for at least 2 hours of work. They must also be paid if they report to work as scheduled and there is no work for them to do.
- Employees who work over 8 hours in a day or 40 hours in a week must be paid time-and-a-half or double-time for overtime hours worked.

Compensation – The remuneration an employee will be paid and how the employee will be paid e.g. hourly, weekly or monthly.

Under the ESA, there are rules that regulate compensation. Some examples include:

- All employees must be at least paid minimum wage.
- Employers cannot deduct business costs from employee wages.
- Employees must be paid twice per month, and pay periods cannot be longer than 16 days.
- All money earned, including overtime and statutory holiday pay, must be paid within 8 days after the end of the pay period. Annual vacation pay and wages in an employee's time bank need not be paid within the pay period.

Vacation – How much time off an employee will receive.

Under the ESA, there are rules that regulate vacation time off and vacation pay. Some examples include:

- Vacation Pay: After five calendar days of employment, employees are entitled to vacation pay on all wages: Employees must receive at least 4% of their total wages for vacation pay until they have been employed for five consecutive years, at which time they must receive at least 6% vacation pay.
- Vacation Time Off: Employees earn vacation time during the first year they're employed. After 12 months, they get two weeks of annual vacation. After 5 years, they get three weeks of annual vacation. Employees are supposed to use the vacation pay they have earned before their vacation time off to pay for their vacation. Vacation must be taken within 12 months of being earned. Employees cannot skip taking vacation time and just receive vacation pay.

Benefits – Employers may provide additional benefits to employees, for example a benefit plan that may include extended health and other benefits such as life, accidental death and disability, and disability benefits.

Expenses – The parameters under which an employee will be reimbursed for out-of-pocket expenses they incur on behalf of their employer.

Confidential Information – A definition of what the employer considers to be confidential information, and the employee's obligations regarding this confidential information.

Termination – The ways that the employment may terminate, and the employer/employee obligations when this happens. This will include:

1. By the employer:
    a. For just cause, immediately, with no advance notice provided,
    b. Without cause, with the advance notice of termination or payment in lieu of this advance notice

2. By the employee (resignation) with the advance notice agreed to in the employment contract.

Whether an employer has "just cause" to terminate an employee is a question of law that requires a case by case analysis.

Under the ESA, employers must comply with the minimum notice provision when terminating an employee without cause. The amount of written notice and / or pay is based on how long an employee has been employed:

Amount of written notice and/or pay required for termination of an individual	
Length of employment	Amount required
Three months or less	No notice and / or pay
More than three months	One week of notice and / or pay
More than one year	Two weeks of notice and / or pay
More than three years	Three weeks of notice and / or pay, plus one week of notice / pay after each additional year of employment (to a maximum of eight weeks)

If an employer and employee agree, e.g. in an employment contract, that upon termination the employee will be provided *more* than the ESA minimum amount of notice/pay in lieu, then that employer must honour that agreement.

A third situation arises where an employer and employee do not reach an agreement to limit the amount of notice or pay in lieu of the ESA minimum amount or the agreement between them is not legally enforceable otherwise. In this situation, that employee may be entitled to additional severance at common law. The amount of notice (or pay in lieu) at common law an employee will be entitled to depends on the employee's age, character of employment and availability of similar work, along with other factors.

Under the ESA, there are also additional requirements upon termination including timing of final pay and delivery of an employee's record of employment.

Temporary Layoff – When an employee is temporarily laid off i.e. given less work or no work, with the plan that the employee will return to a regular work schedule.

Under the ESA, there are rules that regulate hours of work. Some examples include:

- If an employee's hours are reduced, they are considered laid off when they earn less than 50% of their weekly wages at the regular rate (averaged over the previous eight weeks that they worked).
- Employers cannot temporarily lay off an employee unless that employee agrees to the temporary layoff in advance e.g. in an employment contract.
- An employee cannot be temporarily laid off for more than 13 weeks in any given 20-week period (about 3 months in a period of 5 months).

Entire Agreement – The employment contract, and any attached documents, constitutes the entire agreement between the employer and employee. This helps ensure there is no dispute about which documents make up the employment contract, and reduces uncertainty.

Compliance with ESA – The employment contract will be deemed to apply with the ESA. If the ESA is amended, then those amended terms will apply to the employment contract.

Governing Law – The law that will apply to the contract. The employment laws that apply are usually the laws of the place where the employee is living and working.

Severability – If one or some terms of the employment contract are found to be invalid, they are "severed" from the employment contract and the rest of the terms remain valid.

Independent Legal Advice – Confirming that the employee has been given an opportunity to obtain independent legal advice before signing the employment contract.

Additional Terms

The following are examples of other terms that employers may include in their employment contracts. Each requires specific wording, including if there are any obligations that continue after the employment ends.

Other Forms of Compensation – For example, commission payments, participation in a pension plan, bonus plans, stock options etc.

Restrictive Covenants – There are two common restrictive covenants. Both types restrict an employee's activities during and *after* their employment ends:

1. non-competition clauses, which prevent an employee from competing against the business of their employer / former employer, and
2. non-solicitation clauses, which prevent employees from soliciting the clients and customers of their employer / former employer for other businesses.

Restrictive covenants will be enforceable only where the employer can demonstrate that the clause is reasonable in the circumstances. Whether a restrictive covenant is reasonable is a question of law that requires a case by case analysis. Relevant factors include the nature of the interest being protected, and the scope e.g. duration and any geographic limitations.

Intellectual Property – To protect the employer's interest in intellectual property and ownership of developments that employees create while working for an employer.

Click here for downloadable employment agreement templates.:

- Guidance Document
- **Existing Employee** (Full Time Staff, Part Time Staff, Full Time Manager, Part Time Manager)
- **New Hire** (Full Time Staff, Part Time Staff, Full Time Executive Director, Full Time Manager, Part Time Manager)
- Independent Contractor
- **Volunteer** (Committee Member, Staff with Language for Minors, Board Member)

ONBOARDING

Onboarding is one of the most important HR functions for any organization. It is the process of acclimating your new team member to their role, to your existing team and processes, and to your organization's philosophies. When done properly, the onboarding process sets the stage for long-term alignment between the employee and the employer in expectations as well as core values. It also builds a foundation of mutual trust and confidence in the relationship.

A robust onboarding program extends far beyond the first-day introductions, office tour and welcome lunch. It should be designed to achieve 360-degree enablement so that your new team member can become effective in their new role in an efficient manner and facilitate their transition into the new role while they learn the ropes. A successful onboarding program should demonstrate your investment in your new team member's success, and leave them feeling empowered to do their best work and excited about the prospects of growing with the organization for years to come. To achieve all of this, we recommend a comprehensive 30/60/90-day onboarding program.

> **The 3 E's of Onboarding:**
>
> **Enablement -** *Ensure your new hire has everything they need to be effective at their job. This can include knowledge (on the organization, programs, team structure, processes...), tools (devices, software, apps, access to drives / folders / documents...), relationships (proper introductions to the team, partners, other stakeholders...), access to additional resources, and someone to turn to for questions.*
>
> **Encouragement -** *The onboarding process should leave your new hire feeling empowered to do their best work. This requires allowing them*

the time to learn the ropes at an appropriate pace for their experience level; the space to practice, make mistakes, ask questions along the way; and a gradual ramp up to more complex concepts and problems to avoid overwhelm and to help them feel emboldened by their own progress.

Expectations - *Communicate your expectations of your new team member with them clearly and often. Provide context and clarity, and take the time to make sure they understand and are actually on the same page as you. Set realistic metrics and timelines to minimize ambiguity and foster accountability. Also understand their expectations of you as their manager, and make sure you're supporting them the way they need.*

30/60/90-Day Onboarding Framework

Creating a robust onboarding framework for your organization will help ensure a consistent onboarding experience for all new team members and that they are provided with everything they need to succeed in the first 90 days.

The framework should serve as an easy reference and customizable action plan for your team to get all the ducks in a row in preparation for the arrival of a new hire. It also functions as a checklist to follow throughout the new hire's first 90 days, to ensure that everyone involved in the onboarding process (HR, IT, Finance or team members wearing those hats, along with the new team member's direct manager) are accountable for completing the key action items within the specified timeframes.

Before the New Hire's Start Date

Outcomes: *To create a welcoming work environment, acquaint your new hire with the existing team, prepare a fully-equipped work space (and provide them the tools to do so remotely), and let your new hire feel "settled in" on their first day.*

Action	Description	Owner
Initiate onboarding process	*Every onboarding needs a starting point. There should be a clear way for the organization to know it needs to prepare for the arrival of a new team member.*	HR
Set up onboarding presentation, training sessions, meet & greets for the employee's first two weeks	*Planning ahead and putting placeholders in the calendar in advance ensures you lock in your team's availability and lets you focus on the new team member during their first few weeks.*	HR
Plan the employee's first assignment	*Providing the employee with short-term goals helps them find their groove and contribute immediately to the organization's success. Start small with something they can complete within the first two weeks.*	Direct Manager
Assign a buddy where appropriate	*Designate a team member (ideally a peer on the same or an adjacent team) to help settle in the new employee for their first 3 months. This will be their go-to person for questions that they may think are "too small" to ask their manager.*	HR
Meet with buddy and provide suggestions / tips (if applicable)	*Just like a new hire, buddies need to be prepared too. Meet with the buddy in advance to discuss expectations and how they can be the most effective.*	Direct Manager
Prepare workstation, set up office space with supplies	*Part of feeling welcome in a new organization means feeling part of a team. Ensuring that a workstation is prepared and ready for them on their first day creates a good first impression.*	HR
Prepare office key / access card (if applicable)	*Ensuring that the employee has all the tools and materials they need to easily access the office when they need to create autonomy.*	HR
Set up technology equipment and software	*Ensuring that the employee has a working device, and the necessary tools / software to perform their duties means they can be effective from day one.*	IT

Create user accounts, ensure access is ready for first day	*Share all the required login details with the new employee ahead of time through their new work email. Having access to all the right networks, folders, drives, email addresses, materials, etc. will ensure they have minimal roadblocks and can focus on learning the job.*	IT

First Week of Work

Outcomes: *The employee feels welcomed and prepared to start working; begins to understand the position and performance expectations.*

Action	Description	Owner
Set up employee profile in HRIS and payroll	*Double checking proper set up in the employee systems will ensure the new hire is being properly tracked and set up for things like their probationary review and payroll.*	Finance / HR
Receive employee on their first day and provide tour of office if in-person	*The employee's first day may be either in-person or virtually. Most important is you are the first to welcome them and get them settled into their new work environment.*	Direct Manager
Conduct orientation meeting, providing overview of the organization, key individuals and core systems	*Provide an overview of the organization, its mission, purpose, organization structure, offerings, key stakeholders, etc. Ensure the new hire is aware of "who is who" and "where is where" so they can reach out to the right people when needed.*	Direct Manager / HR
Introduce employee to buddy and team members through meet & greets	*Making friends and getting to know colleagues is likely top of mind for the new employee. Get the employee introduced to their buddy as soon as possible. And make sure they're getting to meet the rest of the team over the next couple of weeks.*	Direct Manager

Welcome lunch	*Always a good gesture! If in-person, perhaps let them choose from the popular eats in the area. If virtually, a DoorDash/UberEats voucher can be a great gesture.*	Direct Manager
Clarify goals and tasks for the first few weeks, and confirm training needs	*A new hire will want to know how to be productive, effective, and valuable at work. Take time very early to outline expectations and goals for the first week or two so the employee has a game plan.*	Direct Manager
End of first week onboarding survey	*Gauge how they're feeling at the end of their first week. Ensure expectations are still aligned, and course correct if there are any gaps or misalignment.*	HR

First Month of Work

Outcomes: *New employee builds knowledge of internal processes and performance expectations; feels settled into the new work environment; and builds a trusting relationship with you.*

Action	Description	Owner
Provide benefits overview session	*Set aside time to go over important details with the benefits plan in terms of offerings, deadlines, contact information, etc. Make sure they understand how to use the benefits you're providing to them.*	HR
Give employee their 30–day assignment	*Providing something tangible that the employee can accomplish during their first month will help give them an early sense of accomplishment and value to the organization. Debrief with the employee once the assignment is completed to gauge their comfort level and identify any gaps early on.*	Direct Manager
Check in daily at least for the first two weeks.	*The first couple of weeks are very important, and you want to set employees up for success, so spend extra time checking in more regularly to ensure the employee is on the right track.*	Direct Manager

Introduce 30/60/90-day plan	*Go over the 30/60/90-day plan with your employee, explain how it is designed to help them progress gradually and set them up for success. The plan should be fluid and subject to change as needed.*	Direct Manager
Set expectations around communication and accountability	*Good partnerships are built on strong communication, aligned expectations, and a high level of trust. Give them accountability and autonomy, but set clear expectations on what success looks like.*	Direct Manager
Meet to set and review goals to be accomplished during probationary period	*Toward the end of the first month, set the stage for 60-day and 90-day goals the employee will be striving for from now to the end of their probationary period. These goals will keep them focused and motivated.*	Direct Manager
Get to know the employee on a more personal level	*Get to know the person behind the role and skill set. Learn about what sparks joy for your newest team member outside of work. What goes on in someone's personal life affects how they show up at work. Getting to know your employee as their whole self will help you grasp what work-life integration means to them.*	Direct Manager
End of first month onboarding survey	*Gauge how they're feeling at the end of their first month. Ensure expectations are still aligned, and course correct if there are any gaps or misalignment.*	HR

Second Month of Work

Outcomes: *The employee is cognizant of their performance relative to the position and expectations, while they continue to develop, learn about the organization, and build relationships.*

Action	Description	Owner
Establish and	*You will now be building a regular routine with the new employee. Regular 1:1s will help build an on-going*	

schedule regularly occurring one-on-one meetings	cadence for checking in.	Direct Manager
Provide timely, on-going, meaningful "everyday feedback"	*The new hire is still learning, and will make mistakes. Don't wait to provide valuable feedback. It should be timely and concise. Give them the knowledge to succeed.*	Direct Manager
Elicit feedback from the employee and be available to answer questions	*Keep channels of communication open. It's not just about you providing feedback. Get insight from the employee as well about what is going well and what isn't.*	Direct Manager
Assign meaningful tasks with appropriate and progressing levels of complexity; focus on tasks to be accomplished within the first 90 days	*It's time to provide longer stretch goals. Provide enough meat that will guide the employee toward success during their probationary period. It will also provide you with measurable means to assess performance.*	Direct Manager
Continue introducing employee to key people and bring them to relevant meetings and / or events	*This will be organic and happen naturally through time. Take notice when these are appropriate, and when a new employee may need more context for a task.*	Direct Manager
End of second month onboarding survey	*Gauge how they're feeling at the end of their second month. Ensure expectations are still aligned, and course correct if there are any gaps or misalignment.*	HR

Third Month of Work

Outcomes: *The employee is becoming fully aware of their role and responsibilities, beginning to work independently and produce meaningful work. They feel confident and are engaged in their new role while continuing to learn.*

Action	Description	Owner
Continue having regular one-one-one meetings	*This should now start feeling efficient and natural. Be sure to communicate openly and determine the best way to maximize each meeting.*	Direct Manager
Discuss any significant employee performance challenges with HR/Leadership Team	*If you are having doubts about the performance of the employee and their ability to be successful, this is your last chance to decide. Discuss this early in the third month with HR or relevant senior leaders.*	Direct Manager
Distribute three-month probationary review forms to employee and direct manager	*A probationary review should be conducted and completed before the end of the third month of employment. Send the review forms at least 1-2 weeks in advance to the employee and their direct manager to complete.*	HR
Conduct three-month probationary review meeting with employee	*Set up a formal meeting in advance to discuss employee performance. At this point you have likely decided this person has passed their probation. Be happy to communicate this success!*	Direct Manager
Introduce Career	*Introduce the employee to your Career Progression Framework. Plant the seed and let them know that*	Direct Manager

Progression Framework	*should they wish to advance in their career at the organization, you can create a roadmap together and they would have your support. This conversation doesn't need to go beyond letting them know what would be available to them. If the employee is ready, start planning follow-up conversations for the coming months and quarters.*

Onboarding Plan for Your New Hire

A 30/60/90-day onboarding plan is about clearly communicating the expectations to your new team member around the specific goals they are to meet within their first three months at your organization. These goals should be designed to help them ramp up gradually, set them up for success by setting the time and pace at which they progress to the more complex aspects of their role, and ensure they don't feel overwhelmed with wanting to learn everything they need to know all at once.

When creating a 30/60/90-day plan for your new team member, start at the end and work backwards. Refer to their job description and ask yourself where you expect this new hire to be by the end of their first 90 days in terms of knowledge (about the organization, the team structure, the customers, the programs, ongoing projects, etc.); connections (their relationship with you, their immediate team, the other teams within the organization, customers, and other stakeholders); and hands-on experience in their role (specific tasks or project-based experience and at what level), skills (specific hard and soft skills and at what level, etc.) Now break these down into three 30-day chunks starting with the basics first, and make sure that as the new employee enters each new month they will have learned what they need in order to be successful in the next 30 days (e.g. They should be well versed in X before they start learning Y.)

Below is a basic matrix including some high-level sample breakdowns as a starting point. When using this matrix, you should tailor it to the specific new team member and their role and experience level, break down each cell into SMART (Specific, Measurable, Achievable, Relevant, and Time-Bound) goals and include more details as appropriate so as to minimize ambiguity (e.g. List all of the policies they need to read through in the first 30 days). In fact, the less experienced your new hire is, the more granular their 30/60/90-day plans should be. Review the plan with your new team member at the start of each month, get their thoughts, gauge their progress, and adjust accordingly.

	Knowledge	Connections	Experience	Skills	...
30d	Get acquainted with key policies, processes and procedures	Get to know everyone on the team	Shadow 3 different team members on ongoing tasks	...	...
60d	Read through case studies, program files and playbooks	Be introduced to key stakeholders on ongoing programs	Contribute to 2 ongoing programs	...	...
90d	Form solid understanding of current market and competition for the organization	Participate in introductory calls with stakeholders	Take the lead on their first program	...	...

Onboarding Surveys

Onboarding surveys are an important part of creating a great onboarding experience, particularly if you are implementing a robust onboarding program for the first time. Onboarding surveys provide a systematic way to efficiently check in on your new

team member and get valuable insight about their experience at your organization so that you can continue improving your onboarding framework.

> See this set of sample onboarding survey templates we designed to be used at specific points of the onboarding process: End of first week, end of first month and end of probation period.

Onboarding Best Practices

Take out the guesswork – Your new team member will want to be productive right away but may not know how. Plan out a detailed schedule for their first two weeks at a minimum, so they know exactly what they should be doing at any given time. Balance training activities with heads-down focus time and time to socialize with the team. Assign small, achievable tasks early on to help them find their groove. Be generous with resources and support so that the only thing they have left to do is crush it.

Over-communicate – Set up frequent touch points to discuss expectations, progress, challenges and anything else that comes up. Make a habit of providing more clarity and context than you think is needed, don't just assume your new hire understands you perfectly. Ask for feedback often and keep lines of communication open, especially if you're not in the same physical space.

Celebrate small wins – Make a habit of showing recognition of their contribution early on and frequently. This would be especially appreciated by new team members who are eager to impress.

Have fun - Workplace culture plays a HUGE role in employee engagement and satisfaction. Showing the fun side of your organization early and often will encourage the new team member to loosen up more quickly and feel like part of the team. Plan a social gathering with the team within the first two weeks where the different personalities can shine.

It goes both ways - As much as you expect your new hire to acclimate to your team, make sure you're also putting in the effort to get to know them. Understand their communication style, what motivates them, what management style they'd respond to, how they prefer to receive feedback, etc., and work on being the best manager you can be.

PERFORMANCE MANAGEMENT

Performance management is a useful tool that helps employees succeed, motivate them in their career development, and ultimately help achieve business goals for the organization.

An effective performance management program allows people managers to deliver fair assessments and actionable feedback to their direct reports. This can increase employee engagement, provide strong recognition and encouragement, and create tangible paths for employee growth that are rooted in accountability. It also ensures your team members are receiving the information they need to continue to grow and develop in their roles. When your team members know what they are doing well and where to improve, it becomes part of the culture and something employees continue to seek out.

Performance Management Framework

There are several components to an effective performance management framework, including formal performance reviews, ongoing 1:1's, and performance improvement plans.

PERFORMANCE REVIEWS

Probationary performance review – As a new hire approaches the end of their probation period, it is an opportune time to conduct the first performance review to ensure that all parties are on the same page around the expectations of the role, uncover and discuss any gaps in performance and formulate a plan to resolve any identified issues.

Semi-annual performance review – Every six months, conduct a comprehensive "half year in review" of the employee's performance in their role. This is about highlighting where they have excelled but also openly discussing areas of improvement. This is also a good opportunity to reassess their goals and discuss how the organization can better support their continued growth. The results of the annual reviews also help inform any decision around compensation adjustments for the employee.

PERFORMANCE REVIEW COMPONENTS

Wherever possible, we recommend 360-degree performance reviews that allow for multi-directional flow of feedback between the employee, their manager as well as their peers. At a minimum, however, a performance review should provide the opportunity for reflection on an employee's performance from both the employee and their people manager.

SELF EVALUATION

- Provides an opportunity to assess how a team member feels about their own performance and goals
- Opportunity to assess their culture-fit based on your organization's values
- Opportunity to find out why they enjoy working at your organization
- Opportunity to collect further feedback on their manager
- Opportunity to collect further feedback on their Team

MANAGER'S EVALUATION

Overall, the manager's feedback should be a synthesis of all the data and feedback collected during the ongoing 1:1 sessions (i.e. there shouldn't be any surprises). Synthesizing feedback that's been collected over time captures the progress an employee has made and any pattern or trend they are exhibiting, while avoiding the recency effect (only focusing on work done recently because it's what's fresh in the mind.)

Of course, the manager has the opportunity to (and absolutely should) add their own anecdotal information as well to provide context.

PEER EVALUATION

For a more well-rounded picture of performance, add peer evaluations to the process.

Survey 2-3 of the team members who work closely with the employee in question. Peer evaluations are often helpful in providing an on-the-ground perspective that people managers and leadership might not have visibility to.

> Use this performance review template that includes the self-evaluation, manager's evaluation and peer evaluation components.

SAMPLE TIMELINE FOR SEMI-ANNUAL PERFORMANCE REVIEWS

Action	Details	When
Communicate process and timeline to the team	● Give your team a heads up that performance reviews are coming up ● Let them know when they will be sent their self evaluation forms, and when they need to complete them ● Let them know when their managers will be completing the manager's evaluation forms ● Let them know when they can expect to have their performance review meeting with their manager, and who will be scheduling them	Sep 1
Schedule performance review meetings	Managers to send calendar invites for 1-hour meetings for each team member sometime from April 18-29	Sep 8
Employees to complete self evaluations	Send each employee a self-evaluation form and provide them with 1 week to complete it	Sep 8-15
People managers	Send people managers one evaluation form for	Sep 8-15

to complete manager's evaluations	each employee they manage, and provide them with 2 weeks to complete them	
Conduct and document performance discussions	● The employee and manager review the self-evaluation and manager's evaluation together ● Discuss each point and elaborate as needed ● Address any discrepancies / potential misalignment ● Provide constructive feedback on how things can improve (this goes both ways) ● Thank the team member for their contribution!	Sep 18-29

Ongoing 1:1s

Regular check-ins and touchpoints between manager and employee is an essential part of on-going engagement and performance management. While in most organizations this happens organically, it's especially important to ensure they serve a purpose that benefits both the personal needs of individuals, and the overarching business goals.

● Consider creating templates and process guides for managers on how to conduct 1:1 meetings with employees – this will ensure consistency and a persistence of quality as new managers are hired / promoted

● Considering creating manager training materials (e.g. slide decks, documents) on how to have effective 1:1 meetings and / or effective coaching conversations

● Documenting the 1:1's and having a general record of communication can also be very helpful if someone's reporting relationship changes. These conversations will also form the basis of the Manager's Appraisal come time for the employee's performance review

- ○ Cadence
    - ■ At a minimum every other week
    - ■ Ideally, once per week
- ○ Structure (30 minutes)
    - ■ Water-cooler talk
    - ■ What's going on work-wise
    - ■ Any asks / barriers to remove
    - ■ Feedback / questions regarding any recent changes in the office / team, when applicable
    - ■ From week to week, choose the most relevant questions to cover from our template of 1:1 questions

> Reference this sample list of 1:1 questions to tailor this process to your individual team members.

Performance Scorecards

Scorecards are about setting measurable criteria to evaluate performance over time. While quantitative data helps provide valuable context on how to interpret performance, qualitative measures of performance are necessary to provide baselines to determine whether an employee is meeting expectations or needs to improve. Create templated scorecards for all employees as a basis for establishing and measuring acceptable levels of performance, and to help identify areas of strength and areas of improvement for employees.

Scorecards are a key driver for an employee's success, as it:
- ● Creates accountability for the employee
- ● Collects independent data points about the employee's performance

- Develops alignment between a manager's expectation and employee's performance
- Highlights areas for development for the employee
- Aligns an employee with the organization's vision and strategy

For people managers, scorecards help provide a bird's eye view on a monthly and annual basis. Data collected in a scorecard can be tied into conversations around performance, compensation increases, promotions, and areas for development.

How people managers can create scorecards for their team members:

1. Identify the roles within your department
2. Define unique roles within your department and divide them into appropriate job levels
3. Create a template for your department roles by breaking down each role into:
4. Key components of the position (key competencies, key deliverables, key areas of expertise, etc.)
5. Break down each component into categories and subcategories as appropriate
6. Define the objective and KPI for each subcategory

Use this performance scorecard template to create unique scorecards for your individual team members.

Performance Improvement Plans

Performance Improvement Plans (PIPs) are specific processes designed to accomplish two things: 1) formalize the way you address critically underperforming employees in a way that is constructive, and maximize chances for improvement, and 2) ensure that proper documentation is in place in the event that performance does not improve to acceptable levels.

When to use a PIP?

- A PIP should be used only if there is a real commitment from the people manager and leadership team to help the employee improve, not as a way for a frustrated manager to start the termination process.
- Only use a PIP if a structured plan with time-sensitive goals is the appropriate next step that will serve as an aid to the employee rather than a detriment.
- Use a PIP only if this goal-oriented process is well suited to address the specific performance issue at hand. PIPs might be more effective at addressing problems with quantifiable objectives as they can help identify why the deficiencies occur.

When not to use a PIP?

- When an employee has been with the organization for a long time and they have never been given feedback or training to improve the specific performance concerns. A PIP would not be effective here as this would require a longer-term approach.

- When the sole intention is to create a paper trail and the end goal is to terminate the employee.
- When the employee's competencies are significantly misaligned with the job requirements, or when the core issues are insubordination or insolent behaviours.

Create a formal process for PIPs, outlining responsibilities of both the employee and manager when once is put into effect (i.e. timeline of each step, expectations, drafted communications, etc.)

Use this performance improvement plan template as a plug-and-play resource for managers and employees to track performance progress during the PIP period.

EMPLOYEE ENGAGEMENT

Employee engagement levels are a crucial metric in measuring a number of areas including productivity, retention, and job satisfaction. Knowing how engaged your team members are provides insight on their overall alignment with the organization. It lets you know what attracts people most about working at your organization, but it will also highlight areas where improvements need to be made, and what aspects of the organization people are hoping to see improvements in.

What gets measured gets managed – Create an employee engagement survey that can be run at minimum annually. This can be created with little cost using Google Forms, allowing for easy administration, and an easy container to review and capture trends during analysis. Supplement that with a communication strategy to explain to employees how, why, and how often surveys will be conducted in order to help maximize participation, and honest feedback during each survey period.

> Use this library of employee engagement survey questions to create an employee engagement survey for your organization.

TERMINATIONS

This section outlines important considerations for terminating employees in *non-unionized* workplaces for employees covered by the *Employment Standards Act* ("ESA").

Dismissal and Severance

An employer has a right to dismiss an employee at any time for any reason (so long as there is no discrimination).

Where an employee has done nothing wrong, an employer must provide an employee with advance notice that their employment will be ending, or pay in lieu of such notice (i.e. severance pay). This type of termination is called "without cause".

In certain situations, an employer may also terminate an employee with "just cause", immediately and without advance notice or payment of severance.

Without Cause Terminations

Under the ESA, employers must comply with the minimum notice provision when terminating an employee without cause. The amount of written notice and/or pay is based on how long an employee has been employed:

Amount of written notice and / or pay required for termination of an individual	
Length of employment	*Amount required*
Three months or less	No notice and / or pay

More than three months	One week of notice and / or pay
More than one year	Two weeks of notice and / or pay
More than three years	Three weeks of notice and / or pay, plus one week of notice / pay after each additional year of employment (to a maximum of eight weeks)

If an employer and employee agree, e.g. in an employment contract, that upon termination the employee will be provided *more* than the ESA minimum amount of notice/pay in lieu, then that employer must honour that agreement.

A third situation arises where an employer and employee did <u>not</u> agree to limit the amount of notice or pay in lieu of the ESA minimums, or the agreement between them is not legally enforceable otherwise. In this situation, that employee may be entitled to additional severance under common law.

The common law comes from decisions of judges. Important decisions from the courts become legal precedents for similar cases in the future. Under common law, the amount of reasonable notice (or pay in lieu) an employee will be entitled to depends on the employee's age, character of employment and availability of similar work, along with other factors.

Unlike under the ESA, common law notice is often in months rather than weeks. This is one reason it is important for employers to use employment contracts that include well drafted and enforceable termination clauses.

Termination for Just Cause

If an employee does something awful at work, an employer may want to fire them

immediately without payment of severance. This is allowed where an employer can prove that what the employee did was so terrible that it caused an irreparable breakdown of the employment relationship (i.e. just cause).

Where an employee has *significant performance issues*, if an employer wants to immediately fire the employee and not provide them notice (or pay severance in lieu), the employer has to prove that:

1. They established and communicated a reasonable objective standard of performance;
2. The employee failed to meet those standards;
3. The employee was warned that they weren't meeting the employer's expectations, and that their employment would be in jeopardy if they failed to improve; and
4. The employee was given a reasonable amount of time to correct the situation.

Following and documenting the above four steps can be time consuming and require an employer's focused attention. However, if an employer fires an employee without taking the above four steps, they will likely owe the employee severance pay.

The four steps described above are required when an employee's performance is poor.

However, *sometimes an employee does something so terrible that just that one act can be enough to justify just cause*. For example, if an employee were to physically attack one of their colleagues at work, steal from their employer, or lie to their employer about something really important, an employer may be above to prove that they have just cause to immediately fire their employee without providing them any notice (or paying severance in lieu).

Even where an employee does something terrible and the employee should be fired on the spot, the courts will look at the full context of what happened, and could still decide there wasn't just cause, and that the employer actually owes the employee severance.

Ultimately, the punishment must fit the crime, and firing someone for just cause is the most severe punishment in Canadian employment law. For that reason, the courts will only allow employers to dismiss employees for just cause in the most egregious circumstances. **Based on this, employers should consider seeking legal advice before terminating an employee for just cause.**

Release of Liability

A release of liability is an agreement in which one party waives their right to make a legal claim against another party ("Release").

When the employment relationship ends, an employer may want an employee to sign a Release, to have certainty that employee will not be able to make any employment related legal claims against the employer.

A Release is a contract. A contract between two parties requires each to exchange something of value. The legal term for this "something of value" is called "consideration". For a contract to be valid and legally enforceable, the consideration needs to be "fresh" i.e. something of value that is *new*.

For a Release to be valid and legally enforceable, the employer needs to provide *something new of value to the employee* in exchange for the employee agreeing to waive their rights to sue the employer. For example, an additional payment that the employee would not otherwise be entitled to.

Importantly, ESA termination notice (or pay in lieu), is owed to an employee on a without cause termination. Therefore, providing ESA termination pay does <u>not</u> constitute "fresh consideration" for a Release and it is illegal to withhold ESA termination pay in exchange for a Release.

If an employer wants an employee to sign a Release then that employer will need to provide that employee with something of additional value e.g. an additional payment, for the Release to be legally enforceable.

Practical Tips for Termination

These practices will assist employers in terminating employees.

- Choose a private space where there is little traffic or presence from other staff. Conducting the dismissal meeting in person is the best practice, but not always possible depending on the nature of the employee's work and the business. By video conference is better than over the phone.
- Conduct the dismissal meeting when the employee can leave the premises without a lot of attention from other staff (before the start of the work day, or at the end).
- Whenever possible, have two management representatives at the dismissal meeting, so there is more than one witness.
- During the dismissal meeting, use an employee's Dismissal Letter as speaking notes and follow it.
- If the employee was generally a good performer, consider providing a positive reference letter and / or confirmation of employment letter.
- Immediately after the dismissal meeting, all management representatives at the meeting should take notes. This can be done on paper or digitally, but either way, should include the date, time and length of the meeting and a description

of what was said and by whom.

● If the employee has personal belongings at their desk or around the workplace, ask whether they would prefer to gather those items now accompanied by a member of management, or have the items couriered to them later.

● Only "escort" the employee off the premises if the employee is in a heightened emotional state or you are concerned they will act out. Otherwise, have a member of management "accompany" them by instructing them it is time to go, and watch them leave (only interfering in the departure if the employee acts out). In the vast majority of cases, employees leave the workplace without a problem.

● If applicable, schedule cutting off employees from login access from laptop, phones etc. so they are cut off by the time the dismissal meeting ends.

Templates for a without cause termination letter and a release letter have been included as resources for your organization. We have also included a dismissal guidance document.

OFFBOARDING

Offboarding is the process of transitioning a current team member out of the organization. An effective offboarding process ensures that a departing team member is managed legally, fairly and properly. It can mean the difference between an amicable separation and legal implications should the offboarding be the result of termination.

The offboarding process also plays an important role in maintaining your reputation as an employer and optimizing your current employees' working experience. By showing the same level of care and attention to team members who are leaving as ones that are arriving at your organization, you send a strong message that you truly care.

This is a process that often gets overlooked and it's understandable; employee departure is rarely top of mind for any organization. Chances are that you're not offboarding people very often, and every time you do it's like having to learn the process again trying to remember all the little details. This is precisely why it's important to have an offboarding checklist to capture all the tactical items as well as the more human aspects of offboarding and all the formalities to ensure a smooth transition and nothing gets missed.

> **Farewell -** Offboarding is an important part of the employee life cycle that, when handled properly, can strengthen your employer brand, and potentially turn your departing team members into brand ambassadors who will continue to be advocates for your organization within your prospective talent pool for years to come.

Offboarding Checklist

Communication with the Team:

Communicate the change quickly:

- Schedule one-on-one conversations with any direct reports or people they work closely with
- Where appropriate, schedule an organization-wide email to go out to all team members following the conversations

Information to include:

- When is the team member's last day?
- Who will be taking over their responsibilities in the interim?

Prepare Paperwork:

- Letter acknowledging resignation (as needed)
- Letter of termination (as needed)
- Nondisclosure and Noncompete (as needed)
- Termination, Release and Confirmation Agreement (as needed)

Initiate Knowledge Transfer:

For the exiting employee to complete if they are resigning:

- Can you break down your daily routine into step-by-step instructions?
- Are there any projects that you repeat on a weekly, monthly, quarterly or annual basis? What are they and how do you do them?
- What files does your successor need to know about and have access to?
- Who are your regular contacts, inside and outside the organization, so we can inform them about the transition?
- Are there any systems that your successor needs training on?
- What tasks take priority in your role?

- Please confirm that all of your files, including packaged design files (images, fonts, etc), are saved in the appropriate folders.
- Please share your list of memberships and / or subscriptions utilized for your role and provide contact and / or login details.
- Please share a complete list of your usernames and passwords for any accounts you utilize in your role.

Exit Interview:

Ideally conducted on their last day by HR or a neutral third party.

Recover Company Assets:

In a remote-first world, it is important to set clear expectations as to how and when any company assets will be recovered and by whom. It is equally important to state what repercussions, if any, exist should you not be able to recover company assets.

Have Some Fun: *(As Appropriate)*
- Pass a card around and get everyone to sign it with their well wishes
- Schedule a goodbye lunch or happy hour (and pay for it)
- Get them a personalized gift that only they would love

Leave the Door Open for a Return: *(As Appropriate)*
Should you wish to leave the door open for the exiting team member to return in the future you could connect with them on LinkedIn and maintain a high level of professionalism as they depart the organization to keep things positive.

Tie Up Loose Ends:

IT:
- Remove the team member's user account from any relevant systems and change passwords on any shared accounts
- Forward phone calls and emails to the team member's direct supervisor or their successor

Marketing:

- Remove team member profile from your website (if needed)

HR:

- Cancel benefits

- Update org chart

- Update their status in HRIS

Finance:

- Calculate their final payroll (wages, expenses, vacation pay, etc.) and pay out within 6 calendar days of final date (Consider handing them a paper cheque on their last day or making the payment early so they have peace of mind)

Direct Supervisor:

- Remove the team member from any meeting invites

- Communicate any last-minute details in the transition as they arise

Last Day Logistics:

- Recover company assets (computer, cell phone, IT assets, keys, access cards, etc.)

- Generate ROE

We have included this resignation acceptance template for your easy reference.

Exit Interview

The purpose of exit interviews is to capture a departing employee's unique experience during their time at your organization, so you can understand what went well for them during their time working for you, and what didn't. The insights you gather in an exit interview can give you a glimpse into what your organization can be doing better as an employer, as people who are on their way out are more likely to speak openly and honestly about their experiences than employees who are still here. In addition, it's likely that the departing employee has recently been job hunting and interviewing and can offer some useful intelligence on how your organization compares with other employers.

The exit interview depends on the willingness of the departing employee to provide their honest feedback, so it is important that the answers provided here are kept private, and are only shared with relevant members of senior management on a need-to-know basis. Be deliberate about defining this process and think about how you will go about acting on exit interview feedback without giving away the source of that feedback. Communicate this at the beginning of the exit interview so the employee's mind can be put at ease about sharing their honest feedback without fear of repercussions.

Exit interviews should be reserved for voluntary separations, because issues raised by layoffs and terminations for cause will require a special approach. Moreover, participation in exit interviews should be encouraged but not made mandatory.

Conducting an exit interview is a delicate task that requires tact, emotional intelligence, and the ability to connect with the departing team member in a meaningful way in order to get the most value out of the conversation. The best

practice is to designate an HR practitioner to handle this process, and ideally someone who has a neutral relationship with the departing team member. To help standardize the exit interview process, it's best to have the same person conduct all exit interviews for the organization as much as possible.

> Use this exit interview template and tailor it for your organization.

SAMPLE HR POLICIES

Paid Leave

Vacation Days

[Organization] offers the team with 10 days of vacation per year to start. Vacation entitlement will increase throughout an employee's tenure with [Organization] based on the following schedule below.

Tenure	Vacation Days
Year 1	10
Year 3	15
Year 5	20
Year 10	25

You can carry over a maximum of X unused vacation days to the following calendar year. You also have the option to borrow up to X vacation days from the next year after you have exhausted your entitlement for the current calendar year.

Paid Holiday Closure

[Organization] is closed in the period between December 26 and December 31 every year. This is bonus paid time off for the entire team that will not count towards your vacation entitlement.

Paid Sick Days

You are entitled up to five (5) paid sick days a year for circumstances related to illness or injury. Sick days are available immediately to all employees, but cannot be carried over into the following calendar year.

Statutory Holidays

The following statutory holidays are observed by all employees at [Organization]:

Day	Day Observed
New Year's Day	January 1
Family Day	Third Monday in February
Good Friday	Friday before Easter Sunday
Victoria Day	Monday preceding May 25th
Canada Day	July 1
BC Day	First Monday in August
Labour Day	First Monday of September
Truth and Reconciliation Day (TBD)	September 30
Thanksgiving Day	Second Monday in October
Remembrance Day	November 11
Christmas Day	December 25

In the case of a statutory holiday falling on a weekend, [Organization] will observe the holiday on the next work day falling after the holiday.

Unpaid Leave

Please work with your manager to coordinate your time off. When you do go on an extended unpaid leave your vacation accrual will also cease until you come back. If you do wish to continue your benefits please work with your manager to coordinate.

Unpaid Job Protected Leave

In addition to the other types of leave, an employee may be eligible for additional unpaid leave due to family or personal responsibilities and situations. The types of leave that an employee may be eligible for can be found on the B.C. Employment Standards Act.

[Organization] will be guided by the relevant established legislation regarding employee entitlement to leave and employment protection while on leave. In all cases the employee shall be responsible for payment of their extended health benefits. Post dated cheques will be required to continue health and insurance benefits.

[Organization] is required to provide the following unpaid leaves. These regulations are set out by the Province of British Columbia and the most up-to-date information can be viewed in the Employment Standards Act. [BC Employment Standard Act]

Pregnancy Leave

This leave may start no earlier than 13 weeks before the expected birth date, and must end no earlier than six weeks after the birth date unless the employee requests a shorter period.

If pregnancy leave is requested after the birth of a child, the employee is entitled to up to 61 consecutive weeks of leave beginning on the date of birth.

If pregnancy leave is requested after termination of a pregnancy, the employee is entitled to up to six consecutive weeks of leave beginning on the termination date.

An initial period of leave may be extended by up to six consecutive weeks if an employee is unable to return to work for reasons relating to the birth or termination of a pregnancy (for a total of 12 weeks)

[Organization] may request a doctor's or nurse practitioner's note stating the expected or actual birth date or termination date or reasons for requesting additional leave.

If an employee on leave asks to return from leave earlier than six weeks after the birth, [Organization] may require the employee to provide a doctor's or nurse practitioner's certificate stating the employee is able to resume work.

Parental Leave

Parental benefits are available to the parents of a newborn or newly adopted child. Adoptive parents are entitled to up to 62 consecutive weeks of unpaid parental leave. The leave can begin anytime within 78 weeks of the birth or placement of the child. An initial period of parental leave may be extended up to five consecutive weeks if the child requires an additional period of parental care.

[Organization] may require an employee to provide a doctor's or nurse practitioner's certificate or other evidence that the employee is entitled to the leave or leave extension.

Request for Parental or Pregnancy Leave

The request for pregnancy or parental leave must be made in writing at least four weeks before the proposed start date. However, the courts and the Employment Standards Tribunal have said that failure to give written notice does not affect the employee's entitlement to the leave. Employees are encouraged to tell their employers the date they will be going on leave well in advance and to put it in writing to avoid misunderstandings.

Family Responsibility Leave

An employee is entitled to up to 5 days of paid leave in each employment year to meet responsibilities related to the care, health or education of any member of the employee's immediate family. Family Responsibility Leave does not accumulate from year to year.

Bereavement Leave

[Organization] employees are entitled to an unpaid leave of absence for up to 3 days to grieve, attend a funeral, and take care of issues relating to the death of a member of their immediate family.

"Immediate family" means the spouse, child, parent, guardian, sibling, grandchild or grandparent of an employee, and any person who lives with an employee as a member of the employee's family. It includes common-law spouses, step-parents, and step-children, and same sex partners and their children as long as they live with the employee as a member of the employee's family.

We acknowledge that the grieving process is different for everyone, and our priority is to support our community members. Please discuss your needs with us, and we can work together to create the space for grieving.

Compassionate Care Leave

An employee can take up to 27 weeks of unpaid leave within a 52-week period to care for or support a gravely ill family member. If there is a way to meet all or some of the employee's normal work duties then arrangements can be made for adjusting work responsibilities and appropriate salary can be paid.

Jury Duty, Reservist Leave, Leave Respecting the Disappearance of a Child, Leave Respecting the Death of a Child, and All Matters Under the B.C. Employment Standards Act.

For all other challenging situations requiring leave of an employee, [Organization] will follow the terms outlined in the BC Employment Standards Act. [Organization] aims to be as supportive as possible to our employees and will discuss possible compensation and paid leave terms during these difficult times.

Conditions of Employment to Remain the Same During Leave

[Organization] may not terminate an employee, or change a condition of employment, because of a leave or jury duty without the employee's written consent.

Return to Work

When the leave or jury duty ends, an employee must be returned to his or her former position or to a comparable position. It is the employer's responsibility to contact the employee to make arrangements for the employee's return to work.

Employment is Considered Continuous

If an employee is on any of the leaves referred to in this factsheet or is on jury duty, employment is considered continuous for the purposes of calculating annual vacation and termination entitlements, as well as for pension, medical or other plans of benefit to the employee.

With the exception of reservists' leave, [Organization] must continue to make payments to any such plans unless the employee chooses not to continue with his or her share of the cost of a plan. The employee is entitled to all increases in wages and benefits that the employee would have received if not on leave.

Pay Policies

Pay Statements

Employees will be paid on the [xx]th and [xx]th of each calendar month (unless it falls on a weekend or a holiday in these instances it will be paid on the work day before that) through direct deposit. Employees can access their pay stubs and T4s through [tool].

Taxes

[Organization] will withhold taxes from employees' income based upon established CRA Guidelines. To increase or reduce your tax rate based on your personal circumstances speak with [NAME] for the appropriate tax form.

Expenses

There are circumstances where team members may be asked to make a purchase on behalf of [Organization].

Expenses must be pre-approved either by [MANAGER] and submitted for final approval. Expenses are managed through [tool] and must be submitted within 60 days from the date of the expense.

Once an expense has been submitted, it may take up to 2 payroll periods to be deposited into your bank account.

Bullying & Harassment Policy

Please refer to the latest version of the _British Columbia Universal Code of Conduct (BC UCC)_, which is a requirement for all PSO's.

Health & Safety Policy Statement

[Organization] is committed to health and safety practices that protect its employees, guests, contractors, customers, suppliers, the public and property from incidents occurring on our site. This commitment to health and safety is an integral part of the Organization, from the executive management to the employees. Through this program we will engage workers in safe work practices and in the development of a strong health and safety culture.

We believe that all incidents are preventable, and active participation at all levels will ensure that our goal can be achieved.

We at [Organization] endeavour to provide proper and relevant employee training, competent supervision, job-specific safe work practices, personal protective equipment, best practices, operation and maintenance procedures, and safety guidelines that focus management, employee and contractor awareness on reducing the risk of incidents in all activities. The organization's leadership, executive and management team will take every reasonable precaution necessary to ensure the protection of all employees while complying with all legislated health and safety requirements within the Province.

All employees are responsible for complying with all health and safety standards and regulations, including the Workers Compensation Act and the OHS Regulation, and for cooperating with management in the implementation of the health and safety program, worksite inspections, incident investigations and the continuous improvement of this program. All employees are required to report all unsafe conditions, accidents, injuries and near misses to their direct report, and must work safely and in compliance with the law and with safe work practices and procedures established by the organization.

[Organization] is committed to safe and sustainable practices in all aspects of our operations and therefore will review and update our safety program on a yearly basis to adapt to industry changes, trends and requirements.

All [Organization] employees are collectively responsible to ensure compliance with local government, OHS and environmental regulations.

Code of Ethics and Business Conduct

[Organization] expects that all team members will manage their behaviour in a manner that is compatible with the highest business ethics. This includes the prohibition of any gifts, hospitality, donations or other offerings (including all forms of bribery) that are non-compliant with anti-corruption laws or standards of good business ethics.

The Code cannot foresee every and all situations that may arise, however, it identifies guiding principles to help you make decisions that are consistent with [Organization]'s values and reputation. From time to time, changes in the operational context or regulatory environment create a need for new guidelines. As a result, The Code is subject to change without notice. Any updates may be requested from [MANAGER] at any time.

Who Must Follow the Code?

The Code applies at all times, without exception, to all [Organization] team members. [Organization] customers and partners, as well as third parties (such as agents or advisors), are also expected to adhere to the code when dealing with or acting on behalf of [Organization].

Employment Practices

[Organization] treats all team members] fairly, ethically, respectfully and with dignity. [Organization] offers equal employment opportunities without regard to distinctions covered by the Canadian Charter of Human Rights.

Harassment and Personal Security

[Organization] policies protect team members from harassment, bullying and victimization in the workplace, including all forms of sexual, physical and psychological abuse. As a team member, you are entitled to and are expected to preserve a positive, harmonious and professional work environment.

Team Member's Health and Safety

Your occupational health and safety are of critical importance to [Organization]. [Organization] adopts standards, procedures, contingency measures and management systems to ensure that our operations are managed safely and risks to team members' health are minimized. To protect their own safety as well as that of their colleagues and communities, team members undertake not to work under the influence of any substance that could impair their judgment or interfere with the effective and responsible performance of their duties.

[Organization] Property

Company property should only be used for legitimate work purposes. [Organization] team members are expected to take good care of [Organization] property and not expose it to loss, damage, misuse or theft. At no time should the Organization] property or customer property (i.e.: product inventory, administrative paperwork, IT assets, stationery, etc.) leave the work premises with a team member unless prior specific permission has been granted by a manager or the team member has been given the responsibility to deliver said item(s).

Intellectual Property

Team members have a duty to protect [Organization]'s intellectual property, just as they have the obligation to respect that of others.

Communications

As a [Organization] team member, you should be truthful and straightforward in your dealings and not intentionally mislead colleagues, customers or suppliers. Use appropriate, professional language, both in written documents and public conversations.

Electronic Mail and Internet Usage

[Organization]'s electronic mail and Internet systems are provided for business use. When using electronic mail, you should remember that it is susceptible to interception, creates a permanent record, can be printed or forwarded to others by the recipient and will likely be retained on the recipient's computer for a long time. Thus, exercise the care in sending electronic mail and other written business communications. Never use [Organization]'s Internet connection or computer equipment to access, transmit or download inappropriate content and does not meet business requirements.

Gifts and Entertainment

Team members, suppliers, partners and other third parties representing [Organization] must avoid giving or receiving gifts or entertainment if these might improperly influence the recipient's judgment or might be perceived to do so. Gifts can include goods, services, favours, loans, trips, accommodation or use of property, etc. Sometimes in business, for example, in certain cultures, an exchange of gifts is appropriate. In such instances, the gifts should be reasonable, in good taste, and have a token or nominal value and must be reported through the appropriate mechanisms. Team members must never give or accept gifts when prohibited from doing so by law or by the recipient's or donor organization's policies and should report to their manager the receipt of any gift that has more than a nominal value.

Conflicts of Interest

Avoid conflicts of interest, whether real or perceived, in the performance of your duties. A conflict of interest is considered to be any situation or arrangement where your personal activities or interests conflict with your responsibilities to [Organization]. Should such a situation arise, you are encouraged to discuss it with your manager.

Illegal and Improper Payments

[Organization] team members], suppliers, partners and other third parties are strictly prohibited from offering or taking any form of illegal or improper payment. [Organization] funds and assets must never be used for any unlawful purpose. As a team member, you must never approve, authorize or make any payment, gift or favour to any person in a position of authority in order to obtain favourable treatment in negotiations or the awarding of contracts, or any other dealings.

Competition

[Organization] team members and suppliers, partners and third parties must never employ unethical or illegal practices to collect competitive intelligence nor should [Organization] team members or contractors engage in activities in concert with competitors that would illegally reduce competition.

Reporting Violations

Any individual in the employ of [Organization], or any customer, supplier, partner or another third party, who becomes aware of a possible violation of The Code, or of a violation of the law by [Organization] or any of its team members], has an important duty to report it.

A report should be presented to your supervisor, Human Resources Manager (if applicable), or a member of the Leadership team.

All inquiries will be handled promptly and discreetly. If you report a possible breach of The Code, you have the right to remain anonymous, and confidentiality and/or anonymity will be maintained. However, it is usually easier to conduct a full and fair investigation of your concerns if you identify yourself and those involved. [Organization] will make every effort to keep you informed about the action taken to address your concern.

You will not be penalized, dismissed, demoted or suspended and no retaliatory action will be taken against anyone for reporting or inquiring in good faith about potential breaches of The Code or for seeking guidance on how to handle suspected breaches.

Penalties for Violations

Failure to respect the letter or the spirit of The Code or the law may lead to disciplinary measures commensurate with the violation, including termination of employment. Team members who break the law expose both themselves and [Organization] to criminal penalties (such as fines and jail sentences) or civil sanctions (such as damage awards or fines).

Complaints Procedure

Organizations should implement an effective complaints resolution process with standard procedures for complaints handling, so as to provide a fair, effective and transparent response to complaints and concerns including those arising from internal staff members.

Please refer to this template recommended by the Office of the BC Ombudsperson