People & Planning

A Human Resources Management Tool Kit for CAPC/CPNP Projects

Strategic Planning
Hiring
Orientation
Supervision
Training

People & Planning:
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Introduction

Coming up in this section...

Our Kit, Our Story

How it all began

CAPC:

Community
Action
Program for
Children

CPNP:

Canadian
Prenatal
Nutrition
Program

Hello! Welcome to **People & Planning: A Human Resources Management Tool Kit for CAPC/CPNP Projects**. The kit is a product of the Human Resources, Training and Supervision (HRTS) Project, funded under Health Canada's CAPC/CPNP National Projects Fund (NPF).

The NPF funds training, resource development, and networking initiatives to address common issues faced by CAPC/CPNP projects across the country.

The theme of NPF for the 2001–03 funding period is strengthening program management. Six issues within this theme were approved as priorities by the NPF's National Advisory Committee, which has representatives from projects, regions and Joint Management Committees. The six priority areas are:

- Human Resources, Training and Supervision (HRTS)
- Volunteer Recruitment and Management
- National Think Tank
- Connectivity
- Fetal Alcohol Syndrome (FAS)
- Support for francophone projects outside Quebec

Advisory Committees were struck for each priority area to develop ideas for projects. Each committee was composed of CAPC/CPNP projects from across the country. The HRTS Advisory Committee came up with the idea of producing a human resources (HR) tool kit. Working from lessons learned from evaluation, the renewal process and other CAPC/CPNP initiatives, the Committee identified six priority areas of HR management:

- Staffing
- Orientation
- Training
- Supervision
- Performance Appraisal
- Management

The NPF supported the HR tool kit idea and approved funding for it in April 2001. The Pas Family Resource Centre, a CAPC-funded project in The Pas, Manitoba, was chosen as the project sponsor.

The HRTS Project Team

Cross-country cooperation

The success of the HRTS Project depended mainly on getting lots of input from every region of the country. A participatory approach to project development was adopted in order to make this happen.

The participatory approach was put into practice in two ways:

- A series of teams was assembled to provide guidance and feedback from all the regions.
- A national survey of CAPC and CPNP projects was conducted to identify their priorities for the project.

The first team to be assembled was an Advisory Committee. This committee provided direction and recommendations for the design and implementation of the kit.

The Advisory Committee had representatives from:

- The Pas Family Resource Centre, Inc. – The Pas, Man. (project sponsor)
- Powell River Employment Program Society – Powell River, B.C. (project partner)
- Growing Together – Hay River, N.W.T. (project partner)
- Simcoe County CAPC – Orillia, Ont.
- Jewish Family Services – Montreal, Que.
- Digby County Family Resource Centre – Digby, N.S.
- Health Canada – National, Ontario, and Quebec regions

As project sponsor, The Pas Family Resource Centre also assembled a team of consultants to do much of the work in putting the kit together. The team included:

- A content consultant, the primary writer of the kit
- An evaluation consultant, who conducted an evaluation and provided other management supports for the project
- An administrative support person
- A website consultant

Finally, a group of CAPC and CPNP projects from across the country volunteered to be Peer Review Sites. The Peer Review Sites contributed by reviewing and providing feedback on drafts of the kit.

Thanks to all the Peer Review Sites:

Infant and Early Intervention Project
Whitehorse, Yukon

YWCA Crabtree Corner
Vancouver, B.C.

Frog Hollow Neighbourhood House
Vancouver, B.C.

Blue Ribbon Babies
Stettler, Alta.

Andrews Street Family Centre
Winnipeg, Man.

Child/Family Resource Centre
Cranberry Portage, Man.

Breaking the Cycle
Toronto, Ont.

Simcoe County MotherCare Network
Barrie, Ont.

Growing Up Healthy Downtown
Toronto, Ont.

Jewish Family Services of
the Baron de Hirsch Institute
Montreal, Que.

Kids West
Alberton, P.E.I.

The HRTS Survey

You spoke, we listened

In late 2001, the HRTS Project conducted a survey to collect information from projects about your priorities concerning HR management. Surveys were distributed to CAPC and CPNP projects and Health Canada Program Consultants from all regions across the country. The findings from the survey were used to guide decisions about what to put in the kit.

As indicated in the table below, the survey collected feedback from 119 projects: 86 CAPC-funded projects, 11 CPNP-funded projects, and 22 with funding from both sources. Fifteen (15) Health Canada Program Consultants also provided feedback.

Region	Projects				HC Program Consultants
	CAPC	CPNP	CAPC / CPNP	Total	
Newfoundland	-	-	2	2	5 (Atlantic)
PEI	-	-	4	4	
Nova Scotia	4	1	1	6	
New Brunswick	2	-	-	2	
Quebec	47	-	2	49	-
Ontario	4	2	5	11	3
Manitoba	5	1	1	7	1
Saskatchewan	4	-	-	4	1
Alberta	14	5	3	22	2
British Columbia	2	-	4	6	2
Yukon	2	-	-	2	1
NWT	2	2	-	4	-
Nunavut	-	-	-	-	-
Total	86	11	22	119	15

In general, projects agreed with the Advisory Committee's idea to address their six priority areas of HR management. Projects also identified the major HR management challenges they face. Here are the top ten identified challenges:

- Staff recruitment and retention
- Finding the right staff, especially in rural, isolated areas
- Time and financial restraints
- HR management in partnerships or multiple sites
- Balancing the various duties of project management
- A lack of useful, relevant resources or tools
- Diversity/changeability of needs and staff roles
- Working with boards
- Need to develop policies and procedures
- Need for self-care to avoid burn-out

Health Canada Program Consultants tended to identify challenges similar to those identified by projects, emphasizing the need for projects to develop in the areas of HR policy-making and planning.

You told us, loud and clear:

Give us a highly practical, reader-friendly resource with lots of ready-to-use forms and samples!

For more info:

See pages 1.14 and 1.15 for more survey results and a list of where to find information on the major HR management challenges identified by projects.

The Big Picture

HR management in the CAPC/CPNP context

As we try to explain later in this section, HR management is a multi-faceted job. One important facet is to provide leadership. An important part of leadership is to provide meaning to employees about how their jobs fit in the bigger picture of the project and the community.

Well then, before we start talking about HR management strategies for CAPC/CPNP projects, we should talk about the big picture of CAPC/CPNP.

The Big Picture

CAPC/CPNP's policy framework

The overall goal of CAPC/CPNP is to improve the health of at-risk children from the pre-natal stage to age 6. CAPC focuses on children age 0–6, and CPNP supports women through pregnancy, birth, and the early post partum period.

CAPC/CPNP programming is based on a set of six guiding principles (see the list in the sidebar). The guiding principles have a theoretical foundation in two important public health approaches: health promotion and population health.

CAPC/CPNP Guiding Principles

- Children First/Mothers and Babies First
- Strengthening and Supporting Families
- Equity and Accessibility
- Partnerships
- Community-based
- Flexibility

Health Promotion

Health promotion was first introduced as a Health Canada policy consideration in 1974. It extends health policy beyond the health care system, advocating for social and political strategies to address health issues, as well. It calls for action in five areas:

- Building healthy public policy
- Creating supportive environments
- Strengthening communities
- Developing personal skills
- Reorienting health services

In a health promotion approach, health isn't just a matter of an individual's lifestyle and genetics, it also has a lot to do with the social, economic, and political context surrounding the individual. Empowerment (both of individuals and of communities) becomes a key health strategy.

For more info:

The definition of population health comes from *The Population Health Fund: Guide for Applicants 1998–1999.*

See pages 7.7 to 7.8 for more sources of information on health promotion and population health.

Population Health

Population health is another important policy direction that guides CAPC/CPNP. It was adopted in the mid 1990s by Health Canada as a foundation for public health policy and programs (including CAPC/CPNP).

Health Canada defines population health as an approach that aims to improve the health of the entire population and reduce health inequities among population groups. Health Canada's population health approach recognizes and acts on 12 factors that have a strong influence on health. These 12 factors are called the **determinants of health** (see the list on pages 1.6 and 1.7).

The 12 Determinants of Health

- Income and Social Status
- Social Support Networks
- Education
- Employment/Working Conditions
- Social Environments
- Physical Environments
- Personal Health Practices and Coping Skills
- Healthy Child Development
- Biology and Genetic Endowment
- Health Services
- Gender
- Culture

For more info:

The description here comes from Health Canada. See page 7.7 for a reference. For info on the Internet, go to:

www.hc-sc.gc.ca/hppb/phdd/determinants/

Income and Social Status

This is the single most important determinant of health. Health status improves at each step up the income and social hierarchy. Higher income levels affect living conditions such as safe housing and ability to buy sufficient good food.

Social Support Networks

Support from families, friends and communities is associated with better health. The health effect of caring and supportive relationships with family and friends may be as important as risk factors such as smoking, physical activity, obesity, and high blood pressure.

Education

Health status improves with level of education. Education increases opportunities for income and job security and gives people a sense of control over their lives – key factors which influence health.

Employment/Working Conditions

Unemployment, underemployment and stressful work are associated with poorer health. Those with more control over their work and fewer stress-related demands on the job are healthier.

Social Environments

The values and rules of a society affect the health and well-being of individuals and populations. Social stability, recognition of diversity, safety, good working relationships, and cohesive communities provide a supportive society that reduces or removes many risks to good health.

Physical Environments

Physical factors in the natural environment (e.g., air, water quality) are influences on health. Factors in the human-built environment such as housing, workplace safety, community and road design are also important influences.

The 12 Determinants of Health

- Income and Social Status
- Social Support Networks
- Education
- Employment/Working Conditions
- Social Environments
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- Culture

Personal Health Practices and Coping Skills

Social environments that enable and support healthy choices and lifestyles, as well as people's knowledge, behaviours and coping skills for dealing with life in healthy ways, are key influences on health.

Healthy Child Development

The effect of prenatal and early childhood experiences on subsequent health, well-being, coping skills and competence is very powerful. For example, a low weight at birth links with health and social problems throughout a person's life. **Addressing this particular determinant of health is a primary focus of CAPC/CPNP programs.**

Biology and Genetic Endowment

The basic biology and organic make-up of the human body are fundamental determinants of health. Inherited predispositions influence the ways individuals are affected by particular diseases or health problems.

Health Services

Health services, particularly those that maintain, promote and restore health, and prevent disease, contribute to population health.

Gender

Gender refers to the many different roles, personality traits, attitudes, behaviours, values, relative powers and influences that society assigns to the two sexes. Each gender has specific health issues or may be affected in different ways by the same issues.

Culture

Culture and ethnicity come from both personal history and wider situational, social, political, geographic and economic factors. Multicultural health issues demonstrate how necessary it is to consider the inter-relationships of physical, mental, spiritual, social and economic well-being at the same time.

The Big Picture

From policy to practice

How do the guiding principles and policies of CAPC/CPNP translate to the day to day operation of projects? The answer is: in a vast variety of ways!

CAPC/CPNP has become a highly diverse group of projects using a wide variety of programming approaches. There are two main reasons why:

- CAPC/CPNP are national programs implemented at the regional level. Each region developed its own structures (i.e., the size, sponsorship and geographic distribution of projects) for working within the CAPC/CPNP goals and guiding principles. As well, regions can choose to focus on specific priority groups (e.g., adolescent parents, Aboriginal families, etc.) and specific issues (e.g., FAS).

- The guiding principles allow projects a lot of flexibility in their programming approach. Indeed, flexibility is one of the guiding principles. It is demonstrated in a number of ways. For example:

  – Some projects focus squarely on individuals, while others take a community development approach. Many incorporate both approaches.

  – Some projects work with very specific priority groups, while others are universally accessible but make special efforts to connect with priority groups.

  – Projects include both professional service delivery models (where dietitians, counsellors and other professionals provide services) and para-professional models (where service providers have little or no formal training).

Project diversity is also reflected in the way projects have developed in different communities. In many cases, CAPC/CPNP projects were developed as enhancements to programs within established organizations that have worked effectively with CAPC/CPNP priority groups for years.

For many other projects, CAPC/CPNP has been somewhat of a revelation. It has brought new and more effective ways to deliver services to priority groups in their communities. Indeed, it has come to represent a new model of service delivery for these communities.

The Big Picture

The success of CAPC/CPNP

The guiding principles and policies of CAPC/CPNP have also translated into success.

A comprehensive report on CAPC/CPNP's success is the *CAPC/CPNP Renewal 2000 Final Report*, which synthesizes reports from all the Health Canada regions after the 2000 Renewal process. It identifies the following as major successes of CAPC/CPNP:

The guiding principles
In general, projects have been adhering to the guiding principles, which have proved to be a strong foundation for program development and delivery. Flexibility was the principle cited most often as an element of program success.

Participant involvement
Participants have been actively involved in program development, management, delivery and evaluation. Their involvement was cited as an essential determinant of success.

Community capacity building
Projects have become hubs for mobilizing communities to respond to the needs of children at risk.

Partnerships
Projects have formed strong, sustained partnerships with other community organizations. The partnerships have helped to make service delivery more effective in a number ways.

Local centres of expertise
As projects have matured, they have become recognized as places for others in the community to turn to for training, expertise and referral.

In conclusion…

We've sketched out CAPC/CPNP as a highly diverse group of projects that use a wide variety of approaches while operating under a common goal and guiding principles.

An ongoing part of the sketch is how the policy, practice and successes of CAPC/CPNP come together to articulate an identity – what CAPC/CPNP is and what it can be or should be. On this point there is continuing discussion within the CAPC/CPNP community. Some see CAPC/CPNP as a new, unique and even revolutionary model of health intervention, while others see it as following a well-established path.

Amid these discussions, there is consensus regarding the challenge of HR management to CAPC/CPNP projects. Indeed, HR management (in particular, hiring, supervising and training staff) is identified in the *CAPC/CPNP Renewal 2000 Final Report* as one of the major challenges faced by projects.

This kit attempts to address HR management challenges in a way that accommodates the diversity of programming approaches and philosophies within the CAPC/CPNP community.

Now on to Management

Okay, the table is set. We're ready to begin talking about management, and, more to the point, HR management.

What is Management?

Management comes down to this: taking responsibility for making sure an organization does its job as planned, and in doing so accomplishes what it wants to accomplish.

In the case of CAPC/CPNP, the job is to deliver useful programs and services that improve the health and well-being of at-risk children from pre-natal to age 6. To get these programs and services running effectively takes a lot of work. We can't just pick up and start running a parenting program or a Food Bingo. We need to hire staff, arrange space, make rules, sweep floors, make sure the furnace is working, follow building codes, and on and on. That's the job of management.

We can also think of management as a combination of four major functions, all integrated and overlapping:

- **Planning** – Deciding what you are going to do
- **Organizing** – Putting the plan in place
- **Leading** – Providing direction and support
- **Controlling** – Monitoring and evaluating

To do all this requires three main kinds of skills:

- **People skills** – Understanding, communicating and interacting with people
- **Technical skills** – Having an understanding of (and/or experience in) the job(s) that you're supervising
- **Conceptual skills** – Understanding systems, thinking one or two (even three!) steps ahead

From this we can conclude that management has a dual focus: **people** and **planning**. Both are important, but managing people accounts for most of what we do as managers. Anything to do with managing people is **HR management**.

What's in The Kit

Five more sections about HR management

The Sections

We've organized the rest of the information on HR management into five sections:

Section 2 – Strategic Planning
Section 3 – Hiring
Section 4 – Orientation
Section 5 – Supervision
Section 6 – Training

For more info:

See pages 1.14 and 1.15 for a list of where to find information on the major HR challenges identified by projects.

Sections 3–6 cover four main functions of HR management: hiring, orientation, supervision and training. Section 2 (Strategic Planning) isn't really about HR, but strategic planning is a foundation of HR management, and so it can't be ignored.

And let's not forget **Section 7 – Glossary & References**, which provides definitions of terms used in the kit and a bibliography of sources used in writing the kit.

Common Features of Each Section

Watch for the following features, appearing in each section of the kit (not including this Introduction):

HR for CAPC/CPNP Projects
The first page of each section offers three things:

- An introduction to the HR topic for the section
- A summary of challenges identified in the HRTS survey for the topic
- An overview of the implications of CAPC/CPNP for HR management

May we suggest...
This is the second page of each section. It provides a selection of general tips to consider (like a plate of tasty appetizers) relating to the topic.

The Partnership Page
Go to page 1.16 to find out about this feature.

Section Tool Box
At the end of each section (except Section 6) is a selection of sample forms related to the topic. In general, these are real-life tools submitted by projects.

Important Notes for Readers

When using this kit

Who Is The Kit For?

This kit has been written primarily for managers of CAPC/CPNP projects. Other project staff, board members, partners and volunteers might also find it useful.

Sidebar action

Look in the sidebar for references to sources, tips, and other useful information.

Notes on Style

We've aimed for a clean, well-organized format that makes the kit more practical and easier to read.

Use of Gender in The Kit

Because most CAPC managers and staff are female, most of the pronouns are written in the feminine (she, her). To be inclusive of the whole readership, we substitute masculine pronouns from time to time. This allows us to avoid awkward phrases like him/her, and to make the text easier to read.

Where's the information on volunteers?

A volunteer management kit is also being developed.

Like this kit, it was funded as a project through the CAPC/CPNP National Projects Fund. The project sponsors are two Ontario-based CAPC/CPNP projects: Rural Response for Healthy Children and Our Children, Our Future/Nos Enfants, Notre Avenir.

Attention All Projects with Unionized Employees!

The content of these sections is written primarily for **non-unionized** workplaces. In a unionized workplace, you will need to check to ensure that any HR procedures suggested in the kit do not violate the collective agreement.

The Kit's Response

...to major HR challenges

As noted earlier on page 1.3, we used the HRTS Survey to ask projects to identify the major challenges they face related to HR management.

We have tried to address all the major challenges identified. In some cases, the challenges go a little beyond the scope of this kit. For example, you said that you want to know more about board management. In response, we've provided a brief two-page overview on board management basics. The kit would be impossibly huge if we addressed this and every other major challenge in greater detail.

More survey info:

See page 1.3 for more on HRTS Survey results.

The lists below indicate the most commonly identified challenges for each section, and where in the kit you can find information on them.

Section 2 – Strategic Planning

Working within partnerships	See page 2.16
Lack of evaluation tools	See the Strategic Planning Tool Box
Participatory evaluation	Not addressed directly. See pages 2.12 to 2.13
Board management	See pages 2.14 to 2.15
Time management	See page 5.8

Section 3 – Hiring

Staff retention, especially because of low salaries and part-time positions	See pages 3.2, 3.4, 3.15
Finding staff with the "right" qualities for CAPC/CPNP work	See pages 3.1, 3.2, 3.9 to 3.13
Recruitment in rural or isolated areas	See pages 3.6 to 3.8

Section 4 – Orientation

Time restraints	Addressed indirectly throughout the section. See pages 4.4 and the lists on pages 4.6 to 4.9
Staff turnover	See page 4.4 and Sections 2, 3 and 5
Staff roles are highly diverse & always changing	Addressed indirectly in this section. See page 3.4

The Kit's Response

...to major HR challenges (cont.)

Section 4 – Orientation (cont.)

Need to develop policies and procedures	See page 4.6 and Sections 2, 3 and 5
Orientation within partnerships	See page 4.10
Managing different assumptions/ expectations/knowledge base	See page 4.10, The Partnership Page (all sections), and pages 5.18 to 5.21 (on problem solving and conflict management)
Communicating CAPC/CPNP organizational culture	See Section 1, and page 1 from all other sections.

Section 5 – Supervision

Dealing with sensitive issues	See pages 5.18 to 5.26
Lack of resources, tools & training	See the Supervision Tool Box
Managing different schedules, locations, off-site programming	See page 5.28
Supervising within partnerships	See page 5.28
Need for self-care to avoid burnout	See pages 5.8 to 5.9
Doing staff-centred performance appraisals	See pages 5.12 to 5.17

Section 6 – Training

Insufficient $ for training	Addressed indirectly in this section. See pages 6.2, 6.6 and 6.7
Access to training for isolated, rural or multi-site projects	See page 6.7
Time restraints	See page 6.7
Training pulls staff away from work	See page 6.7
Diversity of training needs among staff	See pages 6.1, 6.2 and 6.4 to 6.7
Finding relevant training opportunities	Addressed indirectly in this section. See page 6.7

The Partnership Page

HR management and partnerships

Many CAPC/CPNP projects are organized as partnerships among more than one organization. These arrangements bring with them special HR challenges. The HRTS survey results show that many of you would like information on how to deal with these challenges.

As we said before, you spoke, we listened. Look for **The Partnership Page** like this one at the end of each section, just before the section tool box. This page provides information specifically for projects with HR challenges related to partnerships (and multiple sites).

Strategic Planning

Coming up in this section...

Section 2 - Strategic Planning

Strategic Planning

for CAPC/CPNP projects

The Strategic Planning Cycle

Strategic planning isn't really an HR function, but it's where HR management begins. Strategic planning is a process for developing the overall guiding policy and focus for your project. It formally articulates what your project wants to accomplish, and by what means. You can think of HR management as one important way to support your project's strategic plan.

The result of strategic planning is a document called (you guessed it) the strategic plan. The strategic plan is the place to start when hiring, orienting, supervising, and training staff. Job descriptions, policy manuals, performance appraisals, and evaluation forms can all be written based on the strategic plan.

Beyond the functions of HR management, the strategic plan articulates your project's overall **organizational culture** – the prevailing traditions, behaviours, and values of an organization. It provides meaning and focus for every activity: planning, budgeting, direct services, you name it. Whether you are developing programs or even renovating a room at the drop-in, consider how your strategic plan might inform the way you organize activities.

Strategic planning is an ongoing, circular process. We see **program evaluation** as the arc in the circle that connects an old plan to a new one. That's why we're including a little something about program evaluation at the end of this section. Like a dessert.

Implications of CAPC/CPNP for Strategic Planning

CAPC/CPNP projects encourage priority groups to take progressively more active roles in identifying their needs, finding solutions, and directing programs.

A project following this approach has priority groups actively participating in strategic planning. Ideally, program participants attend the formal planning sessions and offer input directly. They can also provide input through other means, such as needs assessments, small group meetings, written feedback surveys, or even informal chats over coffee. It's a matter of asking people what your project should try to do, and what success would look like.

What the survey said...

In the HRTS survey, you asked us to address these issues related to strategic planning:

- Working within partnerships
- Lack of evaluation tools
- Participatory evaluation
- Board management
- Time management

See page 1.14 for details on where these issues are addressed in the kit.

Strategic Planning?

May we suggest…

Make your plan participant-centred
As much as possible, engage CAPC/CPNP priority groups in strategic planning. Set up a process that enables priority groups to define their issues for themselves and identify possible solutions.

Involve the right people
Get input from people who will be affected by the plan (especially priority groups) and everyone responsible for implementing the plan (staff, board, partners, volunteers). It's also critical for the project's policy makers to show leadership in the process.

Bring in outside help, if necessary
Strategic planning can get pretty complex, especially if your project is a big one or there's need for a major re-organization. It's a very good idea to have an experienced facilitator to help guide the process. An external facilitator may also be useful if there's a preference for an objective voice.

Know why you're doing it
Strategic planning takes a lot of time and energy. Make sure everyone understands the value of having a plan before engaging in the process. Know what overall goal(s) you hope to accomplish.

Be flexible – there's no one right way to do a strategic plan
Some organizations like a highly structured process, others prefer something more informal or natural. Some start at the top and work down, others start in the middle and work around. Whatever works – that's the right way to do strategic planning.

Be realistic
Your strategic plan may not change the world, but it should make a difference for your project. Still, be careful not to place unrealistic expectations on the process. If you're new to strategic planning, start with small steps and gradually build more detail into the plan. It can be a stressful process, too, so make sure to take care of yourself first.

Keep at it – it's a work in progress
Strategic planning starts with the planning session, but it doesn't end there. A strategic plan is a living document that needs to be shared, acted on, and reviewed on a regular basis.

The Benefits

of a good strategic plan

Focus and direction
A strategic plan is like a road map. It shows you where your destination is and how to get there. You may veer off course, but a good strategic plan helps to get you back in the right direction.

Unity
A strategic plan provides your project with a common purpose and identity. This can be especially useful if your project is a multi-agency partnership.

Effective assessment
The strategic plan includes measurable objectives you can use to assess the progress you're making.

Accountability
A strategic plan clarifies your purpose and provides something for your project to be accountable to. It provides the details describing what is to be done, by whom, and how and when to do it.

Good public relations
The strategic plan is first a planning document, but it's also a great public relations tool. It portrays your project as focused, well-organized, and professional – a valuable asset to your community.

Better use of resources
When you know what you want to do, you are better able to direct funding and human resources to where they can be most effectively used.

Key Elements

of a strategic plan

A strategic plan is a series of **integrated** elements. There is no single accepted format, but strategic plans usually include the following:

The Mission Statement
A concise expression of the purpose of your project and its major activities (who you are, why you exist). It's the heart of the strategic plan. Ideally, a mission statement is one or two sentences long, although some organizations write more detailed ones that can include vision and values statements.

Vision Statement
A compelling description of how the world would look if the project were accomplishing its mission. This is perhaps the strongest motivating statement for an organization.

Values Statement
A statement of the values that guide the way a project operates, such as moral values, community development values, etc.

Goals
General guiding statements of intention that expand on the mission.

Objectives
Statements attached to a goal that make the goal's general intentions specific and measurable. Objectives express goals in manageable, bite-size chunks.

Action Plan
How you put the plan into action. The action plan includes:

- Activities – the things you do to achieve your objectives, i.e., delivering programs and services
- Who is responsible for the actions
- Time lines

All together now

Put together, the mission, values and vision statements make up a strategic philosophy.

Vision and values statements are optional parts of a strategic plan. Recently, more and more organizations are finding them to be a useful part of their plan.

For more info:

Go to page 2.5 for a hypothetical strategic plan and go to the **Strategic Planning Tool Box** for a real-life example from a CAPC/CPNP project.

You say: ***to**-may-**to***
I say: ***to**-mah-**to***

Different writers use planning terms differently, but the general idea is still the same. You try to create a seamless description of what you do, linking the big picture to the day to day detail.

Key Elements

of a strategic plan (cont.)

Here's an excerpt from a **hypothetical** example of a strategic plan. It's a fictional project set in a fictional small town. To save space, we've included only one of the program's three goals.

Mission Statement

The Garenta Family Resource Centre (GFRC) contributes to the health and well-being of children age 0–6 and their families in the community of Garenta by providing and facilitating family-centred programs and services.

Vision Statement

GFRC is an active member of a network of services in Garenta that supports the efforts of a community that is empowered to maintain and improve the health and well-being of local children age 0–6 and their families.

Values Statement

GFRC delivers programs and services that are accessible to families in the community regardless of their income level or cultural background. We engage the participation of families in our activities, with the aim of building their capacity to identify needs and develop solutions to address the needs.

Goal 1

To increase knowledge of and access to services/resources in the community for local families with children age 0–6.

Objective 1.1

To facilitate the regular use of a Community Resource Guide by local families with children age 0–6 as a way for them to connect with local services and resources they require.

Action Plan

- Program staff will complete the guide by October 1, 2002, based on detailed feedback on drafts from at least 10 participants at the drop-in and from all members of the Garenta Community Network (GCN).
- By December 1, 2002, program staff will distribute the guide to at least 200 families with children age 0–6 through our drop-in, parenting programs, and home visiting programs.
- Staff will conduct ongoing follow-up with the families to help them make use of the guide and monitor how it is being used.

Objective 1.2

To engage families with children age 0–6 in the planning of a proposed summer recreation program for pre-school age children by the GCN.

Action Plan

- Program staff will recruit six to ten families to be part of an informal parents' committee that will meet monthly from September 2002 to June 2003 to advise on program design and development. The meetings will be organized and facilitated by program staff.
- One staff member will work with the parents' committee to develop a process for sharing its recommendations with the program's Steering Committee.
- By November 1, 2002, one staff member will engage program participants in designing a poster and suggestion box at the drop-in to gather ideas for the proposed program.

The Strategic Planning Session

Four important steps

Traditionally, strategic planning involves a series of meetings where everyone gets together, you pull out the flipcharts and markers, order in pizza, and spend several hours sketching out a big plan.

In fact, there are many ways to arrive at a strategic plan. Normally, the process follows the sequence described below, but sometimes it doesn't. That's okay, as long as all four steps are addressed:

1. Create your identity – mission, vision, values

This is often the toughest part of strategic planning – deciding at the most fundamental level why your organization exists and what you stand for. Creating an identity may be difficult, but doing so has a big potential payoff – a project where everyone is working together toward a common purpose.

2. Strategic analysis – look inward and outward

Strategic analysis is a reflective exercise in which you take stock of things. One of the most common tools of strategic analysis is the **SWOT Analysis.** SWOT is an acronym that stands for:

Strengths **W**eaknesses **O**pportunities **T**hreats

The Four Parts of a SWOT Analysis	
Strengths What does your project do well?	**Opportunities** What factors "out there" could have a positive impact on your project (e.g., funding and population trends)?
Look inward	**Look outward**
Weaknesses Where is improvement needed?	**Threats** What factors "out there" could have a negative impact on your project (e.g., new government policies)?

For more info:

Go to the **Strategic Planning Tool Box** for a sample SWOT analysis.

Analysis by scenario

Some organizations develop scenarios as part of their analysis. The idea is to develop three scenarios – a best case, worst case, and average case – of what might happen based on the findings from the analysis. They then develop plans for the likely reality, but which account for the best or worst scenario.

3. Establish goals and objectives

The strategic analysis sets up the next step: setting goals and objectives. The goals and objectives summarize your plan for achieving the mission.

Aim to make your objectives **SMART**. SMART (another clever management acronym) means:

- **S**pecific – they are clear, precise, unambiguous
- **M**easurable – so you can tell whether you've achieved them
- **A**ttainable – they present a challenge, but not too much of a challenge
- **R**elevant – aligned with the mission and the rest of the strategic plan
- **T**imely – attached to time lines to help keep you on task

Note that objectives can be written as **process** objectives or **outcome** objectives:

- A process objective expresses an intent to carry out planned activities, for example: *"To offer parenting courses to priority groups in the community."*

- An outcome objective expresses an intent to effect change among priority groups, for example: *"To improve parenting skills among priority groups in the community."*

The difference is that a process objective is project-focused, while an outcome objective focuses on priority groups. Both can be useful in support of a project's goals. Nevertheless, outcome objectives are more directly linked to the overall goal of CAPC/CPNP – to improve the health of children.

4. Develop an action plan

The action plan is just what it says – it's the specific plan to turn your intentions (goals and objectives) into action.

An action plan can be written in different ways, but in each case it becomes a tool for establishing accountability by spelling out who is responsible for what, and by when. It can also include resource and budget allocations.

Be SMART!

It's okay for goals to be general, but for objectives, it's quite important to be SMART, because evaluation depends on SMART objectives.

It's the thought that counts

Depending on the size of your organization, you may end up with only one goal and maybe three or four objectives attached to the goal. In this case, it may be worthwhile to combine the mission and goal into one statement, and just have a set of objectives.

In another instance, maybe you've set some goals and you're starting to come up with objectives, but realize that the goals and objectives don't match. Maybe you'll change the objectives to match the goals, or vice versa.

The point is not to follow the pattern perfectly, but to understand the pattern as a link from the big picture of the mission to the little picture of everyday activities.

Scheduling Strategic Planning

When's the right time?

There is no one schedule to follow for a formal strategic planning process.

Usually, the process involves a series of meetings (one every two or three weeks). The process should last no more than two or three months. If it goes longer than this, you risk losing momentum and having the process fall apart.

How Often Should We Do A Strategic Plan?

The current wisdom holds that it's a good idea for any organization to do a full strategic plan once every three years.

Some form of strategic planning should be done annually, although it's probably not necessary for very stable projects to do a full review every year. At the least, action plans should be reviewed annually, and the entire plan should be reviewed as often as you have to prepare a major budget (usually an annual process).

When's The Best Time To Do Strategic Planning?

It makes sense to coordinate strategic planning with other important events, such as:

- When an organization is just getting started
- The renewal process
- In preparation for a major addition or change to your programming

Or, to respond when some of these issues begin cropping up:

- An employee's workload is too light, too heavy, too confusing, or redundant.
- One or more programs or administrative functions just aren't working.
- There are high rates of employee turnover (maybe that's always!).
- There is confusion about your organizational structure – who reports to whom?

After The Planning Session

Keep at it!

There are three things left to do once the formal planning sessions are complete:

1. Write and distribute a report

All that hard work has to be documented as a report. Remember that the strategic plan belongs to the whole organization. Ensure that copies of the report are readily available for everyone.

2. Acknowledge and celebrate the fact that you completed the plan

All that hard work should be celebrated and rewarded, too. It's quite an accomplishment to complete a strategic plan, so it's important to let people know it's appreciated.

3. Review and use it! Often!

Hopefully, at the end of the year your strategic plan report will be all dog-eared and scribbled on. It's meant to be used – for developing job descriptions, evaluation plans, annual reports, etc.

Remember, the plan is a guide, not a set of rules. You can adjust the plan when it's necessary to adjust. Just make sure there is a process in place to ensure everyone understands and agrees with the adjustments.

Review the plan regularly – every three to six months depending on the size and complexity of your project – as a way to evaluate your progress, to stay on track, and to ensure that the plan stays consistent with reality.

The PATH Process

Another way to do strategic planning

PATH – Planning Alternative Tomorrows with Hope

The PATH process is a creative planning tool developed in Canada by Jack Pearpoint, John O'Brien and Marsha Forest. It has become popular among CAPC/CPNP projects and other non-profit organizations as an alternative to the traditional strategic planning process.

The PATH process is a matter of developing a vision (called "The North Star" in PATH terminology) and then working backwards to create a plan to achieve the vision. The result of a PATH is an illustrated poster (usually a great big one).

Completing a PATH requires eight steps (see the diagram on page 2.11):

Step 1 – The North Star – The Dream
The planning group develops a dream or vision of the world they want to create.

Step 2 – The Goal
The group develops a positive and possible future, just beyond a time they can predict comfortably – 6 months, a year, 2 years, etc.

Step 3 – Now
The group returns to the present and describes the current reality of their situation.

Step 4 – Whom Do We Enroll?
The group generates a list of all people needed to achieve the goal set in Step 2.

Step 5 – Getting Stronger
The group identifies what they need to grow strong enough to reach the goal and keep moving forward.

Step 6 – Three Months
The group moves into the future again, but one much closer (three months) and they imagine what they have already accomplished by this time.

Step 7 – One Month
The group repeats Step 6, except they imagine their progress at one month from the present.

Step 8 – The First Step(s)
To finish, the group identifies the first steps they will take on their way through the PATH.

For more information on PATH, contact

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e-mail: info@inclusion.com
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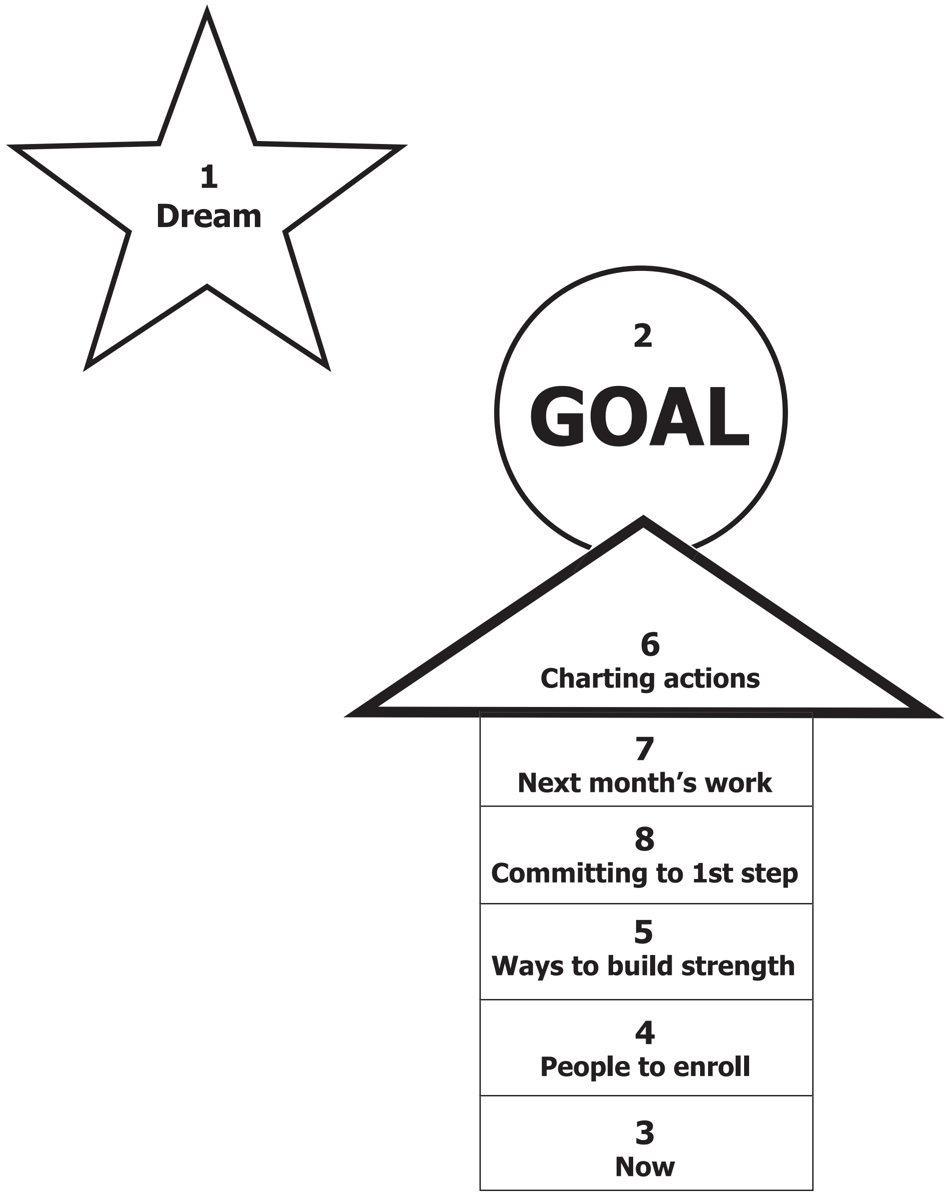
The PATH Process

Another way to do strategic planning (cont.)



The 8 Steps of The PATH Process

Evaluation

Completes the planning cycle

The Strategic Planning Cycle

As we said at the start of this section, evaluation is the piece that makes planning go full circle. It's the main feedback mechanism for assessing your success in implementing the strategic plan.

When it's working well, program evaluation is a great learning tool. Indeed, leading theories of learning confirm that evaluation (whether formal or informal) is a critical part of the learning process. It allows you to be conscious of what you're doing, and as a result, more empowered to improve programs. Like strategic planning, it's an ongoing, circular process that may peak at certain times (e.g., report deadlines) but is active throughout the year.

On the other hand, evaluation can seem threatening. It may force you to confront difficult issues, and sometimes it seems imposed as a way to pass judgment or, worse yet, to punish.

Including evaluation as a part of the strategic planning cycle helps to minimize the threat and maximize the learning. It also gets your evaluation planning started well in advance. Doing so makes evaluation a lot less threatening and a lot more empowering.

Program Evaluation – A Brief Overview

Program evaluation has two major components:

- **Process evaluation** is an assessment of a project's success in implementing activities it planned in the manner it expected. This kind of evaluation identifies what you did, how well you did it, what could be improved, and suggestions to make those improvements. The guiding question of process evaluation is *"What did we do and how can we do things better?"*

- **Outcome evaluation** deals with outcomes – changes or benefits for priority groups resulting from project activities. Outcome evaluation assesses what expected and unexpected outcomes resulted from a project's activities. The guiding question of outcome evaluation is *"What difference does the project make for our priority groups?"*

The two kinds of program evaluation work hand in hand. Outcome evaluation can confirm that all your hard work is paying off. The process evaluation helps to make your hard work more effective and, hopefully, improves the results of your outcome evaluation.

There's also impact evaluation

Impact evaluation is a more intensive form of outcome evaluation. Impacts are longer term changes or benefits resulting from a project. Impacts are harder to measure, especially for the kind of work that CAPC/CPNP projects do.

Evaluation & Project Logic Models

It's only logical

An Evaluation Plan

Your strategic plan sets the stage for evaluation by defining your activities and objectives. To get your evaluation plan all set, you need to develop **outcomes**, **indicators**, and **tools**:

- **Outcomes** are statements of changes or benefits for priority groups that you want to achieve.
- **Indicators** are the kinds of information or evidence you collect that can suggest whether change is occurring in relation to the objective.
- **Tools** are the ways you collect the information – such as personal interviews or written questionnaires.

Terminology Stew

Outcomes, objectives, indicators, tools…sometimes the terms get mixed up. The important thing is knowing what you want to measure, and finding a way to measure it.

The Project Logic Model

Some CAPC/CPNP regions have developed a **project logic model (PLM)** as a framework for an evaluation plan. The PLM is a tool that describes programs and how they work.

Most of the elements of a PLM are already complete if your strategic plan is in place. The big job in developing a PLM would then be to determine what outcomes you could expect, and how to measure whether you achieve them.

Thank you!

To Mary Sehl, Health Canada CAPC Program Consultant in Kitchener, Ont. for her help on PLM's.

As usual, there is more than one way to write a PLM. In general, however, it includes major elements of your strategic plan and your evaluation plan. Combine these ingredients and you've got:

- Mission, Values, Vision Statements
- Goals and objectives
- Outcomes, indicators, and tools

Different regions in Canada have their own PLM templates and definitions of terms. No single one has emerged as the most useful or most effective. What's important is that the PLM works well enough, that everyone in the region agrees with and understands the PLM, and that everyone uses it consistently.

For more info:

Go to the **Strategic Planning Tool Box** for sample PLM templates and a sample work plan based on a PLM.

Board Management

A few basics

In the HRTS survey, many of you requested information about board management.

Well, board management is a complex topic and to address it in detail would require another tool kit. Nevertheless, we're including a brief overview on board management basics because boards are involved in strategic planning and they do have an impact on HR management.

Boards – The Absolute Basics

First of all, to be a CAPC/CPNP funded project, you must have a board of directors. A board of directors is a group of people who assume legal responsibility for governing the project on behalf of community stakeholders. A big part of this responsibility is to ensure that the organization's funding is used appropriately. All boards have this legal responsibility.

How boards govern varies from board to board. Just like strategic planning and evaluation, there is more than one way to design and manage a board effectively. Some organizations limit the board role to setting policy and strategic direction; others also involve their boards in management and daily operations.

Partnerships & boards

Some projects organized as partnerships have an advisory committee instead of a board of directors. Nevertheless, the project's sponsoring organization is governed by a board of directors.

Two Basic Board Models

It's useful to think of boards as belonging to one of two models: a **policy board** or a **working board.**

- **Policy Board** – A policy board is the "traditional" board model. It limits its activity to setting policies and strategic direction. This kind of board is often appropriate for larger organizations with many employees.

- **Working Board** – In a working board, board members are not only concerned with setting policies and strategic direction, but they are also active managers and regular volunteers in daily activities. This type of board is common in new or small organizations that have a limited scope and budget.

The role of a board can change according to the situation. In a crisis situation, the board may take on more managerial responsibilities to deal with problems. In a growth period, the board may delegate roles to newly hired staff.

Which model you choose can have a big impact on the board's effectiveness. For example, using the working board model in a very large and complex project is probably not a good idea.

More important is that everyone agrees on which model to follow. The key for successful boards is to ensure that all stakeholders clearly understand who is responsible for what. Without clarity about roles, none of the models are likely to work effectively.

Another model

The Policy Governance(SM) model, created by John Carver in 1980, is a popular re-working of the traditional policy board model. A so-called "Carver board" makes less use of committees than a policy board, and delegates greater responsibility to the senior staff position.

For more info:

Board Basics Manual for Leadership Development Programs, published by United Way of Canada, is an excellent resource on board management.

Board Responsibilities

There are seven major activities that boards are commonly responsible for:

- **Strategic planning** – Developing the overall guiding policy and focus of the organization
- **Financial and legal accountability** – Ensuring the sponsoring organization upholds financial and legal responsibilities
- **Hiring the project manager/executive director** – And monitoring/evaluating her performance
- **External relations** – Representing the interests of the sponsoring organization in the community, and making community interests known within the sponsoring organization
- **Resource development** – Ensuring financial resources are sufficient to achieve objectives
- **Management systems** – Ensuring that policies and structures are in place for effective operations
- **Board self-management** – Ensuring the board functions effectively

Boards may play three different roles in carrying out these responsibilities:

- **Decision-Maker/Evaluator** – The board monitors the activities, evaluates how effectively they were conducted by managers, and makes decisions on future activities accordingly.
- **Advisor** – The board provides advice to managers who have been given responsibility for the activity.
- **Implementer** – Board members carry out the responsibilities themselves.

Again, the important thing is to clarify what kind of role the board will assume for each area of responsibility. If you accomplish that, you've made a good start in managing your board effectively.

The Partnership Page

Strategic planning tips for partnerships

They say – and they're right – that you can really get to know yourself better once you get into a relationship. It's the same with organizations. And in both instances, the more you know yourself, the more likely you'll have a successful partnership.

So, strategic planning not only gets your project ready to be successful on its own terms, it gets you ready to be successful in a partnership.

The Wild Rose Foundation in Alberta put together a good resource on developing partnerships called *Working in Partnership: Recipes for Success.* Here's a process it recommends to get started:

1. Know yourself

- Establish a clear identity for your project, understand your current reality (perhaps through SWOT analysis), and set priorities.
- Determine how ready you are for a partnership – what expectations you have and what you're willing to commit to it.
- Establish boundaries – how far you're willing to go to make a partnership work.

2. Know what you want

- Identify the specific things you hope to gain from a partnership.
- Identify what you have to offer to potential partners.
- Decide what an ideal partner would look like.
- Identify potential barriers to a partnership.
- Prepare to present yourself to potential partners.

3. Establish compatibility

- Meet with the potential partner to establish the purpose of the partnership and what each partner will commit.
- Identify how the partnership will serve each partner's strategic plan.
- If funding is involved, determine how best to build accountability and equity in the partnership.
- Identify risks or liabilities that the partnership might create.
- Determine how partners will communicate, and how formal the partnership will be.

After these first steps, there are a lot more details to work out. But the right way to start is by doing the work upfront on your project's own strategic plan, and thinking about how a partnership fits your plan.

Partners from the start

Some CAPC/CPNP projects were funded from the start as partnerships, so the individual agencies had no choice but to become partners. If you're already in a partnership, the information on this page may still be helpful for maintaining or improving your working relationship with partners.

For more info:

Go online to download the whole Working in Partnership report for free. The address is:

http://www.cd.gov.ab.ca/building_communities/volunteer_community/resources/partnership_kit/index.asp

Or simply go to **www.cd.gov.ab.ca** and enter ***Working in Partnership*** in the search box.

Strategic Planning Tool Box

Strategic Plan - includes SWOT Analysis (9 pages)
Child Development Centre (Whitehorse, Yukon)

Project Logic Model Templates (1 page)
Ontario, Manitoba and Alberta CAPC/CPNP projects

Project Logic Model (3 pages)
Manitoba CAPC projects

Sample Work Plan (1 page)
The Pas Family Resource Centre (The Pas, Man.)

Partnership Agreement (7 pages)
Growing Up Healthy Downtown (Toronto, Ont.)

Service Agreement (4 pages)
Breaking the Cycle (Toronto, Ont.)

Child Development Centre – Whitehorse, YK
2001 – 2006 Strategic Plan

Developed by Bobbi S. Noble Consulting Inc., November 2000

Introduction

The year 2000 marked the end of a five-year strategic plan for the Child Development Centre (CDC). The value of the 1995 – 2000 strategic plan was demonstrated in the accomplishments of the last five-year period, and subsequently the Board of Directors and the Executive Director initiated a strategic planning process to establish direction and goals for the next five years. Board and staff jointly developed the 2001 – 2006 strategic plan.

Included in this strategic plan are philosophy statements explaining the values and philosophy of the CDC, a mission statement describing the business of the CDC, the vision statement describing the future, and the key directions and goals that will enable the CDC to accomplish the mission and move closer to the vision.

Background information essential to the strategic planning process is captured in the document entitled the "Planning Context" and includes:

- A description of the CDC's role, programs and services
- An update on the progress towards the achievement of the 1995 – 2000 strategic plan
- Trends and changes in early intervention programs
- List of active partnerships
- Utilization data
- Yukon population projections
- Results of consultation with families, staff and stakeholders

The CDC is a child and family centred organization, characterized by a strong commitment to the families and children with whom they work. In this strategic plan, the staff and board continue to demonstrate their commitment to meet the growing and changing needs of Yukon children and families. Their hope for a bright future for all Yukon children is reflected in their catchphrase "together we can reach the stars."

Strategic Planning Assumptions

The 2001 – 2006 strategic plan was developed based on the following assumptions:

- The CDC will continue with the direction set in the 1995 – 2000 plan to provide services to all Yukon children and families who could benefit from their support and services while continuing to emphasize and specialize in the provision of services to children with special needs.
- The CDC will continue to focus on children from birth through school age.
- Prevention services are provided through education, information and following children who may be at risk.
- Further expansion of the CDC's capacity will be done through partnerships and not through significant expansion of the staff resources.
- Development of buildings and facilities to support CDC activities in the rural communities is the responsibility of each community.
- The provision of mental health services to young children, especially those with FAS, is a service gap.
- The population in the Yukon is not likely to increase unless there is significant economic development.
- Demand for services is not likely to decrease even with declining population, given social and economic factors affecting the population.

Philosophy Statements

1. We believe that childhood is a time of wonder, fun, and discovery.

2. We are committed to building a community where all children are welcomed, supported and valued.

3. We believe the growth and development of young children is enhanced by providing children with supports and services as early as possible.

4. We believe families are important to children, and that we are more effective when we work in partnership with the family.

5. We recognize the cultural diversity of Yukon and believe cross-cultural bridges are built through an understanding of cultural values and differences.

6. We believe that by working in partnership with other community members we can build a better community for children and families.

7. We believe in a bright future, full of hopes and dreams, for every child.

8. The values of respect, trust, compassion, and honesty are the cornerstones of our service.

Mission Statement

A mission statement describes the business of the organization. The following is the mission statement that will guide that Child Development Centre's activities from 2001 to 2006:

Working with families and community members, we help Yukon Children, particularly those whose needs are special, to grow and develop to their fullest potential by providing early supports and services from birth to school age.

Vision Statement

Visions are compelling descriptions of the future. The Child Development Centre's vision for the future is:

Together We Can Reach The Stars

To help raise a generation who:

- **believes in themselves,**
- **accepts all others, and**
- **achieves their potential.**

Key Directions and Goals

The key directions and goals were developed based on the SWOT analysis (see Appendix A), the environmental scan document entitled "The Planning Context," a discussion with staff on the aspects of their work they feel "passionate" about and identification of service gaps. The following are the key directions and corresponding goals that will enable the Centre to accomplish the mission and work towards achieving the vision:

1. Form partnerships to develop fully integrated services for young children

- Improve direct service delivery to young children and their families through working in partnership with other service providers

- Participate in community development initiatives to improve the continuum of community services available to young children and their families

Primary responsibility: CDC staff

2. Develop relationships with First Nations

- Increase awareness of First Nations' culture

- Begin to establish relationships with each Yukon First Nation community and the Council of Yukon First Nations (CYFN) to facilitate child development initiatives

- Work collaboratively with First Nations on specific targeted projects

Primary responsibility: CDC staff

3. Develop programs and services for children with fetal alcohol syndrome

- Research and develop a strategy to address fetal alcohol syndrome (FAS) and other pre-natal substance abuses

- Develop information packages on FAS for parents, caregivers, and childcare providers

Primary responsibility: CDC staff

4. Develop mental health services and programs

- Define the CDC's role in mental health in relation to other organizations providing mental health services

- Advocate for and support other agencies in the development of mental health services

- Identify the mental health issues facing young children and develop internal capacity to address these issues

Primary responsibility: CDC staff

Key Directions and Goals (cont.)

5. **Increase education and information services**

- Promote and expand the information resource role of the CDC
- Provide increased education and training on parenting and child development to parents, caregivers, and childcare providers

Primary responsibility: CDC staff

6. **Work with rural communities to strengthen services to meet the needs of families**

- Continue to develop community-based programs and services based on the needs of each individual community

Primary responsibility: CDC staff

7. **Improve the transition process**

- Work with families and the school system to develop a more effective transition process to help reduce the anxiety associated with moving into the school system
- Develop a process to ensure a smooth transition from the CDC to the school system that includes continuity of supports

Primary responsibility: CDC staff

8. **Improve access to and use of information technology**

- Develop an information system to capture clinical and management/human resource data
- Develop research and evaluation strategies
- Investigate the application of technology to clinical, educational and management practices

Primary responsibility: CDC staff

9. **Support staff development and well-being**

- Develop strategies to enhance team relationships and team functioning
- Develop a competitive staff recruitment and retention strategy (Board responsibility)
- Develop a staff safety protocol
- Determine whether to proceed with accreditations and investigate accrediting bodies (Board responsibility)
- Minimize staff burnout potential through the development of a system of checks and measures

Primary responsibility: joint CDC board and staff

Key Directions and Goals (cont.)

10. Improve the Whitehorse facility

- Conduct a needs assessment involving families, the board, staff and stakeholders to determine the physical plant needs for the Centre in Whitehorse (Board responsibility)
- Develop a transportation strategy for the Centre in Whitehorse
- Build a new playground

Primary responsibility: joint CDC board and staff

11. Increase public awareness of the organization

- Develop a targeted public awareness strategy

Primary responsibility: CDC Board

12. Continue to increase the financial stability of the organization

- Increase the core funding base and establish long-term funding commitment
- Access federal funding that is available for providing early supports and services to young children
- Develop a three-dimensional fundraising strategy seeking corporate, service club, and public support

Primary responsibility: CDC Board

13. Develop the CDC Board

- Conduct board orientation for all new members
- Define the board role and identify ways to improve board functioning
- Develop a strategy for board evaluation

Primary responsibility: CDC Board

Appendix A:
SWOT Analysis

STRENGTHS

- Staff commitment and knowledge
- Established reputation
- Board described as "prestigious"
- Success of the CDC
- Flexibility – can operate in all kinds of environments and configure ourselves to meet new and changing needs
- Responsiveness of staff and overall organization
- Do not fear change (Value)
- Community support
- Can attract staff and board members
- Growth is planned and managed
- Clarity of vision and values
- Contacts in all communities throughout Yukon
- Involvement and support from service clubs
- Well-organized
- Collaborative model
- Small size facilitates change
- Diversity of staff and board
- Our "parents" – have provided support when needed
- The children
- Our focus – not taking on more than we can
- Concentrate on what we do
- Commitment to stay current
- Openness to what people tell us

WEAKNESSES

- Transition – need to do it better – need to find out what families needs are
- Information management system
- Public awareness – lots of people who do not know what we do
- Resources – funding
- The building – have expanded to the limit
- Relationships with physicians, other health and social service professionals and child care providers
- Spreading out too far – demands on staff
- The stigma associated with the special needs focus
- Growth without financial support
- Vocabulary used in promotional literature; vocabulary is clinical, e.g., intervention and not inviting
- Promotional material needs to be written in plain language
- Focus on women rather than men and women
- Increasingly becoming a multicultural society – need to operate on multicultural values
- Relationships with First Nations and CYFN
- Need to understand more of FN governance and cultural trends
- Staff not reflective (gender/culture) of population
- Salary scales of staff and benefits
- Fundraising
- Building partnerships with childcare providers
- Board/staff relationship could be enhanced
- Too few parent volunteers

OPPORTUNITIES

- Shift in population – more out there to be done – lower population allows for more opportunities
- Poor economy = more children who need support
- Supporting kids is in "vogue"
- Awareness of children with special needs
- Wealth of research available
- The revisions to the Education Act provide an opportunity to bridge into school system.
- Possible re-opening of the Child Act
- $2.2B offered by federal government for early childhood development
- New Board/new dynamics
- Potential of a "boom"
- Possibility of collocation with Gray Mountain School – reduces stigma
- Potential to co-locate with other programs and develop a Family Resource Centre
- Strengthen the education leave to provide an incentive to return to the CDC upon completion
- Develop services for children and families with mental health issues and alcohol and drug abuse, residential school issues.
- Settling of land claims will shift balance of power in communities; self-governance opens up opportunities
- Pipeline – fundraising opportunity

THREATS

- Need to rethink niche of 0 to school age – this group is reducing in numbers
- Core funding $$$
- Ambition may outstrip resources
- Staff burnout
- Lack of competitive wages and benefits
- No way to access capital funding
- How expendable are we??
- Threat of a lawsuit – threat to our reputation
- How does the CDC fit into the world of our partners i.e. First Nations
- Pipeline could change the social make-up of the community (increase demand for services)
- Addressing mental health issues opens up the deman – requires staff training

Appendix B:
Reference Notes for Operational Planning

Throughout the process of developing the key directions and goals, several objectives were identified. The following is only intended to capture the objectives suggested at the strategic planning workshop and provide a basis for the development of the operational plan.

2. Develop relationships with First Nations

- Increase awareness of First Nations culture
  — provide staff training in traditional First Nations parenting
  — determine whether CDC staff can access the YTG Land Claims Training Module #1
  — develop a staff resource library on First Nations culture

4. Develop mental health services and programs

- Define the CDC's roles in mental health in relation to other organizations providing mental health services
  — define mental health as it relates to the work of the CDC
  — define the role of the developmental therapist in relation to providing mental health services
  — define the roles of other staff in relation to providing mental health serivces

5. Increase education and information services

- Promote and expand the information resource role of the CDC
  — enhance parent-friendly information available in the resource centre
  — provide written information in plain language

- Provide increased education and training on parenting and child development to parents, caregivers, and childcare providers
  — offer educational workshops for the public
  — develop and offer information pamphlets

7. Improve the transition process

- Work with families and the school system to develop a more effective transition process to help reduce the anxiety associated with moving into the school system
  — find out what parents want from the transition process
  — re-look at how we prepare parents for the transition process and how parents are involved in meetings

- Develop a process to ensure a smooth transition from the CDC to the school system that includes continuity of supports
  — identify problems with the transition process
  — continue to work with the department of education

8. Improve access to and use of information technology

- Develop an information system to capture clinical and management/human resource data
  — develop a client record/file system with outcome measures

- Investigate the application of technology to clinical, educational and management practices
  — provide each staff member with a computer

Appendix B:
Reference Notes for Operational Planning (cont.)

9. Support staff development and well-being

- Develop strategies to enhance team relationships and team functioning
  — provide an annual team-building retreat

- Develop a competitive staff recruitment and retention strategy (Board responsibility)
  — provide and allocate staff training dollars
  — issues for upcoming negotiations: salary, benefits, educational leave and pension plan

11. Increase public awareness of the organization

- Develop a targeted public awareness strategy.
  — target groups include: general population, other organizations, potential funders, parent and caregivers who have questions or concerns about their child's development
  — use a plain language approach when developing public awareness materials

Appendix C:
Parking Lot Issues from the Strategic Planning Exercise

During the strategic planning exercise, a few issues were identified that were outside the development of a strategic plan, but noted as requiring discussion in the future.

The parking lot issues are:

Assessments
- who are the staff that are sent to do assessments and how are they selected i.e. is the person doing the assessment the person who can look at the whole child
- length of turn around time getting assessment results to the family

Partnerships
- how well are we partnering and how well are we relating to our colleagues in childcare?
- childcare providers emphasize special development/nurturing – CDC Teacher brings the perspective of cognitive development; what issues arise out of these two perspectives working together and how can they best be addressed

First Nations
- how can we engage the males of the family into the CDC; historically have reached out to women; First Nations have raised this concern
- encouraging family involvement difficult in First Nations, how does this affect the efforts towards early intervention

Language and Definitions
- what is considered “early”
- need to consider the language we use, e.g., “intervention” implies interfering, “identification” implies labelling

Collective Bargaining
- issues for upcoming negotiations: salary, benefits, educational leave, and pension plan

Project Logic Model Templates
For Ontario, Manitoba and Alberta

<table>
<tr><th>Ontario</th><th>Manitoba</th><th>Alberta**</th></tr>
<tr>
<td>Program Areas

• Support for women having babies
• Support education & resources for women who use substances
• Family support, education & resources
• Nutrition
• Healthy child development
• Service system change

Priority Groups

Program/Activities

Short-term Outcomes

Long-term Outcomes

Determinants of Health</td>
<td>CAPC Objectives

See the CAPC Manitoba Project Logic Model in this section for the 9 Manitoba CAPC objectives

Programs/Activities

Tools for Collection

Process Indicators (Outputs)

Process Indicators (Satisfaction)

Outcome Indicators</td>
<td>Inputs

Activities

Outputs

Initial Outcomes

Intermediate Outcomes

Longer term Outcomes</td>
</tr>
</table>

** The Alberta model is a suggested approach based on the United Way of America's model as described in their manual *Measuring Program Outcomes: A Practical Approach*

Manitoba CAPC Work Plan Guide

CAPC Goal: To improve the health and well-being of children age 0–6 years

Source of Information: Program Characterization Matrix

	Definition	Description
CAPC Objectives	Specific, measurable statements of the desired changes that a project intends to accomplish over a given period of time. These most often relate to an increase in knowledge, skills, attitude, or behaviour.	There are 9 common CAPC Objectives that were established through the Central Evaluation Process. Your project's objectives for each program are listed in your Program Characterization Matrix. The Workplan is organized by objective.
Programs/ Activities	Program activities or services which are planned to accomplish each objective.	Each objective may have a number of program activities associated with it. Please list each program activity under the appropriate objective (as listed in your Program Characterization Matrix). A brief description of program activities or services is helpful but needs to be stated only once.

Source of Information: Evaluation Processes

Tools for Collection	The methods with which you collect output, satisfaction, and outcome information. Evaluation tools assess what activities have actually been done by projects, program strengths and weaknesses, and what changes have occurred for participants related to your objectives.	The CAPC database collects output information (attendance records, program frequencies, participant levels, referrals, etc.). Satisfaction and outcome information is primarily collected from participants using written questionnaires and personal interviews. Other sources of information include pre/post questionnaires, focus group sessions, staff observation, participant file reviews, informal feedback, etc. The tools used for collection should be listed for each appropriate program activity or service.
Process Indicators (Outputs)	The actual services or activities delivered or undertaken by projects.	These are the stats collected in the CAPC database. The most common outputs are described as the number of participants that attended. Citing total attendance, average monthly attendance, total number of sessions per year, etc. provides strong and meaningful output data. Outputs should be provided for each appropriate program activity or service.
Process Indicators (Satisfaction)	Information collected from participants to identify strengths and weaknesses involved in implementation of activities and services that can be used to make changes and improvements wherever possible.	Satisfaction information can be collected at the end of a given session or at planned intervals, primarily from participants, using written questionnaires and/or personal interviews. Feedback information is collected to measure participant satisfaction with specific aspects of a program – what they liked most and least about sessions, whether the program met their expectations, and suggestions for program changes and improvements. Informal collection of participant feedback through suggestion boxes, spontaneous feedback, etc. is also valuable in improving program quality and relevance.
Outcome Indicators	An assessment of measurable changes or benefits for participants as a result of project services and activities related to the CAPC objectives. Focuses on identifying what difference the project is making through its activities.	Outcome information can be collected at the end of a given session or at planned intervals primarily from participants, using written questionnaires and/or personal interviews. Outcome indicators can be developed from the CAPC Dimensions of Change. They report on changes in specific areas of knowledge, skills, attitudes, and behaviours that relate to the appropriate objective. For example, you would include increased awareness of nutrition, budgeting, and literacy under the objective of parent life skills. Outcomes are reported under each program activity service and should relate directly to the defined objective.

CAPC Manitoba Objectives & Dimensions of Change

CAPC projects in Manitoba developed nine objectives. Major dimensions of change are specific skill areas pertaining to the objective. The table below provides a working list of dimensions of change for the nine CAPC Manitoba objectives.

Objective	Description	Key Dimensions of Change
1. Parent Life Skills	To increase life skills of parents/caregivers of children 0–6 living in conditions of risk.	– Knowledge of community resources – Good nutrition – Food preparation/meal planning – Budgeting – Literacy or study skills – Healthy relationships – Drug/alcohol education – Pregnancy & family planning – Self-esteem – Positive cultural identity – Empowerment – Other dimensions identified by individual projects
2. Services & Resources	To increase knowledge of, and access to, services/resources in the community for parents/caregivers of children 0–6 living in conditions of risk.	Access to and knowledge of key services & resources: – Family support – Friends – Health care (mental and physical health services) – Education – Income – Recreation – Housing – A positive cultural identity – Other...
3. Parenting Skills	To improve the parenting skills of parents/caregivers of children 0–6 living in conditions of risk.	– Playing with children – Home safety for children – Child nutrition – Helping children to learn – Communicating with children – Teaching discipline and responsibility – Conflict resolution – Being a good role model – Building a child's positive cultural identity – Where to get other information about parenting – Other...
4. Child Development	To improve the healthy development of children 0–6 living in conditions of risk.	– Social skills/how to play with other children – Self-discipline and sense of responsibility – Communication skills – Letters and numbers – Coordination and body movement – Positive cultural identity – School readiness – Other...

CAPC Manitoba Objectives & Dimensions of Change (cont.)

Objective	Description	Key Dimensions of Change
5. Youth Development	To increase knowledge and capacities of adolescents at risk of pregnancy to make healthy choices	Same as dimensions of change for Parent Life Skills objective
6. Aboriginal Culture	To increase knowledge and awareness of Aboriginal culture for parents, caregivers and their children 0–6	– Positive cultural identity – Involvement in culture-based activities and ceremonies – Learning Aboriginal history – Interaction with Elders – Use of Aboriginal language – Other…
7. Community Development	To increase a community development approach within the local community	– Networking among community-based services – Networking with government services – Networking with business – Other…
8. Knowledge of FAS	To increase knowledge of FAS and strategies for intervention for parents/caregivers	– Proper identification and diagnosis of children – Appropriate environments for FAS children – Understanding of FAS issues among parents – Understanding of FAS issues among potential caregivers – Understanding of FAS issues in broader community – Other…
9. Project Development	To improve the project through effective administration	– Participant satisfaction – Adherence to CAPC Design Principles and Priorities – Stability of sponsoring agency – Other…

2002-03 Sample Work Plan for The Pas Family Resource Centre (Excerpt)

CAPC Objectives	Programs/Activities	Tools for Collection	Process Indicators (Outputs)	Process Indicators (Satisfaction)	Outcome Indicators
Parent Life Skills	**Breakfast Buddies**				
To increase life skills of parents/caregivers of children 0-6 living in conditions of risk	This program is designed to provide a nutritious breakfast to any child 0-10 living in the Kelsey Housing Estates Key program activities: -Volunteer Recruitment -Food Preparation -Provision of basic necessities -Nutrition Education -Corporate sponsorship of program (i.e. food donations)	Participant Registrations Participant Feedback forms Staff Observations Program Attendance Agency Feedback	-10 months per year -170 sessions year -25 registered children -4 registered adults -Approx. 2900 meals served annually	Information will be collected at regular intervals to measure: -program expectations -space, schedule, menus -volunteer satisfaction -aspects of program liked best -aspects of program liked least	Information will be collected at regular intervals: -80% of children report inc. knowledge of nutritional choices and improved nutritional habits -80% of children report "feeling better" throughout the day -50% of food costs supported through community sponsorship -80% of parents/teachers report increased sense of child health and behaviour -80% of volunteers report an increase in life skills around menu planning, child nutritional needs, food planning/prep/ storage
	Home Visiting				
	This is an in-home support program for high-risk parents with children 0-6 years. Home visits provide for weekly in-home sessions to address: -child development -parent supports -parent education -connection with other community based supports and services	Participant registration forms Attendance sheets Case Notes Materials Check out Agency feedback (where applicable) Participant feedback forms Child assessment forms (pre and post assessment) Spontaneous Feedback	-5 families maximum per staff -5 adult participants -5-8 preschool children -Approximately 48 sessions annually per family- maximum *This project will work in cooperation with the CPNP and Public Health Home Visiting programs -no duplication of services will occur	Information will be collected at regular intervals to measure: -client expectations -schedule satisfaction -aspects of sessions most helpful -aspects of sessions least helpful	-75% of participants report increased self-esteem & confidence in parenting their child(ren) -75% of participants report increased parenting skills -majority of participants connect with other community programs & services (staff observation) -75% of participants report increased life skills (knowledge of cmty. resources, healthy relationships, empowerment, drug/alcohol ed, etc) -75% of participants report increased parenting skills (home safety, playing with children communicating w children, discipline, role modeling, etc)

Growing Up Healthy Downtown
Partnership Agreement

What is GUHD?

We are:

- A partnership of eight organizations across downtown Toronto
- An equal partnership amongst 8 agencies, with each agency playing a significant role in ensuring that common goals are met, that the partnership functions effectively, and that leadership is provided in moving the partnership forward.
- A project funded by ____________ and supported by a variety of community services.

We Support:

- Families with children 0–6 years of age through education and advocacy on issues which affect their lives.
- Facilitating opportunities for family participation with an aim to strengthen and build local communities.
- Developing and sharing resources to support families and children across downtown Toronto.

We value:

- Diversity and oppose discrimination of any kind.
- A community development approach.
- Varying levels of participant involvement.
- Being ethically and financially accountable to Canadians through responsible and effective service provision.

We believe:

- Cherishing, nurturing, and involving children is important for a successful future.
- In supporting families to create healthy environments.
- In advocating on issues affecting families and children.

Roles and Responsibilities

- **Management Committee:**

  - Consists of representatives who can speak for and commit their agencies to decisions made.
  - Oversees operations of the partnership including finances and the development of positions on social issues; maintains the relationship with funder(s); designates supervision of contract staff hired by GUHD; and deals with any legal issues regarding the partnership.
  - Is staffed by the Project Co-ordinator who takes minutes, works with the Chair to prepare and circulate the agenda, summarizes, distills, shares information, and suggests options and directions when necessary, on a timely basis, so that informed decisions can be made.
  - Is chaired by a management representative from the co-ordinating agency.
  - Meets on a quarterly basis or more frequently if necessary.

- **Work Groups:**

  - Membership is open to all partner agencies with at least three partner agencies participating on each work group or task force.
  - Develop terms of reference and a 6 month work plan, specifying activities and resources required, that is approved by the Management Committee. Any changes to the terms of reference or the work plan are brought back to the Management Committee for approval.
  - Are responsible for reporting to Management Committee and keeping the GUHD Net informed of their activities.

- **GUHD Net:**

  - Broadens training, education, program development and resources, within the partnership with the focus being on work plan priorities.
  - Chairs are designated at the time of work plan development. The Co-ordinator works with the designated Chair(s), to plan the GUHD Net meetings by assisting in the development of the agenda; distilling, summarizing, sharing programming information and resources, and suggesting options and directions when necessary.
  - Is composed of one or more program staff, designated by their agency to make programming decisions.
  - Meeting times are set at the beginning of the year for meetings and are held on a quarterly basis.
  - Provides opportunities for parent participation.

Roles and Responsibilities (cont.)

- **Partner Agencies – What we expect from one another**:

Communication:

– Both management and front line workers are responsible for communicating about GUHD within their agencies. This includes reporting back from meetings, agenda items, online issues, etc. This communication should be timely, regular, lateral, and vertical.
– Each agency is responsible for keeping abreast and responding to issues communicated online. If an agency is offline, it is their responsibility to be informed of online communication.
– All agenda items are posted online in advance by the committee or workgroup chair.
– Minutes are posted soon after meetings.
– All partnership staff work with each other in a respectful way demonstrating open, clear communication, fairness, and willingness to listen and hear each other's concerns.

Budgeting and Administration:

– Each partner is responsible for its own programming, budget, administration, and human resources management within the guidelines of the funder(s).
– Each partner is responsible for completing required reports and other necessary information and sending them to the Co-ordinator by the designated due date. Extensions are only granted in extreme circumstances given that missed due dates affect the partnership as a whole. The Co-ordinator is responsible for providing a schedule of anticipated deadlines at the beginning of each fiscal year.
– Partners share their quarterly narrative report online. Quarterly financial reports are also shared amongst the partnership.
– Partners are liable for their own actions.
– Any agency wishing to leave the GUHD partnership must give 90 days written notice to the other partners and funder(s).

Participation:

– Each partner confirms their initial and ongoing participation in the GUHD partnership by obtaining ratification from their Boards on an annual basis (see attached ratification form).
– Each partner participates in the yearly planning process and incorporates the partnership work plan into their agency workplan.
– Each agency participates in and attends as many cross-agency events as possible in any given year.
– Each partner appoints one senior staff representative with decision-making capacity to sit on the Management Committee. Presence at Management Committee meetings is expected so a back up is designated to attend in her/his absence.
– Each agency will also appoint one or more program staff with the capacity to make programming decisions to the GUHD Net.
– Each partner includes opportunities for parent participation within their structure.

Roles and Responsibilities (cont.)

- **Project Co-ordinator:**

  – Provides support and linkages to each of the partner agencies.
  – Facilitates the computer conference.
  – Seeks out and keeps informed on new program information and initiatives.
  – Provides leadership in advocacy and lobbying based on direction from decisions made by the Management Committee and founded in the yearly work plan.
  – Provides support to the work groups as assigned.
  – Attends and is staff to GUHD Net and Management Committee meetings.
  – Has the responsibility of communicating with the funder on behalf of the partnership.
  – Ensures that information is shared across the partnership.
  – Carries out the administrative functions as needed for the partnership with support from Family Service Association of Toronto.
  – Provides a schedule of anticipated deadlines at the beginning of each fiscal year.
  – Identifies trends, funders' perspectives and conducts an environmental scan in preparation for the yearly work plan development. This also includes the necessary preparations for the "check-in" and the compiling of the quarterly partnership report.

- **The Co-ordinating Agency:**

  – Provides space for and supervises the Project Co-ordinator.
  – Chairs Management Committee Meetings.
  – Receives Project funds from Health Canada and disburses these funds to the individual partner agencies.
  – Maintains a cash flow account of revenue and expenditures for the partnership.
  – Compiles cash flow forecasts and quarterly financial reports based on information provided by the partners, for submission to Health Canada.

- **Contract Staff:**

  – Hired on behalf of the partnership and are accountable to the partnership through the Coordinator or a staff member from a lead partner agency, as designated by the Management Committee.

How we make decisions

- The chair for the committee or work group posts the meeting agenda at least one week in advance, giving all agency staff a chance to discuss agency position. The chosen representative can then be in a greater position to commit the agency to decisions being made at the meeting.

- All committees strive for consensus. In instances where consensus is not possible, any member can request an issue be put on the table for a vote.

- All agencies are provided with ample notice for meetings. Each agency strives to send a representative who can commit the agency. In the event that no representative is available, the agency position may be relayed to the meeting by fax, telephone, etc. However, the understanding is that a decision will be made without that particular agency present.

- Management Committee is ultimately responsible for the project. Specific decisions are delegated to work groups as appropriate.

- If a decision needs to be re-opened, it should be done at the committee or work group where the decision was made. The GUHD online conference is not an appropriate forum for revisiting a decision and therefore is not used for this purpose. The issue should be raised as an agenda item. The Chair should be notified in advance of this addition to the agenda. In the event that the issue cannot wait for the next meeting, an emergency meeting can be arranged or faxes or telephone calls may be made to members of the committee or work group.

Conflict Resolution

- Conflict among GUHD-related staff within a partner agency is dealt with internally.
- Processes, including agency policies, collective agreements, professional Codes of Conduct and statutes/Legislation, take precedence over the conflict resolution mechanisms outlined in this partnership agreement.
- Issues relating to Management Committee decisions are referred to the partner agency representative on the Management Committee for explanation.
- Conflicts involving 2 or more GUHD staff/agencies should be addressed by the parties directly by meeting, naming, and presenting the problem/issue, and seeking a mutually acceptable solution. Failing this, if conflict continues among 2 or more partner agencies, then the Management Committee will attempt to resolve the issue. The Management Committee Chair is informed of the issue and a meeting of the Committee is called to address the issue. Several possible options are available:
  - Resolving the issue at Management Committee
  - Forming a sub-group that will delineate a conflict resolution process among the parties involved
  - Appointing a neutral person/agency from within or external to GUHD
- All conflict resolution processes are documented and kept by the management representative of the co-ordinating agency (FSA).

Principles of GUHD's Conflict Resolution

- Resolution by mutual consensus of all parties involved is preferred.
- Where consensus cannot be reached within a reasonable time frame, a majority decision can be arrived at.
- Concerns/issues should be resolved in a timely manner.
- The resolution process should include all those involved.
- Discussions aimed at resolving disputes between individuals should be kept confidential. We recognize that his may not apply to disputes between agencies.
- The outcomes of the resolution should be transparent.

How we make sure we're doing it right

- The GUHD partnership develops a yearly partnership work plan, including priorities and budget allocation, which reflects the values and mission of Growing Up Healthy Downtown. The partnership work plan establishes priorities, develops outcomes, benchmarks and timeframes, and establishes budget requirements. The partnership work plan is incorporated into partner agencies' individual work plans. This work plan identifies necessary work groups and leadership for these groups.

- The work plan is developed during meeting times set aside for this purpose. The best time for the planning process is January and February so that the plan is ready for the beginning of the fiscal year in April. Two representatives from each agency, who can commit their agency to the work plan, must attend the planning process. In preparation for the first planning meeting, each agency, together with program participants, board members and any other stakeholders, identifies gaps, issues, trends, and needs to be considered in the planning process. Each agency is then prepared to come to the first planning meeting with three to five potential themes for GUHD to focus on in the coming year. In preparation for this meeting, the Project Co-ordinator also conducts an environmental scan and researches funding priorities from a variety of sources.

- A number of planning tools, such as the workshop method and a Strength, Weakness, Opportunity and Threat (SWOT) are used to group ideas. From this workshop, the most viable and relevant theme, for the upcoming fiscal year, is determined. This gives partners the opportunity to go back to their agencies and brainstorm with the same stakeholders, (program participants, board members, etc.) in order to generate potential activities for the partnership.

- These ideas are then brought to the second planning meeting. The Project Co-ordinator researches specific opportunities to pursue the theme including possible workshops, funding sources, additional partners, etc. For the second meeting, the workshop method may be used again to group the ideas generated and to make concrete plans with timelines. Work groups are struck to pursue program ideas, funding sources, etc. The Project Co-ordinator compiles the plans into a partnership work plan and distributes it to each agency, including administrative and project deadlines. The partnership work plan includes the theme chosen; specific tasks identified for the year; the date by which the task will be completed and who is responsible for completing the tasks.

- The partnership will come together, twice during the fiscal year, for a "check-in" on the work plan to ensure that goals and outcomes are being achieved. The "check-ins " will have the same agency representation as in the planning meetings, if possible. Each work group reports on their activities and successes are celebrated. The plan is modified and adapted as necessary at the "check-in" meetings.

Board of Directors Ratification

The Board of Directors of the ___________________________________ endorses the participation of the ___________________________________ in the Growing Up Healthy Downtown partnership. The ___________________________________ is an equal partner in the Growing Up Healthy Downtown Project and shares responsibility with the other Project partners in moving the Project forward in a manner which responds to the needs of the local community of ___________________________________.

Per ____
On behalf of the Board of Directors

Date ______________________

Electronic Communications

Growing Up Healthy Downtown maintains three individual electronic List Serves to facilitate regular and secure communication among partners.

The List Serves are structured for Program Delivery Staff, Management Committee members, and Executive Directors of partnering agencies.

List Serves are easy to use, just like email, and provide a vital role for maintaining regular multi-site project communications. The Project Co-ordinator manages each list serve. Individual List Serves take on unique characteristics, but all provide a key role in maintaining regular communication.

Monthly Partnership updates to track progress, challenges and reporting

Monthly project updates are sent to all List Serves and provide a narrative connection in such areas as
- Successes
- Challenges
- Report due dates and
- Meeting dates

Service Agreement

The parties to this agreement are:

1. Mothercraft; and
   The Jean Tweed Centre,
   who are referred to as the Managing Partners of Breaking the Cycle;

and

2. The MotherRisk Program at the Hospital for Sick Children;
   Children's Aid Society of Toronto;
   Toronto Public Health; and
   Catholic Children's Aid Society of Toronto;
   who are referred to as Partner Agencies of Breaking the Cycle

Definitions:

In this service agreement:

1. Breaking the Cycle is a program for women who are involved with drugs or alcohol and are pregnant or have young children six years of age and under. Its goals are:

   a. Early identification and engagement of pregnant and/or parenting women experiencing substance abuse problems to break the cycle of inter-generational patterns of addiction and reduce the risk of mother/infant health problems, developmental delay or maltreatment of infants.

   b. Develop and implement through an innovative inter-agency partnership a single access, trans-disciplinary model program to collaboratively integrate services targeted to pregnant and/or parenting women experiencing substance abuse problems and their children addressing mental addiction and recovery issues, infant and child development issues, the mother/children relationship, and larger family issues.

   c. Design and conduct an evaluation to assess the short and long-term outcomes of an early identification and education, prevention and intervention support program targeted at this high-risk adult/child group; and the effectiveness of inter-agency partnership in implementing a single access, trans-disciplinary model program integrating mother/child services for a high-risk population. To document and widely disseminate the evaluation assessment to assist communities in replicating this model approach elsewhere.

Administrative Responsibilities of the Managing Partners

The Managing Partners jointly manage Breaking the Cycle in accordance with:

a. the goals and objectives of Breaking the Cycle as described in the project proposal dated February 28,1994;
b. the terms and conditions of the contract with Health Canada's Community Action Program for Children dated April, 1994; and
c. the annual operating budget and plans for Breaking the Cycle as approved by Health Canada's Community Action Program for Children.

The Managing Partners jointly prepare and submit to Health Canada:

a. an annual operating plan and budget request;
b. quarterly financial statements and, following the end of each fiscal year, an annual audited financial statement; and
c. quarterly progress reports, statistics and any other reports as may be required from time to time by Health Canada.

Mothercraft will be the financial administration agent for Breaking the Cycle.
This responsibility includes:

- Maintaining an appropriate set of auditable accounts
- Monitoring in-year expenditures against the budget
- Receiving grant funds from Health Canada
- Receiving any other monies, such as donations

Mothercraft will be the personnel administration agent for Breaking the Cycle.
This responsibility includes:

- Acting as the legal employer of Breaking the Cycle staff, who are not on secondment from the Jean Tweed Centre
- Providing payroll services
- Developing position specifications, in consultation with the Jean Tweed Centre
- Recruitment process, in consultation with the Jean Tweed Centre
- Supervision of the Breaking the Cycle Program Manager, in consultation with the Jean Tweed Centre

Mothercraft will be the owner and manager of all assets on behalf of Breaking the Cycle.
This responsibility includes

- Ensuring appropriate insurance coverage
- Undertaking of leases or rental agreements
- Acting as purchasing agent for Breaking the Cycle furniture, equipment, software and other capital assets, in consultation with the JeanTweed Centre
- Disposal of obsolete and/or redundant items, in consultation with the Jean Tweed Centre

Program Responsibilities of the Steering Committee:

1. The Steering Committee for Breaking the Cycle will consist of:

   - Executive Director, Mothercraft (Co-chair)
   - Executive Director, Jean Tweed Centre (Co-chair)
   - A representative of the MotheRisk Program, Hospital for Sick Children
   - A representative of Toronto Public Health
   - A representative of Children's Aid Society of Toronto
   - A representative of Catholic Children's Aid Society of Toronto

2. Each partner agency will:

   - Contribute staff who deliver services at Breaking the Cycle and/or funding and/or consultation
   - Supervise their staff
   - Ensure that an agency representative participates in bi-weekly clinical team meetings
   - Act as the liaison for communications within their agency

3. The Steering Committee will:

   - Discuss and develop program operating policy for Breaking the Cycle for final approval by the Managing Partners
   - Provide input into program management issues as necessary
   - Receive monthly reports on operations
   - Receive input from Community Advisory Panel

4. The Steering Committee will normally meet every six weeks or at the call of the Chair

5. The Program Manager and Program Co-ordinator of Breaking the Cycle will:

   - Provide staff support for the Steering Committee
   - Represent staff on the Steering Committee

Agreed:

Date:	For: Mothercraft
Date:	For: Toronto Public Health
Date:	For: Jean Tweed Centre
Date:	For: Hospital for Sick Children
Date:	For: Children’s Aid Society of Toronto
Date:	For: Catholic Children’s Aid Society of Toronto

Hiring

Coming up in this section...

Section 3 - Hiring

Hiring

for CAPC/CPNP projects

Phases of HR Management

Hiring employees is the first phase of HR management. What you do in this first phase has a big impact on how well and how long employees work for you.

The hiring process starts with the strategic plan. It is the basis for developing job descriptions, which are like mini strategic plans for each employee. Job descriptions can be a little difficult to do, but they set up the rest of the hiring process. They can save a lot of time and trouble during the hiring process and make orientation, supervision, and training easier, too.

Implications of CAPC/CPNP for Hiring

There is great diversity within and among CAPC/CPNP projects across the country (see page 1.8 for more details). Some are oriented around professional staff doing intensive work with individuals; others have a community focus and are staffed by para-professionals who were once program participants. Most projects combine both professional and para-professional staff with an individual and a community focus.

All these projects have the job of working to improve the health and well-being of children and families who are in challenging circumstances. The diversity of roles within CAPC/CPNP makes it impossible to sketch a single profile of what to look for in a CAPC/CPNP employee. Nevertheless, it does seem to be a priority to find someone who:

- Has a balance of qualifications (education, experience, hard skills) and qualities (attitude, street smarts and the right feel for the work and the people)
- Understands and supports the culture of priority groups
- Understands and supports CAPC/CPNP guiding principles and approaches
- Maintains a commitment to CAPC/CPNP goals, despite the long hours, stressful work, and modest salary (which apply to many CAPC/CPNP employees)

We hope this section can help your project in the ongoing task of finding and keeping the right people to fill CAPC/CPNP staff positions

What the survey said...

In the HRTS survey, you suggested that we address these issues related to hiring:

- Staff retention, especially because of low salaries and part-time positions
- Finding staff with the "right" qualities for CAPC/CPNP work
- Recruitment in rural or isolated areas

See page 1.14 for details on where these issues are addressed in the kit.

Hiring?

May we suggest...

Start from strength
Start with a job description – so that you know what you're looking for.

Show applicants respect and gratitude
Recruit with honesty; portray the job as it really is. Keep potential candidates informed and let unsuccessful candidates know that you value their interest.

Make haste, but not too much haste
Balance the need for a quick decision with the need for a good decision. Keep the process moving so that you don't lose good candidates, but also take the time to interview as many good candidates as you can.

Take both formal qualifications and personal qualities into account
Screen applicants for qualifications and for the things you can't teach – empathy, personality, coachability, and talent. Remember, you can coach or train for skills, but it's difficult to change someone's personality.

Make sure it feels right
Balance facts with your intuition – sometimes you just know when an applicant is the right one (or the wrong one).

Pay attention to past experience
Remember: the best predictor of future behaviour is past behaviour.

Compensate for low salaries
Make up for low salary with good perks – a good schedule, lots of employee development opportunities, effective supervision, and a positive workplace.

Hey! Maybe we should get volunteers!

If you're thinking about recruiting volunteers, consult the CAPC/CPNP volunteer management kit.

Never stop recruiting!
Keep your eyes open for good candidates, whether you're hiring or not. Whenever possible, introduce yourself and your project to people and leave a good impression.

Know the risks and liabilities involved in hiring
Hiring can be risky business. Familiarize yourself with the laws related to hiring to avoid legal or liability issues.

Put together a hiring committee
Hiring is not a one-person job. A hiring committee may include board members, other project staff, current or former program participants, or project partners.

Classifying Workers

Employee or self-employed individual?

Your project can make a variety of arrangements with people who work at the project. Most commonly, projects have **employer-employee** relationships with workers. Projects may also hire workers as **self-employed individuals** (also called independent contractors or contract workers).

It is important to understand the difference between an employee and a self-employed individual. According to the Canadian Customs and Revenue Agency, the key determining factor is how much control the worker has over the work:

- **Employees** have relatively less control. The employer decides when, where, and how the work is done. Employers determine salary and they supervise and assess the employee. Employees may be hired full-time or part-time as **permanent** employees over an indefinite period of time. They can also be hired as **temporary** employees on a short-term basis or over a fixed period of time.

- **Self-employed individuals**, on the other hand, have much more control over when, where, and how they work. They are a private business and make a profit or loss, not a salary or hourly wage.

For the employer, a big difference between the two types of employment is in methods of payment. Unlike employees, self-employed individuals are responsible for remitting tax themselves and for looking after their own benefits. You usually pay them a flat fee, which is negotiated between the project and the individual.

It is important to be absolutely sure whether the worker qualifies as a self-employed individual or an employee. The federal government, provincial employment standards bureaus, and Workers Compensation all have criteria to follow. Your project could be liable for fees and penalties if you pay an employee as a self-employed individual.

To get full details on the federal government's criteria, you can download the whole *Employee or Self-employed?* report free from the Internet at:

www.ccra-adrc.gc.ca/E/pub/tg/rc4110ed/rc4110ed-01.html

Also check your provincial labour standards and Workers Compensation office for their guidelines.

Be very careful!

The term "contract employee" is often used, but is also often confusing. The problem with the term is how it can blur the distinction between an employee and a self-employed individual.

Some workplaces use the term to refer to people hired as employees for a fixed period of time (a six-month contract, for example). It is perhaps best not to use it, but if you do, be **absolutely sure** that your "contract employee" is indeed being treated as an employee, and not as a self-employed individual.

Other Arrangements

Your project may also get involved in **student placements** or **secondments**. Student placements provide students a paid or non-paid work experience at your project. A secondment is an arrangement where an organization "lends" one of its employees to another organization.

Job Descriptions

The strategic plan of the hiring process

As we noted on page 3.1, the job description is the foundation of the hiring process and sets up the orientation, supervision, and training of employees.

A job description (sometimes called a position description) is a written, official record for a particular job. The job description includes:

- **Title and Classification** – the name of the position, its classification (full-time, part-time, etc.) and to whom the position reports
- **Summary** – a one or two sentence summary of the position
- **Responsibilities** – a more detailed description of what's involved
- **Job Competencies** – the personal qualities, knowledge, skills, education, and experience needed for the job
- **Basic Terms of Employment (optional)** – salary range, benefits
- **Performance Standards (optional)** – minimum expectations of performance for the position

Writing a job description starts with a process commonly known as **job analysis.** Conducting a job analysis is a good idea whether you're creating a new position or replacing someone in an existing position.

In a job analysis, you systematically collect information needed to fill in the job description. The amount of detail going into a job analysis depends on many factors, especially the complexity of the job, and the amount of time you have to complete the analysis!

There are a number of ways to conduct a job analysis: through interviews, observation, employee questionnaires, etc. In any case, it's a good idea to involve as many people as possible who know something about the job. See page 3.5 for a list of questions you can use to conduct a job analysis.

Not Performance Appraisal

It's critical to remember that job analysis is **not** a performance appraisal. These two processes should be kept completely separate. A job analysis is about the job, not the person holding the job!

For more info:

Go to the **Hiring Tool Box** for some sample job descriptions.

Job descriptions? Yeah, but...

They take forever to do and the positions are always changing!

Yes, they do and yes, they are, and for these reasons, some organizations don't write job descriptions in the way described above. Instead, they make a list of the qualities they want in an employee – qualities which will serve them well no matter how the job may evolve. Go to the **Hiring Tool Box** to see some examples.

In either case, remember that putting time into the job description can really pay off, both sooner and later.

Job Analysis

Questions to ask

Title and Classification

- Does the job title match the reality of the position?
- Is the job best offered as full-time, part-time, regular, or temporary?
- To whom does the position report?

Summary

- How would you describe the job in one or two sentences?

Responsibilities

- What are all the responsibilities of the position?
- Which are the essential responsibilities?
- What percentage of the workday do the essential responsibilities take up?
- What, if any, supervisory responsibility does the position have?
- Who must the employee work with to carry out each of her responsibilities?
- What conditions of risk are involved in the position? (e.g., safety issues, exposure to risky situations, travel, physically challenging work)

Job Competencies

- What are the **minimum** and **preferred** levels of knowledge, skills, and abilities required to fulfill the responsibilities?
- What personal qualities are required to be successful in this position?
- What are the **minimum** and **preferred** levels of education, certification, and experience required to fulfill the responsibilities?

Basic Terms of Employment

- What are the current salary and benefits offered for this position?
- Are there any factors that would justify adjusting the level of salary or benefits (up or down)?

Performance Standards

- Are the performance standards **SMART** (specific, measurable, attainable, relevant, timely)?

Here's an idea:

Andrews Street Family Centre in Winnipeg, Man. gets new employees to log all their activities during their first two weeks. Then they review the log book and adjust the job description if necessary.

Did you notice?

We organized the questions following the categories in a job description.

Recruitment

A few good fishing tips

Got your job description ready? It's recruiting time!

Recruiting applicants involves five main steps:

- **Activate the hiring committee** – If you don't have one, you'll need to start one, and decide who will be on it (see page 3.2 for some ideas on who to have on your hiring committee).
- **Clarify what you want** – If you've completed a job description, this step is done.
- **Set a budget** – Decide how much $ and time you're willing to spend on the hiring process.
- **Decide where to search** – Conduct the search according to the budget, and where you're most likely to find applicants.
- **Start recruiting** – Get at it and get to it!

Recruitment can be difficult when the position is low-paying, part-time, and located in an isolated community. Here are a few strategies to deal with this challenge:

- **Start from strength** – Develop a good job description.
- **Be honest** – Honesty is the best policy when it comes to recruiting. Again, this is where a job description comes in handy. If people want more information about the job, give them the straight goods. Don't be pessimistic, just factual. If you end up hiring the person, there's less chance for unpleasant surprises (and the new recruit will be more likely to stick around).
- **Be creative** – See page 3.7 for some recruiting ideas.
- **Recruit year-round!** – Never stop recruiting, even when there's no position available. Always keep your eyes open for good candidates. Introduce yourself and your project to people and leave a good impression.

Where to Recruit

15 Ideas

1. Promote from within – hire your current employees.
2. "Promote" volunteers – by hiring them.
3. Take on work placement students.
4. Welcome unsolicited applicants and keep their resumes on file.
5. Take advantage of word of mouth.
6. Get referrals from employees.
7. Ask other projects or service providers how they recruit – learn from others' experience.
8. Consider joint recruiting with another agency – one process for two or more positions.
9. Network within the community by attending or hosting public and community events.
10. Use the media – print, radio, TV, Internet.
11. Post want ads in community places like laundromats, stores, supermarkets, schools, community centres, service providers, places of worship.
12. Host or attend job fairs.
13. Use the HRDC Job Bank (www.jobbank.gc.ca/Prov_en.asp).
14. Use private employment agencies.
15. Advertise in professional journals (for nurses, dietitians, etc.).

Job Postings

What to include

Usually, a written job posting should include the following:

- Position title and classification
- Who the position reports to
- Summary description of the job (short and sweet)
- Responsibilities (from the job description – if you have to limit words, include essential roles only)
- Job competencies – the personal qualities and the minimum required knowledge, skills, abilities, experience, and education. You could include preferred competencies along with the minimum competencies required.
- Any special requirements, such as use of one's own vehicle
- Basic terms of employment – again, take from the job description (this is optional – it can change subject to funding)

A Few Writing Tips

- Use lists – they're easier to read and write.
- Make it easy on yourself – use phrases straight from the job description.
- Make sure applicants know everything required for the application – what to include, when and where to send it, and to whom.
- Make the complete job description available to applicants, and let them know how they can get a copy or other information about the job. Include a phone number if you want to take calls, or a website address if you want to post the job on the Internet.

For more info:

Go to the **Hiring Tool Box** for some sample job postings.

Screening Applicants

How to pick the choice candidates

In a perfect world, you'd find one single perfect applicant for your available position. Of course, that's not reality. You'll probably get more than one applicant, and they'll all be imperfect. Or you'll get no applicants (Yikes!). When you have to choose applicants for interviews, that's when to begin the screening process. It goes something like this:

1. Review application forms

If you use application forms, review these first to screen out applicants who clearly do not meet the requirements for the job. Have each member of the hiring committee review the applications individually, then discuss your choices as a group to make a decision. Make sure to compare the applicants' qualifications to the job competencies in the job description.

2. Screen resumes

The **ABC method** of screening is a good idea, both during individual and group screening. Once you've looked at a resume, put them in one of three piles:

- **A** if it looks like a keeper
- **B** if it's a possible keeper
- **C** for the ones you don't want to pursue

If you end up with a big A pile, screen those resumes only. If the A pile is too small, review the B pile and pick the best ones.

3. Do a brief phone interview (optional)

If it's too difficult to make a choice, you could try a short phone interview. If you do this, follow these guidelines:

- Introduce yourself and establish a rapport with the applicant.
- Be upfront about the purpose of the call; it's to collect information, not set up an interview.
- Focus on job requirements and address any issues or information needing clarification.
- Remain objective, take notes, and encourage questions.
- Promise to call back whether or not the applicant is chosen for an interview.
- Evaluate the applicant immediately, and follow up on your promise to call back (but not too quickly).

4. Make your choices and set up the interviews!

Good screening ideas

Some projects like to use scorecards to rate applications. Go to the **Hiring Tool Box** for a sample.

Another good idea when you have a lot of resumes is to **skim** them all first before reading each one in detail. A quick skim may be enough to decide whether a resume is an A, B, or C.

Also, try noting highlights and concerns (on paper or computer) for each A or B resume.

Interviews

How to make them go smoothly

To help make interviews go smoothly, make sure to:

Be prepared

- Develop an interview schedule (and stick to it).
- Involve more than one member of the hiring committee in interviews (you risk intimidating the candidate, but you'll make a better decision).
- Prepare all the questions in advance, and anticipate possible answers to the questions.
- Send the job description to candidates before they come to the interview.
- Review the resume and know the job description (bring both to the interview).
- Arrange the meeting time and space – make it comfortable and private to help applicants feel at ease.
- Arrange to have the same interviewers conduct all the interviews.
- Provide candidates with a comfortable, safe place to wait for the interview.

Welcome the applicant
Create a friendly, comfortable atmosphere that enables applicants to "perform" better.

Review the position
Provide a brief recap of the responsibilities of the position, the basic routine, the work schedule, and how the position fits in the strategic plan. Describe the position briefly, succinctly, and honestly.

Let the candidate talk
Guide, but don't dominate the interview. Your main job is to listen – carefully and openly. Ask open-ended questions to allow candidates to talk (interviewers should talk no more than 20–25% of the time).

Be careful
Ask each candidate the same questions, don't prejudge or form an opinion too early, and make sure to avoid inappropriate questions.

What are inappropriate questions?

Go to Risk Management on page 3.16 for more info.

Get the information you need

At minimum, you need to find out:

- Why is the candidate interested in the job?
- What competencies would the candidate bring to the project?
- What kind of person is the candidate? Are her values and attitudes a good match for the job and the project?
- What will it cost to hire the candidate? (Avoid talk of salary and benefits too early in the interview.)

Take notes

Take notes so that everyone on the committee can remember what was said. Be open and explain to the candidate why you're taking notes.

Wrap up

Make sure not to miss any of these important details:

- Thank the candidate, explain the time line for making a decision, and make sure to stick to it.
- Promise to call the candidate with a decision, whether she's offered a job or not, and keep your promise.
- Ask for references. You may also want to get signed consent from the candidate to contact them.
- Find out when the candidate could start if offered the job, and whether she's considering any other offers.

Pick your favourites

There's no one way to make the choice, but do get to it as soon as possible. It's a matter of reviewing the information and making your best call.

Here's an idea:

As part of the selection process, some projects like to give the final two or three candidates a short volunteer placement on site to see how well they interact with program participants.

For more info:

Go to the **Hiring Tool Box** for some sample interview guides and a ranking tool.

Reference Checks

Check before you choose

You should always ask for references – at least two – and you should always check them out before making a decision. References are a very useful tool for making a decision. They say the best indicator of future behaviour is past behaviour, and who better to provide information on employment behaviour than previous employers.

An effective reference check will allow you to:

- Confirm facts about the candidate's education and work history.
- Address areas of concern you may have identified.
- Gather an informed opinion about the candidate.
- Learn more about the candidate's interpersonal and teamwork skills, i.e., how well he related to supervisors and co-workers.

The person giving the reference may suggest to you (either directly, indirectly, or inadvertently) that the candidate may not be the best choice. Take note when people give you vague or evasive answers. They may be trying to avoid making negative comments. If a candidate's references include no former employers, you should call the candidate and ask for one. It may well be the case, however, that it's the candidate's first chance at a job – a common thing among CAPC/CPNP priority groups.

For more info:

Go to the **Hiring Tool Box** for some sample reference check questions.

What if...

We went through the whole hiring process and found no suitable candidate?

Start by looking to see how well the job responsibilities match the competencies. If they don't match well, try adjusting the job description. You could also consider hiring the highest ranked candidate and provide extra training. You may just have to re-advertise the position.

You may also need to reconsider whether your project has the capacity to provide the service that the position is intended for. It may require another look at your strategic plan.

Making an Offer

Landing that prize catch

Made a choice? All right, it's time to offer the job. A job offer requires a formal offer letter, which provides both employer and employee with a written agreement. Write the letter before making the actual offer so that you can be very clear about the details of the offer. The letter covers the terms of employment, which basically spell out the rules of the agreement. At minimum, it needs to include:

- A statement of offer
- A statement that the job description is attached (don't forget to attach it!)
- The terms of employment, which set out the following:
  - Start date and work schedule
  - Employment period (if it's a term position) and probation period
  - Employer obligations regarding salary and benefits (including holidays and vacations)
  - Other conditions of employment the employee must abide by, such as the project's personnel policy, confidentiality and conflict of interest agreements
  - Dates for the end of the probationary period and performance appraisals
  - Rules for terminating the agreement
  - A place for the candidate to sign

For more info:

Go to the **Hiring Tool Box** for samples of employment contracts.

It's best to meet with the candidate in person to discuss the offer. Once you've come to an agreement, have the employee sign the letter and welcome her aboard.

Don't Forget!

Make sure to contact the candidates you don't select. Phone them and/or send a letter. But wait! Don't contact them until **after** the offer has been accepted. Also make sure that other employees know about the selection.

Unsuccessful candiates may want to know more about why they weren't selected. You may want to talk with them in the interest of maintaining a good relationship. After all, they may be current staff, or you may want to consider hiring them for another position in the future. A good way to respond is to describe how the successful candidate had the required competencies.

On the other hand, you may want to keep your response as brief as possible, to avoid liability or other problems. In fact, you are not required to give reasons why someone was chosen to anyone except for Board members, who, as the offical employers, have a right to know.

What if...

Nobody accepts our offer?

You may want to ask the candidates why they didn't accept. Perhaps there was a misunderstanding, or need for more negotiation. Maybe there's an issue that can be resolved. If so, call the candidate(s) back, tell them how the issue is being addressed, and extend the job offer again.

Employee Records

What to put in their files

All employers need to keep an employee file for each employee. In fact, record-keeping is required by law.

When you hire a new employee, the following things should be put in his employee file:

- ❑ Completed application form
- ❑ Resume, cover letter, and reference letters
- ❑ Interview notes
- ❑ Signed letter of offer
- ❑ Job description
- ❑ Other signed agreements, e.g., confidentiality or conflict of interest
- ❑ Criminal records check & child abuse registry check documents
- ❑ Completed TD1 form (Personal Tax Credit Return form)
- ❑ An employee information form, which must include:
  - ❑ Full name
  - ❑ SIN
  - ❑ Date of birth
  - ❑ Date of hire
  - ❑ Salary and pay schedule
  - ❑ Employee address
  - ❑ Employer address

  The following items aren't required on an employee information form, but you may want to include them:

  - ❑ Emergency contact information
  - ❑ Benefits information

For an employee with driving responsibilities, you will also want to include copies of:

- ❑ His driver's license
- ❑ Required certification
- ❑ A driver's abstract
- ❑ A vehicle registration and insurance (if he is using his own vehicle)

For more info:

Go to the **Hiring Tool Box** for a sstaff file content requirements form.

As time goes by...

...you'll be adding other documents to the employee record, such as all completed performance appraisals, letters of promotion, and any records of disciplinary action.

Salary Scales

Some basic guidelines

A number of projects asked for information about how to set salary levels among project staff.

Salaries are not just payment for work done, they are also a motivation. Setting a salary is a balance between what you can afford and what the employee expects. Hopefully you can strike a balance and get the right person at the right price.

When recruiting for a position, you need to indicate the salary. Unless you have no financial flexibility at all, it's a good idea to set a salary range instead of an exact figure.

Look Internally and Externally

To help set the salary range, first review the salaries of current employees. If the position being offered is similar to a current position, it needs to be in the same range, but also it must account for factors such as experience.

If you're hiring for a brand new position, you need to compare it against existing positions. Consider the following:

- Is the new position more senior or junior?
- What kinds and levels of competencies does the new position require?
- Does the new position have more complex tasks and working relationships?

For unionized workers

You need to follow collective agreements when setting salaries and benefits.

You can also look at salaries being offered by other organizations. Check job postings in newspapers or the Internet, or talk directly to other organizations. You can also check several Internet sites for salary surveys, many of which offer information for free. There are numerous sites to check. Try the search engine **www.google.com** and search "salary surveys Canada" for Canadian information.

Consider Benefits, Too

Of course, salaries come with benefits, and these have to be factored into your budget. There are **mandatory** benefits you have to pay such as vacation pay, employment insurance, and Canada/Quebec Pension Plans. Check your provincial labour standards for exact information for your province. On the Internet, go to

http://info.load-otea.hrdc-drhc.gc.ca/labour_standards/provincial.shtml

Also consider whether to offer **optional** benefits to sweeten the deal for employees. Optional benefits (sometimes called "perks") traditionally include such things as health plans and life insurance, but can also include things like training opportunities or time off.

For more info:

This information and more on salaries and benefits comes directly from the book:

Hiring, Managing and Keeping the Best

by Monica Beauregard and Maureen Fitzgerald. See page 7.14 for a reference.

Risk Management

Hiring can be risky business

Regional Differences

Labour laws and standards vary from province to province. Consult the provincial labour standards in your area to ensure that your risk management strategies comply with the law. See the bottom of page 3.17 for an Internet address for all provincial labour standards.

Hiring someone comes with certain risks. Here are some critical risk management strategies to use when hiring:

Follow human rights legislation

The first risk is the possibility of breaking human rights legislation when advertising, recruiting, interviewing, or selecting for a job opening. The grounds of discrimination vary among provinces, but in general, the grounds are:

- Age
- Sex
- Sexual orientation
- Race
- National origin
- Physical disability
- Mental disability
- Religion
- Marital status
- Colour

You can't use any of these grounds as a reason to hire or not hire a candidate. People cannot be denied a reasonable opportunity to be hired based on any of these grounds.

Establish conflict of interest guidelines

A conflict of interest happens if someone who makes a decision that affects others is influenced by real or potential personal benefits from the decision. For example, you would be in a conflict of interest if you were part of a hiring committee for a job that your spouse was applying for. If the spouse was hired, others would perceive the decision to be unfair.

In this case, you would declare the potential conflict as soon as you knew your spouse was interested in applying. The best way to remove the perception of conflict of interest would be to remove yourself from the hiring committee.

Conflict of interest can be less obvious than the example above. The key is to recognize potential conflict of interest and to declare it immediately. Then a timely and appropriate response to the situation can be made.

It is a good idea for a project to put conflict of interest guidelines in writing as a personnel policy (for more on personnel policies, see page 5.10).

For more info:

Beauregard and Fitzgerald's book ***Hiring, Managing and Keeping the Best*** is again a good source of information on risk management. Or, go online to:

http://canadaonline.about.com/cs/labourstandards/index.htm

Criminal records and employment

A criminal record includes convictions only, not allegations against a person.

Check with a lawyer or your local labour standards authority if you have questions about hiring someone who has a criminal record.

Participant waiver

You may also want to have participants sign a waiver form to protect your project from liability if a participant is injured. Go to the **Hiring Tool Box** for a sample form.

Probationary periods for part-timers

For part-time employees, Powell River Employment Program Society bases the probationary period on the equivalent of three months full-time work, instead of three calendar months.

Perform a criminal record and child abuse registry check

A criminal record check screens for offenses that may pose potential harm to program participants. The rules and procedures for these checks vary from region to region. Check with a lawyer or your local labour standards authority if you have questions about criminal record or child abuse registry checks.

Sign confidentiality agreements

A confidentiality agreement defines employee responsibilities regarding confidential information about project activities and participants.

Establish a Code of Ethics

A code of ethics describes expectations for ethical behaviour among staff. A letter of offer can include a statement that employees agree to abide by your project's code of ethics.

Use probationary periods

Despite your best efforts, you may end up hiring someone who just isn't working out. Each province has established a probationary period for all employees when they start the job. In most (but not all) provinces, you can terminate anyone during the probationary period without notice or pay in lieu of notice, as long as:

- The employee is made fully aware of the period and its length when she is hired.
- There are written expectations (for example, performance standards).
- You document how the expectations were not met.

Most provinces have a maximum three-month probationary period. For current employment standards for all provinces and territories in Canada, call your provincial labour department to confirm. As we mentioned earlier, the information is also available on the Internet at:

http://info.load-otea.hrdc-drhc.gc.ca/labour_standards/provincial.shtml

The Partnership Page

Hiring tips for partnerships

Partnerships present hiring challenges that single-agency projects generally don't have to worry about. In partnerships, it's common to have one or more employees who work exclusively for the project (usually in administration, but often in program delivery as well), and then others who do project work as a part of their job with one of the partnering organizations. The challenge is to sort out who has responsibility for managing the hiring process. Depending on the particular situation of the project, there are a few general approaches the partners might take:

- The partners share hiring responsibilities in a highly collaborative approach.
- The hiring process is highly centralized, with most responsibility delegated to the project coordinator.
- The partners maintain a high degree of hiring autonomy.

No matter which arrangement your project chooses, there are always these important considerations to make:

Assigning responsibilities
As we described above, there are several ways to organize the hiring process in a partnership. The important thing is to get all partners to agree on an overall plan, and to clarify what role each partner will play in the hiring process.

Strategic planning
As we discussed in both Sections 2 & 3, the strategic plan is the foundation of the hiring process. A good strategic plan provides a common point of reference from which partners can develop a workable hiring process.

Job descriptions
No matter how the partnership arranges the hiring process, it is a good idea for all employees to have a job description for the CAPC/CPNP part of their job. Ideally, all partners should have a say in what goes in the job description, so that there is a common understanding of the position's function.

Hiring committees and decisions
As much as possible, hiring committees should have representation from partners who have an important stake in the position. For example, if a nutritionist from Partner "A" makes regular visits to the site of Partner "B" to facilitate a collective kitchen program, it makes sense for Partner "B" to be represented on the hiring committee.

However the hiring committee is composed, all members of the committee can work from a common set of hiring criteria when there is a clear job description for the position.

Hiring Tool Box

Job Description for Project Assistant (1 page)
Powell River Employment Program Society (Powell River, B.C.)

Job Description for Program Assistant (1 page)
Child Development Centre (Whitehorse, Yukon)

Job Description for CAPC Project Coordinator (2 pages)
Powell River Employment Program Society (Powell River, B.C.)

Job Posting (1 page)
Frog Hollow Neighbourhood House (Vancouver, B.C.)

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Powell River Employment Program Society
Job Description – Project Assistant

Job summary

Under the direction and supervision of the Project Coordinator, the Assistant performs duties to support the goals and objectives of the project. The Assistant participates in planning and facilitating project activities, attends activities as required such as parent/child drop-ins, and may be seen as a role model by the participants.

Duties and responsibilities (include but are not limited to the items listed)

- Reports regularly to the Program Coordinator
- Informs the Program Coordinator of significant occurrences or difficulties
- Maintains confidentiality
- Participates in planning project activities, such as training sessions, parent/tot drop-ins etc.
- Arranges for use of facility/room for training and other activities; ensures facility/room is cleaned up and ready after use
- Ensures materials and equipment needed for training sessions and activities are ready and available
- Purchases food for snacks for activities within nutrition and budget guidelines and prepares group snacks using safe food handling techniques
- Transports participants to and from activities as assigned
- Attends activities and assists during sessions as required
- Maintains accurate records as required, such as mileage logs, petty cash, receipts for purchases, etc.
- Participates in training as required
- Performs other related duties as required

Qualifications

Education and experience

- Previous experience in a parent support group, or working with children & families
- Safe food handling techniques
- Safe driving record
- Familiarity with/knowledge of Powell River and services for 0–5 population and their parents
- Training or education in a related field is an asset

Skills and abilities

- Effective communication skills
- Non-judgmental and accepting attitude
- Good interpersonal skills
- Good organization, time and general management skills
- Excellent work habits including: team work; independent work; ability to follow instructions and make decisions within the parameters of the job; accurate record-keeping

Additional information

- Duties will be performed an average of 5 hours per week
- Flexibility required to work variable hours including occasional evenings/ weekends
- A satisfactory criminal record check is required
- A valid B.C. driver's license is required; class 4 license is preferred
- Use of a safe vehicle is required

Job Description

PROGRAM ASSISTANT

(revised 2001)

Reporting to the Preschool Teacher/Physiotherapist/Occupational Therapist/Speech Pathologist, the Program Assistant is responsible for assisting in the implementation of therapy based programming for preschool children.

1. Assists in the implementation of the integrated classroom program, developmental groups and programs for individual children by:

   1.1 participating in the development and implementation of group activities that encourage and facilitate child development by incorporating individual child goals
   1.2 participating in the development and implementation of activities in a child's individual therapy program
   1.3 participating in the development and implementation of group activities that encourage and facilitate social interactions between children
   1.4 carrying out programs/therapy with individual children as instructed by the appropriate clinician (physiotherapist/OT/SLP/Teacher)
   1.5 collecting and collating data about the developmental status of children in the respective area of involvement as directed
   1.6 being responsible for classroom maintenance and organization of material

2. Performs administrative duties as required by:

   2.1 attending staff meetings
   2.2 adhering to policies and procedures of the Child Development Centre
   2.3 continuing professional development activities by reading, course work and attending appropriate training sessions
   2.4 acting as a responsible team member
   2.5 carrying out other related duties as requested

I have read the above job description and responsibilities assigned to it.

____________________________ ________________________

Program Assistant Date

As supervisor, I have reviewed the duties and responsibilities assigned to the above position with the incumbent.

____________________________ ________________________

Physiotherapist/ Teacher (etc.) Date

Powell River Employment Program Society
Job Description – CAPC Project Coordinator

Job Summary

Accountable to the PREP Society Board of Directors and reporting to the executive administrator, the coordinator is responsible to organize and implement the CAPC Mobilization Project and oversee the day-to-day operations of the Project to meet the Project goals and objectives. The coordinator plans and facilitates Project activities and may be seen as a role model by the participants. The coordinator works in consultation with the Project Steering Committee and will liaise with other community agencies. The coordinator works in accordance with the PREP Society policies and procedures.

Duties and Responsibilities (include but are not limited to the following)

1. Project Development and Coordination

   – Provide leadership and input to the Steering Committee in the development of Project guidelines
   – Identify activities that are appropriate to the Project goals/objectives
   – Facilitate activities as approved by the Steering Committee
   – Recruit parents from the target population who will participate in the Project
   – Arrange for use of facilities for activities and ensure requirements for use of facilities are met (e.g., set up and clean up)
   – Ensure childminding and transportation are accessible for participants to enable them to attend activities
   – Arrange for the provision of snacks for activities within nutrition and budget guidelines
   – Support and encourage parent's involvement in decision making, planning, and implementation of Project activities
   – Prepare and maintain accurate Project documentation including minutes of meetings
   – Maintain accurate and complete records as required such as mileage logs, petty cash, receipts for purchases, etc.
   – Ensure expenditures are within budget guidelines
   – Prepare reports (verbal and written) as required
   – Attend Steering Committee and other meetings as required
   – Maintain confidentiality

2. Development of Support Networks for Children and their Families

   – Investigate how parents may be mobilized/supported/empowered in the process, planning and decision-making in community projects related to the healthy development of children living in conditions of risk
   – Encourage peer support and leadership
   – Coordinate Project activities in conjunction with existing community programs and facilities
   – May attend community committees/working groups
   – Promote, publicize, and disseminate information about the Project
   – Incorporate and apply community development principles to Project work and activities

Powell River Employment Program Society
Job Description – CAPC Project Coordinator
(cont.)

3. Evaluation

   – Participate in the CAPC evaluation as required

4. Other duties

   – As required

Qualifications

Education and Experience:

- A degree or training in social services, health or a related field
- Experience in community development and/or program management
- Minimum 3 years previous related experience
- Previous experience working with children and families or with a parent support group
- A working knowledge of community-based services related to ‘at risk’ children
- Familiarity with/knowledge of Powell River and services for 0–5 population and their parents
- Knowledge of applicable legislation and policies

Skills and Abilities:

- Excellent oral, written and interpersonal communication skills
- Group facilitation skills
- Demonstrated teamwork and leadership skills
- Excellent time and general management skills
- Ability to work effectively with parents, non-profit or publicly funded groups, agencies and organizations
- Non-judgmental and accepting attitude
- Demonstrated understanding and application of community development principles
- Demonstrated ability to work with families with children living in conditions of risk
- Basic computer literacy preferred

Additional information

This position requires:

- The ability to function independently and collaboratively
- The ability to accommodate a flexible work schedule including occasional evenings and weekends
- A satisfactory criminal record check

JOB POSTING

Family Empowerment Coordinator

Frog Hollow Neighbourhood House is looking for a mature, self-motivated individual with experience in participant-driven programs for families. In collaboration with parents/caregivers, the **Family Empowerment Coordinator** will be responsible for planning and implementing programs aimed at supporting families in our community with an emphasis on immigrant and Cantonese-speaking families. Programs have included Family Drop-Ins, multicultural cooking club, Nobody's Perfect parenting program, a clothing exchange, social/recreational activities and an informal counseling/referral service. This position will be able to take advantage of other programs and services offered at Frog Hollow Neighbourhood House to enhance and build on the support to families.

Position: **Family Empowerment Coordinator**

Hours: 17.5 hours/week with an additional 4.5 hours/week until March 31, 2002 (some evenings)

Salary: $16.98
Plus excellent benefit package, including extended health, dental, LTD and pension plan

Closing date for applications: Friday, February 9 at 5:00 pm

Qualifications:

- Experience in designing and implementing community-based, participant-driven programs in a multicultural setting
- Demonstrated ability and interest in working with families in need
- Demonstrated experience in, and knowledge of, community development principles of program planning
- Degree/diploma in relevant field and a minimum of 3 years experience in community development, family support programs, parent education, and/or social work or a suitable combination of education and experience
- Demonstrated ability in budget management an asset
- Strong planning, implementation, leadership and communication skills
- Demonstrated interest and ability in working with a diverse community
- Ability to work flexible hours
- Knowledge of Hastings Sunrise community and the local family resource programs an asset
- Ability to speak and write fluently in Cantonese and English is required

Please apply to:

Pamela Kacir
Family Programs Coordinator
Frog Hollow Neighbourhood House
2131 Renfrew Street
Vancouver, BC V5M 4M5

or fax 254–3764 **by February 9 at 5:00 pm**

No phone calls please. Only short-listed candidates will be contacted.

The Vancouver YWCA is a registered charity organization that is part of the world YWCA network and is dedicated to social justice and responsible social change. Our volunteers and staff provide leadership and empowering programs for women and families. Approximately 3,000 women per week use the YWCA's many diverse services.

CAPC COORDINATOR

Status: Grant Part Time
24 hours per week, till March 31, 1999

Location: Crabtree Corner
Community Program
101 E. Cordova Street

Responsibility is to design, plan, implement, facilitate, and evaluate the support and training with single parents of children 0–6 years old. Based on a community developed approach which requires additional time, energy and creativity, the focus of the program is to train the 10 – 12 Mums to do the work themselves as opposed to working along with staff in a support role. The end result is that women have acquired the skills they need to plan and implement the life skills, health and safety awareness workshops for parents and children and other coalition programming as it develops.

Responsibilities include:

- Facilitate the Action Group, a parent community, organizing and action group.
- Support the Children's Coalition, a consortium of Downtown Eastside community parents and community agencies.
- Facilitate community development, networking and collaboration with community and governmental agencies.
- Maintain records, statistics and prepare project reports.
- Co-ordinate project evaluation with the parents and the evaluation consultant.

The successful individual must possess the following skills and education:

- A Technical School or Community College diploma in Community Development with 3 – 5 years related experience and knowledge of community development issues.
- The ability to set goals which match long term community development issues. Poverty, violence against women and racism are three of the major issues confronted daily.
- Coalition building and teamwork are necessary skills to possess.
- A self starter, highly organized, flexible, and have a keen sense of humor.
- Being committed to community development, work for the "long haul" is also imperative.
- Maintaining records, statistics and evaluation information is also a major requirement of this position.

Women of Original ancestry are encouraged to apply.

Interested candidates are invited to apply by February 28, 1999, in writing to:
Human Resources Department, 535 Hornby Street, Vancouver, BC, V6C 2E8
e-mail: hr@ywcavan.org

The YWCA of Vancouver is an equal opportunity employer.

We thank all who apply.
Only those applicants selected for an interview will be contacted.

Interview Questions

1. Please tell us what you know about Blue Ribbon Babies and what attracted you to this position.
2. What strengths (knowledge, skills, and experience) do you bring to this position?

   Knowledge:

   Skills:

   Experience:

   Computer Skills:

3. Describe your values and beliefs around working with families.
4. What does empathy mean to you? Describe a situation in which it was difficult for you to empathize with a client and how you dealt with that.
5. How will you know that you need to access the support and/or direction available from your co-workers and Coordinator?
6. Give examples of successful strategies you have used to deal with a difficult client.
7. Give an example of how you have supported someone to reach his or her personal goal(s).
8. Describe a conflict you had with a co-worker or supervisor and how you dealt with it.
9. Identify areas in which you feel you will need additional training for this position.
10. What are your career goals? Where do you see yourself in 5 years?
11. What services are available, in the area you will be covering, to support families and children?
12. When could you start? Discuss the flexibility required for the position.
13. Ask for References. Discuss Child Abuse Registry Check and Criminal Records Check.
14. Ask interviewee if they have any questions.

Questions for Project Coordinator Interview – January 2001

1. What interested you to apply for this position?

2. Please tell us about your training/educational background relating to this position.

3. We'd like to know your experiences related to this position. Give 1 or 2 examples of your involvement regarding: using the community development process; coordinating projects and events; working with the target group (at risk parents of children 0–6); facilitating a group process.

4. What strengths or abilities, both personal and professional, do you have that make you a good candidate for this position?

5. Is there an area of professional weakness that might affect your job performance? How could this be addressed?

6. What aspect of this job do you think would be the most challenging for you?

7. How would you approach recruiting parents to participate in the project?

8. Tell us about a previous work experience where you were required to do record-keeping and how you handled these duties.

9. How would you handle this situation:
   Mary, a young single mother, says she is keen to participate in a parent advisory group through this project. After a few weeks, you note that Mary usually arrives late for meetings and her late arrival is disruptive to group activities that are already underway.

10. Have you had experiences working with First Nations people? How would your approach with First Nations be different?

11. Describe a conflict situation you have experienced and tell us how you handled it.

12. What are some of the services/resources/agencies in the community for 'at-risk' 0–5 children and parent support?

13. Under what circumstances did you leave your last 2 positions?

14. How many sick days, or other days off (not including holidays) did you take in your last 2 positions?

15. Are there any personal circumstances that might affect or interfere with your ability to do this job (e.g., planned holidays)?

16. Funding for this project from Health Canada has been approved for this fiscal year. We expect that commencing April 1, we'll have the same amount of funding over a full year. This means that the total annual coordinator hours will be the same for both fiscal years but the weekly hours will be reduced considerably in the second year. How do the hours/length of employment fit in with your present lifestyle? Can you be flexible (e.g., work intensively for the next few weeks and then reduce hours, attend evening meetings if required)?

17. What are your computer skills?

18. When are you available to commence work?

19. Do you have any questions?

20. Is there anything else you'd like to add?

Interview Questions Regarding Job Competencies

Job Knowledge

- How appropriate do you feel your education has been in preparing you for your profession?
- What could you do educationally to improve your overall effectiveness in your work?
- What was there about working with children and families that you found most appealing?

Job Performance

- What key accomplishments can you cite that suggest you are an excellent candidate for this position?
- Based on how you feel your boss would rate your current job performance, what areas would he or she cite as:
  - exceeding expectations? Why?
  - meeting expectations? Why?
  - falling short of expectations? Why?
- Give me some examples of things you have done that go considerably beyond what is required by your job.

Persistence

- Describe a work situation where you faced incredible odds but prevailed.
- What were the odds you faced?
- Why was there so much resistance?
- Why did you prevail?

Personal Qualities

- If we had two or three persons (with whom you work closely) in the room with us and asked them to describe you, what three or four things would they likely say about you rather quickly?
- What five or six adjectives do you feel best describes you as others see you?
- If you could change one thing about yourself to add to your effectiveness, what would it be? How would you change? Why?
- To what aspects of your personal style are you most sensitive and try continuously to improve?
- What are the basic work principles by which you try to operate?
- Why are these important to you?

Strengths

- Describe your three greatest strengths and tell me how you used them to bring about improvements in your job.

Weaknesses

- As you view your overall qualifications for this position, what do you see as some of your developmental needs?
- What steps have you taken to improve your overall performance? Why?

Interview Questions Regarding Job Competencies (cont.)

Communication

- Give me an example of a complex communication problem that you faced.
- What made it complex?
- Why was it difficult?
- How did you solve this problem? Why?
- How effective were the communications?
- How might you have further improved the communications?

Teamwork/Interpersonal Skills

- What has been your experience in working as part of a team?
- What do you see as being advantages and disadvantages of working as part of a team? Give me an example of your involvement in a successful team effort.
- What role did you play?
- Why was the effort successful?
- Give me an example of your involvement in a team effort that failed.
- What role did you play?
- Why did it fail?
- In which of your past positions did you have the most effective working relationship with fellow employees?
- What factors contributed to this effective relationship?
- Someone in another organization, with whom you have infrequent contact, has been saying some uncomplimentary things about you. What would you do?
- With what kind of people do you most enjoy working? Why?
- With what kind of people do you have difficulty working? Why?

Conflict Management Skills

- Tell me about a time when you had a major conflict with another employee.
- What was the cause of the conflict?
- What things did you do to alleviate the problem.
- What were the results?
- When confronted by someone who is particularly angry with you, what do you do?
- If someone is continuously critical of you and appears not to like you, what do you do?
- If you sense you are not fitting in well with the group and feel that you are being treated as an outsider, what would you do?
- What examples can you cite that best demonstrate your ability to relate well to others?

Interview Questions Regarding Job Competencies (cont.)

Decision Making/Problem Solving

- What examples can you cite of your ability to apply prudent judgment in a delicate situation?
- Why was the situation delicate?
- What did you do?
- Why did you do it?
- What was the outcome?

Creativity

- Give me an example of something very creative that you did.
- Why was it creative?
- What were the alternative approaches you considered?
- Why was this a particularly creative solution?

Organizational Skills

- How do you go about organizing you work?
- What is the basis for organizing?
- How do you accomplish priorities?
- What impact has organization had on your results?

Organizational Skills Scenario

You have been asked to cover the centre for 4 days while the Program Coordinator is away. You come in at 9 am and have a parent group from 9:30 am – noon and a meeting scheduled for 1 pm. You check the messages on the answering machine before you start getting ready for the group. There are 3 messages:

– Health Canada consultant needs to talk to the Program Coordinator as soon as possible about a funding issue.
– A mom has called and said she is at the Flin Flon Crisis Centre, her boyfriend beat her up last night and she wants to talk to you.
– A committee member needs you to fax the minutes from the last meeting.

- How would you deal with this scenario?
- Give me some examples of such problems you faced.
- What did you enjoy about them?
- What types of problems do you least enjoy tackling? Why?
- Give me some examples of such problems you didn’t enjoy.
- What was there about them that you least enjoyed?

Working with Children and Families: Scenarios

Scenario 1:

A young mom likes to come to the centre on a regular basis to enjoy a coffee and visit with the staff. She always brings her 3 month old son with her. You have noticed that baby is always tightly wrapped up and mom either keeps baby in the baby carrier or carries him in her arms. Baby is very quiet and doesn't seem to move around a great deal. What might your concerns be? Why? What would you do about it?

Scenario 2:

There are a number of families in the community who have toddlers (1–2 years) and they would like to come to the centre with their children. Describe the program you would implement for this age group. What are the key areas you would focus on and why?

Scenario 3:

The toddlers in the above group have been coming to your program for 1–2 years now and are now 3–4 years of age. Describe the type of program you would implement for this group. What are the key areas you would focus on and why?

Scenario 4:

Parents have been talking to you about the following issues/concerns they have:

- They have no one to talk to about concerns with their children's behaviour, they have been getting calls from the school to come and pick up their children because they are unmanageable (Kindergarten/nursery).
- They are feeling so stressed out that they feel like 'smacking the kids' to keep them quiet.
- They feel so lonely in this community, they sit at home and never go out to do anything.

Describe how you would address these issues/concerns.

Scenario 5:

You are holding a preschool playgroup and notice that little Jimmy runs around the room and goes from one thing to another very quickly, likes to smash his truck into other toys and runs into other children and laughs. The other parents have told you that they will not be coming anymore because he is too rough with their child. You get the impression from talking to mom, that she feels there is nothing wrong.

- How would you handle the concerns you may have with Jimmy?
- How would you handle the situation with the other parents?
- How would you approach your concerns with mom?

Working with Children and Families: Scenarios (cont.)

Scenario 6:

Sally is 4 years old and she has very little speech and prefers to point to things she wants. When you try to talk to her, she puts her head down and won't look at you. In the past, mom refused to believe anything was wrong but has now come to you for help. Describe the steps you would take to support Sally and mom and explain why you chose those steps.

Scenario 7:

The elementary school principal has asked if she could meet with you. At the meeting she expresses her frustration with 2 nursery/kindergarten children whose behaviour is out of control in the classroom. The school had no alternative but to call the parents to come pick their children up. Now the parents are upset with the school. She is asking for your help. How would you tackle this issue?

Scenario 8:

As a new person coming into the community, please describe how you would begin to establish a relationship with families in the community.

Scenario 9:

You have now been working at the centre for 6 months and have established a good relationship with some of the families in the community. Some of the parents have expressed an interest in having more input into the types of programs and services offered at the centre. How would you engage these parents in the decision-making process? What are the advantages of having parental input? What are the disadvantages of having parent input?

Scenario 10:

You have asked for parent input into the types of programs and/or topics that would interest them. The parents have come up with a long list of topics: craft sessions, family outings, shopping trips, gardening, stress management, caring for sick children, exercise program, respite care, movie night, more community events. You know that one of the objectives of the program is to provide parenting sessions and it wasn't a 'hot topic' with the parents. Describe how you would handle the situation.

Interview Questions Regarding Work Preferences

Preferences Re: Work Environment/Work Style

- In which of your past positions did you feel most motivated and productive?
- What factors most influenced these feelings?
- In which of your past positions did you feel least motivated and productive?
- What factors contributed to your feelings?
- How would you describe the ‘ideal job’ from a work content standpoint?
- In which of your past work environments were you happiest?
- Why were you happy?
- What specific factors most contributed to your feelings?
- In which of your past environments were you least happy?
- Why were you unhappy?
- What factors most caused your unhappiness?

Preferences Re: Management Philosophy and Style

- For which of your past bosses did you most enjoy working?
- What traits did this boss exhibit that you found particularly pleasing?
- How did you respond to these traits? Why?
- For which of your past bosses did you least enjoy working?
- What traits did this boss exhibit that you found less than pleasing?
- How did you respond to these traits? Why?

Scenario Regarding Preferred Work Environment

Given a choice between the following two work environments, which would you most enjoy? Why?

Work Environment 1:

General description: High pressure, large volume of work, tight deadlines, some Saturday and Sunday work required, large amount of time working at desk.

Types of Work: Detailed analytical work requiring high level of accuracy, repetitive, little interaction with others, structured.

Decision-Making: Little freedom to make independent decisions, all major decisions made at top, well-defined guidelines and procedures for most decisions.

Resource Allocation: Top management sets budget with little input for this job level.

Basis for Effective Working Relationships (external): Hard-nosed negotiations are needed, environment politically charged with many turf issues.

Basis for Effective Working Relationships (internal): High-pressure, fast-paced environment, little time for idle social chitchat, intense work-focused people.

Management Philosophy: Given strict guidelines to follow, high expectations work will get done.

Work Environment 2:

General description: Structures are in place but environment is flexible and changes as needs arise. Busy, hectic place at times, some evening and weekend work expected.

Types of Work: majority of work is interacting with people, taking time to know people, juggling several programs at once, dealing with changes.

Decision-making: there are overall guidelines and objectives but decisions are usually made with staff involvement, opportunity for independent decision making and judgment.

Resource allocation: involvement in budgeting and resource plans.

Basis for Working Relationships (external): environment where teamwork and shared goals are important, mutual respect for colleagues, collaboration of a variety of organizations.

Basis for Working Relationships (internal): teamwork setting, close working relationships, everyone works together to accomplish goals and objectives.

Management Philosophy: employees viewed as important avenues for planning, vision, valued team members, individual growth is encouraged.

Interview Rating Guide

Secretary Receptionist

Candidate: ___________________

INTRODUCTION

1. Knowledge of Child Development Centre programs, objectives, structure (2) ____
2. Interpretation of role and responsibilities of secretary/receptionist (2) ____
3. Reasons for seeking employment with CDC (1) ____

TOTAL (5) ______

EDUCATIONAL BACKGROUND

1. Course in MS Word (5) _____
2. Course in Publisher (2) _____
3. Course in Access (3) _____

TOTAL (10) ______

PROFESSIONAL EXPERIENCE

1. Greet and receive visitors/clients cordially (5) _____
2. Experience working in confidential settings (5) _____
3. Experience with MS Word, report writing etc. (7) _____
4. Experience as resource person in use of computers for staff (3) _____
5. Prepare and distribute newsletters (3) _____
6. Prepares brochures and other PR information (3) _____
7. Input and familiarity with statistical systems/databases (5) _____
8. Familiarity with community resources/agencies (2) _____
9. Familiarity and experience with general office routines (5) _____
10. Familiarity with Internet use (5)_____
11. Cross-cultural experience (5) _____
12. Maintenance of resource library (4) _____
13. Demonstrated ability to work on a team (3) _____

TOTAL (55) ______

WORK STYLE

1. Ability to take direction from different people		(5) _____
2. Works independently		(5) _____
	TOTAL	**(10) _____**

PERSONAL CHARACTERISTICS

1. Maturity, self-confidence		(5) _____
2. Is friendly, polite		(3) _____
3. Demonstrates willingness to help staff and clients		(2) _____
4. Has a sense of humour		(3) _____
5. Respectful of others		(7) _____
6. Shares similar beliefs/philosophy with CDC		(3) _____
7. Communication skills	Oral	(5) _____
	Written	(5) _____
8. Future career plans and objectives		(2) _____
	TOTAL	**(35) _____**

Other Comments:

GRAND TOTAL (100) ____________

Job Interview Matrix

Position:	
Candidate:	

SELECTION CRITERIA

The following areas of skills, knowledge and experience will be evaluated for this position:

	SCORE
1. Background, Training and Education Previous work experience, training and education that will make candidate appropriate for this position	
2. Programming Knowledge and Skills Previously demonstrated knowledge and skills in program planning, implementation, supervision and evaluation	
3. Communication Skills Experience in and ability to work as a team member, self-directed and problem solving skills; attitudes and aptitude for position	
TOTAL SCORE	

Scoring:

0 – does not meet criteria
1 – meets criteria to a limited degree
2 – somewhat meets criteria
3 – meets criteria
4 – more than meets criteria
5 – exceeds criteria

Interviewer____ Date:____________________________

Candidate ____ Page:___________ of _____________

Criteria:
Background, Training and Education

Questions	**Expectations**	**Score**
Please give us an overview of your training, education and experience. How would your skills and experience benefit our program?	Post-Sec. Ed. in – Soc. Services – Education – Counselling – Child Dev. – Family Studies Previous relevant work experience	
Tell us why you are interested in this position? Tell us about your long-range plans and ambitions.	Interest in community development Desire to assist people Work in similar or related areas	
What can you bring to this position that we would find useful/ beneficial to our centre?	Commitment Special training, etc.	
Please tell us of your understanding of our mission and current programs.	Community-based support program for at-risk pre-school children, single parents, and adolescents. – Parenting skills – Support groups – Lending library – In-Home supports – Intervention/Enrichment – Community play room – Superv. Visitations	

Criteria:
Programming Knowledge and Skills

Questions	Expectations	Score
Which community activities, groups, programs have you been involved with in the past year. Why?	Should have interests which demonstrate a strong interest in community service/development Direct experience in working with children and at risk groups	
What types of experience do you have with community and program development?	Participation with community organization or group in the area of development of goals and objectives, strategic planning, etc. Opportunity to plan, implement and evaluate programs/activities	
Please name the resources in our community that you are aware of for our target groups.	Family Services Mental Health Public Health Income Security Aurora House Friendship Centre Addictions Centre Baby's Best Start Family Resource Centre Nurse Resource Centre FAS Peer Mentor Program	
What type of training and experience do you have in facilitating groups? How often have you facilitated in the past year? Tell us about your greatest challenges while being a facilitator.	Parent Education courses – Nobody's Perfect, Ready or Not, STEP Should be active and current Probing for personal strengths and experiences	
In your experience, what have been the most important elements of establishing and running successful groups?	Personal contact Strong adult educational components Group Screening / Dynamics Applicable content	
Tell us about some of the barriers you have encountered in running effective groups. How did you handle these situations? Tell us about your experience working with delayed and/or challenging child behaviours?	Failure to screen participants/dynamics Unsafe setting, lack of confidentiality Inappropriate materials – Education setting – Child care setting – Social work/mental health – must be recent and relevant	
Tell us about your experience in assessing child development.	Portage Guide, HELP Checklist, Denver Screening Tool Other	
Include behaviour-based questions here using examples and work experience that candidate has referred to during interview		

Criteria:
Communication Skills

Questions	Expectations	Score
Tell us about your work with parents.	Coaching, mentoring, teaching, counselling, etc.	
When a conflict has arisen with a parent, how have you handled it?		
How would you respond to a parent who is disciplining her child inappropriately during a home visit with you?	Intervene immediately with an offer to help – model appropriate guidance Acknowledge and support parental frustrations while offering guidance alternatives.	
How would you handle a conflict with a fellow staff?	Identify issue, discuss alternatives, take responsibility for own feelings and behaviours.	
How would you respond to a fellow staff acting inappropriately with children or clients?	Intervene to stop behaviour Address with staff in private Notify supervisor	
Administrative Questions – no scoring assigned		
What salary do you expect?	$10.00 – $15.00 hour	
Do you have questions for us regarding this position or our services?		

Reference Check Discussion Guide

1. Explain what the position is.

2. How long have you known the candidate? And in what capacity or relationship?

3. How would you describe her people skills?

4. Strengths – What would you say are her 2 major strengths?

5. Weaknesses – Where would she need additional support or an area that she was not good at?

6. What would you say are her best personal attributes?

7. How does she work individually? Quite independent?

8. How does she work in teams?

9. Ability to take direction? Willingness to learn?

10. Anything else you would like to add that was not covered.

STATEMENT OF CONTRACT BETWEEN

____

herein known as "employee"

and

The Pas Family Resource Centre Inc.

This Contract will confirm our offer of employment and your acceptance on the following terms:

POSITION TITLE: Community Outreach Worker

REPORTS TO: Executive Director or Designate

SPECIAL REQUIREMENTS FOR EMPLOYMENT:

1. Training and/or experience in working with high risk populations, specifically pre-school children and their families (i.e., Early Years Education, Applied Counselling Skills, Teacher's Aide training, etc.)

2. Awareness and understanding of Population Health and Health Promotion practices as they relate to children and families at risk.

3. Knowledge of and experience in working with at risk populations.

4. Demonstrated organizational and supervisory skills – working with contract staff and program volunteers.

5. Demonstrated ability in program development, delivery and evaluation.

DUTIES OF EMPLOYMENT:

1. Programs
- Development
- Delivery
- Evaluation

2. Networking
- Community Agencies and Organizations

3. Administration
- Tracking and evaluation report submission
- Program Summary Submission

The Pas Family Resource Centre Inc. appoints you to the position of Community Outreach Worker

DUTIES

The Community Outreach Worker is considered an integral part of the management and operations team and will work closely with the Director to ensure programming and services that are applicable and relevant to community needs.

Summary:

Plans, organizes, and coordinates programs with agencies and groups concerned with social problems of community: Promotes and coordinates activities of agencies, groups, and individuals to meet identified needs. Studies and assesses strength and weakness of existing resources. Interprets needs, programs, and services to agencies, groups, and individuals involved and provides leadership and assistance. Prepares reports and disseminates information. Maintains contact with representatives of other organizations to exchange and update information on resources and services available. May write proposals to obtain government or private funding for projects designed to meet needs of community. May assist in budget preparation and presentation. May assist in raising funds. Works in specialized fields such as housing, urban renewal and redevelopment, and health or in public or voluntary coordinating agency, such as community welfare or health council, or combined fund raising and welfare planning council. Works with special groups such as financially disadvantaged, children, at risk populations. May direct and coordinate activities of volunteers or practicum students.

1. **Prepare and deliver family support programs**
   Parenting Programs/Groups (group and individual)

2. **Planning and delivery of in-home visiting programs**
   Working in the KHEPS area to identify and support target group families for in-home supports:
   - Toy Lending Program
   - Home Visiting for parental support

3. **Individual and group counselling**
   Develop effective and applicable case plans for target group individuals

4. **Preschool child programming**
   Develop, deliver and evaluate preschool child programs that support appropriate child development and relationship with parent(s)

5. **Community liaison and networking**
   Working out of the KHEPS area, plan, participate in and evaluate programs designed to meet the needs of area population:
   - Breakfast Buddies
   - Parent Child Play Program
   - In-home Visitations
   - Community Kitchen
   - all other programs as directed

6. **Maintenance of accurate/pertinent activity plans, work summaries, hours of employment and client records**
   - Client intake forms
   - Program evaluations
   - Client file (programming)
   - Time sheets
   - Program summaries

7. **Other duties as assigned**

TERMS OF EMPLOYMENT

1) The appointment of ______________________________

2) to the position of ______________________________

3) shall commence on ______________________________

   This position is appointed on a "Contract" basis with an annual review.

4) There will be a six (6) month probationary period for all new employees to the Centre which will commence from the first date of contract employment. Returning employees will not be subject to the six (6) month probationary period unless they change job classifications. The probationary period may be extended to a maximum of twelve (12) months. Termination of employee on probation shall not be subject to grievance or arbitration.

5) Contract date: ______________________________

6) End of Probation: ______________________________

COMPENSATION AND BENEFITS

1) As of the date of this Contract, the employee shall be paid at the rate of

   $_____________________________ per annum.

2) Benefits are defined by the current Personnel and Policy Manual. Please review and indicate here that you have received a copy.

   _____________________________ _________________________
   Signature Date

TERMINATION OF EMPLOYMENT

1) This agreement may be terminated during the life of the Contract in the following manner:

   a) By the employee, at any time during the six (6) month probationary period, with two (2) weeks written notice to the Board of Directors.

   b) By the employer, at any time during the six (6) month probationary period, with two (2) weeks written notice to the employee.

   c) By the employee after six (6) month probationary period with consideration of a twenty (20) working day notice to the Board of Directors.

   d) By the employer, without notice or pay in lieu thereof, or causes as listed:
      i) Breach of Contract;
      ii) Conviction of a criminal offence punishable by indictment;
      iii) Mental or physical disability that restricts the performance of duties as per job description;
      iv) Job abandonment

   e) By the employer for employee behaviour(s) previously addressed through disciplinary action(s) as per Personnel and Policy Manual guidelines. As well, for behaviours which compromise or are contrary ethically to Centre Mission Statement and Philosophy.

   f) The employer reserves the right to renew or decline Contract renewal for employee services on an annual basis upon completion of the stipulated contract period.

2) The employee acknowledges that all items/materials of any nature or kind created by the employee in connection with Job duties on Centre time is the exclusive property of The Pas Family Resource Centre and will be surrendered to the Centre in good condition, promptly on the effective termination date.

Furthermore, all equipment, books, records, files, reports, manuals, literature, confidential information or other work materials are the property of The Pas Family Resource Centre and will be returned in good condition, promptly on the effective termination of the employee.

ASSIGNMENT OF RIGHTS

This agreement is entered into by:

____

and The Pas Family Resource Centre Inc.
and will remain in effect between the parties until the date of:

____

MODIFICATION OF AGREEMENT

Any modification to this agreement must be in writing and signed by both parties with the inclusion of an effective date.

SIGNATORIES

Employee	Date
TPFRC Designate	Date
Witnessed by	Date

____
Contract Expiration Date

The Pas Family Resource Centre Inc.
81 Edwards Ave. Box 97
The Pas, MB
R9A 1K3
(204) 623–4841 or fax (204) 623–4346

TERM
CONTRACT

Name ______________________________

Address ______________________________

____

Phone ____________________ Msg ____________________

SIN ____________________

Position:

Kelsey Housing Estates Breakfast Buddies Program Coordinator.

Duties:

Planning, implementation and supervision of the Breakfast Buddies program:

– planning and shopping for meals
– food preparation for meals
– supervision of children and volunteers
– program organization and scheduling (volunteers)
– tracking of program statistics
– completion of evaluation forms

Personnel Policies and Program Practices Guide regarding this program are considered to be duties as assigned and part of contract conditions.

Wage:

$10.00 per hour
Time sheets and schedules/reports to be turned in every two weeks as per pay period schedule.

Term:

November 13, 2000 – June 22, 2001

Applicant is to complete a Criminal Records Check, Child Abuse Registry Search, and Confidentiality Pledge.

Staff File Content Requirements

Name of Staff: ____

Position: ____

Start Date: ____

Date	Document Inserted & Completed	Staff Initials
__________	Code of Confidentiality	__________
__________	Code of Ethics	__________
__________	TD1	__________
__________	Child Abuse Registry Check and Clearance	__________
__________	Staff Evaluation Form	__________
__________	Copy of Resume	__________
__________	Letter of Offer	__________
__________	Job Description	__________
__________	Benefits Package	__________
__________	Leave of Absence	__________
__________	Other	__________
__________	Other	__________
__________	Other	__________

Agreement of Non-disclosure/Confidentiality

I, ______________________________, of ____
in the Powell River Regional District, in the province of British Columbia, as an employee of the Powell River Employment Program Society:

1. Understand that respect, courtesy and dignity are integral to successfully carrying out all of my work duties and therefore will treat as confidential and will not at any time disclose, release, or publish or permit to be disclosed, released or published, any information supplied to me, obtained by me, or which comes to my knowledge while providing services on behalf of PREP, except where disclosure, release or publication of said information is: (a) required in order to provide said services; (b) authorized by the client; (c) required for the safety and well-being of clients for whom services are provided; (d) subpoenaed by a court of law; (e) required by law, such as evidence or suspicion of child abuse; (f) specified in the PREP Personnel Policies and Procedures Manual;

2. Will maintain confidentiality after termination of provision of services for PREP;

3. Will disclose immediately any conflict of interest or potential conflict of interest which could arise during my assignment or which does arise during my assignment.

This agreement will be a part of my personnel record and will remain in effect for the duration of my employment with the PREP Society regardless of changes in employment (e.g., changes in location or position).

Dated this ________ day of _________________________ in the year ___________ in the Regional District of Powell River in the province of British Columbia.

____
Signature

Witnessed in the presence of:

____
Name of witness

____
Signature of witness

Growing Years Family Resource Centre

Waiver Form

(to be completed by parent/caregiver on initial visit to centre)

I hereby assume complete and full responsibility for the supervision and safety of myself and my child/ren or children in my care while using the services on the premises at the Growing Years Family Resource Centre.

Should any injury occur to myself, my child/ren, children in my care or to others as a result of actions of myself or my child/ren or children in my care, I hereby assume complete and full responsibility on behalf of myself, my child/ren, children in my care for any and all injuries to any person/s which may result in whole or in part from using the services at the Growing Years Family Resource Centre.

I fully release Growing Healthy Together Inc. and the Growing Years Family Resource Centre from any and all responsibility in respect to any injuries as sustained as they may occur. I understand that I am participating in the Program activities and permitting my child/ren or children in my care to participate entirely at my own risk.

Please sign below, prior to participating in any services or activities at the Growing Years Family Resource Centre.

Thank you.

____________________________ _______________
Signature Date

____________________________ _______________
Witness Date

Orientation

Coming up in this section...

Orientation

for CAPC/CPNP projects

Orientation is the second phase of HR management. Orientation is the process of welcoming new employees and supporting their adjustment into their new job.

Staff orientation begins before the new employee comes to work, boils up during the first week on the job, simmers over the next three months, and actually never really ends. Instead, it just transforms into ongoing supervision. Really, orientation is like an intensive supervisory period that is gradually relaxed, but never abandoned, as the employee grows into the job.

Implications of CAPC/CPNP for Orientation

Ideally, your hiring process brings new employees to the project who can understand and support:

- Your project's organizational culture
- The CAPC/CPNP guiding principles and approaches
- The culture(s) of priority groups

It's possible that you'll hire someone who does not have all these competencies. And if you're hiring from priority groups, you may hire someone who is not familiar with work culture in general, i.e., the conventional structures, schedules, and interpersonal communications of the workplace.

These factors emphasize the importance of orientation in CAPC/CPNP. As explained in further detail in this section, taking the time for a thorough orientation can pay off in a lot of different ways. The intent of this section is to make the challenge of orientation more manageable.

Phases of
HR Management

What the survey said...

In the HRTS survey, you suggested that we address these issues related to orientation:

- Time restraints
- Staff turnover
- Staff roles are highly diverse & always changing
- Need to develop policies and procedures
- Orientation within partnerships
- Managing different assumptions/expectations/ knowledge base
- Communicating CAPC/CPNP organizational culture

See pages 1.14 and 1.15 for details on where these issues are addressed in the kit.

Orientation?

May we suggest...

Plan it, and plan it ahead
Know what you want to cover, set goals, and prepare a timetable. Anticipate employee questions and have answers ready.

Take the time to cover the material
There's a lot to cover in an orientation, so don't stuff it all into one day. Give the employee a chance to breathe.

An orientation kit – put it on paper
In all the excitement, the new employee (never mind the employer) is bound to forget things. Create an orientation kit with complete information and a checklist of all things the employee needs to know. Make sure to keep it up to date.

Make it comfortable, make it fun
New employees want to know about the new job and also want to feel accepted. Provide lots of opportunities for new employees to get to know others at the project. Make orientations energizing and celebratory.

Be honest
Put your best foot forward, but be careful about giving the new employee unrealistic expectations about the job.

Involve everyone, especially management
Everyone has a role to play in orientation, but the board and management lead the process – sending the message that orientation is a priority. All staff should chip in to welcome and support the new employees. Don't forget that orientation works both ways – it's an orientation to the new employee as well.

Use mentors
Management can also assign one or more mentors or buddies, employees who take special responsibility to be there to answer the new employee's questions.

Choosing Mentors

It's critical to choose sincere and enthusiastic mentors. You may also consider using a recent employee – someone with a fresh memory of her first days at work.

Support the mentor so she can do a good job – provide her with a plan, clarify your expectations, and give her formal recognition.

Offer orientation to all new employees
Part-time and casual employees are too important to exclude from the full staff orientation treatment!

The Orientation Cycle

A brief overview

You may have noticed that we like to use the idea of cycles to explain the phases of HR. The orientation cycle is a simple one (only three steps): plan, deliver, and evaluate.

1. Plan the orientation

There's a lot to do to prepare an orientation (for proof, see Page 4.6). No, you probably don't have a lot of time to prepare, but the more prepared you are, the more likely your project will reap the benefits of orientation (see page 4.4).

Setting objectives for the orientation will help you in planning and focusing the evaluation, and will set up an effective evaluation of the orientation process.

2. Deliver the orientation

There are four major themes to cover in an orientation:

- **Introducing the workplace** – the new employee meets the people, tours the facility, and begins to familiarize herself with the workplace culture.
- **Explaining the big picture** – the new employee learns about the project and its strategic plan, and how her position fits into the strategic plan.
- **Explaining the little picture** – the new employee learns in detail about her new position and responsibilities.
- **Taking care of administrative matters** – you take care of the required paperwork, such as terms of employment and other forms.

See the checklists on pages 4.6 to 4.9 for suggestions on a schedule and on specific items to include in an orientation.

3. Evaluate the orientation

Evaluating the orientation helps to assess whether you achieved your objectives, and how the orientation can be improved. You may, for example, determine that you need to add some new items to your evaluation checklists.

Meeting with the new employee at the end of her probationary period is a good way to gather this information.

A full package

Simcoe County MotherCare Network in Barrie, Ont., has an orientation binder with 8 sections:

- Introduction & Mission Statements
- History
- Funding
- Program Descriptions
- Community Partners
- Program Staffing
- Evaluation
- Forms, etc.

Orientation for volunteers?

Check the CAPC/CPNP volunteer management kit.

The Benefits

of a good orientation

New employees feel welcome and valued…
Orientation is a great strategy to take care of a very basic but important job: to make new employees feel welcome, valued, and a part of the team. The sooner they feel this way, the sooner they fit in and start to contribute.

…not to mention more comfortable, less anxious
Starting a new job can be scary stuff! A good orientation takes care of a lot of scary unknowns. There's less guesswork for the new employee and more chance for her to make a good impression.

It saves time, eventually
If you make time for a good orientation, you'll probably save yourself time (and headaches) down the road because the new employee will be better prepared.

Well-managed expectations
The orientation allows you to get on the same page with the new employee. It's a chance to review the job description together and clarify expectations.

New employees get off to a running start (well, not crawling, anyway)
Do a good orientation and new employees will get up to speed more quickly. They'll make fewer mistakes and more positive contributions.

Reduced turnover (we can always hope)
Orientation is a great strategy for retaining staff. Employees who have a good start are more likely to stick around. On the other hand, a poor orientation can also impact future recruitment efforts. Negative rumors may discourage others from applying.

Orientation challenges

Don't have enough time to do a proper orientation?

Do staff turn over so often that it seems you never stop doing orientations?

Yes, it's difficult to do an orientation properly under these conditions, but a good orientation is worth the investment in time. And in the long run, it will probably help you deal with that turnover problem.

Celebrate!

The new arrivals

Traditionally, we celebrate when someone leaves. That's great – any excuse for a party, we say. Well why not celebrate when someone arrives?! It will sure help the new employee to feel welcome – and special.

Hiring and orientation are opportunities to bring great new people into the project. That's worth celebrating.

Consider some of these ideas:

- Welcome her before the first day by sending a personal card or by making a phone call to the new employee's home.
- Prepare a welcome banner or card (signed by everyone) and have it waiting on her desk when she arrives.
- Have some kind of small gift for the new employee waiting on her desk when she arrives.
- Offer some kind of small gift for the new employee's family members or partner.
- Book a lunch date on the first day.
- Hold a reception at lunch, coffee time, or at the end of the day.
- Take a team picture on the first day and get everyone to sign it.
- Give her a project t-shirt or other project souvenir.
- Publish the news about the new employee in a newsletter, website, or local paper.

Orientation Checklist

Prepare for arrival

Develop orientation plan

- ❑ Orientation schedule
- ❑ Orientation objectives – decide what the new employee needs to know
- ❑ Brainstorming to anticipate questions the new employee may have
- ❑ Assign mentors/buddies

Send welcome letter

- ❑ Brief summary/schedule of first day/week activities
- ❑ When & where to arrive, who to ask for
- ❑ Where to park/public transit info
- ❑ Suggested attire
- ❑ Arrangements for lunch/meal

Prepare welcome gift/reception

- ❑ Welcome card/sign/banner signed by staff
- ❑ Small gift
- ❑ Reception/celebration (at lunch, break or end of day)
- ❑ Other: ___________________________

Inform people of the new employee

- ❑ Staff How? ________________________
- ❑ Board How? ________________________
- ❑ Program participants How? ________________________
- ❑ General public How? ________________________

Prepare an orientation kit

- ❑ Project history and information
- ❑ Strategic plan
- ❑ Photos of key personnel
- ❑ A staff organizational chart
- ❑ Public brochures/print materials about the project
- ❑ Project telephone directory
- ❑ Project policy manuals
- ❑ Workplace health and safety information
- ❑ Business cards
- ❑ Employee handbook
- ❑ Job description
- ❑ Co-workers' job descriptions
- ❑ Appointment book

Set up the employee's work station

- ❑ Pens, pencils, paper, other office supplies
- ❑ Phone system
- ❑ Computer equipment

For more info:

Go to the **Orientation Tool Box** for a sample orientation kit welcome letter and a checklist.

Presenting the Orientation Kit

Mail it to the new employee's home before she starts or have it ready and waiting on her desk on the first day.

Orientation Checklist

On the first day

This list is a minimum for the first day. You can do more if you like…

On the first day, the new employee will:

Meet with the supervisor/mentor to:

- ❑ Receive a warm welcome (at the start of the day).
- ❑ Review the plan for the day.
- ❑ Confirm the work schedule for the week.
- ❑ Follow up on lunch/meal arrangements, if any (as per welcome letter).
- ❑ Get to know the supervisor/mentor a little better.
- ❑ Wrap up the day on a positive note (this would obviously involve another meeting at the end of the day).

Tour the facility, noting the location of:

- ❑ The employee's workspace
- ❑ Other employees' workspaces
- ❑ Programming areas
- ❑ Eating and break areas
- ❑ Washrooms
- ❑ Clothes closets
- ❑ Office supplies area
- ❑ Resources area (files, manuals, etc.)

And don't forget to…

- ❑ Meet the executive director (if applicable).
- ❑ Get a set of keys (as required).
- ❑ Be introduced to the end-of-day routine: lights, telephones, locking-up, computer, etc.
- ❑ Have some scheduled free time for the employee to review the orientation kit, chat with new co-workers, explore a little, set up workspace, etc.
- ❑ Attend a reception or celebratory event as honoured guest.

Orientation Checklist

After one week

By the end of Week 1, the new employee will:

Meet with the supervisor to:

- ❑ Complete necessary forms.
- ❑ Review and sign terms of employment.
- ❑ Review employee handbook/policy manuals.
- ❑ Review the strategic plan.
- ❑ Discuss expectations regarding ongoing formal and informal interaction with the supervisor.
- ❑ Review orientation checklists and discuss any remaining questions, concerns, issues.

Have workspace set up:

- ❑ Telephone, computer, e-mail, Internet are set up and connected.
- ❑ All necessary documents and supplies are available.

And of course:

- ❑ Meet all staff, including the chief executive of the sponsoring organization.
- ❑ Meet with the mentor and supervisor at least once a day.
- ❑ Read all materials in the orientation kit.
- ❑ Be familiar with workplace health and safety guidelines.
- ❑ Learn end-of-day routine: lights, telephones, locking-up, computer, etc.
- ❑ Get schedules and invitations to project staff meetings that the new employee should know about.
- ❑ Take any necessary field trips.

Orientation Checklist

After three months

By the end of the first three months on the job, the new employee will:

Meet with the supervisor at the end of the period to:

- ❑ Review orientation checklists and assess whether orientation objectives were achieved.
- ❑ Review the job description and, if necessary, make adjustments.
- ❑ Prepare a performance appraisal schedule.
- ❑ Review performance according to standards (or work with supervisor to set standards).
- ❑ Provide feedback to the supervisor about the position and any other issues related to the work of your project.
- ❑ Also, meet with the supervisor one on one, once a week, during the first 4–6 weeks.

And also:

- ❑ Feel comfortable in the new job and in the project's organizational culture.
- ❑ Be well-acquainted with all other employees.
- ❑ Need the mentor's help only once in a while.

Three months? Six months?

This could be a six-month phase, depending on factors such as the length of the probationary period, and the number of hours the employee works every week.

The Partnership Page

Orientation tips for partnerships

Perhaps the biggest challenge in doing orientations in partnerships is consistent communication. With partners, there is more potential of sending mixed messages to new employees.

It's impossible to avoid sending mixed messages if your messages are indeed mixed. So, it's very important for the partners to make sure they have a consistent view of the partnership. We talked about strategic planning as a way to establish a consistent view on The Partnership Page in the Strategic Planning section (page 2.16).

You could almost consider the orientation as a way to assess how effectively you've arranged the partnership. If the partnership is clearly defined, you're more likely to deliver clear, consistent, and effective orientations.

Here's an idea:

Growing Up Healthy Downtown in Toronto suggests that new employees should meet the project coordinator. It's a good way to reinforce the big picture view of the project to the new employee.

Preparing an Orientation

There are three main things partners have to do to prepare for orientation:

- Clarify the objectives of the partnership.
- Determine who will be responsible for preparing and delivering the orientation.
- Determine what to include in the orientation. If you have multiple sites, decide what common information should be communicated at all sites, and what information is specific to individual sites.

Don't forget anyone

Make sure all team members in the partnership get an orientation.

It's possible that none of these steps will be easy to accomplish. Nevertheless, they are necessary steps. Once you get through them, the orientation process for partnerships tends to resemble that of single-agency projects. Employees given responsibility for delivering the orientation can use this section as a guide to follow.

For orientation within a partnership, you may need to spend more time explaining how the partnership works, i.e., what are the roles of the different partners.

For more info:

We again borrow heavily from the Wild Rose Foundation's *Working in Partnership* report to write this page (see page 2.16 for reference information).

Orientation Tool Box

Staff Orientation Review (2 pages)
The Pas Family Resource Centre (The Pas, Man.)

Project Staff Orientation Handbook (3 pages)
Growing Up Healthy Downtown (Toronto, Ont.)

Orientation Kit Welcome Letter (1 page)
Written by Michael Case, HRTS Project Content Consultant

The Pas Family Resource Centre
Staff Orientation Review

To be completed by new employee at: 30 days 90 days

	30 days	90 days
Who We Are		
Health Canada CAPC Program		
Guiding Principles		
Population Health Promotion Model		
Values		
The Pas Family Resource Centre		
Mandate		
Philosophy		
Program Objectives and Activities		
Project Logic Model		
Board of Directors		
Function		
Board Roster		
Staff		
Positions		
Roles and Function		
What We Do		
Job Descriptions		
Executive Director		
Community Outreach Worker		
Administrative Assistant		
Contract Employees		
How We Operate		
Personnel Policies		
Probation		
Hours of Work		
Pay Practices		
Sick Leave		
Overtime		
Holidays		
Vacation		
Leave of Absence		
Remoteness		
Layoff		
Resignation		
Educational Assistance		
Maternity/Paternity Leave		
Adoptive Parent Leave		
Compassionate Leave		
Discipline Procedures		
Grievance Procedures		

The Pas Family Resource Centre
Staff Orientation Review (cont.)

	30 days	90 days
Your Personnel File		
Contract		
Financial Forms – TD1		
Confidentiality Clause		
Criminal Records Check		
Abuse Registry Check		
Driver's License and Abstract		
Benefits Accrual Form		
How Our Programs Operate		
Policies, Procedures and Practices		
Safety, Accident and Illness		
Staff		
Participants		
Vehicle		
Program Operations		
Screening		
Environment		
Physical Facilities		
Parking		
Building Codes		
After Hours Access		
Use of Centre Equipment		
Cleaning and Recycling		
Program Operations		
Client Intake		
Record Keeping		
Observation Notes		
Home Visiting		
Release of Information		
Interagency Case Management		
Retention of Records		
Contracts and third party billing		

Administrative note:
This tool can be used to:
–evaluate your own in-house orientation process by reviewing employee comments
–determine in-house training needs based on employee feedback
–support future disciplinary actions regarding centre policies, procedures, etc.
–support peer training programs by assigning specific portions of the orientation

Growing Up Healthy Downtown

Project Staff Orientation Handbook

Our Goal: To decrease the economic stresses impacting healthy child development and improve access to culturally appropriate, non-stigmatizing resources for parents/caregivers with children ages 0–6 years living in downtown communities.

WELCOME!

The Growing Up Healthy Downtown Project (GUHD) was started in 1994 as a partnership of eight agencies in downtown Toronto. Our main source of funding comes from Health Canada as part of the Community Action Program for Children (CAPC).

The partners of GUHD are:
- The 519 Church Street Community Centre
- Davenport Perth Neighbourhood Centre
- Dixon Hall Neighbourhood Centre
- Family Service Association of Toronto
- Harbourfront Community Centre
- St. Christopher House
- University Settlement Recreation Centre
- WoodGreen Community Centre

Our Project Goal is:
To decrease the economic stresses impacting healthy child development and improve access to culturally appropriate, non-stigmatizing resources for parents/caregivers with children 0–6 years living in downtown communities.

Our Project Outcomes are:
1. Economic stress of poverty on low income parents/caregivers with children ages 0–6 years will be reduced by broadening the range of non-monetary resources available to promote healthy child development;
2. Social and physical isolation of parents/caregivers with children ages 0–6 years living in downtown communities will be reduced;
3. Parent knowledge and community decision-making participation on issues affecting the healthy development of children ages 0–6 years will be increased; and
4. Effective use of community resources available to promote healthy child development will be increased.

Planning, Communication, Decision-making and Evaluation

The GUHD Project and its program activities that are offered by each partner agency are guided by our goals and objectives and by the individual community requirements where each agency works. This requires flexibility and coordination.

To keep the Project on target we have the following internal planning sources:

1. A Management Committee
2. A GUHD Network
3. Program Participants
4. Community Partners
5. A Project Coordinator
6. **YOU!**

The Management Committee and the GUHD Network have detailed guidelines to ensure that we meet our own goals and those of Health Canada.

Health Canada has very specific strategies for ensuring consistency and conformance to funding agreements with CAPC projects. These strategies include:

1. Financial reports (4 per year)
2. National Evaluation (2 per year)
3. Regional Evaluation (all year)
4. Local Evaluation (all year as defined by the project)

All of our activities must continue to meet community and parent/caregiver needs as they change over time. The active participation of staff and parents/caregivers make the above activities possible. To assist in this we meet annually to review our successes and challenges and to plan for the coming year.

GUHD Network

The GUHD Network is made up of program staff, either at meetings or through contributing ideas for meetings when you are unable to attend. Who attends is a decision that your agency, as your employer, will make.

A Manual is available at each program site if you wish to review it. The manual contains:

- Communication Listing
- GUHD Project Beliefs
- GUHD Network Terms of Reference
- Annual Strategic Plan
- Project Partnership Agreement
- Project Partner Agency Profile
- Project Activity Chart (current year)
- Reference Materials
- GUHD Network Agendas and Minutes

Program Areas

Programs that are offered by the GUHD project fall under six CPAC program areas:

1. Support for Women Having Babies
2. Family Support, Education and Resources
3. Nutrition
4. Child Healthy Development
5. Community Development and
6. Service System Change (community advocacy and work)

Your agency will have a complete listing of all GUHD programs offered, community partnerships and statistical information on usage.

Annual Plans

CAPC projects receive Contribution Funds in three-year blocks. As the end of a funding period approaches the project must develop a new project Work Plan for the coming three-year period as well as report on the detailed status of the prior three year work plan.

The project then sets annual work plan targets and these are combined in a report and will guide each year's activities. A copy is available at your agency for review.

Based on the project's work plans individual program Work Plans are developed to include each program offered. These too are available at your agency to review.

Each of these documents is reviewed at the six-month point to assess how we are accomplishing our goals for the year.

Creating a Project Database

Evaluation information for a multi-partnership, when condensed, as a project does not provide the level of information required. To capture useful partner and project level quantitative information a database has been developed. This database captures national, provincial and local evaluation indicators.

Connecting with other CAPC staff from across the project, province and country

Our Project

We have what is called a 'list serve' that is just like email, but for our project only. This communication method is as critical to the smooth working of the project as report submissions; information sharing is posted here, including meetings, professional development opportunities, etc.

The site is **GUHD-FSW@yahoogroups.com**

List Serves also are set-up for Management Committee members as well as the Executive Directors from each project partner site.

Health Canada connections

Health Canada provides a WebBoard for all projects that is used as the main communication source. There is a range of conferences within the main site and is a helpful source for programming information and questions.

This site can be found at **http://healthforum.ic.gc.ca//**

It is an expectation that at least one Family Support Workers at each project partner site is registered on the WebBoard and maintains regular use of this WebBoard.

The Personal Touch

Nothing can replace the human connection. Other Family Support Worker and the Project Coordinator welcome your questions and suggestions, and an individual orientation session can be set. Together we are always stronger.

A contact listing with phone/fax numbers and email addresses is included in the front of the GUHD Network Manual in the Communication Listing section.

Welcome Aboard!

Dear ____________________________

We're happy to have you on our team!

We've prepared this little Orientation package to help you ease in the new job

Item	**Got it?**
A brief history of our project	☐
Our strategic plan	☐
Photos of key personnel	☐
A staff organizational chart	☐
Public brochures/print materials about our project	☐
Project telephone directory	☐
Project Policies and Procedures Manual	☐
Employee handbook	☐
Your job description	☐
Co-workers Job Descriptions	☐
Appointment Book	☐

This Kit was prepared by...

____

Please ask this person if anything is missing from the Kit or you need more information

Supervision

Coming up in this section...

Supervision

for CAPC/CPNP projects

Phases of HR Management

Supervision is the third phase of HR management. It's not really a phase, but rather the ongoing direction and support that managers provide to employees.

Building good, trusting relationships is the foundation of supervision, but supervision goes much further. It's about people first, but it's also about planning, organization, and systems. Remember the three core management skills we talked about in Section 1: people skills, technical skills, and conceptual skills.

Implications of CAPC/CPNP for Supervision

CAPC/CPNP has three key implications for project supervisors:

- Operating within CAPC/CPNP requires an organizational culture that focuses all activities on supporting and empowering priority groups.
- Many projects hire, either by choice or by necessity, people who are still in a developmental stage in their work career, i.e., they have little or no work experience or familiarity with workplace culture. Furthermore, the employees may be dealing with many of the same personal issues and challenges of program participants.
- Crisis, uncertainty, stress, and an unrealistic workload can be an everyday reality for many CAPC/CPNP employees. In this kind of environment, it can be difficult to maintain a focus on the project's goals and objectives.

These implications emphasize the need for CAPC/CPNP supervisors to provide employees with plenty of direction and support. We define the process of directing and supporting employees as **leadership**, and it is a focus of this section.

What the survey said...

In the HRTS survey, you suggested that we address these issues related to supervision:

- Dealing with sensitive issues
- Lack of resources, tools & training
- Managing different schedules, locations, off-site programming
- Supervising within partnerships
- Need for self-care to avoid burnout
- Doing staff-centred performance appraisals

See page 1.15 for details on where these issues are addressed in the kit.

Supervision?

May we suggest…

Be a people person
Treat employees with courtesy and respect. Show you care, sincerely. Get feedback from employees regularly and be the best listener you can be. Support the employee as a whole person who has a life outside work. Don't threaten him (or else!). Be positive.

Be more than a people person
People skills are critical for understanding and communicating with employees, but a supervisor's job also requires technical skills (for performing specific jobs) and conceptual skills (for understanding systems).

Learn what motivates your employees
You can't actually motivate anyone – motivation comes from within. But you can set up a work environment that enables an employee to become motivated. Listen and observe to learn what motivates each employee. Even try asking them directly: "What motivates you?" This is an ongoing job, because people change and so do motivations.

What motivates you?

Don't forget to think about your own motivations. Ask the question to yourself, as well.

Reward and celebrate success
When you know what motivates your employees, you can match the right reward to the right person, and employees will feel even better about their accomplishments. Don't forget to have fun.

Build a team
Create a work environment where employees support each other.

Provide meaning
Help employees to feel good about contributing to the mission of the project, instead of simply being satisfied with their job. Let them know how they're really making a difference.

Empower employees to grow
Provide employees with the direction, support, and structure they need to achieve competence and success. Provide challenge and variety, and help employees to build on skills they already have.

Manage the facilities
Ensure the workplace is a safe and healthy place.

Direct Supervision

Some basic principles

The heart of the supervisory role is to support and direct individual employees so that they can be successful in fulfilling their responsibilities. Within this role, there are three general tasks:

1. Communicate and clarify the employee's responsibilities

Ideally, your employees all have nice clear job descriptions, and new employees have all received a thorough orientation. Whether or not this is the case, the supervisor needs to clarify the employee's responsibilities (and the project's expectations of the employee). Doing this upfront is a very effective way to empower employees, and also helps to avoid future problems or conflicts.

Another way to empower employees is to involve them in making decisions about the scope of their responsibilities. Involving employees in these decisions may, however, be limited by factors such as the employee's level of experience, or restrictions based on collective agreements.

For more info:

Go to the **Supervision Tool Box** for some organizational tools for managers.

2. Provide direction

In general, supervisors need to specify what is to be done, by when, and at what cost. As well, they have to clarify limits on what employees are **not** allowed to do. It's best to provide this information in writing, through personnel policies (see pages 5.10 and 5.11).

Effective direction is a matter of balancing the need to provide structure with the need to give employees freedom to apply their skills and abilities. Strike the right balance and employees feel grounded, empowered and motivated. The wrong mix may very well leave employees feeling confused, smothered (or abandoned), and generally disenchanted.

3. Provide support

Support comes in many different forms: coaching, feedback, problem solving, training, performance appraisal, employee recognition, and more. Effective support is a matter of closely monitoring employees' progress, and developing the right strategies to build on employee strengths and address their limitations. We discuss many of these support strategies later on in this section.

A useful approach

The Situational Leadership® approach (see page 5.5) offers a useful framework for thinking through how much direction and how much support supervisors need to provide to employees.

Leadership

Providing direction and support

You know it when you see it, but it's hard to explain exactly what leadership is. Theories and ideas abound everywhere, attempting to nail down this elusive concept. If we put several of the theories together, we come up with a definition of leadership that looks something like this:

The process of directing and supporting a group to achieve a common goal.

Leadership is an important ingredient in the success of a project. You can really understand its value when you think about what happens when there is no leadership: an organization lacks purpose, direction and enthusiasm. It's not a recipe for success.

Traditionally, leadership was thought to come from individuals – a heroic figure who inspires a group to victory. By our definition, it's a shared responsibility. It's a more empowering way of looking at leadership; anyone who does something that contributes to the achievement of a common goal is showing leadership.

Still, the role of leadership often falls squarely on the shoulders of supervisors. This can be especially true of a project with new, inexperienced employees (or board members) who are struggling just to fulfill their basic responsibilities.

Leadership and Management

We think of leadership as a part of management, the part that creates vision and facilitates motivation. Others say it's something different from management, and come up with clever slogans:

- Managers do things right, leaders do the right things.
- Manage things; lead people.
- Managers stabilize, leaders direct.
- Management is to efficiency as leadership is to effectiveness.

These slogans might minimize the importance of management, but they do give a good sense of the importance of leadership.

Motivating by money or fear

Money and fear are not the best motivators. Money is attractive, but it may only serve to keep people around, as opposed to increasing their enthusiasm about the job. As for fear as a motivator, it usually works, but only for a short time. Over the long term, using fear as a motivator tends to do more harm than good.

Situational Leadership

A popular approach to leadership

For more info

Situational Leadership® is a registered trademark of the Centre for Leadership Studies. The description here was adapted primarily from the book *Supervisor Savvy*. See page 7.17 for a reference.

Don't forget!

Highly able employees need relatively less support, but they still need support!

One useful way to practice leadership is the Situational Leadership® model. Consistent with our definition of leadership, it suggests that there are two main tasks of leadership:

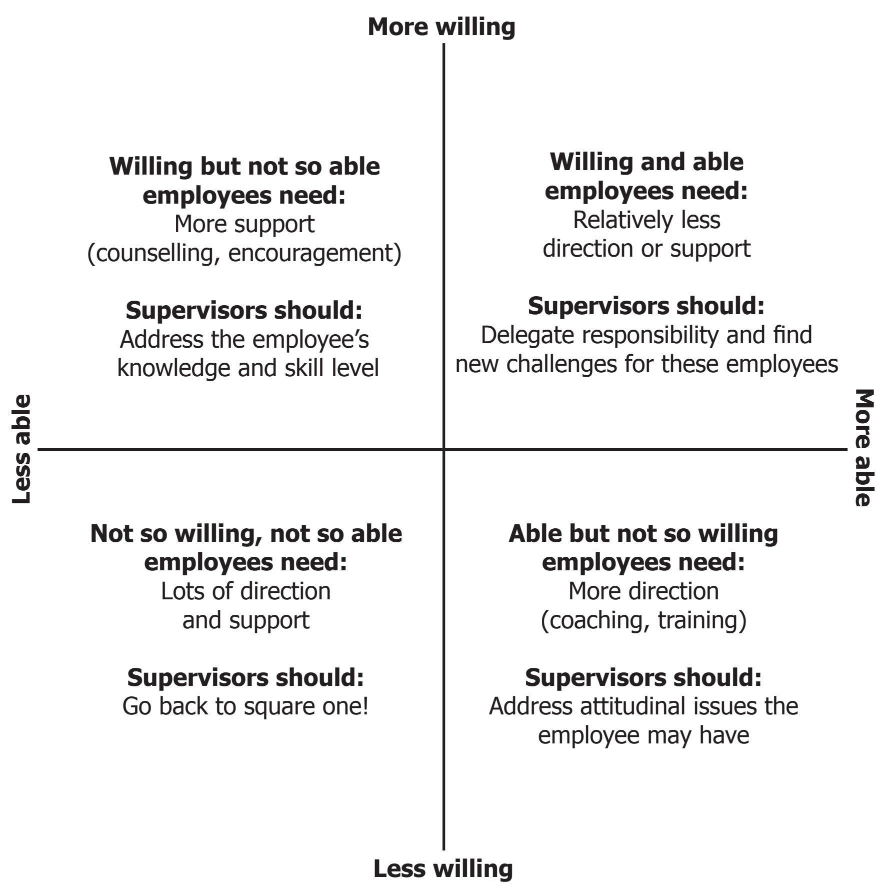
- **Direction** – identifying what to do and how to do it (more to do with technical and organizational skills)
- **Support** – encouraging and motivating staff (more to do with people skills)

The art of leadership is in knowing how much directing and how much supporting to do in any given situation. The chart below helps us make these decisions.

Every employee is different, but it is useful to think of employees as belonging to one of four types. You do this by considering two main qualities of the employees: their willingness (motivation) and ability. You end up with the following four types:

- Employees who are willing and able
- Employees who are willing but not so able
- Employees who are able but not so willing
- Employees who are not so willing and not so able

Effective leadership happens when you match the right combination of direction and support according to an employee's level of willingness and ability.



Reflective Practice

How to learn from experience

People don't necessarily learn from experience. If you're not careful, experience may lead you to form bad habits, become inflexible, and close yourself to new (maybe better) possibilities.

The concept of reflective practice offers a way to make experience an opportunity for growth and learning. It is a structured process that brings together experience and theory. The idea behind reflective practice is that learning from experience is an active process; it doesn't just happen magically. It's a matter of making yourself more conscious of your experience, and more reflective about it.

In the spirit of evaluation

When done right, evaluation is a form of reflective practice – taking time to review and assess what happened, what it means, and what to do next time.

How Reflective Practice Works

Reflective practice begins with employees reflecting on things that happen in their work. In doing so, they can identify a problem or issue they want to resolve, or something they want to learn. These questions provide a guide for reflecting on their experience:

- What important/interesting thing happened?
- What was I thinking and feeling at the time?
- What was good and what was bad about what happened?
- What's significant about what happened?
- What else could I have done about it?
- What would I do if it happened again?

An employee can then set goals for herself based on her reflection. It's usually best to start with modest goals and build up toward more ambitious ones. Here are some examples of employee goals:

- To get to work on time
- To learn more about FAS/FAE
- To improve my group facilitation skills
- To get along better with my co-worker Jane

Putting Reflection into Practice

Putting the theory of reflective practice into action can involve three types of activities:

Journal writing
Reflective practice starts with individual reflection through journal writing. Taking the time to write things down forces you to think and reflect about what happened and how you can learn from it.

If you're new to journal writing, the first thing to do is just relax and try it. Don't worry about mistakes. Draw pictures if you want. Pick a quiet time (regularly scheduled) and place to do it. Follow the reflective questions (see page 5.6) as a guide to get you started.

Meetings with a mentor or supervisor
Reflective practice can be used as an overall approach for individual supervision of employees. Supervisors can help employees to set and achieve goals. The meetings do not replace individual reflection; employees should continue journal writing and use the meetings as a way to build on what they discover and learn on their own.

Group sessions
Regularly scheduled group sessions take the reflective practice approach a step further. Essentially, group sessions are a structured way for individuals to get support from peers in working through the goals they set for themselves.

Employees may need time to get used to a group process of reflection. The group facilitator will need to take time to explain the process and set a positive tone that will make employees feel comfortable and ready to participate.

The Benefits of Reflective Practice

You can use reflective practice as an individual exercise for your own professional development, and as a way to direct and support the professional development of employees you supervise.

Most commonly, people get the following benefits out of using reflective practice:

- They understand their experience better.
- They have a more detailed memory of their experience.
- They have a better understanding of behaviours – their own, their colleagues and program participants.
- They take time to process events, thinking how they could be different, and ways to improve for next time.

Like a good job description and a good orientation, reflective practice can be a time-saver, too. Employees using the approach learn to resolve problems without having to go to the supervisor (you). That can save a lot of time.

Journal writing tip

You don't have to answer each reflective practice question each time you write. Some days, you may spend the whole time on one question. Just make sure to move beyond the description and into the analysis of the situation.

Reflective relief

Journal writing is also a useful stress management technique. See page 5.8 for more info on stress management.

The costs of reflective practice

Reflective practice takes time, especially at the beginning. It's a process that may require a lot of facilitation; employees may find it to be a confusing, frustrating or even threatening experience, because it may force them to think and act in ways that are unfamiliar or uncomfortable. Nevertheless, it is often the case that employees find the process to be very valuable and well worth the time they invested in it.

Stress Management

Manage yourself first

News flash! Management can be a stressful job. It can be especially challenging if you're new to the job. Managing stress may well be your biggest management challenge.

There is a lot of good advice out there on how to deal with stress, but it's easier said than done. Nevertheless, it's still worthwhile to say:

Look after your health
Eat well, get enough sleep, and try to stay physically active. If you've been mistreating your body, maybe it's time to apologize to yourself, and make up for the mistreatment.

Stay grounded
Maintain your connection with personal sources of strength (family, friends, spiritual convictions). Bring photos or other keepsakes to your workspace as friendly reminders.

Don't do it all alone
"Recruit" someone you can depend on to lend a sympathetic ear, if you need to talk or vent. Tell this confidant about your signs of stress and ask her/him to keep an eye open for them. It's a good idea to get together with this person regularly, even if there are no stress issues to deal with.

Also try and find a mentor (your confidant or another person) who can share the wisdom of experience with you.

Recognize signs of stress
Different people show their stress in different ways. Some people blow up or become forgetful. Others stay sane at work but their home life falls apart. Know your signs of stress, and have a strategy in place to deal with stress in a positive way when you feel it coming on. Some of the ideas listed here might be helpful.

Practice time management – buy a daytimer!
The first sign that things are getting out of hand is that you're working too many hours. Keep track of your hours. Set a limit and stick to it. It will also help if you make all appointments in writing. Make sure to make and keep appointments with yourself, too – for chores, tasks, and for doing things you enjoy.

You may want to schedule a "closing up shop" routine. Take this time to preview your schedule over the next few days, to write in your journal (if you keep one), or do some other relaxing activity to bring closure to the day.

Manage yourself first (cont.)

More stress management ideas:

Communicate regularly with employees
Meet regularly with staff, especially when you're starting out as a supervisor. Keep lines of communication open, and don't assume employees know as much as they should. Err on the side of too much communication, rather than not enough.

Learn to delegate
Share the load. Give employees opportunities to take responsibility for tasks. But be careful! Delegating can be unproductive if you don't properly prepare the delegates for the task. You want the task done right, so that it doesn't cause further stress.

Make sure to delegate to someone who can handle the responsibility, or adjust the responsibility to match the delegate's skills. Clarify exactly what the task involves, just like you would in supervising any activity. Monitor and support the delegate through the task, remembering that you have to strike the right balance between providing support and giving the delegate the space he needs.

Practice pro-active crisis management
Learn to respond to what's important, rather than what's urgent. As you gain experience, you learn to respond not so much to the crises as to the problems that cause the crises. It's a pro-active approach that helps to eliminate crises before they have a chance to happen.

The classic urgent vs. important example is managing telephone calls. The telephone rings unexpectedly, demanding to be answered. Do you drop everything you're doing to respond to the telephone's urgent demand? Or, do you get an answering machine and respond to the calls at a better time?

Recognize accomplishments
Make time to celebrate success, even if the celebration amounts to nothing more than a good laugh over coffee. As a supervisor, you are in a position to show leadership in this regard by initiating celebrations, and encouraging an environment in which people are recognized when something good happens.

And don't forget to recognize your own accomplishments!

Personnel Policies

Guidelines for treating employees right

Your project's personnel policy is one of the most important documents you'll need for supervising staff. Personnel policies clarify the practices that ensure fair and consistent treatment of all employees. They make employees (including supervisors) aware of their responsibilities and can help your project to reduce personnel problems.

The most important use of personnel policy is to provide a framework for dealing with personnel issues. Having the rules in place before something happens is always a good idea. Each individual policy has **procedures**, which are the specific activities for implementing the policy.

Important Things to Consider When Writing Personnel Policy

- If you borrow ideas or policies from other organizations, always make sure to modify them to your particular situation.
- Try to keep your policy manual at a manageable size. Beware of writing a policy to deal with one particular incident; consider ways of broadening an existing policy so that the incident is covered. As well, see if you can keep each policy down to a single page.
- Have a lawyer who understands labour law review your policy manual. A lawyer can help you to write policies that minimize risk (and keep you out of trouble) or let you know what could happen if you don't follow the policies you set.
- Get staff involved in reviewing the policies to ensure they remain current. All employees should have access to the policy manual (include policies in employee handbooks).
- Have all employees read the personnel policy. You may even want them to sign a form stating they have read it.
- The policy manual should state that:
  - The purpose of policies is to provide guidelines regarding the relationships between employees and the organization.
  - The board has authorized the policy.
  - Policies are subject to change as per official decisions of the board.
  - Policies are not a contract between the employer and the employee.

Another approach

There is a trend in management today toward simplifying policy manuals. Instead of a thick, weighty manual, some organizations write a short set of guidelines. The guidelines empower staff to use their best judgment, instead of providing specific rules. In this way of thinking, simpler (and shorter) is better.

Personnel Policies

What to include

We should clarify that personnel policies make up one section of an organization's policy manual. The policy manual includes policies for all aspects of the project – administration, board issues, finance, etc. – not just HR.

The *Strengthening Leadership* workbook, developed by Nancy M. Draper for Family Space Quinte in Belleville, Ont., is a useful guide for developing a policy manual. For the personnel policy section, it suggests including a series of 48 policies under 10 categories:

1. Employment Policy, Roles, and Responsibilities

1.1 Purpose of this manual
1.2 Definition of terms
1.3 Employer's responsibilities
1.4 Personnel responsibilities
1.5 Employment principles
1.6 Employment equity

2. Health and Safety

2.1 Health and safety
2.2 Health assessment
2.3 Security for home visits

3. Recruitment and Selection

3.1 Job openings
3.2 Recruitment advertising
3.3 Recruitment and selection of employees
3.4 Recruitment and selection of Executive Director
3.5 Conflict of interest
3.6 Pre-employment reference checks
3.7 Criminal reference checks
3.8 Personnel/Payroll records

4. Orientation

4.1 Orientation program

5. Salary and Benefit Administration

5.1 Salary administration
5.2 Employee benefits

6. Terms of Employment

6.1 Attendance and absenteeism
6.2 Code of conduct
6.3 Confidentiality
6.4 Dress code
6.5 Expense reimbursement
6.6 Hours of work
6.7 Layoff
6.8 Leaves of absence
6.9 Letters of reference
6.10 Media relations
6.11 Overtime/lieu time
6.12 Paid holidays
6.13 Retirement
6.14 Sexual harassment
6.15 Sick leave
6.16 Staff meetings
6.17 Travel expenses
6.18 Vacation

7. Performance Appraisals

7.1 Performance appraisals
7.2 Exit interviews

8. Career Development

8.1 Professional development and training
8.2 Secondment
8.3 Student placements

9. Discipline

9.1 Progressive disciplinary procedures
9.2 Conflict resolution and appeal procedures

10. Termination of Employment

10.1 Employee resignation
10.2 Termination of employment
10.3 Severance

Just a guide

The *Strengthening Leadership* workbook is offered as a guide only. Your project would develop its own list of policies based on your particular circumstances.

For more information on the workbook, contact:

Family Space Quinte, Inc.
201 MacDonald Avenue
Belleville, ON
K8N 3Z3

Telephone: (613) 966-9427
Fax: (613) 966-8819

Performance Appraisals

Managing employee performance

In Section 2, we talked about strategic planning and how evaluation is the part that completes the planning cycle – the feedback mechanism for assessing your success in implementing the strategic plan.

Performance appraisal (also known as staff evaluation) works quite the same way. It's a feedback mechanism for assessing how well employees are doing, and how well you're doing your job as a supervisor. It's an ongoing, year-round process, not a one-time annual meeting with an employee.

Performance appraisal begins with the job description, which spells out the employee's responsibilities and work performance standards. A good job description saves you a lot of work at performance appraisal time. Performance appraisal is also linked to the strategic plan, because it focuses on how the employee can contribute to the project's goals.

This is Not A Test

The purpose of performance appraisal should not be to test employees, but to support them. It is a tool that allows you to:

- Provide feedback on performance
- Provide recognition for good work
- Identify training needs
- Provide a forum for discussing career goals
- Generate ideas how supervisors can better support the employee

Performance appraisals can be somewhat informal, but they should remain scheduled and well-planned.

Like we said a few paragraphs ago, performance appraisal is a year-round activity. It is, however, structured around annual (or semi-annual) assessments. There are lots of ways to do performance appraisals, but there are basic steps to follow:

- Plan the performance appraisal.
- Hold performance appraisal meeting(s).
- Document the performance appraisal.
- Act on the performance appraisal.

The final step is perhaps the most important. There's really no point in doing performance appraisal if you don't act on the results. If you implement strategies to address performance issues, make sure to follow through.

Performance Appraisals

Prepare the job description
The performance management process starts – like everything else in HR – with the job description. The job description provides you with criteria to use to appraise the employee's performance.

Set a schedule
Normally, you should schedule the first performance review at either three months or six months into the employee's employment, or at the end of the probationary period. Then do one at the end of the first year, and then once a year in following years (or, if you prefer, every six months).

Inform/Involve staff
Provide information about the appraisal early and upfront. There should be no secrets about it. Engage the employee in a private, preliminary chat about topics of interest to them for the appraisal.

Prepare appraisal forms
Prepare the form, basing it on the performance standards as listed in the job description. The supervisor should lead the process of writing the form, but it's best to get employee feedback on drafts before writing the final version. Involving the employee helps to make sure criteria are based on the reality of the job.

For more info:

Go to the **Supervision Tool Box** for samples of performance appraisal forms.

Decide on appraisal methods
At minimum, you should complete the appraisal form and review the employee file. You may also consider doing interviews with other staff, or program participants. A good idea is to have the employee fill out her own appraisal form. At the meeting, you can compare and discuss assessments.

Train all appraisers
Ensure everyone involved in the appraisal is ready for it. If peers are involved in appraising, make sure they know the plan, and know how to provide feedback and reinforcement. See page 5.17 for information on the 360 approach to performance appraisal, which can involve peer appraisals.

A word about the appraisal form…

The appraisal form may create a lot of stress in the workplace. To minimize the stress, design the form early and get a lot of feedback on it from employees.

Meeting with the employee

Once you've conducted the actual appraisal, it's time to sit down and meet the employee to discuss your assessment.

There are six main topics to cover in the meeting:

- The employee's strengths and achievements (cover this first to set a positive tone)
- Review of the responsibilities of the job (use the job description)
- Areas needing improvement
- Possible supports and strategies to address areas needing improvement (or new emerging job responsibilities)
- Developing an action plan
- Evaluation of the effectiveness of the appraisal process

The objectives of the meeting should be:

- To identify accomplishments, strengths and weaknesses
- To identify strategies for improvement
- To set goals, objectives and outcome expectations
- To develop an action plan to implement the strategies

In conducting the meeting, let the employee speak first and give her input. Respond with your own input, and discuss areas where you disagree. Discuss behaviours, not personalities. Start and end the discussion positively.

Keep a record

Make sure that there's clear documentation of decisions made at the meeting. See page 5.16 for more information.

Here's an idea:

YWCA Crabtree Corner in Vancouver, B.C., suggests that supervisors keep an ongoing record of positive things an employee does over the year.

The supervisor can make reference to the record at the performance appraisal meeting.

Performance Appraisals

Effective feedback

Here are some tips on giving effective feedback in an appraisal meeting. You can use these tips for day to day supervision of staff, too:

Accentuate the positive
Start with positive comments, be supportive and avoid judgmental comments. Be quick and generous with praise, but only if it's sincere. Praise the specific positive behaviours that you want the employee to demonstrate.

Focus on behavior
Comment on actions, not personality. You're not asking the employee to appraise herself, but rather her behaviour.

Avoid judgments
Think about describing things instead of evaluating them. Use "I" statements instead of "you" statements so that you don't appear to be accusing or blaming.

Compare:

A judgmental "You" statement:

You don't know how to listen to people.

A non-judgmental "I" statement:

Sometimes when we talk, I'm not sure whether you hear what I'm saying.

Be clear and specific
Avoid general comments and clarify pronouns such as "it," "that," etc. Be careful with absolutes like "all," "never," or "always." They're arbitrary and limiting.

Be timely
Feedback has a best before date – don't wait too long before you offer it.

Make formal feedback private
Make it private, respecting the employee's view of what privacy means.

Be very careful about offering advice
People need a sympathetic ear more than they need advice. The best approach is not to resolve someone's issue, but rather to help the person understand the issue better, how it developed, and figure out for themselves ways to resolve it.

Encourage two-way communication
The intent of feedback is to open a door to dialogue, not close it.

Here's an idea:

The Powell River Employment Program Society in Powell River, B.C., includes a checkbox for staff to say if they agree or disagree with the performance appraisal report. Go to the **Supervision Tool Box** for a sample form.

After the meeting, a final performance appraisal report needs to be written. The report should contain no surprises for the employee, because it basically reports the results of the meeting, which the employee attended. The employee should get to see a draft of the report before the final version is written. At the meeting, agree on a deadline for submitting the draft.

The employee should sign the final copy to confirm that she read it and had an opportunity to contribute to the findings. Signing does not mean that the employee agrees with the appraisal. If the employee refuses to sign, it could be noted on the report.

Make a copy of the report for the employee and also put one in the employee's file.

Use of Ratings

You may develop a rating system for the employee's performance as a whole, and for specific areas of performance. If you use ratings, you will need to take time beforehand to establish baseline expectations of performance.

You could try this five-point rating scale, adapted from one used by the University of California, San Diego:

E = Exceptional: Performance is consistently outstanding
A = Above Expectations: Performance is consistently beyond expectations
S = Solid Performance: Consistently fulfills expectations and at times exceeds them
I = Improvement Needed: Performance does not consistently meet expectations
U = Unsatisfactory: Performance is consistently below expectations

Or this three-point rating scale, brought to us by the Powell River Employment Program Society in Powell River, B.C. (Thanks!):

C = Competent
M = Mostly competent
A = Needs assistance

Performance Appraisals

The 360 approach

360 performance appraisal is a popular term for a process that is reciprocal or full-circle. The traditional form of performance appraisal is one-way, from supervisor to employee. In the 360 approach, the supervisor, peers, and the employee herself all complete an appraisal of the employee. The self-appraisal is then compared to the supervisor and peer appraisals.

Identity crisis?

360 performance appraisal goes by many other names: peer evaluation, multi-source feedback, multi-rater feedback, multi-rater assessment, full-circle appraisal, and upward feedback, just to name a few.

To some extent, we've already covered the 360 approach, because we suggest that performance appraisal should involve a self-appraisal. Planning for the 360 approach is similar, but more extensive, because there are more people involved.

If you are interested in implementing a 360 approach at your project, there are two important issues to consider:

The process requires commitment from the whole project
For a 360 approach to be effective, there needs to be a buy-in from the whole project. Perhaps its primary appeal is its fit with the CAPC/CPNP guiding principles (see Section 1 for more details). The 360 approach encourages staff participation, empowerment and capacity-building, all distinguishing features of CAPC/CPNP.

Participants may require training
Both those appraising and those being appraised need to be prepared for the process. Along with a general orientation to the approach, training may be required in the following areas:

- The 360 approach in general
- Confidentiality issues, ownership of survey results
- Effectve feedback techniques
- How to receive feedback from peers

When Things Aren't Working Out

Problem solving

This kit can't possibly give solutions to all work problems (call them "managerial opportunities" if you want to give them a positive spin). On the other hand, it can provide an overall approach to problem solving in case a solution is not immediately clear. The approach applies to either an individual or a group that's trying to solve a problem. Maybe you can't solve all problems with this approach, but it does provide some good basic guidelines.

Keep it positive

Instead of asking:

"Who is to blame?"

Try asking:

"Who is involved/affected?"

1. Take time to define and understand the problem

a. Begin by asking the following questions:

- **What** can you see that causes you to think there's a problem?
- **When** is it happening?
- **Where** is it happening?
- **How** is it happening?
- **With whom** is it happening?
- **Why** is it happening?

b. Write a brief description of the problem. Describe what actually **is** happening vs. what **should** be happening. Be sure that you and your fellow problem-solvers check your own feelings about the issue. Ask yourselves whether your feelings are affecting the way you see it.

c. If the problem turns out to be more than one problem, decide which one to address first. Think about which problem is important, as opposed to urgent (important problems may be causing the urgent ones). See page 5.7 for more about urgent vs. important problems.

2. Look at potential causes

a. Get input from others who have a stake in the problem – those who see the problem and those who are affected by it.

b. Take notes, and write out what you think is the cause – the what, where, when, how, with whom, and why.

3. Identify your options

a. Brainstorm ideas. When brainstorming, don't pass judgment on ideas, just accept them and write them down.

b. Screen out the less useful ideas and decide on the best options.

4. Select the best option

a. When considering your options, ask yourself:

- Which option is most likely to solve the problem over the long term?
- How realistic is each option? What are the costs in time and $?
- How risky is each option?

5. Take action

a. Describe how things will look when the problem is solved.

b. Decide what steps to take.

c. Determine what indicators you’ll use to monitor progress.

d. Decide what resources you’ll need.

e. Schedule the plan.

f. Delegate people (including yourself, perhaps) to implement the plan.

g. Write out the action plan (include items a–f above) and communicate it to all who need to know.

6. Monitor and evaluate your progress

a. Monitor the indicators of success:

- Are you seeing the results you expect?
- Is the plan on schedule?

b. If you’re not making sufficient progress, consider ways to adjust the plan (e.g., change the schedule, find new ideas, allocate more resources).

c. Look at the situation and how it compares to your description of how things will look when the problem is solved (developed during Step 5a).

d. Reflect on the process, what you learned from it, and how it could be improved for next time.

When Things Aren't Working Out

Conflict management

Conflict can be constructive or destructive, depending on how it's managed. It may result in hard feelings and bad decisions, or create new understanding and good decisions. On this page and the next are five approaches to conflict management, applicable to conflicts between individuals or even between whole organizations.

Avoiding
In this approach, the parties simply withdraw from the conflict.

Advantages
Avoiding can be viewed as a live-and-let-live approach that helps keep the peace. It may be effective in situations where it is just not worth investing time in resolving the conflict, or when a more direct approach would probably end up in bad feelings and make matters worse.

Disadvantages
The conflict doesn't go away, because nothing is done to address it. Hoping it goes away may not be enough.

Accommodating
One party in the conflict lets the others have their way.

Advantages
Like the avoiding approach, accommodating may work well in situations where letting one party have her way makes sense when you consider the bigger picture. The saying "Don't sweat the small stuff" may apply here.

Disadvantages
The party that accommodates may deny herself a satisfying resolution. Furthermore, she shuts herself out of decisions, and may set herself up as someone who can be taken advantage of.

Either/Or Solutions
In this approach, the parties use power tactics or other means to try and get their way.

Advantages
In certain situations, one party may clearly be "in the right," and the either/or approach leads to the most justifiable decision. If applied in an atmosphere of underlying trust between parties, confrontation may be a good way to allow the best decision to emerge.

Disadvantages
Confrontation can turn into an ugly power struggle. It presents a real risk of damaging relationships. The losing side in the conflict may end up feeling bitter or resentful, possibly setting the stage for further unhealthy conflicts down the road.

For more info:

This information on conflict management comes mostly from the book *Supervisor Savvy* (see page 7.19 for a reference).

Compromise

Compromise is a more cooperative resolution, in which the parties take a middle ground, usually by giving up one thing to gain another.

Advantages

When it works, compromise provides a resolution that saves face for all parties and allows them to move forward in a positive way. Effective compromise maintains or restores positive relationships, because the compromise represents bargaining in good faith.

Disadvantages

Compromise may come at the expense of making the best decision. A good idea or better decision may be sacrificed to appease one of the parties. It's possible that compromise leads to a resolution that no one is really happy with, and the resolution may be simply tolerated, instead of supported.

Collaboration

Collaboration is another cooperative resolution. It goes a step further than compromise; the parties face the conflict directly and work to resolve it.

Advantages

Collaboration is the most thorough approach to conflict resolution because it addresses the roots of the conflict. In this approach, the parties work as true partners, striving toward a solution that is mutally beneficial, and not merely tolerable for both parties.

Disadvantages

This is possibly the riskiest approach. Collaboration requires the most time and energy, and possibly the most pain of any approach. The parties must be prepared to confront issues they perhaps would rather not face.

Because collaboration is the most difficult approach to take, we offer the following tips to guide you through:

- Agree on the common goal.
- Be flexible.
- Be candid and upfront with information.
- Be careful about arguing or letting emotions take over.
- Put yourself in the other person's shoes.
- Ask questions to understand the other position.
- Make sure everyone has a vested interest in the outcome.
- Make sure everyone gets credit for resolving the conflict.

The best way to deal with grievances (employee complaints) is to prevent employee dissatisfaction from turning into a grievance. Effective supervisors notice possible sources of dissatisfaction, and are pro-active in dealing with them at a very early stage (before they turn into problems).

In reality, you probably can't forecast all upcoming problems, and some day an employee will come to you with a complaint.

One good idea is to have a written grievance procedure as part of your personnel policy. Putting it in writing makes it clear to employees what to do if they have a complaint. It also sends the message to employees that it's safe to bring up issues, and that they will be listened to. Just listening to the complaint is often half the job of resolving it.

How A Grievance Procedure Works

1. Make sure employees are well informed about the procedure

The procedure should be in your personnel policy and included in the employee handbook (or orientation kit). It may even be useful to review the procedure during orientation, as part of discussions about your project's organizational culture.

In any case, supervisors should let employees know that official procedures are in place to hear grievances, and that the door is always open to talk about any issues they may have.

For more info:

Go to the **Supervision Tool Box** for a sample grievance procedure.

2. Talk it over with the employee or with a supervisor

Often, it takes no more than a conversation to resolve a problem. When meeting the employee, remember these steps:

a. Make sure that the employee is comfortable and that the conversation will not be disturbed. Establish an atmosphere of concern and trust and maintain it throughout the conversation.

b. Listen to the employee attentively so that you can understand the entire problem, not just the immediate cause.

c. Explain your point of view about the situation.

d. Once both sides of the story have been told, work together to find a resolution that will satisfy you both. If you can't resolve it, agree to give yourselves time to think it over and schedule another meeting.

e. Follow up. Make sure that you carry through on the decision you reach. If you promise to do something, keep your promise. Otherwise, employees may very well lose trust in you and the grievance procedure.

3. If the disagreement continues, find a "mediator"

If after two meetings you still can't sort things out, it is probably time to find a mediator – someone who will bring an independent, impartial point of view to the discussion. An effective mediator doesn't suggest specific solutions; a mediator helps the two sides to see the situation more clearly, to explore options, and to find solutions for themselves.

On the other hand, it may simply be time to move forward and make a decision. Ultimately, your project's board of directors has the final decision on a grievance. The board may delegate responsibility for these decisions to a supervisor or a manager. Your written grievance policy should make it clear who exactly has the final authority to make a decision. An employee who is not satisfied with a final decision may still have the right to appeal to the provincial labour authority.

Discipline: positive and progressive

Good employee discipline starts with a shared, clear understanding of expectations, which takes us all the way back to the strategic plan. The strategic plan establishes expectations of achievement (written as values statements, goals, objectives, and action plans). In turn, these are reflected in job descriptions (in the job standards) and, finally, translated into personnel policies regarding appropriate behaviour.

Communicating expectations regarding behaviour is an ongoing task. Once the expectations are established, you have to communicate them. When the standards and rules are known by all employees, discipline can be enforced equitably and fairly.

Discipline can be very effective when it's **positive** and **progressive**.

Positive Discipline

At its core, positive discipline is about mutual understanding of expectations, and supporting employees.

Here are some guidelines for establishing a climate of positive discipline:

- Disciplinary policies and procedures are reasonable.
- Staff have meaningful input into setting disciplinary policy.
- There's common understanding among staff and management of behavioural expectations, rules, standards, and consequences.
- Adherence to disciplinary policy is recognized and rewarded.
- Behaviour issues are addressed fairly, based on the facts of the situation.
- There's a procedure in place for employees to appeal decisions.

Progressive Discipline

Progressive discipline involves applying increasing levels of disciplinary measures in response to repeated problem behaviours by an employee. This approach gives the employee every opportunity to correct the behaviour. It also provides a viable process in case discipline issues lead to more serious punitive measures, such as suspensions or termination. Furthermore, it allows you to set consequences that match the severity of the problem.

There are four levels within this approach:

1. Minor issues – informal discussion

Address the issue verbally, as soon as possible after the behaviour occurs. Talk about it with the employee privately, not in front of other people. Definitely do not ignore the issue or wait until the performance appraisal to bring it up. Be brief, direct, professional, and constructive.

For more info:

Go to the **Supervision Tool Box** for samples of written forms for disciplinary measures.

Second incidents

At this point, it may be helpful to explore other duties for the employee.

Third incidents

At this point, you should get legal advice.

2. First incident – a verbal warning

Hold a private meeting with the employee, and conduct it following the principles of effective feedback (see page 5.15):

- **Be clear and specific** – clarify the issue and your expectations (these should have been clearly communicated to the employee when she was first hired).
- **Be constructive** – describe the behaviour you want to see and offer supports (training, new work procedures, etc.) to help the employee deal with the issue.
- **Focus on behavior** – it's the behaviour, not the person, that's the issue.
- **Be timely** – address the issue as soon as possible.
- **Listen well and encourage two-way communication** – allow the employee to explain her perspective.
- **Remain calm, firm, and consistent** – don't make threats and don't argue with the employee.
- **Take notes and write a memo** – make copies for you and the employee (see Step 3 below for what to include in the memo). The notes and memo may come in handy later on if the performance problem persists.
- **Follow up** – set out a course of remedial action and then work together with the employee to solve it.

3. Second incident – a written warning

Issue a written warning if the behaviour occurs again within the next month or two. Always present such a warning in a private meeting. The meeting follows the same principles as the first meeting. The written warning should include:

- Description of the behaviour
- Information about the verbal warning and steps taken
- Steps to be taken to address the misconduct
- Consequences to the employee of this and any further misconduct

4. Third incident – consider more serious measures

A return to probation, leave of absence, suspension or even termination are more serious measures that should be thought through very carefully, especially termination. See page 5.26 for guidance on termination.

When Things Aren't Working Out

Termination – the last resort

Termination becomes a possibility in the case of a very serious incident (theft, for example), or after all other disciplinary measures have failed to correct unacceptable behaviour. If you're thinking of terminating an employee, follow these steps:

Think it over – very carefully
To protect yourself from liability for a wrongful dismissal, you must be very careful about the decision to terminate someone. Consider termination only if:

- You have absolute proof of misconduct that violates your working agreement with the employee.
- Your personnel policy is clear in specifying termination authority and procedures, and the employee has signed to verify that she read the policy.
- You have carefully followed through the entire process of progressive discipline, and you have exhausted all other reasonable options.
- You've followed termination procedures "by the book."
- You have taken the time you need to think your decision through.
- You have consulted provincial labour laws, a lawyer, your board, and the chief executive of your project's sponsoring agency.

Decide on a settlement
Terminated employees may be entitled to final payments. You may decide to offer a settlement package as a way to avoid legal action or other problems that could result from having a disgruntled former employee in the community.

Write a letter of termination
This is the official document of your decision. The letter should be as brief as possible. It only needs to state the fact that the employee is terminated, and the date of termination. You may also use the letter to inform the employee of arrangements for final payments and benefits the employee will receive.

If possible, end the letter on a positive note by thanking the employee. A simple "thank you" costs nothing but could alleviate hard feelings and improve future relationships.

Hold a termination meeting with the employee
At the meeting, present the termination letter and inform the employee of the procedure to follow. Ask for keys, etc. and give the employee time to remove personal items (you may need to have this monitored). If necessary, change the door locks and passwords on phone systems, etc.

The meeting should be brief (five or ten minutes). It is not an opportunity for the employee to debate the decision. Take notes of what was said at the meeting and file them in your records.

Get legal advice!

We've provided only a brief overview of the termination process here. There are many other important details you need to know about. We strongly recommend that if you decide to terminate, you get legal advice to guide and protect you through the process.

For more info:

Go to the **Supervision Tool Box** for a sample letter of termination and a termination meeting guideline.

Document, document, document.

It's very important to keep written records of disciplinary measures you take with an employee. Doing so protects you in case the employee decides to fight the termination decision. If everything is recorded in writing, it is much easier to justify your decision, and prove that you followed labour standards in making your decision.

Exit Interviews

A positive way to say goodbye

Exit interviews offer a way for an employee and a supervisor to end their working relationship on good terms.

The exit interview can serve various purposes. For example:

- To collect candid feedback from the employee about her experience at the project
- To identify competencies that the new employee should have
- To identify any loose ends that need to be tied up
- To provide closure for the employee and supervisor, and (as the title says) provide a positive way to say goodbye

Whatever you choose to talk about, ensure that the employee understands in advance the purpose of the meeting.

The exit interview is best scheduled during the employee's last few working days, or in the first week after her departure. Depending on your relationship with the employee, you could hold the interview in your office or over lunch. You do want to choose a location that allows for open and candid discussion.

To Interview or Not To Interview

It's possible the employee may not want to have an exit interview. For example, the employee may have left under some kind of negative circumstances, and no longer wants to be in contact with the project. In this case, respect her decision. If the employee doesn't want to be there, it's unlikely the interview will be very useful.

On the other hand, the employee may no longer want to visit with you personally, but may agree to an interview if it's with someone else from your project.

It is a good idea to conduct an exit interview with employees who were with the project for only a short time. You may or may not get a lot of useful feedback, but it is a way to leave the departing employee with a good impression of your project.

For more info:

Information on this page comes primarily from the Paula MacLean book The *Supervisor's Big Book of Answers*. See page 7.19 for a reference.

Also go to the **Supervision Tool Box** for a sample exit interview form.

The Partnership Page

Supervision tips for partnerships

Who Should Supervise?

On The Partnership Page in the Hiring section (page 3.18), we discussed how different partnerships may take different approaches to hiring according to their specific situation. The same holds true for supervision; the partners may decide to take a more centralized or a more autonomous approach.

There are advantages and disadvantages to each approach. A centralized approach may mean more consistency across partners, because the same person is doing the supervising. On the other hand, the supervisor may be a little distanced from the employee's work (literally and figuratively) and not be able to provide enough on-site direction and support. Conversely, a more autonomous approach may mean more on-site supervision, but there is more chance of losing consistency of direction among partners.

The key is for the partners to decide which approach works best for their project, and to find ways to address the limitations of the approach. A more autonomous approach demands an emphasis on communication among partners, to ensure that the supervisors are all working from the same principles and priorities. A centralized approach may mean that the supervisor needs a larger travel budget.

Who Should Be Supervised?

The partners need to work together to coordinate supervision between the project supervisor and supervisors from the partners. It's a good idea to consider all employees that do project work as project staff, even if they are staff of individual partners. Doing so indicates the project's intent to provide team members with effective support and direction for their CAPC/CPNP work.

Here's an idea:

Simcoe County MotherCare Network suggests that in partnerships, performance appraisals should include a review of how employees interact with community partners.

What About Conflicting Policies Among Partners?

Policy issues among partners are another important issue for supervising partnerships. It is possible that personnel policies of one partner may be different or even in conflict with another partner, or with the CAPC/CPNP project.

In this case, the partners need to share this information and decide to harmonize the policies, or (more likely) just decide which policy applies in which situation. This would be necessary in a situation where, for example, an employee does home visits in one community for her employer (one of the partners) and home visits in another community for the CAPC/CPNP project.

Supervision Tool Box

The Project Manager's Bookshelf

All the critical operational materials at your fingertips.
The manuals are annual documents - only current information is kept in these binders.

1 Board Manual	**2** Staff Manual	**3** Program Manual
Current Board Members and Positions	Staff Roster	Program Summaries
By-laws	Job Descriptions	Project Logic Model
Board Development	Personnel Policies & Procedures	Evaluations
Minutes	Summary Calendars	Reports to Funders
Advisory Committee Reports	Orientation	Reporting Forms
Director Reports	Performance Appraisal	Financial Summaries
Strategic Plan	Staff Minutes	Budgets
	Volunteer Manual	

Project Manager Annual Planner

1st Quarter	For	√	2nd Quarter	For	√	3rd Quarter	For	√	4th Quarter	For	√
APRIL			JULY			OCTOBER			JANUARY		
4th Quarter Budget	HC		1st Quarter Budget	HC		2nd Quarter Budget Due	HC		3rd Quarter Budget Due	HC	
4th Quarter Project Summary	HC		1st Quarter Program Summary	HC		2nd Quarter Program Summary	HC		3rd Quarter Program Summary	HC	
New Fiscal Forecast	HC										
New Fiscal Budget	HC		Summer Program Planning	Staff		Staff Training Conference	Staff		Staff Training - Programs	Staff	
New Workplans Forecast	HC										
Previous Year's Workplans Completed	HC					Koats for Kids	Pgm				
Director's Activity Report - March	BD		Director's Activity Report - June	BD		Director's Activity Report - Sept.	BD		Director's Activity Report - Dec.	BD	
MAY			AUGUST			NOVEMBER			FEBRUARY		
Audit	BD		Program planning - fall term			Staff Evaluations	Staff		Funding Applications - Summer	Staff	
Summer Staff - ads, interviews, hiring	Pgm.		Staff Training - Programs						Review of HR policies & practices	BD	
Program Review	BD Cmt										
Staff Training - Programs	Staff								T-4's	Staff	
Director's Activity Report - April	BD		Director's Activity Report - July	BD		Director's Activity Report - Oct.	BD		Director's Activity Report - Jan.	BD	
JUNE			SEPTEMBER			DECEMBER			MARCH		
Staff Evaluations	Staff		Annual General Meeting - Orientation	BD		Fundraiser	Pgm		Major fundraiser	Pgm	
Summer staff - train/orientate	Pgm		- Training - Strategic review			Up date Personnel Files	Staff		Database Update	Pgm	
						Staff / Board Dinner	BD Staff				
Board recruitment	BD Cmt		Fundraiser	Pgm							
Director's Activity Report - May	BD		Director's Activity Report - Aug.	BD		Director's Activity Report - Nov.	BD		Director's Activity Report - Feb.	BD	

Legend:
HC - Health Canada
BD - Board of Directors
Pgm. - Program

Staff Meeting Guide

(Insert Date Here)

NOTE: This staff meeting format was developed to assist in on-going employee performance evaluation and serve as a permanent record of activities and responsibilities for staff and the Director. As well, it documents internal communication processes in the event of performance issues at a later date.
Meetings are held every Monday morning from 9:00 a.m. – 11:00 a.m.
The minutes are printed within 1 hour of the meeting and distributed to all staff and a copy is forwarded to the Board of Directors. They also assist in the preparation of monthly Director's Activity Reports.

Attending:
(include all who are present – make note of those who arrive late without due cause – it may indicate a pattern of employee performance if it is consistent)

Absent:
(note regrets for employees who have notified you prior to the meeting of their absence – note employees who are absent without cause)

Agenda	**Work Plan**
1. Program Review (Include all program activities here that your project operates) 1.1 Parenting Programs (all activities and planning for the past week are discussed –include sessions held, attendance, facilitator, issues) Nobody's Perfect How to Talk So Kids Will Listen Growing Up Again 1.2 Children's Programs Breakfast Buddies Community Play Room Preschool Program Parent Child Play Group Intervention and Enrichment 1.3 Community Outreach Activities FAS Presentation Home Visiting Mom's Afternoon Out Community Kitchen Drop Ins 1.4 Networking Activities FAS Interagency Group Koats for Kids Kampaign 2. Administration Include staffing schedules and reassignments, staffing issues such as performance appraisal schedules, new funding proposals, coalition work, upcoming training, new policies or procedures, staff celebrations and recognition, etc. – anything not directly related to recording program activities. 3. Staff Items Emerging issues, questions, concerns that are brought forth by staff can be captured as individual items so that they may be addressed at the next meeting. A serious HR issue should not arise in the workplace that Managers don't know about if it is addressed here first. 4. Training Topic Include ongoing training topics that can be addressed in 30 minute segments – i.e. Participant File Maintenance, Observation and Report Writing Skills, Facilitation Skills – these sessions can carry over from one meeting to the next or the time used to do in house training with new employees or those under probation – allow staff to do presentations as part of the project's training plan.	Any work associated with the operation of the program is assigned a specific task, with due date and employee name – this provides reference for clear work assignments and employee responsibility – the past minutes are used at the next meeting to check on task completion and program progress.

Employee Performance Appraisal

Code Key
N/A - Not applicable
G - Good
S - Satisfactory
N/I - Needs improvement

- ❑ 1 Month
- ❑ 2 Month
- ❑ 3 Month
- ❑ Annual
- ❑ Other

Name ______________________ Date ______________________

Position ______________________ Employment Date ______________________

Status ______________________ Supervisor ______________________

Purpose

This performance evaluation is a method to identify strengths and weaknesses and to outline and agree on a practical improvement program. Regularly conducted performance appraisals provide a history of development and progress.

1. Quality of Work	**N/A**	**G**	**S**	**N/I**
1. Knowledge of the job as per job description				
2. Ability to plan and implement work-related duties				
3. Demonstrated ability to accurately complete job-related duties & responsibilities				
4. Demonstrates effective utilization of work-related time				
Comments				

2. Effectiveness	**N/A**	**G**	**S**	**N/I**
1. Ability to carry out instructions				
2. Ability to work independently				
3. Ability to work under pressure				
4. Ability to deal effectively with an emergency				
5. Ability to adapt to changing conditions in the workplace				
Comments				

3. Human Relation Skills

	N/A	G	S	N/I
1. Demonstrates verbal and written communication skills in English				
2. Ability to observe and communicate change in client function				
3. Demonstrates respect for team members for their individual strengths and roles in their effort to provide the best possible service				
4. Respects the necessity of confidentiality in both work & personal matters				
5. Recognizes the lines of responsibility in the organizational structure				
6. Respects the association with professionalism and supports decisions made				
7. Provides appropriate level of assistance and supervision in performing client services				
8. Maintains a professional relationship with clients				
9. Ability to work effectively with clients of different values and lifestyles				
10. Consistently demonstrates self as a positive role model for clients and staff				
Comments				

4. Community Relations

	N/A	G	S	N/I
1. Displays professionalism in all community interactions while carrying out association business				
2. Displays an effective working relationship with all professionals involved with the client				
3. Understands and utilizes the correct access routes to professionals involved				
Comments				

5. Work Habits

	N/A	G	S	N/I
1. Demonstrates ability to do the job with a minimum of supervision				
2. Consistently demonstrates the ability to maintain a safe workplace environment				
3. Promotes and supports client's independence				
4. Demonstrates evidence of good health and emotional stability required for the demands of the position				
5. Attendance, notification of absence, return to work				
6. Punctuality				
7. Personal appearance on duty (grooming, clothes)				
8. Use of supervision				
9. Response to supervision				
10. All work-related documents (time sheets, vacation & sick forms, reports, etc.) submitted in a professional and timely manner				
Comments				

I acknowledge that within the past 12 months I have reviewed and accepted all of the PREP Policies and Procedures. ______ YES ______ NO

General Comments

Employee's Signature: ____

I agree with this appraisal _________ **I disagree with this appraisal** _________

Evaluation completed by: ____ ______________

Supervisor's Signature/Title **Date**

Performance Appraisal

Program Coordinator
BOND Program

Name of employee	______________________
Date appointed to this position	______________________
Date of this performance appraisal	______________________
Date of last appraisal	______________________
In attendance (names and positions)	______________________
	______________________
	______________________

Notes:

Comments are recorded separately and attached to this appraisal form. Comments are an integral part of this appraisal and provide explanation for ratings.

The job description should be reviewed first. Recommendations for changes to the job description should be forwarded to the Personnel Committee.

A random audit of client files will be undertaken by a professional from the Advisory Committee (Part 6).

Ratings:

C: employee is wholly competent
M: employee is mostly competent
D: employee is developing competence and skill

1. Relations with Program Staff and Volunteers

______ Gives encouragement and support to staff, maintains staff morale, establishes a positive work environment

______ Makes all employees feel that they are part of the overall operation

______ Fosters a team concept among staff, encourages team work and team solutions to problems

______ Keeps the staff informed of information relevant to their work

______ Encourages 2-way communication with staff

______ Keeps informed of staff's work and issues/concerns arising

______ Implements corrective discipline procedures for staff, when necessary

______ Communicates expectations to staff

______ Gives clear directions to staff

______ Administers an evaluation program, both formal and informal, of staff performance that includes measures for improving staff performance, as needed

______ Deals effectively with inter-personal problems among staff

______ Respects individual strengths and roles of staff in their effort to provide the best possible service

______ Delegates responsibility and authority appropriately

______ Uses staff meetings effectively

______ Ensures staff understand and comply with policies and procedures, including changes in policies and procedures (e.g. PREP, BOND program, workplace health and safety, etc.)

2a. Relations with the PREP Society (Board, Administrator, Bookkeeper)

______ Understands and respects the lines of responsibility in the organization's structure

______ Respects the Society and supports Board decisions

______ Executes Board policies and procedures and follows up, as necessary

______ Keeps the Board/Administrator informed on matters affecting operation and administration of the Program

______ Keeps the Board/Administrator informed of current developments and concepts affecting service provision

______ Discusses with the Board/Administrator any issues which may warrant a change in policy

2b. Relations with the Advisory Committee

_____ Understands the Committee's functions and utilizes the Committee's expertise (both individual members and Committee as a whole, e.g., clinical consultation)

_____ Respects the Committee and supports Committee decisions

_____ Keeps the Commitee informed on matters affecting the operation and administration of the Program

_____ Keeps the Committee informed of current developments and concepts affecting service provision

_____ Attends Committee meetings and provides progress reports, as requested

3. Relations with the Community

_____ Investigates and handles concerns or complaints from the community and provides appropriate acknowledgement of the concerns

_____ Develops and maintains positive working relations with

_____ Public Health staff
_____ Physicians
_____ Other health care professionals & service providers
_____ Community organizations

_____ Develops and maintains good public relations with

_____ Business community
_____ Community organizations

_____ Makes effective use of local news media

_____ Advocates in the community for ongoing support of the program

_____ Presents a positive profile of the program and the organization in the community

_____ Displays professionalism in all community interactions while carrying out program business

_____ Participates in community committees/activities that are relevant and beneficial to the program and program clients

_____ Keeps informed of community services and resources

_____ Makes appropriate referrals to community resources

4. Professional Performance

______ Understands expectations and parameters of the position, as per the job description

______ Understands and respects confidentiality in both work-related and personal matters

______ Establishes rapport with clients

______ Maintains appropriate relationships with clients

______ Keeps appropriate and accurate records (see also File Audit)

______ Researches information and data applicable to program services

______ Pursues program planning and development in accordance with Health Canada/CPNP guidelines and reflecting local/community needs

______ Maintains an overview of all aspects of the program operations (e.g. outreach, nutrition component, groups, Community Kitchens)

______ Complies with Society and program policies and procedures

______ Recommends changes to policies and procedures as necessary

______ Demonstrates leadership:

______ Initiative

______ Decisiveness

______ Motivation of others

______ Takes an active role in the recruitment, selection, and orientation of new employees & volunteers

______ Demonstrates clear communications skills:

With clients: ______ oral ______ written

With professionals: ______ oral ______ written

______ Demonstrates effective listening skills with clients and professionals (e.g. listens to those with opposing views)

______ Demonstrates good problem-solving skills

______ Accepts constructive criticism and accepts responsibility for errors

______ Voluntarily takes on new responsibilities and challenges

______ Gives credit where credit is due

______ Ensures and maintains a safe, clean, and organized work environment

______ Ensures program expenditures are within budget guidelines

5. Work Habits

_____ Demonstrates punctuality for all occasions, or provides adequate notice of absence/delay

_____ Informs staff and administrator of absences and ensures responsibilities are covered during absences

_____ Responds to phone calls, enquiries, requests for information and correspondence in a timely manner

_____ Makes effective use of time; e.g., establishes priorities

_____ Presents written work (e.g., payroll records, personnel files, reports to Health Canada) that is accurate, timely, and professional

_____ Demonstrates calm, clear thinking while under pressure or in an emergency

_____ Presents self as a positive role model for staff

_____ Demonstrates interest in and ability to acquire knowledge and new skills for professional growth

6. Files and Record-keeping

A random file audit will be done separately.

a. The Coordinator's client files include:

_____ appropriate intake assessment
_____ identification of client's needs and goals
_____ ongoing assessment, monitoring and evaluation of client progress and re-defining of goals
_____ pertinent and relevant information regarding service provision
_____ all appropriate forms and required documentation, signed and dated (e.g., confidentiality form, agreement for services, etc.)

b. Are the Coordinator's client files kept in a confidential manner (e.g., locked cabinet)?

7. Professional Development

Attach a record of professional development to date

Future professional development goals, including time frame:

I acknowledge that in the last 6 months I have reviewed and I accept all of the PREP Policies and Procedures and BOND Program policies and procedures, and Health Canada/CPNP guidelines.

_____ YES _____ NO

Choose one: _____ I agree with this appraisal
_____ I disagree with this appraisal

Employee's signature ______________________________ Date ______________________

Employer's signature ______________________________ Date ______________________

Grievance Procedure

A grievance is defined as a difference arising between staff and/or Board relating to the interpretation, application, administration or alleged violation of the Personnel Policies and/or job description.

- It is the mutual desire of all parties that complaints of employees be addressed as quickly as possible.
- It is understood that an employee has no grievance until s/he has first given the staff the opportunity of adjusting the complaint.
- If an employee has a complaint, s/he shall discuss it with staff within 5 days. If the complaint is not resolved at this level, the employee may forward the complaint in writing within 10 working days to the Personnel Committee which will make recommendations to the Board of Directors. The Board will respond in writing within 15 working days. An employee may request to appear before the Board to argue the complaint. The decision of the Board is final.

Employee Incident Report

Employee ____________________________________ Date ____________________________________

Nature of Incident (include name of witness or complainant):

Policy/Procedure Violation:

Disciplinary Procedures:
(recommendations for specific remedies to the situation - i.e., training, supervision, mediation, probation, etc.)

- ❑ Verbal Warning (no employee signature is needed for a verbal warning)
- ❑ 1st Written Warning
- ❑ 2nd Written Warning
- ❑ 3rd Written Warning
- ❑ Suspension
- ❑ Termination

____________________________________ ____________________________________
Employee Signature Date

____________________________________ ____________________________________
Employer Signature Date

To: xxxxx
From: xxxxx
Date:

Dear xxxxx,

Over the past three months we have discussed your behaviour. We met on *(insert dates)* and at that time I spoke with you about incidents that occurred involving you and co-workers *(and/or)* clients. You did not offer any reasonable explanation for your behaviour and in fact did not appear to believe that your actions were inappropriate. I indicated to you that your attitude and behaviour *(describe the behaviour)* must change and you must become a member of the “Team.”

Please be advised that this letter shall be placed in your Personnel File as a written warning that you must correct your behaviour and cease any further outbursts immediately. You are expected to behave professionally at all times. If you do not understand what this means please come and see me and we shall discuss further. I hope you take the corrective action required. If not, further and more severe discipline will follow.

Yours sincerely,

(Signature and title)

cc Union Representative (if required)
Personnel File

Note: If it is necessary to prepare an Action Plan do so and include it in the documentation. The Action Plan must identify the correct behaviour and include specific measurable outcomes, e.g., **no outburst**; deal with clients politely **at all times**.

Extension of Probation

Name ____

Position ____

Start Date ____

Six Month Probation Date ____________________________

Extended Probation Date ____________________________

Reasons for Extension:

____
Board Designate

____
Date

To: xxxxx
From: xxxxx
Date:

Dear xxxxx,

It has become necessary for me to take further action in regard to your inappropriate behaviour.

We have discussed this problem on many occasions, specifically *(insert dates)*. You were given a written warning on *(date)*. You were told during our meetings that you must correct the situation and act professionally at all times.

There has been no action on your part to correct the problem. The latest incident brought forward by *(staff or client)* demonstrates that you do not accept the fact that your behaviour is inappropriate.

This is unacceptable; therefore you will be suspended without pay for *(insert time)*. We hope you will spend this time considering the seriousness of your actions and return with a commitment to correct the behaviour thus avoiding any further disciplinary action that may include terminating your employment.

Yours sincerely,

(Signature and title)

cc Union Representative (if required)
Personnel File

Note: It may be necessary to identify the staff member or client. This should be made clear to the individual and if they do not wish to be identified then the complaint **cannot** be acted upon.

Name
Address
Town

Date

Dear ________________________________

This letter confirms the meeting of (date) with (name of person) of Organization XXX, at which time you were advised that your employment with (organization name) would be terminated effective immediately. As was explained to you at this meeting and on a number of occasions which preceded it, Organization AAA has been concerned for quite some time about your job performance and your suitability to the position of CCCCC.

In accordance with your employment contract with Organization AAA, Organization AAA will pay to you on a without-prejudice basis and upon signing of a full and final release, an amount equal to thirty (30) days salary less statutory deductions. As well, you will be compensated for any outstanding wages and vacation pay owing to you at the time of termination.

Please return immediately any Organization AAA property that you may have. Should you have any personal effects on Organization AAA's premises, please contact me at the _________________ at any time within the next week and I shall arrange either to have someone meet with you or have your belongings sent to you.

During the course of your employment with Organization AAA, you have had access to a number of confidential matters and I am sure you will appreciate that your obligation to keep these matters confidential continues beyond the termination of your employment. Should you have copies of any confidential information in your possession, we would ask that these be returned to Organization AAA (Attention: _______________).

Your acceptance of this offer constitutes a full and final release in respect of all claims which you may have against Organization AAA for any matter arising out of the termination of your employment, including but not restricted to any claims for payment in lieu of notice or any other entitlement under the Employment Standards Act or the Human Rights Code of Ontario.

Would you please indicate your acceptance of this offer by signing and returning the duplicate copy of this letter to me within five (5) working days from the date of this letter.

Yours truly,

____

Organization AAA, Manager

____

Employee signs here

Acknowledged, accepted and agreed to this _______ day of ________________________________

____

Witness (this can be the person who signs the letter)

Termination Meeting Guideline

For Board Members or Program Manager

1. State the purpose of the meeting - termination of employment.

   - State the reason for termination clearly and concisely
   - Do not 'discuss' performance issues with employee, previous disciplinary meetings were the time for those discussions
   - Stay 'fact' centered - do not get personal or address personal relationships

2. Termination at this time is final and is NOT negotiable.

3. Communicate Board and Program Manager support for the decision.

4. State the date for termination. If termination is effective immediately have the following prepared:

   - final pay cheque
   - separation slip
   - summary and payment of holiday pay, overtime, banked time
   - process for collecting personal items from work area
   - check-in of keys, codes, work files, materials, etc.
   - identify who will assist employee with collection of items and departure

   If termination will occur within the coming two weeks:

   - summary of pay and benefits to be cashed out
   - list of work tasks to be completed or transferred to other staff

5. Provide employee with written summary of all accrued benefits:

   - holiday pay
   - overtime
   - banked time

   State effective termination date of health care plans, disability, life insurance, pension or other benefits.

6. Inform employee who will contact them about any other issues that may arise from the Centre or who they may contact should they have additional items that need to be returned.

7. End the meeting by wishing the employee luck in future endeavors.

This is NOT a meeting to discuss issues - it is a termination meeting. Keep the meeting as brief as possible - use clear, concise language and do not dialogue on the issue or negotiate on the outcome. Do not respond to inquiries if you are not sure - defer to another time when you have the time and information to address the employee issues.

PREP Society Exit Interview

Employee information:

Name ____

Start date with PREP ____

Most recent position/program ____________________________________

Other positions/programs ____

Last day of work ____

Reason for "exit" (check as applicable):

___ completion of term of employment
___ postion/program ended
___ resignation
___ termination of employment

Interviewer (name and postition) ______________________________________

Interview date ____

1. What do you feel were the most enjoyable aspects of your work?
2. What do you see as your greatest achievements/successes in your position(s) with PREP?
3. What were the most difficult or challenging aspects of your work?
4. Do you feel you had appropriate training to do all aspects of your job? If no, what training would have helped?
5. Do you feel you were supported by management (e.g., your supervisor, the administrator, the PREP Board) in your role? How? Are there other ways you/employees could be supported?
6. (If person has resigned): What were your considerations that led to your decision to resign?
7. Do you have any comments about your working conditions (e.g., facilities, equipment, hours of work, etc.)?
8. Do you have any comments about "staff dynamics?"
9. Do you have any recommendations for:
   - the program in which you worked;
   - the admin. staff; and/or
   - the PREP Board?
10. Would you choose to work for PREP again?
11. Taking everything into consideration, would you recommend PREP to others as a place to work? Why?

Training

Coming up in this section...

Section 6 - Training

Training for CAPC/CPNP Projects
Unique challenges and implications

Training?
May we suggest...

A Learning Organization
It's more than training

The Training Cycle
A familiar plan

Training Goals & Objectives
Set your priorities

Training Methods
How to choose the right kind

Facilitating Training Sessions
Basics on instructing adults

Evaluate the Training
Reflect on the learning

Follow up!
To complete the training cycle

Training and Turnover
Looking on the bright side

The Partnership Page
Training tips for partnerships

Training

for CAPC/CPNP projects

Phases of HR Management

Training is the fourth phase of HR management, but like supervision, it really isn't a phase. It's more of an extension of the ongoing supports provided to employees through supervision.

We see training as an activity that's integrated into the strategic plan and ongoing HR management. It's not an add-on, but part of the fabric of how a project operates. Quite a lot of the work in putting together a staff training plan is done through strategic planning, writing job descriptions, and conducting performance appraisals. All of these activities are covered in other sections, but they're also an important part of a training plan.

Implications of CAPC/CPNP for Training

CAPC/CPNP places high value on training and professional development. There are three main reasons why:

- CAPC and CPNP are still emerging programs. We're still learning about what they are and how to make them work best. Sharing learnings and experiences is key to the programs' further development.
- Many projects hire staff who are inexperienced and lack some of the preferred competencies for their positions. Projects hire this way by choice (hiring program participants as part of a community development approach) or by necessity (not being able to attract fully qualified people because of low salaries, part-time hours, and isolated communities, for example).
- Training employees is a practice consistent with the CAPC/CPNP emphasis on community capacity building. With more training, CAPC/CPNP employees can become better equipped to play their role in supporting project goals and objectives. Priority groups and the community benefit as a consequence.

What the survey said...

In the HRTS survey, you suggested that we address these issues related to training:

- Insufficient $ for training
- Access to training for isolated, rural, or multi-site projects
- Time restraints
- Training pulls staff away from work
- Diversity of training needs among staff
- Finding training opportunities specific and relevant to our projects

See page 1.15 for details on where these issues are addressed in the kit.

Training?

May we suggest...

Think about training as one part of learning
Professional development shouldn't be limited to your training budget. Training is a single event; learning is an ongoing process. Think about how training can fit within a learning environment. Performance appraisals, ongoing supervision, evaluations, networking, and other activities outside of training sessions all contribute to employee learning.

Plan your training goals
Training works much better when it's planned. It's fine to take advantage of opportunities when they arise, but an opportunistic approach will probably not satisfy your training needs.

Integrate your training
Training plans are most effective when linked to the strategic plan, job descriptions, performance appraisals, and project evaluation. This keeps your training responsive to project needs and employee needs.

Stretch your training dollar with evaluation and follow-up
Don't let all that learning go stale. Evaluate training sessions to see how well they worked and how they can be improved. And do follow-up activities after training so that employees can retain what they learned.

Think about training for the whole person, not just the employee
The primary role of training is to support employees in their efforts to do their jobs better. More than that, though, training can support the whole person if it provides opportunities for personal growth. Maybe employee development could be a goal in your project's strategic plan.

A Learning Organization

It's more than training

If there's one useful concept to pick up in this section, it's that training is best organized as one part of an overall learning strategy, consistent with your project's strategic plan.

Starting on the next page of this section, there's practical information on how to set up a training plan. This page is about vision – what's possible for a project that commits itself to becoming a learning organization.

Qualities of a Learning Organization

A learning organization recognizes the importance of learning as a strategy for success, and makes it a top priority of the organization. If your project were a fully functioning learning organization, it might look something like this:

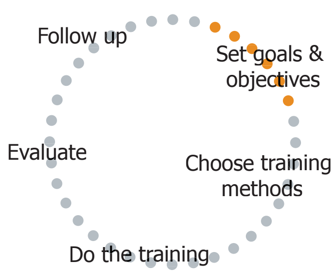
- There's a positive, energetic vibe in the workplace.
- Employees regularly and enthusiastically offer suggestions and ideas for improving service, and the supervisors willingly listen.
- Staff are working as a team, acting as resources for each other.
- Staff are regularly thinking about and trying out new and better ways of doing their work.
- When problems arise, staff come together to find creative solutions.
- Some days are training days, but every day is a learning day.

If this vision looks familiar, it may be because you've just finished reading the previous section on supervision. As we said on page 6.1, training is like an extension of the ongoing supports provided to employees through supervision.

The Training Cycle

A familiar plan

The Training Cycle



If you've been reading the other sections of this kit, the process for setting up a training plan will look familiar to you. It's a cycle in five steps or phases:

1. Set training goals and objectives
2. Choose training methods
3. Do the training
4. Evaluate the training
5. Follow up the training

If you have a strategic plan in place, you've made a great start on assessing your project's general training needs. Got good job descriptions? Even better. Just completed performance appraisals? And program evaluation, too? Fabulous! You're well on your way to a training plan.

Look at your strategic plan and decide what areas of training would support your efforts to achieve your project's goals and objectives. Also review job descriptions so that you have a clear understanding of employee responsibilities and potential needs. You may already have this step completed (or well underway) if you have conducted a performance appraisal. Indeed, the performance appraisal is the best way to determine employee needs.

In conducting this review, ask the following questions:

- What do employees need to know so that they can do their jobs well?
- In what areas do employees need to improve?
- Are changes happening at your project or in the community that require employees to learn new things?
- What areas of training are employees interested in?

Training Goals & Objectives

Set your priorities

Easy Does It

It's a good idea to limit yourself to two or three training goals, and then link objectives to the goals. It's very possible that you'll have more training needs than you can handle in one year, or that project needs and employee interests are not in synch. This calls for some priority setting. Try this:

- Brainstorm a list of all the things you'd like training for. When brainstorming, don't pass judgment on ideas, just accept them and write them down.

- Start sorting all your ideas into three groups: A (great ideas); B (maybe great ideas); and C (not great ideas). It's the same way we sorted resumes (see page 3.9).

- If you have lots of ideas in the A pile, discard all the B and C ideas. Use the following criteria to select the best ideas:

  – How well would the training fit your project's goals and objectives?

  – How popular is the idea among employees?

  – Is it doable? Is it a realistic possibility?

  – Is it affordable? This is sometimes the same question as above, but not always. Consider the following possible costs: facilitators, space rental, equipment, travel, accommodation, books, tuition, etc.

Goals general, objectives SMART

Remember, goals are general, objectives are **SMART** (specific, measurable, attainable, relevant, timely).

A Tough Call

How do you choose between a training idea that all the employees really want and one that is more directly linked to the strategic plan? All we can say is make your best call. You probably want to stick with project priorities, but keep in mind that the training you offer should respond to employee interests. Training will not be effective if the employees don't buy into it. If employees have been involved in strategic planning, it's more likely that employee interests and project priorities will be a good match.

Training Methods

What kind of training works for you?

The Training Cycle

Training methods come in all shapes and sizes. Don't believe us? Take a look at the next page. How do you choose which one(s) to use?

Ideally, you have training priorities all decided, and you have some funds allocated to training. It becomes a question of matching your needs, your resources, and what's available to you.

Start by considering these questions:

- Who is the training for?
- How much money do we have for training?
- How much time do we have to prepare something?
- Can the training be delivered in-house by staff, or should we bring somebody in?
- How complex is the training topic?
- When can we do it and how much time do we have for it?
- Which training methods do the employees prefer?
- What locations do we have for training?
- What kind of support materials and equipment are needed?

We can't find training in our area! We have no $ for training!

You wanted us to address these issues in this section. Sorry, we can't include a few cheques in the kit, but page 6.7 has a few ideas that could help.

Training Methods

In all shapes and sizes

Here are the main categories of training methods:

Traditional classes
Courses, workshops, or presentations can be an expensive option, but may be worthwhile if there's no one in-house who is able or available to facilitate training.

Self-learning
Self-learning through books, correspondence courses, or computer software programs is good for self-motivated learners. These methods are generally inexpensive and offer the most flexible schedule.

On the job training
On the job training covers a variety of methods that take advantage of existing knowledge among staff. In effect, on the job training is more than a training method; it's a daily commitment to learning. The simplest of these methods is informal **coaching**, otherwise known as hands-on daily supervision. It costs very little and can be very effective, as long as the coach or mentor knows the material and is a good communicator.

Other on the job training methods that are more formalized than coaching include:

- **Job rotation** – employees leave their current job and "rotate" for a set period of time to another position.
- **Job-sharing** – one position is shared by two or more employees.
- **Cross-training** – employees do their own job but are trained in other positions as time allows.
- **Special projects** – employees take on a one-time project in addition to their regular job.

Other Methods (that don't really fit the above categories)

- **Networking** – have staff interact with and learn from other organizations through meetings or other activities.
- **Evaluation and performance appraisal** – these are not actual training methods but they are great learning opportunities when the focus is on learning and improvement, and not on judgment.
- **In-services** – employees make a formal presentation on a topic to other staff.
- **Brown bag sessions** – plan an informal "in-service" over lunch or coffee in which an employee or a visitor offers a short talk or presentation on a particular topic. This is best for shorter topics, or as a quick refresher or follow-up on previous training.

Where to look

A few places to consider when looking for training possibilities:

- Other CAPC/CPNP projects in your region
- Other community organizations
- Local universities or colleges
- The local volunteer centre
- Municipal, provincial, or federal government programs
- Local businesses, service clubs, or Chambers of Commerce

And what about your program participants? Maybe they have something they can teach. YWCA Crabtree Corner in Vancouver, B.C., suggests doing an assets inventory of program participants to identify skills they could share with others.

Facilitating Training Sessions

How adults like to learn

Let's say that you're having a training session on FAS/FAE, for example, and **you** have to facilitate and organize everything!

If you find yourself in this situation, it's good to know the following things about adult learners:

We expect learning to be useful
In grade school, we often learned things just because we were supposed to. As adults, we need a clear motivation to learn, or we probably won't bother.

We have lots of past experience
We process new information based on our own life experience. In some cases, we may have fixed perspectives on certain topics, but on the other hand we bring knowledge that is valuable to share with the other learners.

We want more ownership of the learning process
We want some say in how the training session is organized, and how we learn.

We learn better when we apply what we learn
We like to take concepts and try them out. Listening to a lecture can be okay, but it's not nearly as effective as taking the information and applying it.

Facilitating Training Sessions

Some basic principles

It's good to keep in mind these basic principles of instruction, too:

Focus on learning objectives
Be clear about what is to be learned, and why. Learners need focus and motivation.

Start with the big picture
Summarize the whole task or concept, then break it down, then put it backtogether again.

Start with what learners know
Learning is a matter of making connections to existing knowledge. Starting from what people already know makes learning more effective.

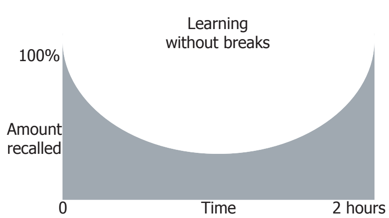
Make learning active
You learn more when you act on your learning. Apply what you've learned, demonstrate it, talk about it, play games with it. There's still a lot of truth to the old saying "practice makes perfect."

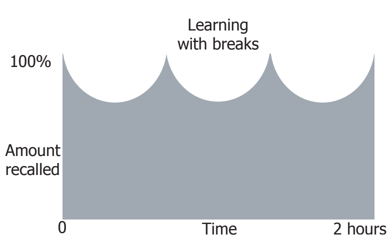
Take different learning styles into account
People learn in different ways, and everyone has a preferred learning style. Some learn best by seeing, others by hearing, others by moving, and still others by combinations of the above. Apply the whole body approach to learning, in which you provide opportunities to see, hear, do, and act (smell and taste, too). This way, everyone gets the chance to learn in the way that suits them best.

Make learning satisfying and motivating
Learning is better when it's fun and people feel good about it. Encourage people and give positive reinforcement.

Breaks are good
There are lots of good reasons to have breaks, but did you know that breaks can actually help learning. Research shows that we learn the most at the beginning and end of a session, and less in the middle. The longer the session, the more our learning level droops. If you have breaks or other ways to break up long sessions, you create more beginnings and ends, and shorter droops in the middle.

Breaks are good





Evaluate The Training

To reflect on the learning

The Training Cycle

The standard way to evaluate a training session is with a **sharing circle** or a **written questionnaire** at the end of the session. Both methods have their advantages:

- In a sharing circle, group members gather in a circle and each person gets the opportunity to speak. A sharing circle can be a more empowering experience, because it gives participants a voice and a greater sense of ownership of the session. As well, some people prefer to give oral feedback instead of written feedback.

- The written questionnaire provides anonymity, and is less threatening to those who may not be comfortable about openly sharing their opinions. Another advantage of the questionnaire is that it's easier to remember people's comments later on if they're on paper.

Perhaps the best approach is to make time for both a sharing circle and a written questionnaire. This offers people two different ways to share their views. They may have some comments they would like to share with the group, but they may have other comments they would like to put on paper just for the facilitator.

Evaluation of a session often falls apart because the participants are tired at the end of a session and don't put much effort into answering the questions. The key is to stick to a schedule and make time for the evaluation, instead of just squeezing it in.

Another good idea is to distribute and review the evaluation questionnaire at the beginning of the session. This way, people have the questions in mind throughout the whole session.

Two Sides of Evaluation

If you read Section 2 of this kit, you may remember our discussion about **process** evaluation and **outcome** evaluation (see page 2.12). Process evaluation of a training session looks at how well the training went and how it can be improved. Outcome evaluation of a training session looks at what and how much participants learned.

Evaluate The Training

To reflect on the learning (cont.)

A chance to say thanks?

Answering process questions may become an exercise in thanking and complimenting the facilitator and not a reflective analysis of the training session.

Evaluating Process

Learning about process can be very helpful for the facilitator. Participants may be able to provide very useful suggestions about how to improve the session for the next time. The basic process questions to ask are:

- What did you like about the session? (Or, what did you like best?)
- What did you not like about the session?
- What suggestions do you have to improve the training for next time?
- What is your overall opinion about how well this session went?
- Do you have any other comments to make about the session?

It may be useful to have subcategories of these questions to inquire about various aspects of the session, i.e., the space, the material covered, the facilitator's "performance," etc. Do this if you want to know specifically about certain aspects of the session. If you use a lot of categories, you may want to have participants answer on a scale of 1 to 5. In general, however, it's best to keep the questionnaire brief.

Evaluating Outcomes

The greatest potential value of an evaluation is on the outcome side. If you set up the questions as part of the learning process, then both facilitator and participants gain directly from it. Facilitators can determine whether their training was effective (as opposed to being merely enjoyable) and participants have an opportunity to reflect on their learning (a critical part of the learning process).

Link the outcome questions to the learning objectives of the session, to assess whether the objectives were achieved. The questions should allow participants to ask themselves "What did I learn today?" The responses will allow facilitators to answer the question "Did we achieve our learning objectives?"

Follow up!

To complete the training cycle

The Training Cycle

Training ends, but learning never stops.

Leading theories of learning suggest that learning is far more effective when you use and apply what you've learned. Getting information at a session and then doing nothing with it is not an effective way to learn.

Hopefully, you've got such a good training plan that the training you get is highly practical, and people have a chance to use it all the time. In reality, it's natural to forget. Furthermore, you don't use some kinds of training very often, and you need a refresher or reminder. CPR training is a perfect example; you are required to do refresher courses to keep your certification. But of course, you hope you never need to use it.

Incorporate Follow-up into The Training Plan

A complete training plan includes follow-up activities. These can be as simple as arranging to get together over coffee to go over the material, or as formalized as arranging another training session. What's important is to think ahead and plan a way to keep the training and the learning alive.

Here's one interesting idea for doing follow-up: During the session, have the participants write themselves a letter that describes how they are going to follow up on the training. The facilitator takes the letters in sealed envelopes and promises to mail them to the participants at a certain date (two weeks later, or whatever makes sense). It's a fun way to remind yourself to follow up on your training.

Training and Turnover

Looking on the bright side

It's a common occurrence…you spend the time training staff and then they take their new skills and go find another job. The effects can be damaging; programs can be left hanging, and connections you've made with the community may start to unravel. It may be enough to make you want to eliminate training altogether.

Of course, eliminating training is not a good option. Perhaps it makes sense to accept that turnover will happen despite all your best efforts, and somehow turn it into a positive. Perhaps…

- You use your commitment to training as a recruitment tool.
- You accept that your project is a stepping stone to other opportunities. When the community recognizes this, you may be able to generate more interest in available positions. As well, this approach may generate partnerships with the employers who benefit from the training you provided to their new employees.
- You make training and development a project goal.
- You adjust your expectations about what outcomes you can achieve with participants.

The employees you train will be more able to make a positive contribution to the community, whether they work at your project or somewhere else. Losing an employee may be difficult for your project, but at least the community stands to gain from the training you provided.

Maybe the best way to think about is:

What great employees they're going to be!
After all, we trained them.

The Partnership Page

Training tips for partnerships

We don't really have a lot to say about training within partnerships, because information from the rest of the section applies to partnerships, too. But there are three things that we can mention:

Watch out for duplication
Are partners doing the same training separately when they could be doing it together? Watch for opportunities to coordinate training opportunities among partners.

Keep training focused
It's quite possible that partners may have a greater number and range of training priorities than a single-agency project. The challenge is to focus training on a manageable number of priority areas.

Consider a focus on team-building
Team-building is important in any project, but perhaps especially so in partnerships, where team-building has to occur on both an individual and an organizational level.

Glossary & References

Coming up in this section...

Section 7 - Glossary & References

Glossary
Definitions of terms used in the kit

References
Sources used in writing the kit

Glossary

From Board of directors to HR

Board of directors (page 2.14)
A group of people who assume legal responsibility to govern an organization.

CAPC – Community Action Program for Children (page 1.1)
A program, delivered through Health Canada regional offices, that funds community groups to establish and deliver services that address the developmental needs of at-risk children (0 – 6 years).

CPNP – Canadian Prenatal Nutrition Program (page 1.1)
A comprehensive community-based program, funded by Health Canada, that supports pregnant women who face conditions of risk that threaten their health and the development of their babies.

Note:

The page numbers indicate where the term in used in the kit.

Delegating (page 5.9)
A management technique in which one employee (usually a manager or supervisor) transfers a task or responsibility to another employee.

Determinants of health (pages 1.5 to 1.7)
A list of 12 factors that have a profound influence on health, developed as part of the population health theory.

Exit interview (page 5.27)
An interview conducted (most often by a supervisor) with a departing employee that provides closure to the employee's working relationship with an organization.

Goals (page 2.4)
In strategic planning, the general, guiding statements that expand on the mission statement.

HR (page 1.1)
An acronym for human resources, a function of management. Human resources concerns the management of people in an organization. The focus of HR in this kit is on managing employees.

Glossary

From HRTS Project to Leadership

HRTS Project (page 1.1)
The Human Resources, Training and Supervision Project, which produced this kit. The HRTS Project was funded by the CAPC/CPNP National Projects Fund, sponsored by The Pas Family Resource Centre, Inc. in The Pas, Man., and supported by numerous CAPC/CPNP projects across Canada.

Health promotion (page 1.5)
A public health philosophy that extends health policy beyond the health care system, advocating for social and political strategies to address health issues. In a health promotion approach, health isn't just a matter of an individual's lifestyle and genetics, it also has a lot to do with the social, economic, and political context surrounding the individual.

Indicators (page 2.13)
In evaluation, the kinds of information or evidence collected to suggest whether change is occurring in relation to objectives.

Job analysis (page 3.4)
A systematic examination of a position in an organization, used to clarify the function, scope, and requirements of the position. Job analysis is usually conducted in order to write a job description.

Job classification (page 3.3)
A definition of the basic relationship between an employer and a worker. For example, workers can be classified as employees (full-time, part-time, etc.) or self-employed individuals.

Job competencies (page 3.4)
The personal qualities, knowledge, skills, education, and experience required for a job.

Job description (page 3.4)
A written, official record for a particular job. Also known as a position description.

Leadership (page 5.4)
The process of directing and supporting a group to achieve a common goal.

Management (page 1.11)
Taking responsibility for making sure an organization does its job as planned, and in doing so accomplishes what it wants to accomplish. The term is sometimes substituted by the term "supervision" in this kit.

Mission statement (page 2.4)
A strategic planning term for a concise expression of an organization's purpose and major activities (what it is and why it exists).

Objectives (page 2.4)
In strategic planning, statements attached to a goal that make the goal's general intentions specific and measurable.

Orientation (page 4.1)
The process of welcoming new employees and supporting their adjustment into their new job.

Organizational culture (page 2.1)
The prevailing traditions, behaviours and values of an organization.

Outcome objectives/evaluation (pages 2.7 & 2.12)
Objectives that express an organization's intent to effect change, to make a difference. Outcome evaluation concerns itself with assessing what changes or benefits resulted from a project's activities.

PATH (page 2.10)
An acronym for Planning Alternative Tomorrows with Hope, a planning tool used commonly among community organizations.

Performance appraisal (page 5.12)
The process used to evaluate, manage and direct employee performance. Also known as staff evaluation.

Performance standards (page 3.4)
A description of the minimum expectations of performance for a certain job.

Perks (page 3.15)
An informal term for optional benefits offered to employees by employers, such as extended health plans, extra vacation time and other incentives.

Personnel policy (page 5.10)
An organization's guidelines and rules regarding the management and treatment of employees.

Population health (page 1.5)
In Health Canada's definition, an approach that aims to improve health of the entire population and reduce health inequities among population groups. Health Canada's approach recognizes and acts on 12 factors (called the determinants of health) that have a strong influence on health.

Priority groups (page 1.8)
This term is used in the kit to describe groups of people who CAPC/CPNP projects intend to serve. For example, families with lower incomes who have children age 0–6 is a common CAPC/CPNP priority group.

Process objectives/evaluation (pages 2.7 & 2.12)
Objectives that express an organization's intent to carry out planned activities. Process evaluation concerns itself with assessing an organization's success in implementing activities it planned in the manner it expected.

Project logic model (page 2.13)
A planning tool used to describe an organization's activities in relation to on organization's mission, goals, and objectives. Also referred to by the acronym PLM.

Reflective practice (page 5.6)
A structured process of analyzing one's daily work experiences in order to learn and grow from them.

Risk management (page 3.16)
Activities that reduce an organization's liability. In this kit, risk management refers to potential liabilities related to the hiring process.

Glossary

From SWOT analysis to Vision statement

SWOT analysis (page 2.6)
An organizational planning tool. SWOT is an acronym for strengths, weaknesses, opportunities and threats.

Secondment (page 3.3)
A staffing arrangement in which one organization "lends" an employee to another organization.

Strategic planning (page 2.1)
A process for developing the overall guiding policy and focus of an organization.

Supervision (page 5.1)
The ongoing direction and support that managers provide to employees. This term is sometimes used in place of the term "management" and vice versa.

360 Performance Appraisal (page 5.17)
An approach to employee performance appraisal involving peer evaluation and self-evaluation.

Values statement (page 2.4)
A strategic planning term for a statement of the values that guide the way an organization operates, such as moral values, community development values, etc.

Vision statement (page 2.4)
A strategic planning term for a compelling description of how the world would look if an organization were accomplishing its mission. The intention of a vision statement is to provide an organization with a motivating description of what it wants to achieve over the longer term.

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Numerous sources were used to inform the writing of this kit. In this section is a list of the written sources, organized according to the section and pages where they were used.

Of all the written sources cited in this section, six were particularly useful:

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Perhaps the most valuable source of information was not a written source, but rather the collective experience and wisdom of the members of the HRTS Project Advisory Committee and the Peer Review Sites. These contributors reviewed three drafts of the kit and offered numerous useful suggestions for improving the kit's content and presentation. They are listed on the Acknowledgements page in the front of the kit.

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