3. Managing People and their Work

A fundamental of good management is that all employees know what to do, how well they are performing and what they need to learn in order to do a better job. Setting clear performance targets and expectations, ensuring employees get objective feedback on their performance and have a personal development plan, will drive more effective individual behaviour and enhance organization performance.

Building workplace relationships supports commitment by staff to the organization and to their work. These Standards will help to build a work environment that encourages individual excellence and satisfaction balanced with the needs of the organization.

Standard 3.1  All new employees are oriented to the position and to the organization.

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| Orientation may include information on:  
  - HR management policies  
  - Employee benefits and any documentation explaining benefits  
  - The organization’s mission  
  - The governing, management & reporting structures  
  - The funding structure  
  - The organization’s programs and services  
  - Expectations of the position over 3 months, 6 months and 1 year  
  - Resources available to support the position  
  - Respective roles and responsibilities of volunteers and staff | Appropriate orientation begins at the very beginning of an employee’s employment. Being properly oriented has shown to enhance the early and ultimate performance levels of new hires as well as build commitment to the position and to the organization.  
  
  Orientation is a process rather than an activity; depending on the position, orienting a new employee may take up to a year. | Information on orientation processes is available at:  
  www.hrcouncil.ca/hr-toolkit/right-people-orientation.cfm  
  Templates are available at:  
  http://www.hrcouncil.ca/hr-toolkit/resources-overview.cfm  
  • Orientation Checklist |
Making the transition in your career to managing and supervising others includes learning a new set of skills. These skills can include:

- Motivating and engaging others
- Working with employees to set goals
- Conducting performance reviews
- Management and delegation of work

It is important to ensure that all managers have the opportunity to develop the new skills required to manage others.

### Standard 3.2
Managers and supervisors with the responsibility for managing the efforts of others are provided with appropriate learning opportunities to develop their supervisory skills.

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<td>Making the transition in your career to managing and supervising others includes learning a new set of skills.</td>
<td>Learning may include a variety of options including coaching, mentoring, job shadowing etc. as well as structured training sessions.</td>
<td>Information on the roles and functions of managers and supervisors is available at: <a href="http://www.hrcouncil.ca/hr-toolkit/keeping-people-supervision.cfm">www.hrcouncil.ca/hr-toolkit/keeping-people-supervision.cfm</a></td>
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### Standard 3.3
All employees have a work plan and performance objectives that identify the tasks/activities and expected results for future performance.

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<td>The work plan or performance objectives (usually annual) reflect the organization’s strategic direction, business plans, and/or annual plans. The work plan/performance objectives are written documents jointly prepared by the employee and their supervisor.</td>
<td>Creating work plans/performance objectives is a joint responsibility of both the employee and his/her supervisor. Supervisors have final approval to ensure work plans/performance objectives are integrated across the organization and support the overall goals of the organization. Work plans/performance objectives can include individual development activities that support the organization’s goals. The supervisor needs to ensure that the work plan is achievable given the time assigned to the position and the skills of the individual.</td>
<td>Information on strategic and operational HR planning, succession planning and risk management is available at: <a href="http://www.hrcouncil.ca/hr-toolkit/planning-overview.cfm">www.hrcouncil.ca/hr-toolkit/planning-overview.cfm</a> Templates are available at: <a href="http://www.hrcouncil.ca/hr-toolkit/resources-resources.cfm">www.hrcouncil.ca/hr-toolkit/resources-resources.cfm</a></td>
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- Work Plan Template 1
- Work Plan Template 2
Performance management is a continuous process of planning, monitoring and reviewing employee performance.

An effective performance management system will:
- Assessing the employee’s contribution to the operational and strategic plan of the organization
- Encouraging performance excellence
- Identifying and addressing areas for improvement in performance
- Identifying personal and professional development needs
- Consideration for promotion or other work assignments
- Identifying work and career goals
- Consideration for compensation increases

Performance reviews are systematic; based on current job descriptions and work plans.

The performance review process and evaluation criteria are established prior to any assessment and will be known to both supervisor and employee.

The performance review results in a written document that has been reviewed and signed by both the employee and his/her supervisor; the written document is filed in the employee’s confidential personnel file.

Managers and supervisors responsible for assessing the work of others are provided with an orientation to conducting performance management reviews.

Performance management is an on-going process guided by principles of positive employee relations. Performance reviews are intended to give employees clear feedback on their performance.

Performance reviews are intended to solve performance problems early before the staff member’s performance impacts negatively on the organization as a whole and/or the individual’s continued employment.

If the workplace is unionized, performance management processes may need to be negotiated with the union.

Refer to the following Standards:
- Standard 2.1
- Standard 3.2
- Standard 5.1

Information on performance management systems and processes is available at:
www.hrcouncil.ca/hr-toolkit/keeping-people-performance-management.cfm

Templates are available at:
www.hrcouncil.ca/hr-toolkit/resources-resources.cfm
- Performance Management Form Template
Clear expectation, appropriate supervision and feedback on a day-to-day basis are the best ways to avoid employee performance issues or concerns. However, despite our best intentions performance issues or concerns will arise. It is therefore important to have a process in place that deals with these situations.

An effective process will also make any necessary termination more defensible if termination is necessary and the situation is taken to court.

Identifying the issue or concern with the employee is a good first step. Discuss how the performance could be improved and agree upon timelines for improvement. Resolving the issue or concern may involve for example coaching or training.

Refer to Standard 5.1

There may be times however when the employee continues to demonstrate unsatisfactory performance or problem behaviour.

An approach to discipline should be set out in a policy rather than determined after an incident has occurred.

Termination may be considered. Often this course of action isn’t considered unless all reasonable efforts have been made to support the employee’s efforts to address the problem areas.

Employers have a basic right to terminate the employment of an employee, but along with that right comes responsibilities. Employers must comply with the employment/labour standards and human rights legislation for their jurisdiction and beyond that, employers must treat employees fairly and in good faith as defined by common law or civil law (Quebec).

Refer to Standard 1.2

Information on supervision, discipline and termination are available at: www.hrcouncil.ca/hr-toolkit/keeping-people-overview.cfm
The organization develops a compensation strategy that supports the work culture they are trying to create. The compensation strategy should be rooted in the principles of external and internal equity.

Compensation is not just the direct amount of money paid to an employee. It also involves non-financial rewards and benefits.

Creating a strong compensation strategy means an organization will likely use job evaluation and benchmarking.

The salary range or wage rate for a position is reviewed whenever there are significant changes to position responsibilities. However, all salary ranges and wage rates will be reviewed and updated at a minimum of once every two years.

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| The organization develops a compensation strategy that supports the work culture they are trying to create. The compensation strategy should be rooted in the principles of external and internal equity. | Depending on the organization’s strategic direction as well as local labour market conditions, the benchmark for a competitive compensation package may include references to salary ranges or wage rates of comparable positions in:  
- Other organizations in the nonprofit sector  
- The public sector and/or  
- The private sector | Information on compensation and benefits are available at:  
www.hrcouncil.ca/hr-toolkit/planning-compensation.cfm |
| Compensation is not just the direct amount of money paid to an employee. It also involves non-financial rewards and benefits. | Cash compensation is only one element in an equitable and competitive work environment. Organizations can provide a range of other benefits that can supplement cash compensation. Health benefits, pension, vacation, access to learning opportunities or other benefits (such as hours of work per week, ‘family days’, flex time, etc.), should be considered when designing the overall compensation package. | Examples of transparent processes for compensation for fundraising positions include Imagine Canada's Ethical Fundraising and Financial Accountability Code  
and The Ethical Principles (Compensation & Contracts) adopted by the Association of Fundraising Professionals  
www.afpnet.org/ka/ka-3.cfm?content_item_id=1068&folder_id=897 |