Human Resource Handbook:

A Guide for Not-for-profit Organisations

**Produced by Volunteering WA, 2016**

This document has been developed by Volunteering WA as an example of HR Procedures suitable for not-for-profit organisations. Please adapt as appropriate for your organisation. It is designed to provide guidance in good faith without accepting liability and is not intended to be legally comprehensive.

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# General Conditions of Service for Employees and Volunteers

##  Code of Conduct

This organisation is a professional organisation with high standards and expects that all staff will adhere to behaviours that exemplify these standards. This section describes the behaviours and standards which all staff are expected to apply in order to uphold the mission and values of the organisation.

This section applies to **both** paid employees and volunteers and it is supported by detailed procedures and processes where applicable.

### Conduct and Behaviour

The organisation expects that paid employees and volunteers will behave in a professional manner which upholds the standards and values of the organisation. Staff, both paid and volunteer, will treat others with respect and courtesy at all times, reflecting the objectives of both the organisation’s policy and government legislation with regard to access, inclusion and equal opportunity employment.

Staff are expected to behave with integrity in their dealings with others, providing support and assistance to their co-workers and to individuals and organisations to whom they provide services or information.

Harassment and bullying are not tolerated in the organisation’s workplace or in any venue where its services are delivered. All staff share responsibility for ensuring that the organisation’s workplace is free from bullying and harassment and that the appropriate processes are used to deal with any incidents that may arise. Disciplinary action or termination may result from inappropriate behaviour.

### Community Care Obligations

The organisation has a responsibility to the community to provide services which are sensitive to the needs of the community and the individuals within it. During the course of their work, the organisation’s staff will come into contact with children and vulnerable members of the community and have a clear duty to protect the rights, safety, financial security and the well-being of these individuals.

To support these responsibilities the organisation’s requires that paid employees and volunteers, including the Board of Directors, have a *Police Clearance* and in some circumstances a *Working with Children Clearance*

A paid employee or volunteer will advise the Chief Executive Officer immediately if any Authority commences proceedings that may result in either the *Police Clearance* or *Working with Children Clearance* being negated.

The organisation will advise paid employees and volunteers of the procedures required to apply for the identified clearance/s and will meet the normal costs associated with obtaining the required clearance/s. The organisation retains the right to require paid employees and volunteer members to renew the required clearance/s every two to three years.

### Privacy & Confidentiality

All staff are required to maintain the confidentiality of all personal and corporate information which they may have access to during their time at the organisation. This information is only for use in the course of your duties at this organisation, and may not be used for other purposes.

Staff must also respect the privacy of individuals who are registered with the organisation and should not use or disclose personal details except when expressly authorised by the organisation. This includes disclosure to any other employee not authorised to receive such information.

Except when expressly authorised by the organisation, a staff member will not:

* Directly or indirectly reveal, or cause to be revealed, to any third party any confidential dealings, finances, transactions or affairs of the organisation or any of its clients which may come to their knowledge during their period of employment.
* Use for their own benefit or gain or that of any other person, firm or company, any confidential information belonging to the organisation.

A staff member’s obligation in these matters continues to apply after the termination of employment without limits in time.

### Intellectual Property

Any changes, innovations and ideas initiated by staff members in the course of employment with the organisation will belong to the organisation and staff must do everything necessary to completely vest ownership of such matters in the organisation.

All records, documents and other papers or electronic images, together with any copies or extracts thereof, made or acquired by staff members in the course of their employment with the organisation must be returned to the organisation on demand or otherwise no later than upon the termination of employment.

A staff member’s obligation in these matters continues to apply after the termination of employment without limits in time.

### Equal Opportunity Employment

The organisation recognises that people are its most important resource and is committed to equal employment opportunity for all staff members. It supports the objectives of the *Western Australian Equal Employment* *Opportunity Act* (1985) and all the organisation’s employees and volunteers are also expected to support these objectives in their behaviour and conduct in the organisation.

### Dress Code

Both paid employees and volunteers are required to demonstrate a neat and presentable standard of dress. Jeans or casual wear are not considered appropriate unless worn for a specific reason or on a defined “casual attire” or charity day.

Management reserves the right to raise the issue of dress with individual paid employees and volunteers when considered necessary.

### Drugs and Alcohol in the Workplace

The organisation is committed to providing staff and visitors with a smoke, drug and alcohol free work place during designated work hours and similar commitment and cooperation is required from staff members. Alcohol is permitted to be served at designated staff and the organisation’s social occasions.

The unlawful distribution, dispensation, possession or use of a controlled substance in the organisation’s offices or shared spaces is prohibited.

The Chief Executive Officer must be notified immediately if a staff member is:

* Convicted of a drug or alcohol violation arising out of conduct occurring in the workplace
* Fined, or has their license suspended while driving an organisation vehicle under the influence of alcohol or other intoxicants.

Any staff member who violates this policy will be subject to discipline up to and including termination.

### Presentations and Gifts

Employees and volunteers may on occasion receive presentations and gifts in recognition of services provided by the organisation’s.

The Chief Executive Officer must be advised when this occurs and a decision will be advised with regard to the future of the presentation or gift.

### Office and Administrative Procedures

General office and administrative procedures are detailed in the *Administrative Procedures* *Handbook*. All employees and volunteers **must** familiarize themselves with these procedures where applicable to their duties.

## Insurance

All volunteers and paid employees will be covered by the insurance policies of the organisation as shown below.

Employees and volunteers: The organisation’s Public Liability insurance.

Volunteers: Personal Accident insurance

Employees: Workers Compensation Insurance

Volunteers and paid employees can request to see a copy of the organisation’s insurance policy.

Paid employees and volunteers are advised to check with their own insurance company that their comprehensive cover for loss/damage to their own vehicle includes cover while driving to and from the place of volunteer work or work (as appropriate).

For insurance cover when using the organisation’s cars please see position title.

## Internet and Email Access

The primary purpose for access to the internet and email is to assist the organisation’s staff carry out their duties of employment. Staff and volunteers may use the internet and email access provided by the organisation for any work-related purpose. Limited personal use is permitted as described below and staff are also required to comply with the Unacceptable Use restrictions at all times.

### Personal Use

Limited personal use is permitted, provided that it is outside of normal working hours, or that staff adjust their hours worked for that day to make up the time spent using the internet. Limited personal use may include access to social networking media, travel or other personal arrangements provided that it:

* Is infrequent and brief
* Does not interfere with the duties of the employee, work colleagues or with the operation of the organisation
* Does not compromise the security of the organisation’s system or impact on the organisation’s electronic storage capacity or network performance
* Does not incur any additional expense for the organisation
* Does not violate any laws
* Does not compromise any confidentiality requirements of the organisation

### Unacceptable Use

A staff member may not use the internet or email (including internal email access) provided by the organisation to:

* Conduct a business
* Create or exchange messages that are discriminatory, offensive, harassing, bullying, obscene or threatening
* Knowingly visit websites containing illegal, objectionable (including pornographic), or criminal material
* Create, store or exchange information in violation of copyright laws including the uploading or downloading of commercial software, games, music or movies.
* Use internet-enabling activities such as gambling, gaming or conducting illegal activities.
* Create or exchange advertisements, solicitations, chain letters and other unsolicited or bulk email

### Permitted Extended Personal Use

It is recognised that there may be times when a staff member requires the internet or email for extended personal use that may be indirectly related to work. For example when a staff member needs to use the internet to access material related to study they are undertaking.

In these circumstances it is expected that the staff member will advise and negotiate usage with the Chief Executive Officer or their Senior Manager

## Telephones

### General

In many instances the telephone is the first contact made with clients and it is important that telephones are answered promptly, politely and in an efficient manner. All messages received must be emailed immediately to the person concerned. The telephone night switch is to be turned on prior to the office being closed. Telephone procedures are included in the Administrative Procedures Handbook and the telephone instruction booklet.

### Personal Mobile Phone Use

When using personal mobile phones in the office, staff members are requested to ensure that calls, texts and any other mobile phone usage are of a short duration and the ring tones are at a level that does not adversely impact on the working environment.

Staff members are asked to exercise professionalism and courtesy during defined work time and to restrict external phone calls and limit incoming calls.

### Personal Use of Work Telephones

Limited personal use of work telephones is permitted when it is infrequent, brief and does not interfere with the duties of the employee or work colleagues or interfere with the operation of the organisation.

Without the approval of the position title, personal regional intrastate, interstate or international calls may not be made using the organisation telephones.

## Vehicles

The organisation operates a fleet of xx vehicles, xx of which are pool vehicles. Pool vehicles are available when staff members are required to travel on behalf of the organisation.

Detailed procedures for the use of the organisation’s vehicles are contained in the *Administrative Procedures Handbook* and staff **must** familiarise themselves with the procedures before operating a corporate vehicle.

## Travel

Insert information on travel procedures such as: request to travel, approval requirements, expenses and reimbursements.

## Internal Grievance Resolution

If any volunteers or employees feel they have cause for complaint regarding their treatment within the organisation, they may seek resolution via the formal grievance process. Every effort should be made to solve problems cooperatively and informally before escalating them to a Senior Manager.

All formal avenues for handling of grievances will be fully documented and the employee’s (or volunteer’s) wishes will be taken into account in the determination of appropriate steps and actions. All complaints will receive thoughtful consideration in a timely manner and will be discussed with the individual who raised them. Discussions held are confidential.

Staff and volunteers are assured they will not be disadvantaged by the use of these procedures whether decisions are found for or against their grievance.

The following process is recommended should a staff member (whether an employee or a volunteer) have a grievance. At any stage the individual may also seek any outside assistance if they wish

### Grievance and Appeal Process

| **Trigger** | **Action** | **Responsibility** |
| --- | --- | --- |
| Employee or volunteer is unable to resolve an issue or grievance informally, or would like assistance/support in order to resolve it. | Staff member to discuss with Senior Manager. This may be either their own or another Senior Manager or the CEO depending on the circumstances.The content of this discussion is confidential however there will be a record that a discussion has occurred in relation to a grievance. | Staff member to raise the issue |
| Initial discussion results in agreement that the Senior Manager will seek to resolve the issue. | Senior Manager to undertake issue resolution, taking into account both the views of the employee and the well-being of the organisation.Senior manager to record a brief description of the action they have or will take.  | Senior Manager |
| Issue is resolved satisfactorily | Senior Manager to note for the record that the grievance has been resolved. | Senior Manager |
| Issue is not resolved to the satisfaction of the staff member | Employee or volunteer to make a formal, written complaint to the CEO or, if appropriate, the Board of Directors. | Staff member |
| Formal complaint received | Determination to be made and advised in writing to the individual within 14 days.If applicable the decision will be in line with the relevant Acts of Parliament and Award, contract of employment. | CEO or Board of Directors, as applicable |
| Formal resolution is not satisfactory to the employee | If a paid employee is not satisfied with the decision of the CEO or Board of Directors, they may consult with the relevant union | Employee |

# General Procedures

## Work Health and Safety

### Safety in the Workplace

Workplace health and safety is important in ensuring the work place environment is both safe and encourages sound health practices. The organisation is committed to ensuring a healthy and safe work place for staff, volunteers, visitors and contractors. All staff members and volunteers are encouraged to regard accident prevention as a collective and individual responsibility.

Should a safety hazard or incident be identified it is imperative that the problem be reported immediately to the position title to enable immediate action to be taken.

Care should be taken to ensure that, where a professional service is required, no action is taken that may endanger the health or safety of a person. All persons present at the time are required to obey all reasonable instructions aimed at protecting their health and safety.

Should an accident or injury occur it must be immediately reported to the position title who will ensure that appropriate action is taken. The organisation’s *Incident Report* *Form,* found at *<insert location of form>* is to be completed and filed by *position title* along with any accompanying documentation.

If an illness requires medical attention suitable arrangements will be made to provide transport to either a doctor or hospital. Any staff member who has a medical issue which may require urgent medical treatment should make their Manager aware of the possible action required.

### First Aid

The organisation encourages staff members to hold a current first aid certificate. On request the position title will arrange for staff members to attend an appropriate first aid course.

### Emergency Procedures

Emergency procedures for the office/location are clearly outlined in the emergency procedures booklet held *<insert location of emergency procedures>*. It is imperative that all staff members are familiar with this document and concerns should be raised immediately with the warden. No staff member is exempt from taking part in organised emergency activities.

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### Professional Support Services

The organisation has arrangements with a private provider to provide counselling services to staff members as required. Up to two counselling sessions will be provided to each staff member.

### Children in the Workplace

The organisation provides a caring work environment for all staff and is supportive of family values but it is not considered appropriate for children to be in the work place for an extended period of time. In exceptional circumstances the Chief Executive Officer may determine if it is appropriate to waiver this policy.

## Communications

### Promotional Material

All promotional material is to be approved by the Chief Executive Officer to ensure that the design and content are consistent with the organisation’s publications.

### Media Contact

The Chief Executive Officer has sole responsibility of determining what media interviews and other promotional opportunities are undertaken on behalf of the organisation.

Should a staff member be approached with a media or promotional opportunity they should immediately advise the position title to determine if the request is appropriate and who should speak on behalf of the organisation. Should the position title not be available the Senior Managers have the delegated authority to determine urgent requests.

### Press Releases

All draft press releases must be submitted to the position title for approval prior to release. Should the position title not be available the Senior Managers have the delegated authority to approve urgent press releases.

### Social Media

Social media and external communications will be timely, relevant and appropriate to the business, image and reputation of the organisation. All postings on social media will be considered as public comment. Staff will ensure that postings are not discriminatory, offensive, inappropriate or liable to bring the organisation into disrepute. All employees and volunteers of the organisation have responsibility to ensure that social media content is aligned with the values and policy of the organisation

* Consent will be obtained in writing prior to posting images of individuals, either from the individual or from parent/guardian when the person is under the age of 18.
* Any information or image/s of a person will be removed on request by the person or their parent/guardian.
* Only staff authorised by the CEO will post to social media platforms.
* Breaches of policy may trigger disciplinary action. Staff should be aware that cyber bullying may, under certain circumstances, be considered a criminal offence.
* Any postings that are, or appear to be in conflict with this policy or with the values of the organisation should be brought to the attention of the Chief Executive Officer or a Senior Manager as soon as possible

### Managing Client Feedback

From time to time, clients may feel unhappy with their situation and although this may sometimes be caused by external factors, staff and volunteers are encouraged to assist and support their clients at all times. When clients have a complaint or other issue, use the four steps shown below to help in managing the situation.

**Four steps to managing client feedback**

1. **Listen:** Listen to their story without interruption. To show that you understand their problem, it may be helpful to repeat their issue back to them in your own words.
2. **Apologise:** Acknowledge their issue and apologise for the inconvenience. Don’t be defensive, don’t over explain and don’t assign any blame to the client or other staff. Thank them for their feedback.
3. **Take action:** Tell the client what you are going to do about it to fix the situation for them, or to ensure it doesn’t happen again. Take their details, so that they can be contacted later if appropriate (eg: for an apology letter).
4. **Follow Up:** Make sure that the action you have promised the customer is completed.

## Management Reporting Requirements

The organisation has a range of formal reporting mechanisms which are described below.

### Staff Meetings

Insert details of staff meetings, for example

* frequency of meetings
* attendees
* agenda preparation – who, when, how to add agenda items
* if required to provide update on own work

### Conference and Training Reports

*Insert details of feedback/reporting requirements for attendance at external events, for example:*

* *Staff member is required to prepare a report within 14 days of returning from the conference.*
* *Staff should circulate/share any learning they gain from any training or other sessions that they attend. This may be done informally in person, or by email or via a written report*.

### Senior Manager Reporting Requirements

*<Insert details>*

### Board Reports

*<Insert details>*

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### Annual Reports

*<Insert details>*

# Volunteers Conditions and Procedures

## Introduction

Volunteers are valued members of the organisation’s team and we are committed to providing a supportive and rewarding workplace for both paid employees and volunteers.

This section describes the HR procedures applying to volunteer staff and our volunteers are required to comply with these.

## Volunteer Recruitment and Induction

Volunteers will be recruited based on suitability for the position, and in line with the organisation’s recruitment and appointment procedures.

Volunteers will be provided with a job description and orientation is provided to all first time the organisation’s volunteers and is aimed at introducing them to the organization and to the policies and procedures governing work practices at the organisation.

During this session the emergency procedures will be explained and volunteers taken on a guided tour showing them the layout of the premises areas including the kitchen, the toilets and the fire extinguisher location. Volunteers will also be introduced to other staff including the fire warden and first aid officers.

## Attendance & Leave

#### Hours of Duty

The organisation offers a flexible working environment for both employees and volunteers and endeavours to accommodate individual requirements. The core hours of operation are *<Insert details>*

#### Work Breaks

The organisation recognises the importance of staff well-being and encourages paid employees and volunteers to work no more than 5 hours without a break. Lunch breaks should be at least 30 minutes.

#### Absence

If for any reason you are running late or unable to come in for an agreed shift, please inform your manager at the earliest possible opportunity. This will enable us to make suitable arrangements to cover your work load on that particular day.

#### Taking leave

* The organisation observes all gazetted Western Australian public holidays. Unless otherwise agreed volunteers are expected to take public holidays as they occur.

Volunteers are entitled to take leave on request and should notify *<Insert position title>*

* If the period of leave is more than a few days, you are asked to give *reasonable* notice to enable them to make arrangements to cover your workload.
* If you need to take unplanned leave, notify the position title as soon as possible. We request that you keep in regular contact with the position titleduring extended leave so rosters and workload can be managed.

#### Time Keeping & Reimbursement

Insert details of the timesheet requirements if applicable. Eg: weekly/fortnightly/monthly and any approval or sign off requirements. Include reimbursement procedures if applicable.

## Ongoing Support & Development

The Volunteer will be provided with ongoing support and supervision. Volunteers are designated a Manager dependent on their role and tasks undertaken.

#### Annual Review

An annual interview will be held to review performance and determine further training requirements or opportunities.

#### Review of Volunteer Job Description

Job description forms may reviewed during the volunteer’s annual review.

#### Identified Education and Training Requirements

The organisation encourages its volunteers to enhance their knowledge of matters relating to their volunteering position. Should training needs be identified during the Annual Review or a volunteer identify an appropriate course or event, consideration will be given as to what level of support may be provided by the organisation.

## Termination of Service

#### Termination by Volunteer

Should a volunteer wish to resign from their role they are asked to give the organisation reasonable notice. The volunteer will be paid any outstanding reimbursements due and property of the organisation must be returned prior to leaving the organisation.

When a volunteer terminates their engagement with the organisation an exit interview will be conducted. A record of the interview will be retained.

Our wish is to obtain information that may help to:

* Establish the reasons for leaving.
* Analyse any trends in the reason for leaving.
* Gain constructive feedback on the volunteer’s position and their time at the organisation.

#### Termination by The Organisation

The organisation reserves the right to terminate volunteer services in the event that the volunteer is no longer required for reasons such as:

* The volunteer is considered not suitable for the position offered
* The workload changes such that the volunteer is no longer required
* The workload changes such that the volunteer does not have suitable skills for the work available.

#### Termination due to Misconduct

The organisation may terminate a volunteer in the event of misconduct. Misconduct includes breaches of any the organisation’s policies which warrant instant dismissal and includes serious misconduct as defined in the *Fair Work Act (Cwlth) 2009*.

Examples of misconduct include:

* Theft of property or funds from the organisation
* Wilful damage to the organisation property
* Intoxication through alcohol or other prohibited substance whilst volunteering
* Verbal or physical harassment of any other employee, volunteer, board member or any other person particularly in respect of race, sex or religion
* Disclosure of confidential information regarding the organisation to any other party without prior permission from a position title
* Falsification of any of the organisation’s records for personal gain or on behalf of any other employee/volunteer
* Unwillingness or inability to support and further the mission of the organisation and/or the objectives of the programme.

Immediate dismissal would only take place in the most serious of circumstances, and in these instances:

* The Volunteer’s Manager/ position title would jointly advise the volunteer.
* The volunteer may wish to include the presence of a support person of their choosing.
* A written report is to be supplied to position title.
* A copy of the report is kept on the volunteer’s file securely.
* All property of the organisation must be returned.

# Paid Employees Conditions and Procedures

## Introduction

The procedures outlined in this section apply to all paid employees of the organisation and employees are expected to comply with these at all times.

These procedures are intended to be applied to the extent permitted by law.

## Recruitment and Induction of Paid Employees

Recruitment of paid employees is the responsibility of position title, who is appointed by the Board of Directors. All recruitment activities will align with the procedures outlined in the Administrative Procedures Handbook.

New employees will receive induction and orientation on commencement which is designed to introduce them to the organisation and to the policies and procedures governing work practices at the organisation. Staff are also encouraged to familiarise themselves with the information provided via the organisation’s website.

Employees will be given a job description and an overview of the probation and performance management processes to ensure they understand their role in those processes. Employees are expected to be proactive in seeking any information, clarification or guidance they may need during the induction and probation period.

## Employment of Short Term Contract Staff or Consultants

If your organisation employs contract staff or consultants, insert a brief description of the employment terms here.

## Timekeeping and Hours of Duty

#### Hours of Duty

The core hours of operation are insert details.

Individual contracts of employment will state the hours of duty per week to be worked by individual paid employees. It is expected that, unless otherwise agreed, hours of work will be completed during the organisation’s core hours of operation.

#### Time keeping

Insert details of the timesheet requirements if applicable. Eg: weekly/fortnightly/monthly and any approval or sign off requirements

#### Work Breaks

The organisation recognises the importance of staff well-being and encourages paid employees and volunteers to work no more than 5 hours without a break. Lunch breaks should be at least 30 minutes in length.

#### Absent without Authority

Should a paid employee be absent from or late for work they must phone *<your manager>* within XX minutes of their regular commencement time to advise the reason for their absence.

#### Time in Lieu

<Insert details if applicable>

#### Flexi Time

<Insert details if applicable>

## Probation Period

As a condition of employment all the organisation’s staff will be subject to probationary period of four months for long term employees. Short term or casual employees should see their contract for any probationary conditions

During the probationary period the staff member or the organisation may terminate a contract of employment by giving one working week notice or by the forfeiture or payment, as the case may be, of one week’s pay in lieu of notice.

The probation period may be extended but will not exceed six months in total.

#### Probation & Review Process

| **Step** | **Trigger** | **Action** | **Responsibility** |
| --- | --- | --- | --- |
| 1 | Employee commences | Employee to be provided with access to:* Position description
* HR Procedures handbook
* Administrative Procedures handbook
 | Senior Manager |
| 2 |  | Probation Review scheduled for 2 months after commencement | Senior Manager |
| 3 | First Probation Review (2 months) | Senior Manager and employee meet to assess performance to date.Review will consider:* Effectiveness and appropriateness of training and induction provided
* Employee performance against position description
* Employee performance against Code of Conduct
* Other factors which may have an impact on employee performance

Review outcomes will be documented.Note that both the employee and the Senior Manager should prepare for the Probation Review Meeting to ensure that the discussion is both focused and useful. | Senior Manager & Employee |
| 4 | Probationer’s performance is satisfactory | A successful Probation report is recorded.Final Probation Review is scheduled for the completion of the probation period.  | Senior Manager |
| 5 | Probationer’s performance is **not** satisfactory | Probationer is given a clear understanding of: * the areas for improvement,
* the expected behaviour or standards,
* a timeframe for improvement and
* the possible consequences of continued poor performance, including extension of probation and possible termination of employment.

The outcomes of the review are documented and provided in writing to the employee.Second Probation Review is scheduled to occur in two months. | Senior Manager |
| 6 |  Probation Review (4 months) | Senior Manager and employee meet to assess performance to date as per 2 month review. If the probationer had an unsatisfactory assessment at the 2 monthly review, the assessment will include the performance improvement outcomes documented at that review. | Senior Manager & Employee |
| 7 | Probationer’s performance is satisfactory | The probation period is completed, and the employment will continue until the expiry date of the staff member’s contract, unless terminated for other causes. |  |
| 8 | Probationer’s performance is **not** satisfactory | Probation may be extended by a further 2 months (to a maximum period of 6 months probation). S*ee step 9***OR**Employment may be terminated with one week’s notice or payment in lieu.  | Senior Manager |
| 9 | Probation is extended | If probation is extended, Steps 5 to 8 are repeated, with a final Probation Review scheduled to occur after 6 months employment. If the employee’s performance is unsatisfactory after 6 months probation, then employment **will** be terminated. |  |

## Performance Agreement

#### Annual Performance Agreement and Mid-Year Performance Review

Following successful completion of probation, <two> formal review processes will be undertaken annually with each employee:

<Insert details of frequency of review>

#### Annual Performance Agreement and Mid-Year Performance Process

| **Event** | **Description** | **Responsibility** |
| --- | --- | --- |
| Mid year Performance Review Scheduled**Or**Annual Performance Review scheduled | * Meeting time and venue booked.
* Two weeks notice of the meeting provided to employee.
* Employee provided with *Mid-Year Performance Review Form* or *Annual Performance Review Form*

  | Senior Manager |
| Preparation for review meeting | Complete *Mid-Year Performance Review Form* or *Annual Performance Agreement Form* as applicable | Employee  |
| Performance Review meeting | Employee and Senior Manager to:* Review the job description and update as needed
* Identify achievements (past 6 months)
* Discuss goals, career opportunities and aspirations
* Identify training or development needs and/or opportunities
* Discuss overall performance of the employee

**And**, for an Annual Performance Review:* Review the Performance Agreement as needed.
 | Senior ManagerEmployee |
| Meeting Outcomes – performance satisfactory | * Provide a brief summary of the discussion, and any agreed actions or outcomes.
* Update the Performance Agreement as needed
 | Senior Manager |
| Meeting Outcomes – performance **not** satisfactory | Refer to the Performance Management Process below | Senior Manager |

## Performance Management

### Performance Management Process

Performance issues arising during an employee’s probation will be addressed during the probation period as outlined in section 4.1.4. After the employee’s appointment has been confirmed, the following procedures will apply for any performance issues which do not involve serious misconduct.

#### Performance Management Process

| **Trigger** | **Action** | **Description** |
| --- | --- | --- |
| Performance issue identified | Verbal warning by Senior ManagerWarning to be recorded by Senior Manager | Senior Manager to discuss performance issue and suggest ways for improvement.Employee to be advised that if poor performance continues, there will be a formal warning and performance monitoring will be undertaken. |
| Performance issue continues for one month or more after verbal warning | First formal warning: Senior Manager, CEO and employee meeting. | One week’s notice of meeting to be provided.Employee may have support person present.Meeting to be documented including the agreed performance improvement strategy or plan and timeframes for improvement. |
| Performance management monitoring | Senior Manager to monitor employee performance | In accordance with the outcome of the formal warning. |
| Performance Monitoring period ends: Performance improvement **OR** | Senior Manager determines that performance is now satisfactory. | If performance is now satisfactory, advise employee and CEO that the performance issue is resolved |
| Performance Monitoring period ends: No performance improvement or performance remains unsatisfactory | Senior Manager determines that performance remains unsatisfactory  | Senior Manager schedules a Performance Management meeting with employee. One week’s notice of meeting to be provided.Employee may have support person present.  |
|  | Senior Manager, CEO and employee meeting to review the poor performance issue | CEO to consider the employee’s response, and:1. If they deem it unsatisfactory may terminate employment with notice. The relevant period of notice is set out in the Award as described in the contract of employment with the employee

**or**1. If CEO accepts the employee’s response, the performance monitoring may be extended.
 |

### Misconduct and Disciplinary Action

In the event of misconduct, the organisation may take disciplinary action and in cases of serious misconduct may terminate employment. Misconduct includes breaches of the organisation’s Policies and Code of Conduct. Disciplinary action will be determined on a case-by-case basis and may include:

* Financial penalties
* Changes to duties, including demotion
* Restriction of access to the organisation’s resources and/or facilities

Serious misconduct, including breaches of any the organisation’s policies may be determined to warrant instant dismissal.

Examples of serious misconduct include but are not limited to:

* Theft of property or funds from the organisation’
* Wilful damage to the organisation’s property
* Intoxication through alcohol or other prohibited substance at work
* Verbal or physical harassment of any other employee, volunteer, Board Member or any other person particularly in respect of race, sex or religion
* Disclosure of confidential information regarding the organisation to any other party without prior permission from the Senior Manager or the Chief Executive Officer
* Falsification of any of the organisation’s records for personal gain or on behalf of any other employee

## Identified Education and Training Requirements

Insert your organisation’s training conditions or requirements. For example:

This organisation encourages employees to enhance their knowledge of matters relating to volunteering. Should a training need be identified during the formal review process, or a staff member identify an appropriate training course, consideration will be given as to what level of support can be provided by the organisation to enable the staff member to undertake the training. Depending on the organisation’s capacity to accommodate requests, professional development leave is or may be available. Any request must be approved by <insert position title> prior to enrolment.

## Other Employment

Insert details, for example:

A paid employee of *the organisation* is not permitted to work for any other employer, consultant or offer their services for payment to any other person without first receiving the written consent of the <insert position title>.

## Leave Entitlements

#### Annual leave

The organisation’s fulltime employees are entitled to four weeks annual leave for each completed year of service. Annual leave accrues pro rata on a weekly basis. Part time staff are entitled to leave in proportion to the hours worked (i.e. pro rata).

Applications for leave must be made on the *Leave Application Form* and approved by the staff member’s Manager/position title. Approval of annual leave will consider the operational requirements of the organisation, and may occasionally need to be negotiated.

Annual leave may be taken at a time mutually agreed between you and the organisation, provided that where no agreement is reached, the organisation may direct you to take annual leave. Annual leave should not be accumulated beyond two years. The organisation’s employees who accrue annual leave beyond two years may be directed to take outstanding leave at a time mutually agreed or if no agreement is reached at a time convenient to the organisation.

The *Leave Application Form* is available at:

Insert location of application form

#### Public Holidays

The organisation observes all gazetted Western Australian public holidays. Unless otherwise agreed, employees are expected to take public holidays as they occur. Part time staff are paid for Public Holidays which occur on a rostered working day (as defined in their Contract of Employment).

Employees may on occasion be required to work on days declared as public holidays in Western Australia. When this occurs staff will be granted a day in lieu to be taken at a time agreed between the staff member and their Senior Manager or with annual leave.

#### Personal leave

* Staff members are entitled to 10 days (75 hours) (pro rata) paid personal/carers leave per year in accordance with the *Fair Work Act (Commonwealth) 2009*. For example this may be for personal illness or injury, or for the purposes of caring for an immediate family or household member who is sick or in a state of emergency and requires care or support (carers leave) as defined in the *Fair Work Act (Commonwealth) 2009*.
* The organisation may require reasonable proof of sickness, which may include a medical certificate, if personal ill health is given as a reason for absence from work.
* Employees are required to advise their <insert position title> if they are ill and unable to undertake their duties.
* On return to work the employee member is required to complete the *Leave Application Form.*
* Personal leave not taken in any year shall accumulate from year to year but will not be paid out upon cessation or termination of employment.

#### Employee Volunteering Leave

<insert details of any Volunteering leave entitlements if applicable>

#### Bereavement leave

* Full time employees are entitled to use up to three days paid bereavement leave on each occasion and on presentation of satisfactory evidence, of death of an immediate family or household member inside Australia, or outside Australia if the employee travels to attend the funeral.
* Part–time employees are entitled to bereavement leave on the same basis for days that would normally be worked.
* Bereavement Leave does not accumulate from year to year.
* Applications must be made on the *Leave Application* *Form.*

#### Long Service Leave

All employees are entitled to paid long service leave in accordance with the legislation applying in the *Fair Work Act (Commonwealth) 2009* and *Long Service Leave Act (WA) 1958*.

#### Parental and Other Leave

As provided by the *Fair Work Act (Commonwealth) 2009* employees are entitled to up to 52 weeks unpaid parental leave in accordance with the minimum terms and conditions of employment through the *National Employment Standards*

Extension beyond the 12 month entitlement is possible by negotiation and agreement by both parties. In line with the terms and conditions of the *Australian Paid Parental Leave Scheme 2011, t*he organisation will provide any required assistance to eligible employees to access this scheme.

Other types of leave as are provided in the *Fair Work Act (Commonwealth) 2009* and the employee’s contract of employment.

#### Professional Development Leave

<insert any professional development support details >

## Salary Packaging

<insert details>

## Superannuation

The organisation makes payments to a staff member’s choice of fund in accordance with Government legislation.

## Termination of Employment

###  Termination by Employer or Paid Employee

In order to terminate employment at the organisation, the staff member or the organisation must give the period of notice as set out in the *Fair Work Act (Commonwealth) 2009* and/or as outlined in the contract of employment of the employee.

During the probationary period, this period is one week (five working days) or by the forfeiture or payment, as the case may be, of one week of pay in lieu of notice.

After the probationary period, the contract of employment may be terminated by you or the organisation giving two weeks notice or, by the forfeiture or payment, as the case may be, of an equivalent amount of pay in lieu of notice.

In any case a lesser period of notice may be given without payment or forfeiture of pay by agreement between you and the organisation. The organisation may deduct from your final pay any monies owed by you to the organisation on termination.

The organisation retains the right to terminate a staff member’s employment without notice for serious misconduct that warrants summary termination in accordance with the *Fair Work Act (Commonwealth) 2009.*

### Redundancy and Severance Pay

If applicable, entitlements will be paid in accordance with the *National Employment Standards* as provided by the *Fair Work Act (Commonwealth) 2009*, applicable Award and the employee’s contract of employment.

### Exit Interview

When an employee terminates their employment with the organisation their direct Senior Manager will conduct an exit interview. A record of the interview will be retained. During the exit interview arrangements will be made for the return of all the organisation’s property including office keys.

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