

# HR Management Standards

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# HR Council for the Voluntary & Non-profit Sector

The HR Council for the Voluntary & Non-profit Sector (HR Council) works with organizations, educators, labour and government to identify and address issues related to paid employment in the voluntary and non-profit sector.

Our priorities are to:

- Build and share knowledge
- Promote good HR practices
- Foster training and learning opportunities
- Provide leadership on HR issues
- Engage voluntary and non-profit organizations in our work

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# 1 Introduction

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Each organization will need to consider how the Standards can be adopted to reflect their organization's available resources.

Organizations in the non-profit sector are increasingly challenged by the same HR issues as organizations in other sectors – an aging workforce, falling recruitment levels and rising skills requirements. However many boards and managers in our sector lack the skills, tools and resources to address these challenges. Many are seeking resources and support in relation to their human resource management responsibilities.

The HR Management Standards (Standards) developed by the HR Council for the Voluntary & Non-profit Sector (HR Council) are intended to inspire, educate and support board members, managers and employees with regard to the fundamental role HR management policies and practices have in creating effective organizations. The Standards are designed and presented in such a way as to assist non-profit organizations in developing effective HR management policies and practices.

The diversity of organizations in the non-profit sector and the significant variations in how organizations are structured and funded means that the Standards will not uniformly fit every organization. Each organization will need to consider how the Standards can be adopted to reflect their organization's available resources, such as expertise, available time and priorities, yet at the same time achieve the overall intent underlying the Standards. Organizations can work towards achieving these Standards in ways that are appropriate to their operations and which consider the resources available to them.

Organizations can use these Standards to:

1. Examine their current policies and practices
2. Determine what needs to be changed, and then
3. Determine how the Standards can be used to improve the organization's policies and practices in order to enhance the organization's performance.

Balance is required; standards need to address current issues confronted by non-profit organizations; however there also must be a focus on the future. As evident in *Toward a Labour Force Strategy for Canada's Voluntary & Non-profit Sector*<sup>1</sup>, organizations in the sector are influenced by circumstances in the

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<sup>1</sup> Available at <http://www.hrcouncil.ca/projects/council-projects-sector.cfm>

external environment such as high labour market demands in other sectors that compete with the ability of non-profit organizations to recruit and retain staff. Non-profit organizations need to consider these Standards as they develop appropriate policies, processes and practices to address such challenges.

Principles underlying the Standards and potential target audiences are identified in order to deepen the understanding of organizations as to how Standards can be used.

### The Standards are grouped into six broad clusters:

- HR Management Policy Framework & Employment Legislation
- Getting the Right People
- Managing People and their Work
- Workplaces that Work
- Training, Learning & Development
- HR Planning

### Each cluster of Standards has five parts:

1. Introductory statements that identify the intent and benefits of achieving the standards within that cluster.
2. The **Standard** statement itself that summarizes the end result to be achieved.
3. **Standard Details** that provide detail on what to include when considering how to achieve the standard.
4. **Implementation Considerations** that includes information to help in implementation as well as connections between Standards and/or other operations within the organization.
5. **Links to Resources** that provides links to articles, research documents, tools or templates to assist in achieving the Standards.

## How the standards were developed

In 2008, the HR Council convened an Advisory Committee<sup>2</sup> composed of individuals from across Canada involved in providing HR management services to organizations in the sector. Working with a consultant, the Advisory Committee reviewed research<sup>3</sup> that identified the key features and structures to relevant standards programs in Canada and the US. The research provided a basic framework to undertake developing a series of HR management standards.

Once a draft set of standards was developed, three validation sessions were held in Toronto, Regina and Halifax to solicit feedback from 37 individuals representing a variety of organizations.<sup>4</sup> Using the feedback, the HR Management Standards were revised and the Advisory Committee met to review the revised standards and offer final comments.

## Principles

The following principles articulate the broad framework and intent of the Standards and guided the development of the specific standards:

- **Reinforce compliance with legal requirements.** Being compliant with relevant legislation is the absolute minimum standard that organizations must achieve. The Standards reinforce compliance but also provide a rationale as to why organizations should do more than the minimum.
- **Support active and positive approaches to working with employees.** Rather than being reactive to continuing problems, the Standards provide managers with information to establish processes and practices that encourage and support employees in their current and future work.

<sup>2</sup> See Appendix 2 for a list of Advisory Committee members and consultant

<sup>3</sup> See Human Resource Management Standards/Guidelines August 1, 2008

<sup>4</sup> See Appendix 3 for a list of individuals and organizations who participated in the validation sessions

- **Contribute to a fair and equitable work environment.** The Standards set the stage for developing processes that are clear, known and applied consistently so that expectations in performance and relationships essential to an effective workplace are established and promoted.
- **Integrate with standards that support organizational excellence in governance and accountability.** HR management practices do not function in isolation, but are part of the organization's overall approach to interacting with the public, funders, volunteers and other organizations. These HR Management Standards must be integrated with other standards, such as good governance, ethical fundraising and financial accountability.
- **Act as a foundation for individual learning and organizational improvement.** The Standards support organizations in identifying areas for improvement and to make a clear link between employee performance and organizational results.
- **Provide tools that will build organizational effectiveness.** By implementing the Standards, organizations make a demonstrable commitment to excellence and allocating resources to ensure capacity is built and sustained and that their mandate is accomplished.
- **Current and future employees** in assessing how the organization supports their work and career.
- **Donors and funders** in determining which organizations have effective HR management policies and practices and supporting organizations in developing and implementing effective HR management policies.
- **Partner organizations** in gauging the sustainability and effectiveness of their partners.
- **Organizations that provide capacity building** activities to non-profit organizations to support implementation of effective HR management policies and practices.
- **The public and community** by providing a clear link to understand how a non-profit organization works with their employees to achieve results.

## Target audiences

Primary target audiences who can benefit from the Standards include:

- **Organizations** in assessing and evaluating their current HR management policies and practices, identifying gaps and developing solutions to fill those gaps.
- **Management staff** in identifying where their skills and knowledge to implement effective HR management policies and practices may be limited or missing.
- **Boards** by providing clear direction on their role in this critical area as well as criteria to ensure the organization's HR management policies and practices are implemented thoroughly and effectively.

## Terminology

### Employee

Is used generically throughout this document to apply to all paid staff of the organization whether full-time, part-time, fixed-term contract, salaried or hourly. This would include all management employees but exclude all individuals volunteering their time with the organization.

### Governing Authority

Refers to the formal body with highest authority within the organization. In most cases this will be a board of directors of the legal entity, or a governing committee of volunteers to whom the most senior staff person reports.

### Most Senior Staff Person

The highest ranking paid employee in the organization to whom all other employees report either directly or indirectly, and who reports to the Governing Authority. In most cases this will be an Executive Director or Chief Executive Officer (CEO).

### Position

Refers to a role or job that is filled by an employee.

# HR Management Standards Overview

## 1. HR Management Policy Framework and Employment Legislation

- 1.1 HR management policies are formalized, documented and approved by the appropriate authority.
- 1.2 HR management policies comply with employment, workplace health and safety, and other related legislation as applicable in the jurisdiction in which the organization operates.
- 1.3 HR management policies are reviewed on a regular basis and revised, if necessary.

## 2. Getting the Right People

- 2.1 An approved job description is completed for all positions.
- 2.2 Recruitment is through an objective, consistent process.
- 2.3 Criteria used to select the appropriate individual are established and documented.
- 2.4 All individuals external to the organization who are offered a position sign a letter of employment that outlines the working relationship between the individual and the organization.
- 2.5 All new employees are oriented to the position and to the organization.
- 2.6 Plans are documented to address any potential key employee turnover so that the organization's clients and public continue to receive programs and services.

## 3. Managing People and their Work

- 3.1 Managers and supervisors with the responsibility for managing the efforts of others are provided with appropriate learning opportunities to develop their supervisory skills.
- 3.2 All employees have a work plan and performance objectives that identify the tasks/activities and expected results for future performance.
- 3.3 The performance of each employee is fairly assessed, at least annually, at the end of the work plan or performance period.
- 3.4 The organization's performance management process includes the potential for coaching employees in order to address performance issues/concerns.
- 3.5 The organization provides competitive compensation to employees.

## 4. Workplaces that Work

- 4.1 The organization is committed to providing a safe work environment.
- 4.2 The organization is committed to supporting employee work/life balance.
- 4.3 The organization ensures a work environment free of harassment.
- 4.4 The organization is committed to promoting an inclusive workplace.
- 4.5 The organization has established procedures and informed employees with regard to how to resolve conflicts within the organization.

## 5. Training, Learning & Development

- 5.1 Every employee's training and development needs are reviewed at least annually and plans established to address any gaps.
- 5.2 During the development of the annual budget, consideration is given to including appropriate resources to fund employee training and development..

## 6. HR Planning

- 6.1 The organization has a process to review staffing needs resulting in a plan to address those needs.
- 6.2 Critical positions in the organization are identified and succession plans are established to address any potential gaps.

# 2 Standards

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# 1. HR Management Policy Framework & Employment Legislation

The intent of HR management policies is to create a workplace where:

- It can be assured that minimum legal requirements are being met
- Best practices appropriate to the organization can be documented and implemented
- Management decisions and action are consistent, uniform and predictable
- Individuals and the organization are protected from the pressures of expediency
- Organization values are promoted

In developing HR management policies, organizations will likely have practices that can be reviewed and converted into policies. All employers, including those in the non-profit sector, must comply with federal and/or provincial legislation relating to employment and workplaces, therefore HR management policies and practices must take into account the relevant laws and regulations. While legislation provides the framework, the interpretation of legislation will be through case law – both legislation and case law will need to be referenced for a complete picture of what is required of employers.

## Standard 1.1 *HR management policies are formalized, documented and approved by the appropriate authority.*

STANDARD DETAILS	IMPLEMENTATION CONSIDERATIONS	LINKS TO RESOURCES
<p>HR management policies are formal written documents easily accessible by management, employees and key stakeholders.</p>	<p>Policies can be hard copy or electronic copy.</p> <p>Consideration can be given to providing the governing authority with a report on how policies are applied and any revisions that are being considered to the policies.</p>	<p>Information on developing HR policies as well as sample policies are available at:  <a href="http://www.hrcouncil.ca/hr-toolkit/policies-overview.cfm">www.hrcouncil.ca/hr-toolkit/policies-overview.cfm</a></p>
<p>Policies should include those issues that govern the work and actions of employees, such as:</p> <ul style="list-style-type: none"> <li>• Conflict of interest</li> <li>• Working conditions</li> <li>• Compensation and benefits</li> <li>• Vacation and sick leave</li> <li>• Termination by employer</li> <li>• Performance management</li> <li>• Staff development</li> <li>• Harassment</li> <li>• Conflict resolution</li> <li>• Formal complaint process</li> <li>• Processes to review/update policies</li> <li>• Confidentiality</li> </ul>	<p>Refer to the following Standards:</p> <ul style="list-style-type: none"> <li>Standard 3.3</li> <li>Standard 5.1</li> <li>Standard 4.3</li> <li>Standard 4.5</li> </ul>	<p>Templates are available at:  <a href="http://www.hrcouncil.ca/hr-toolkit/resources-resources.cfm">www.hrcouncil.ca/hr-toolkit/resources-resources.cfm</a></p> <ul style="list-style-type: none"> <li>• Sample Employee Handbook</li> <li>• Sample Policies on Common HR Topics</li> </ul>

**Standard 1.2** *HR management policies comply with employment, workplace health and safety, and other related legislation as applicable in the jurisdiction in which the organization operates.*

STANDARD DETAILS	IMPLEMENTATION CONSIDERATIONS	LINKS TO RESOURCES
<p>A periodic review of relevant legislation is conducted to ensure compliance.</p> <p>A written report documenting compliance is submitted to the organization’s governing authority at least annually</p>	<p>At a minimum, legislation reviewed should include the following:</p> <ul style="list-style-type: none"> <li>• Employment/Labour Standards</li> <li>• Privacy legislation</li> <li>• Occupational Health and Safety</li> <li>• Human Rights</li> <li>• Workers Compensation</li> </ul> <p>It is not feasible to identify all legislation that needs to be considered; some legislation is provincial while other legislation is federal.</p> <p>Organizations also need to be aware of how legislation may, periodically, be applicable to their workplace, such as provisions for releasing staff to vote on election day or legislation relevant to organizing a union.</p> <p>Depending on the internal expertise available to the organization, it may be appropriate to seek external assistance to ensure HR management policies comply with relevant legislation.</p>	<p>An overview with additional links to employment-related legislation:  <a href="http://www.hrcouncil.ca/hr-toolkit/policies-overview.cfm">www.hrcouncil.ca/hr-toolkit/policies-overview.cfm</a></p>

**Standard 1.3** *HR management policies are reviewed on a regular basis and revised, if necessary.*

STANDARD DETAILS	IMPLEMENTATION CONSIDERATIONS	LINKS TO RESOURCES
<p>HR management policies are reviewed annually to ensure changes to employment-related legislation and/or new developments in HR management best practices are incorporated into the organization’s HR management policies.</p>	<p>Policies could be reviewed annually by the governing authority in order to satisfy their responsibility that the organization is operating in compliance with the appropriate laws and regulations.</p> <p>Policies could be reviewed during a regular staff meeting to gain input from staff as well as remind staff of existing policies.</p>	

## 2. Getting the Right People

Recruiting individuals to fill positions is the most critical HR management function undertaken whether the person is being recruited from within or outside the organization. Committed, motivated, and qualified employees will help an organization achieve its purpose and goals. The recruitment process begins by defining the job, seeking a pool of qualified individuals, selecting the best individual for the position, and finally orienting the individual to the position and to the organization (if the individual is hired from outside the organization).

When an organization hires, promotes or transfers an employee it is making a commitment to that person. As such, an organization is obligated to ensure that the individual has all reasonable opportunity to perform the job satisfactorily; the goal is to recruit, select and orient the most suitable individuals to the organization.

### Standard 2.1 *An approved job description is completed for all positions.*

STANDARD DETAILS	IMPLEMENTATION CONSIDERATIONS	LINKS TO RESOURCES
<p>Job descriptions may include:</p> <ul style="list-style-type: none"> <li>• Typical duties, tasks, and responsibilities of the position</li> <li>• How the work of the position supports the goals of the organization</li> <li>• Minimum competencies/experience required to do the work of the position including equivalencies to address non-Canadian education/credentials</li> <li>• Special requirements (if any) such as security clearance or criminal record checks</li> <li>• Degree of authority and/or independence of the position</li> <li>• Impact of the position on the organization (such as relationships the position is expected to maintain with stakeholders and others)</li> </ul>	<p>Job descriptions document the tasks and activities required of the position in order to fulfill the organization's strategic and short-term objectives within the current organization structure. The end result will determine the types of skills and experiences required of individuals in order to be successful in this role.</p> <p>The job description is the foundation for both performance management and knowledge management activities.</p> <p>Refer to the following Standards:            Standard 2.1            Standard 3.3            Standard 5.2</p> <p>If the workplace is unionized, job descriptions may need to be negotiated, reviewed or shared with the union.</p>	<p>Information on developing job descriptions is available at:  <a href="http://www.hrcouncil.ca/hr-toolkit/right-people-job-descriptions.cfm">www.hrcouncil.ca/hr-toolkit/right-people-job-descriptions.cfm</a></p> <p>Templates are available at:  <a href="http://www.hrcouncil.ca/hr-toolkit/resources-resources.cfm">www.hrcouncil.ca/hr-toolkit/resources-resources.cfm</a></p> <ul style="list-style-type: none"> <li>• Job Analysis Questionnaire Template</li> <li>• Job Description Template</li> </ul>
<p>All job descriptions are reviewed annually to ensure that they are aligned with the strategic direction and structure of the organization.</p>	<p>Job descriptions should be reviewed when there are significant changes in the direction of the organization and/or position.</p>	
<p>Changes to job descriptions automatically trigger a review of compensation rates.</p>	<p>Refer to Standard 3.5</p>	

## Standard 2.2 *Recruitment is through an objective, consistent process.*

STANDARD DETAILS	IMPLEMENTATION CONSIDERATIONS	LINKS TO RESOURCES
<p>The recruitment process is fair and objective so that candidates, whether internal or external, are being assessed using the same criteria.</p> <p>Recruitment will comply with human rights legislation.</p>	<p>External recruitment of staff will likely involve a variety of communication processes to inform other organizations and relevant communities-of-interest of the available position.</p> <p>Internal recruitment will be linked to processes of succession planning, performance management, learning and could potentially involve some form of job posting.</p> <p>Refer to Standard 1.2</p>	<p>Additional information on recruitment is available at:  <a href="http://www.hrcouncil.ca/hr-toolkit/right-people-recruitment.cfm">www.hrcouncil.ca/hr-toolkit/right-people-recruitment.cfm</a></p> <p>Templates are available at:  <a href="http://www.hrcouncil.ca/hr-toolkit/resources-resources.cfm">www.hrcouncil.ca/hr-toolkit/resources-resources.cfm</a></p> <ul style="list-style-type: none"> <li>• Recruitment Checklist</li> <li>• Reference Check Questions</li> </ul>

## Standard 2.3 *Criteria used to select the appropriate individual are established and documented.*

STANDARD DETAILS	IMPLEMENTATION CONSIDERATIONS	LINKS TO RESOURCES
<p>Treatment of information collected through the selection process conforms with privacy legislation.</p> <p>Interview questions comply with human rights legislation.</p>	<p>Staffing for permanent positions could include oral interviews, written or other appropriate tests to determine competence.</p> <p>Refer to Standard 1.2</p>	<p>Additional information on selection processes is available at:  <a href="http://www.hrcouncil.ca/hr-toolkit/right-people-selection.cfm">www.hrcouncil.ca/hr-toolkit/right-people-selection.cfm</a></p> <p>Templates are available at:  <a href="http://www.hrcouncil.ca/hr-toolkit/resources-resources.cfm">www.hrcouncil.ca/hr-toolkit/resources-resources.cfm</a></p> <ul style="list-style-type: none"> <li>• Interview Questions</li> <li>• Interview Rating Guide Template</li> <li>• Hiring Practices for Equity in Employment – Interview Guide</li> <li>• PIPEDA Guide</li> </ul>

**Standard 2.4** *All individuals external to the organization who are offered a position sign a letter of employment that outlines the working relationship between the individual and the organization.*

STANDARD DETAILS	IMPLEMENTATION CONSIDERATIONS	LINKS TO RESOURCES
<p>The letter of employment is signed by the employee and returned to the organization before the commencement of work. The letter contains key information including:</p> <ul style="list-style-type: none"> <li>• Start date</li> <li>• Job title</li> <li>• Starting salary or wage rate</li> <li>• Hours of work</li> <li>• Notice period for resignation</li> <li>• Notice period for termination</li> <li>• Probationary terms</li> <li>• Directions on accepting the offer</li> <li>• Requirements for criminal record checks, security clearances, bonding, etc.</li> <li>• Key employee benefits</li> <li>• Any special conditions of the position or offer</li> <li>• Any accommodation needs as agreed during the recruitment process</li> <li>• Reporting/supervision relationships</li> <li>• Information on the organization’s human resource management policies and confirmation that employees must adhere to them</li> <li>• The end date of employment should be included in the letter of employment for fixed term positions (such as project funded positions or filling a maternity leave)</li> <li>• Reference to union status (if applicable)</li> </ul>	<p>The letter of employment is a legal document and should be treated as such.</p> <p>A personnel file for each individual hired should be maintained; the file should include the letter of employment and documentation of any subsequent changes to the terms and conditions of employment.</p> <p>The current job description for the position could be attached to the letter of employment, for information.</p>	<p>Templates are available at:  <a href="http://www.hrcouncil.ca/hr-toolkit/resources-resources.cfm">www.hrcouncil.ca/hr-toolkit/resources-resources.cfm</a></p> <ul style="list-style-type: none"> <li>• Employment Agreement Template</li> <li>• Offer Letter Template</li> </ul>

## Standard 2.5 *All new employees are oriented to the position and to the organization.*

STANDARD DETAILS	IMPLEMENTATION CONSIDERATIONS	LINKS TO RESOURCES
<p>Orientation may include information on:</p> <ul style="list-style-type: none"> <li>• HR management policies</li> <li>• Employee benefits and any documentation explaining benefits</li> <li>• The organization’s mission</li> <li>• The governing, management &amp; reporting structures</li> <li>• The funding structure</li> <li>• The organization’s programs and services</li> <li>• Expectations of the position over 3 months, 6 months and 1 year</li> <li>• Resources available to support the position</li> <li>• Respective roles and responsibilities of volunteers and staff</li> </ul>	<p>Appropriate orientation early in an employee’s employment has been shown to enhance the early and ultimate performance levels of new hires as well as build commitment to the position and to the organization.</p> <p>Orientation is a process rather than an activity; depending on the position, orienting a new employee may take up to a year.</p>	<p>Additional information on orientation processes is available at:  <a href="http://www.hrcouncil.ca/hr-toolkit/right-people-orientation.cfm">www.hrcouncil.ca/hr-toolkit/right-people-orientation.cfm</a></p> <p>Templates are available at:  <a href="http://www.hrcouncil.ca/hr-toolkit/resources-resources.cfm">www.hrcouncil.ca/hr-toolkit/resources-resources.cfm</a></p> <ul style="list-style-type: none"> <li>• Orientation Checklist</li> </ul>

## Standard 2.6 *Plans are documented to address any potential key employee turnover so that the organization’s clients and public continue to receive programs and services.*

STANDARD DETAILS	IMPLEMENTATION CONSIDERATIONS	LINKS TO RESOURCES
<p>Key positions are identified that require ‘backup’ to ensure continuation of service. Short term and long term plans are in place to address potential gaps in these key positions.</p>	<p>Refer to Standard 3.3</p> <p>The annual review of performance management results could identify employees capable of assuming responsibilities of other positions.</p>	<p>Information on succession planning is available at:  <a href="http://www.hrcouncil.ca/hr-toolkit/planning-succession.cfm">www.hrcouncil.ca/hr-toolkit/planning-succession.cfm</a></p>

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

STANDARD DETAILS	IMPLEMENTATION CONSIDERATIONS	LINKS TO RESOURCES
	Learning may include a variety of options including coaching, mentoring, job shadowing etc. as well as structured training sessions.	Information on the role and functions of the manager/supervisor 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>

**Standard 3.2** *All employees have a work plan and performance objectives that identify the tasks/activities and expected results for future performance.*

STANDARD DETAILS	IMPLEMENTATION CONSIDERATIONS	LINKS TO RESOURCES
<p>The work plan or performance objectives (usually annual) reflect the organization’s strategic direction, business plans, and/or annual plans.</p> <p>The work plan/performance objectives are written documents jointly prepared by the employee and their supervisor.</p>	<p>Creating a work plan/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.</p> <p>Work plans/performance objectives identify individual development activities that support the organization’s goals.</p> <p>The supervisor needs to ensure that the work plan is achievable given the time assigned to the position and the skills of the individual.</p>	<p>Strategic and operation planning; succession planning; 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></p> <p>Templates are available at: <a href="http://www.hrcouncil.ca/hr-toolkit/resources-resources.cfm">www.hrcouncil.ca/hr-toolkit/resources-resources.cfm</a></p> <ul style="list-style-type: none"> <li>• Workplan Template (2)</li> </ul>

### Standard 3.3 *The performance of each employee is fairly assessed, at least annually, at the end of the workplan or performance period.*

STANDARD DETAILS	IMPLEMENTATION CONSIDERATIONS	LINKS TO RESOURCES
<p>Performance reviews have clearly stated purpose(s) which can include:</p> <ul style="list-style-type: none"> <li>• Assessing the employee’s contribution to the operational and strategic plan of the organization</li> <li>• Assessing the degree of achievement related to his or her workplan/objectives</li> <li>• Encouraging performance excellence</li> <li>• Identifying and addressing areas for improvement in performance</li> <li>• Identifying personal and professional development needs</li> <li>• Consideration for promotion or other work assignments</li> <li>• Identifying work and career goals</li> <li>• Consideration for compensation increases</li> </ul>	<p>Performance management is an on-going process guided by principles of positive HR management. At a minimum the policy should require a review at least annually, but an organization can choose to conduct more frequent reviews.</p> <p>Performance reviews are intended to give employees clear feedback on their performance.</p> <p>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.</p> <p>If the workplace is unionized, performance management processes may need to be negotiated with the union.</p>	<p>Information on performance management systems/processes is available at:  <a href="http://www.hrcouncil.ca/hr-toolkit/keeping-people-performance-management.cfm">www.hrcouncil.ca/hr-toolkit/keeping-people-performance-management.cfm</a></p> <p>Templates are available at:  <a href="http://www.hrcouncil.ca/hr-toolkit/resources-resources.cfm">www.hrcouncil.ca/hr-toolkit/resources-resources.cfm</a></p> <ul style="list-style-type: none"> <li>• Performance Management Form Template</li> </ul>
<p>Performance reviews are systematic; based on current job descriptions and work plans.</p>	<p>Refer to the following Standards:            Standard 2.1            Standard 3.2</p>	
<p>The performance review process and evaluation criteria are established prior to any assessment and will be known to both supervisor and employee.</p>		
<p>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.</p>		
<p>Managers and supervisors responsible for assessing the work of others are provided with an orientation to conducting performance management reviews.</p>	<p>Refer to Standard 5.1</p>	



**Standard 3.4** *The organization’s performance management process includes the potential for coaching employees in order to address performance issues/concerns.*

STANDARD DETAILS	IMPLEMENTATION CONSIDERATIONS	LINKS TO RESOURCES
<p>The aim of coaching should be to help the employee address concerns and issues related to performance so that there is a positive contribution to the organization.</p>	<p>Refer to the following Standards:            Standard 1.1            Standard 5.1</p>	<p>Information on the role and functions of the supervisor 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></p>

**Standard 3.5** *The organization provides competitive compensation to employees.*

STANDARD DETAILS	IMPLEMENTATION CONSIDERATIONS	LINKS TO RESOURCES
<p>The organization’s compensation policy is designed and implemented to provide internal equity amongst similar positions within an organization, and ensures the organization is competitive in the marketplace as determined by management and Governing Authority.</p>	<p>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:</p> <ul style="list-style-type: none"> <li>• Other organizations in the non-profit sector</li> <li>• The public sector and/or</li> <li>• The private sector.</li> </ul> <p>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.</p>	<p>Information on compensation and benefits is available at:  <a href="http://www.hrcouncil.ca/hr-toolkit/planning-compensation.cfm">www.hrcouncil.ca/hr-toolkit/planning-compensation.cfm</a></p>

### Standard 3.5 *The organization provides competitive compensation to employees (continued).*

STANDARD DETAILS	IMPLEMENTATION CONSIDERATIONS	LINKS TO RESOURCES
<p>A salary range or wage rate based on compensation levels for comparable positions is established for each position.</p> <p>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 three years.</p>		<p>Examples of transparent processes for compensation for fundraising positions include Imagine Canada’s <i>Ethical Fundraising and Financial Accountability Code</i> <a href="http://www.imaginecanada.ca/files/en/ethicalcode/updated_ethical_code_October_2007.pdf">www.imaginecanada.ca/files/en/ethicalcode/updated_ethical_code_October_2007.pdf</a></p> <p>and <i>The Ethical Principles (Compensation &amp; Contracts)</i> adopted by the Association of Fundraising Professionals <a href="http://www.afpnet.org/ka/ka-3.cfm?content_item_id=1068&amp;folder_id=897">www.afpnet.org/ka/ka-3.cfm?content_item_id=1068&amp;folder_id=897</a></p>

## 4. Workplaces that Work

A healthy workplace takes into consideration the physical, environmental, intellectual, emotional, occupational and mental health of employees with the aim of balancing workplace responsibilities with personal/family/community responsibilities. Wellness promotion does not just benefit individuals; organizations with healthy cultures are productive workplaces that attract, retain and motivate healthy employees.

As Canada becomes an increasingly diverse country, it is important to establish diverse and inclusive workplaces. Ensuring that the workplace is reflective of the community and clients that the organization serves is part of creating a healthy workplace.

### Standard 4.1 *The organization is committed to providing a safe work environment.*

STANDARD DETAILS	IMPLEMENTATION CONSIDERATIONS	LINKS TO RESOURCES
<p>The organization will:</p> <ul style="list-style-type: none"> <li>• Ensure the governing authority clearly understands and discharges its occupational health and safety obligations</li> <li>• Ensure issues related to occupational health and safety are discussed with employees at least once a year</li> <li>• Enforce safe work procedures, rules and regulations applicable to the organization</li> <li>• Correct substandard conditions and activities</li> <li>• Report accidents according to legislation</li> <li>• Inspect the work area regularly</li> <li>• Ensure equipment is properly maintained</li> <li>• Promote a culture of safety</li> </ul>	<p>Refer to Standard 1.2</p>	<p>Information on safe workplaces is available at:  <a href="http://www.hrcouncil.ca/hr-toolkit/workplaces-health-safety.cfm">www.hrcouncil.ca/hr-toolkit/workplaces-health-safety.cfm</a></p>

### Standard 4.2 *The organization is committed to supporting employee work/life balance.*

STANDARD DETAILS	IMPLEMENTATION CONSIDERATIONS	LINKS TO RESOURCES
<p>The organization reviews options for supporting staff in achieving work/life balance.</p> <p>A process is in place to address the impact of work/life balance on the organization's operations</p> <p>Workloads are reviewed regularly to ensure that excessive overtime is not required.</p>	<p>Overtime may be required from time to time, but it should be balanced with the awareness that excessive or continual overtime does not contribute to a healthy work environment, effective job performance, and potentially compromises the organization.</p>	<p>Information on work/life balance in the work place is available at:  <a href="http://www.hrcouncil.ca/hr-toolkit/workplaces-flexible.cfm">www.hrcouncil.ca/hr-toolkit/workplaces-flexible.cfm</a></p>

### Standard 4.3 *The organization ensures a work environment free of harassment.*

STANDARD DETAILS	IMPLEMENTATION CONSIDERATIONS	LINKS TO RESOURCES
<p>The organization will take every reasonable measure to ensure that no employee is subject to harassment from any source within the organization’s governing, managing, employee, membership/client, and volunteer structures.</p> <p>A process is in place to investigate complaints of harassment.</p>	<p>Refer to Standard 1.2</p> <p>A policy to limit access to the information and outcome of any investigation could be documented. Consideration should be given to limiting the information to the most senior employee (ED or CEO) or other designated individual/committee such as a Complaints Officer, Ombudsperson, etc.</p>	<p>For information on legislation regarding workplace harassment is available at:  <a href="http://www.hrcouncil.ca/hr-toolkit/policies-human-rights.cfm">www.hrcouncil.ca/hr-toolkit/policies-human-rights.cfm</a></p>
<p>All complaints regarding harassment are to be handled in confidence; access to the information and the outcome of any investigation is strictly limited</p>	<p>Where the Executive Director is named in the complaint, the organization’s governing authority (or other designated individual/committee such as a Complaints Officer, Ombudsperson etc.) will handle the complaint according to established process.</p>	

### Standard 4.4 *The organization is committed to promoting an inclusive workplace.*

STANDARD DETAILS	IMPLEMENTATION CONSIDERATIONS	LINKS TO RESOURCES
<p>The organization regularly examines its current practices to ensure that inclusivity and diversity are supported proactively by:</p> <ul style="list-style-type: none"> <li>• Promoting the organization as an inclusive workplace</li> <li>• Recruiting and selection processes that consider alternative qualifications</li> <li>• Reviewing processes and documents to ensure that bias/discriminatory practices are removed</li> <li>• Reviewing policies and practices to ensure that they comply with human rights legislation</li> </ul>	<p>Refer to Standard 1.2</p> <p>In some circumstances, organizations may be able to identify specific target groups for employment; however they should contact their relevant human rights commission to discuss further. For example, organizations have been able to target recruitment for positions from specific audiences (aboriginal, disabled, women, etc.) in order to support employment options for target audiences.</p>	<p>Information on human rights legislation is available at:  <a href="http://www.hrcouncil.ca/hr-toolkit/policies-human-rights.cfm">www.hrcouncil.ca/hr-toolkit/policies-human-rights.cfm</a></p> <p>Templates are available at:  <a href="http://www.hrcouncil.ca/hr-toolkit/resources-resources.cfm">www.hrcouncil.ca/hr-toolkit/resources-resources.cfm</a></p> <ul style="list-style-type: none"> <li>• Hiring Practices for Equity in Employment – Interview Guide</li> </ul>

## Standard 4.4 *The organization is committed to promoting an inclusive workplace (continued).*

STANDARD DETAILS	IMPLEMENTATION CONSIDERATIONS	LINKS TO RESOURCES
Employees with supervisory responsibilities are provided with relevant learning opportunities to ensure they have the skills to support the development of an inclusive workplace.	Refer to the following Standards: Standard 3.1 Standard 5.1	Information on the role and functions of the supervisor 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>
The organization works with employees to accommodate religious observation and/or disabilities to the mutual benefit of employees and the organization.	Refer to Standard 1.2  Employers have the ‘duty to accommodate’ and should investigate relevant legislation (federal and/or provincial) to assess their responsibility for accommodation.  Other organizations or individuals with relevant expertise may be consulted to determine what accommodation is required and reasonable within the resources available.	Information on accommodation is available at: <a href="http://www.hrcouncil.ca/hr-toolkit/diversity-at-work.cfm">www.hrcouncil.ca/hr-toolkit/diversity-at-work.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>  <ul style="list-style-type: none"> <li>• Building Accessibility Checklist</li> <li>• Flexible Workplace Guidelines</li> </ul>

## Standard 4.5 *The organization has established procedures and informed employees with regard to how to resolve conflicts within the organization.*

STANDARD DETAILS	IMPLEMENTATION CONSIDERATIONS	LINKS TO RESOURCES
	This could include the establishment of a formal complaint process or formal open door policy for employees to communicate instances where they feel the organization or another employee has acted inappropriately.  A key ingredient in any conflict resolution or complaint process is the principle of “no retribution”.	

## 5. Training, Learning & Development

In a fast-paced and decentralized work environment employees often must act independently while carrying out their duties. Organizations must ensure that employees have the necessary knowledge and skills required to complete their tasks effectively and efficiently.

Learning, training and development activities are the planned, continuous effort by an organization to improve employee competency levels and organizational performance. Learning can include a variety of approaches including structured training courses, mentoring, coaching, job shadowing, peer exchanges, and/or self-directed learning.

A systematic program of learning, training and development blends the needs of the organization with the needs and aspirations of individual employees. The aim is to improve organizational performance and to engage employees in their career development.

**Standard 5.1** *Every employee’s training and development needs are reviewed at least annually and plans established to address any gaps.*

STANDARD DETAILS	IMPLEMENTATION CONSIDERATIONS	LINKS TO RESOURCES
<p>The organization documents the knowledge and skills required for each position, to ensure that the organization is meeting:</p> <ul style="list-style-type: none"> <li>• Legal/regulatory requirements</li> <li>• New directions (programs/services)</li> <li>• Position responsibilities</li> </ul> <p>Individual employee knowledge and skills are assessed against the standard for the position.</p>	<p>Refer to the following Standards:</p> <ul style="list-style-type: none"> <li>Standard 2.1</li> <li>Standard 3.2</li> <li>Standard 3.3</li> </ul> <p>The organization’s strategic plan or annual plan can be reviewed to determine what knowledge and skills may be required to implement new programs or initiatives.</p> <p>In developing learning plans consider identifying learning in the following categories:</p> <ul style="list-style-type: none"> <li>• <i>Essential</i> which is required as part of the job and will either address new responsibilities assigned to a staff member’s current job, or issues/concerns identified in job performance.</li> <li>• <i>Enhancement</i> that benefits the staff member in current or future positions with the organization.</li> </ul>	<p>Information on learning, training and development is available at:  <a href="http://www.hrcouncil.ca/hr-toolkit/learning-overview.cfm">www.hrcouncil.ca/hr-toolkit/learning-overview.cfm</a></p> <p>Information on learning, training and development options is available at:  <a href="http://www.hrcouncil.ca/hr-toolkit/learning-overview.cfm">www.hrcouncil.ca/hr-toolkit/learning-overview.cfm</a></p>

**Standard 5.1** *Every employee’s training and development needs are reviewed at least annually and plans established to address any gaps (continued).*

STANDARD DETAILS	IMPLEMENTATION CONSIDERATIONS	LINKS TO RESOURCES
	<ul style="list-style-type: none"> <li>• <i>Career Development</i> which is requested by the staff member, but may not directly benefit the organization.</li> </ul> <p>Annual work plans and performance objectives for individual employees should include:</p> <ul style="list-style-type: none"> <li>• A description of the learning activity</li> <li>• The goal of the learning activity</li> <li>• Expenses and time involved</li> </ul> <p>On completion of learning in which the organization provided funds and/or leave with pay, the employee could provide his/her supervisor with a report on the learning which,</p> <ul style="list-style-type: none"> <li>• Indicates the benefits to the organization and the individual</li> <li>• Provides suggestions for how the learning can be applied to the employee’s job and the expected results</li> </ul> <p>A written report could be required, particularly for learning that was intensive and complex.</p>	<p>Templates are available at :  <a href="http://www.hrcouncil.ca/hr-toolkit/resources-resources.cfm">http://www.hrcouncil.ca/hr-toolkit/resources-resources.cfm</a></p> <ul style="list-style-type: none"> <li>• Individual Development Plan Template</li> </ul> <p>Information on learning, training and development options is available at:  <a href="http://www.hrcouncil.ca/hr-toolkit/learning-overview.cfm">www.hrcouncil.ca/hr-toolkit/learning-overview.cfm</a></p> <p>Templates are available at :  <a href="http://www.hrcouncil.ca/hr-toolkit/resources-resources.cfm">www.hrcouncil.ca/hr-toolkit/resources-resources.cfm</a></p> <ul style="list-style-type: none"> <li>• Transfer of Learning Template</li> </ul>

**Standard 5.2** *During the development of the annual budget, consideration is given to including appropriate resources to fund employee training and development.*

STANDARD DETAILS	IMPLEMENTATION CONSIDERATIONS	LINKS TO RESOURCES
	<p>By ensuring the budget has funds for employee training and development, the organization makes a demonstrable commitment to supporting staff learning and development.</p> <p>While learning can be low-cost, organizations need to include in their annual budget funds to support learning initiatives.</p> <p>Determining the amount of funds to allocate in a budget will depend on the individual organization's resources.</p>	



# 6. HR Planning

An HR plan is a roadmap that describes how an organization will meet its current and future human resource needs based on the strategic plans of the organization. HR planning is a critical element for ensuring organization success and can be implemented in part by HR management policies built on these Standards.

HR planning is a systematic process of reviewing and anticipating human resource requirements to ensure that there are sufficient employees and volunteers with the required skills available when needed. HR planning can be a formal or informal process – often planning will be evident in annual budgets, strategic planning documents, funding proposals/contracts, etc. that identifies the positions required for accomplishing the organization’s work and how the costs of maintaining those positions will be accomplished.

At the same time HR planning should also consider how HR management directions and activities are developed so that they not only contribute to the effectiveness of the organization, but also to leading the organization into the future. HR management needs to position itself to be a strategic element in the organization’s future by examining and addressing pending legislation, labour shortages or economic conditions affecting the future workforce of the organization.

**Standard 6.1** *The organization has a process to review staffing needs resulting in a plan to address those needs.*

STANDARD DETAILS	IMPLEMENTATION CONSIDERATIONS	LINKS TO RESOURCES
<p>The organization engages in planning at least annually or has a system to identify organizational goals and/or directions, trends/changes in social and economic conditions, general labour market conditions, legislative, and/or technology developments which impact on recruiting and retaining talent.</p>	<p>Plans for staffing can be addressed through various documents generated by the organization such as:</p> <ul style="list-style-type: none"> <li>• Annual budget</li> <li>• Strategic plan</li> <li>• Funding proposals</li> </ul> <p>Each organization has a unique planning cycle; HR needs should be reviewed in conjunction with other planning activities.</p>	<p>Strategic and operation planning; 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></p>

## Standard 6.2 *Critical positions in the organization are identified and succession plans are established to address any potential gaps.*

STANDARD DETAILS	IMPLEMENTATION CONSIDERATIONS	LINKS TO RESOURCES
<p>The organization has processes in place to address succession in the event that individuals in identified positions leave or move into other positions in the organization.</p> <p>Whenever size and resources permit, a succession plan will involve nurturing and developing talent from within the organization.</p> <p>Employees and/or volunteers who have the skills, knowledge, experience and the desire are identified and supported as part of succession planning activities.</p>	<p>Information that profiles current staff and/or volunteers such as age/projected retirement; positions held in the organization; skills acquired; etc. allows the organization to profile how people in the organization who can contribute to other positions.</p> <p>Learning and development opportunities should be reviewed to ensure there is a connection to developing staff to assume other positions in the organization.</p> <p>Refer to Standard 3.3</p>	<p>Succession planning information is available at: <a href="http://www.hrcouncil.ca/hr-toolkit/planning-succession.cfm">www.hrcouncil.ca/hr-toolkit/planning-succession.cfm</a></p>

# 3 Implementing Standards

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The Standards have been developed to help non-profit organizations improve their overall human resource management processes over the long term.

It is unrealistic, and it is not expected that organizations can achieve all of the HR Management Standards immediately. The Standards have been developed to help non-profit organizations improve their overall human resource management processes over the long term. A Self-Assessment Guide is provided in Appendix 1 to help organizations identify which Standards they may already be meeting and where there could be gaps. Organizations will need to determine in what ways they can achieve the Standards given their current operations and available resources.

The following steps are suggested to help organizations move towards achieving and maintaining standards:

**1. Identify who needs to be involved in assessing existing policies and practices and developing plans to address gaps between the current reality and the Standards.**

- Typically this would include senior staff in the organization (in small organizations all staff could be included) as well as members of the organization's governing authority.
- The purpose is to create awareness of the importance of HR policies and practices and how the Standards can support the organization in establishing appropriate policies.
- This will also ensure individuals are aware of changes in human resource management policies and practices and provide support throughout implementation.

**2. Assess the organization's current policies and practices versus the Standards by:**

- Reviewing current HR management policies and practices compared to the Standards to identify gaps.
- Identifying those Standards that are critical to the organization's current operations. For example, if the organization is experiencing a period of growth and is hiring additional staff, the focus could be on Standards pertaining to *Section 2 – Getting the Right People*.
- The Self-Assessment Guide in Appendix 1 can indicate where gaps exist in the organization's HR management policies and practices.

**3. Develop a one-year plan that targets those Standards your organization plans to implement.**

- For example, if the organization currently has no job descriptions for any positions, it may be realistic to accomplish only this Standard. However if job descriptions already exist, but they have not been reviewed recently, this Standard, along with others, may be the goal.
- In developing a plan be sure to include time or resources required for developing staff skills related to the Standard – for example staff may need to be trained in developing job descriptions.
- Upon completion, target new Standards to implement.

**4. Communicate your organization’s commitment to standards with the appropriate target audiences.**

- The goal of implementing standards is to support the development of effective organizations. By making target audiences aware that you have made a commitment to achieving standards you can demonstrate your commitment to this goal.
- Develop clear messaging that presents the impact that standards have on your organization, the changes that have been made and the reasons why you are aiming to achieve these standards.
- Target audiences may include your organization’s staff, board of directors, donors, funders, partner organizations, clients and the broader community. Keep in mind that you may need to adapt your message to suit each particular audience.

## Role of the Governing Authority

The Standards must be integrated with other processes in the organization. Many of the Standards rely on the organization having effective governance practices, in particular having the governing authority, the executive director and managing staff understand and effectively carry out their respective roles.

The HR Council’s HR Toolkit has a section that discusses the Board’s role in HR management (<http://www.hrcouncil.ca/hr-toolkit/planning-board-role.cfm>) which could be a starting point for a discussion on this topic.

Imagine Canada developed the Ethical Fundraising and Financial Accountability Code (Ethical Code) which lays out standards for charitable organizations to manage and report their financial affairs responsibly. As well, Imagine Canada is developing a broader set of standards (draft document available at [http://www.imaginecanada.ca/files/en/ethicalcode/accountability\\_standards\\_discussion\\_paper\\_october\\_2007.pdf](http://www.imaginecanada.ca/files/en/ethicalcode/accountability_standards_discussion_paper_october_2007.pdf)) in a variety of areas (including mission, governance and transparency) as one way to bolster public confidence and enhance the credibility, performance, and effectiveness of Canadian registered charities and non-profits. Such standards should be reviewed to establish the broader context for these Standards.

All governing authorities must understand their legal obligations as an employer. They must ensure the organization is at least compliant with all legal requirements related to employment and labour issues. Many provinces have information outlining the responsibilities of governing authorities, such as Volunteers and the Law from Volunteer Vancouver (available at [http://www.volunteervancouver.ca/library/volunteers\\_law.asp](http://www.volunteervancouver.ca/library/volunteers_law.asp)).

# 4 Appendices

## Appendix I: Self-Assessment Guide

By completing the guide periodically, you will see where your organization is making progress and where work still needs to be completed.

The following provides a quick assessment of your organization's HR management practices and can help identify where your organization may wish to focus its efforts in achieving the Standards. The self-assessment guide can also serve as a tool to benchmark the progress your organization is making in achieving standards – by completing the guide periodically, you will see where your organization is making progress and where work still needs to be completed.

Directions:

1. **Read** through the standards, including the second column (Standard Details).
2. **Assess** if your organization's current HR management practices (4) Fully Meets; (3) Needs Works; or (2) Does not Meet the standard. **Circle** the appropriate number.
3. **Circle** (1) Don't Know if you do not have enough information to assess what your organization's human resource management practices are.

### Interpretation of results

It is not possible to provide customized solutions for every organization on how to approach addressing gaps to achieve standards – the following are suggestions:

After you have completed the assessment, review your responses –

- a. **Identify** which standards were circled (1) Don't Know – you will need to investigate further to determine what your organization is doing towards achieving these standards.
- b. **Identify** which standards were circled (2) Does not Meet – developing a plan to address these standards should be a priority.
- c. **Identify** which standards were circled (3) Needs Work – these gaps will need to be addressed, however if your organization has some processes/practices that meet the standards it may not be an urgent priority.

HR MANAGEMENT STANDARDS	Circle the rating that best describes how your organization's current HR management practices meet the Standards			
	Don't Know	Does Not Meet	Needs Work	Fully Meets
<b>1. HR MANAGEMENT POLICY FRAMEWORK AND EMPLOYMENT LEGISLATION</b>				
1.1 HR management policies are formalized, documented and approved by the appropriate authority.	1	2	3	4
1.2 HR management policies comply with employment, workplace health and safety, and other related legislation as applicable in the jurisdiction in which the organization operates.	1	2	3	4
1.3 HR management policies are reviewed on a regular basis and revised, if necessary.	1	2	3	4
<b>2. GETTING THE RIGHT PEOPLE</b>				
2.1 An approved job description is completed for all positions.	1	2	3	4
2.2 Recruitment is through an objective, consistent process.	1	2	3	4
2.3 Criteria used to select the appropriate individual are established and documented.	1	2	3	4
2.4 All individuals external to the organization who are offered a position sign a letter of employment that outlines the working relationship between the individual and the organization.	1	2	3	4
2.5 All new employees are oriented to the position and to the organization.	1	2	3	4
2.6 Plans are documented to address any potential key employee turnover so that the organization's clients and public continue to receive programs and services.	1	2	3	4
<b>3. MANAGING PEOPLE AND THEIR WORK</b>				
3.1 Managers and supervisors with the responsibility for managing the efforts of others are provided with appropriate learning opportunities to develop their supervisory skills.	1	2	3	4
3.2 All employees have a workplan and performance objectives that identify the tasks/activities and expected results for future performance.	1	2	3	4
3.3 The performance of each employee is fairly assessed, at least annually, at the end of the work plan or performance period.	1	2	3	4
3.4 The organization's performance management processes include the potential for coaching employees in order to address performance issues/concerns.	1	2	3	4
3.5 The organization provides competitive compensation to employees.	1	2	3	4

HR MANAGEMENT STANDARDS	Circle the rating that best describes how your organization's current HR management practices meet the Standards			
	Don't Know	Does Not Meet	Needs Work	Fully Meets
<b>4. WORKPLACES THAT WORK</b>				
4.1 The organization is committed to providing a safe work environment.	1	2	3	4
4.2 The organization is committed to supporting employee work/life balance.	1	2	3	4
4.3 The organization ensures a work environment free of harassment.	1	2	3	4
4.4. The organization is committed to promoting an inclusive workplace.	1	2	3	4
4.5. The organization has established procedures and informed employees with regard to how to resolve conflicts within the organization.	1	2	3	4
<b>5. TRAINING, LEARNING AND DEVELOPMENT</b>				
5.1 Every employee's training and development needs are reviewed at least annually and plans established to address any gaps.	1	2	3	4
5.2 During the development of the annual budget, consideration is given to including appropriate resources to fund employee training and development..	1	2	3	4
<b>6. HR PLANNING</b>				
6.1 The organization has a process to review staffing needs resulting in a plan to address those needs.	1	2	3	4
6.2 Critical positions in the organization are identified and succession plans are established to address any potential gaps.	1	2	3	4

# Appendix II: Advisory Committee Members

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**Sue Armstrong**

Director of Human Resources  
Pearson Peacekeeping Centre

**Bill Palamar**

Director  
Human Resources Services  
Scouts Canada

**Eldon Emerson**

Manager  
Human Resources Initiatives  
Muttart Foundation  
*Member, HR Council Board of Directors*

**Yves Savoie**

CEO  
Multiple Sclerosis Society of Canada  
*Member, HR Council Board of Directors*

**Isha Khan**

Director  
Organization Development and Legal Counsel  
United Way Winnipeg

**Bibi Patel**

Vice-president  
Community Foundation of Ottawa

**Suzanne Lawson**

Organizational Consultant

**Katherine van Kooy**

President and CEO  
Calgary Chamber of Voluntary Organizations

**Don McCreesh**

Chair  
Imagine Canada  
President, The Garnet Group Inc.



# Appendix III: Organizations Participating in Validation Sessions

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Organizations and individuals participating in the validation sessions included:

Affiliated Services for Children & Youth (ASCY) - Joyce Minten  
Canadian Mental Health Association - Sudbury - Marion Quigley  
Dartmouth Learning Centre - Sunday Miller  
Dartmouth Work Activity Centre - Robert LaPierre  
Doctors Without Borders/Médecins Sans Frontières - Fabienne Gilles  
Family Service Regina - Shellie Pociuk  
Family Services of the Eastern Shore - Maureen Kirk  
Federation of Community Organizations - Margaret Fraser  
Halifax Sexual Health Centre - Rhonda Phillips  
Humboldt and District Museum & Gallery - Jennifer Hoesgen  
Kids Help Phone - Lisa Smecca  
Lake City Employment Services Association - Chris Fyles  
Our Neighborhood Living Society - Wynn Wilson  
Phoenix Residential Society - Kent Lawson  
Regina Open Door Society Inc. - Tracey Peterson  
Saskatchewan Archaeological Society - Talina Cyr-Steenkamp  
Saskatchewan Deaf and Hard of Hearing Services - Carol Samuels  
Saskatoon Indian & Metis Friendship Centre - May Henderson  
SaskCulture Inc. - Eleanor Adams  
South Riverdale Community Health Centre - Lynne Raskin  
The Arthritis Society - Hilja Lassen  
United Way of Halifax Region - Evelyn Barkhouse  
United Way of Halifax Region - Peter Mortimer  
United Way Regina - Corinne Bokitch  
VON Greater Halifax - Chris Baert-Wilson  
YWCA Saskatoon - Barb MacPherson

*Note: Some participants chose to remain anonymous.*

HR Council<sub>for the</sub>  
Voluntary & Non-profit Sector