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| **Human Resources policy Manual** | Human Resources policies and practices for the Sport and Recreation Industry in Western Australia. Developed by Apex Human Resources as part of the Department of Sport and Recreation’s Human Resources Project |

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# **Introduction**

This Human Resources Policy Manual is provided as a central human resources policy and process reference for human resources management within the organisation.

The specific policies that follow promote the philosophy of <Organisation> with regard to standards of excellence; terms of employment; employee development; and employee services.

It may be necessary to change these policies from time to time to reflect changes in the workforce, employment trends, economic conditions and state and federal legislation. However, any changes in policy will be consistent with the organisation’s approach to:

* Employing talented individuals whose creativity and imagination will support and contribute to achieving the organisation’s strategic goals and business objectives;
* Communicating organisation standards and expectations in all aspects of employment including performance;
* Valuing diversity, and assure equal employment opportunity and a workplace where relationships are based on mutual respect;
* Treating all staff, workers, contractors and stakeholders in a professional, non-discriminatory manner;
* providing safe, effective working conditions, and;
* providing competitive employment terms and conditions

Any Policy changes will be fully consulted on and communicated to all staff through normal communication channels. This Policy Manual will also be updated as necessary.

This Policy Manual should be read in conjunction with the Staff HR Handbook.

**Note**

Matters related to employment are governed by state and federal legislation and are subject to change. It is the responsibility of the organisation to ensure the policies and guidelines contained within this Manual remain consistent and current with prevailing legislation.

Further information in this regard can be obtained at [www.fairwork.gov.au](http://www.fairwork.gov.au) which advises employers on issues related to the Fair Work Act, National Standards of Employment and Sporting Organisation Awards.

# Recruitment and Selection

At <Organisation> our primary objectives regarding recruitment are that staff are employed fairly and expertly based upon relevant skills and experience, ensuring they are properly inducted, and ensuring they are aware of the required standards of business conduct including use of email and the internet.

Effective recruitment and selection is central and crucial to the successful functioning of <Organisation>. It depends on finding people with the necessary skills, expertise and qualifications to deliver the organisation’s strategic objectives and the ability to make a positive contribution to the values and aims of the organisation.

## Advertisements

Vacancies will be advertised utilising a variety of methods and will not be confined to those media which, because of their particular source of applicants, provide only or mainly applicants of a particular group. Primary recruitment sites for the industry include;

Sportspeople.com.au website

WA Sports Federation website and weekly e-newsletter

Department of Sport and Recreation website

Seek.com.au

All vacancies will also be posted on the organisation Intranet, and internal notice boards. <Organisation> is keen to facilitate internal promotions wherever possible as development opportunities for its staff.

## Application process

Candidates for all posts will be asked to address standard criteria and skills appropriate to the role in order that they can be judged on the basis of comparable information.

In applying for posts, all candidates will be provided with a job description, details of the appropriate conditions of service and details about the organisation. A brief statement about the appointment procedure will also be provided and, if possible, an indication of the date (or week) when interviews will be held. The job description will include a list of the main duties and responsibilities of the post, together with an outline of the qualifications and experience which candidates are expected to possess.

In drawing up the job description and conditions of service <Organisation> will ensure that no job applicant receives less favourable treatment than another on the grounds of disability, gender, race, religion or belief, age, sexual orientation, marital status, parental status, caring responsibilities or hours of work, and that no applicant is placed at a disadvantage unjustifiably by requirements or conditions which have a disproportionately adverse effect on a particular group.

Applicants will be required to supply the names and addresses of two people from whom references can be obtained, one of which should normally be the applicant's current or most recent employer.

Only references for short listed candidates for interview will be obtained. References will normally be sought post interview with any offer of employment made subject to receiving satisfactory references.

All completed applications forms are private and confidential and should only be made available to those directly involved in the recruitment and selection process.

## Selection Methods

Interviews will be held by a panel comprising of ideally three persons, but a minimum of two persons. The interviewers will encourage candidates to be at ease during the interview, in order that they can give a fair and accurate impression of themselves.

The selection and appointment of the Chief Executive will be made by members of the Board and the panel will be chaired by the Board Chairman.

A set of questions will be agreed by the interview panel in advance and will be developed from the current job description for the post. The panel will seek to develop questions which ask the candidates to give examples of their previous relevant experience and suitability for the role.

All candidates will be asked the same questions in the same order, and their responses rated accordingly, e.g. on a scale of 1-10. The panel will each have a copy of the questions and will score independently of each other during the interview. Time should be allocated between interviews for the panel to discuss each candidate and to assess the candidate’s suitability for the role.

It should be remembered that an interview is a two way process, and candidates will be given every opportunity to ask questions about the organisation, to ensure that they have a full understanding of the post for which they are applying and the way the organisation operates.

In addition to interviews, a range of other selection techniques may be used. In such circumstances reasonable notice and relevant information will be given to ensure that candidates have sufficient time and information to prepare.

All appointments will be made strictly on merit and related to the requirements of the job.

All interviewed candidates will be notified of the outcome of the selection process as soon as possible, either by telephone, email or letter.

All unsuccessful candidates’ application forms and interview notes will be retained for one year from the date of interviews taking place. After this date they should be destroyed.

## Reference checks

All offers of employment will be made conditional upon satisfactory results from the following:

* two satisfactory references;
* confirmation of the right to work in this country (if appropriate)
* obtaining of certain job pre-requisites, e.g. Police Certificate, Working With Children Certificate

## Probationary Period

All appointments into the organisation will be made subject to a probationary period of three calendar months, at which time a review meeting will take place between the post holder and their line manager to discuss progress.

At the end of the probationary period, and subject to a satisfactory report by the appropriate head of section or line manager, employees will be notified in writing that they have successfully completed their probationary period. The probationary period may be extended by a further 3 months should the individuals line manager consider this appropriate.

## Exit Interviews

All employees who leave the employment of the organisation voluntarily will have an exit interview with their manager before their last day of employment.

Exit interviews provide the opportunity for departing employees to discuss their reasons for leaving. The information provided is useful in identifying trends, learning and development and evaluating the effectiveness of the organisation’s human resources policies and practices.

The appropriate line manager should receive all appropriate information, such as recommendations made for change, or significant issues raised in the questionnaire, whilst bearing in mind confidentiality issues. The exit interview questionnaire will be retained on the employee’s personal file.

## Induction Process

<Organisation> believes that all new employees must be given timely induction training. This training is regarded as a vital part of staff recruitment and integration into the working environment. This policy, associated procedures and guidelines define the organisation’s commitment to ensure that all staff are supported during the period of induction, to the benefit of the employee and organisation alike.

It is the aim of the Organisation to ensure that staff induction is dealt with in an organised and consistent manner, to enable staff to be introduced into a new post and working environment quickly, so that they can contribute effectively as soon as possible. This induction policy, associated procedures and guidelines aim to set out general steps for managers and staff to follow during the induction process. It is expected that all managers and staff will adhere to this policy.

The organisation expects that the implementation of good induction practice by managers/supervisors will:

* Enable new employees to settle into the Organisation quickly and become productive and efficient members of staff within a short period of time.
* Ensure that new entrants are highly motivated and that this motivation is reinforced.
* Assist in reducing staff turnover, lateness, absenteeism and poor performance generally.
* Assist in developing a management style where the emphasis is on leadership.
* Ensure that employees operate in a safe working environment.
* Will reduce costs associated with repeated recruitment, training and productivity.

In terms of its commitment to an effective induction process for new employees, the organisation will:

* Issue guidelines to familiarise managers and staff with the induction process.
* Maintain and update the Induction Policy.
* Provide a checklist for managers and staff to follow during the induction period.
* Ensure there is effective monitoring of the induction process particularly in the first three months.
* Deal with any problems promptly providing an efficient service for both managers and staff.
* Review all policy, procedure and guideline documents on a regular basis.
* Provide relevant formal training courses necessary to assist the induction process.

## Guidelines for Managers/supervisors

Starting a new job is a demanding and often stressful experience. Quite apart from the obvious challenge of tackling new tasks, there is also the need to become accustomed to a new organisation, a new environment and new colleagues. The purpose of induction is to support new employees during this difficult period and to help them become fully integrated into the organisation as quickly and as easily as possible.

Induction has benefits for all involved in the process. Employees who settle quickly into the Organisation will become productive and efficient at an early stage and in turn will experience feelings of worth and satisfaction.

It is generally recognised that new employees are highly motivated and an effective induction process will ensure that this motivation is reinforced.

The advantages of an effective and systematic induction process are as follows:

* To enable new employees to settle into the Organisation quickly and become productive and efficient members of staff within a short period of time.
* To ensure that new entrants are highly motivated and that this motivation is reinforced.
* To assist in reducing staff turnover, lateness, absenteeism and poor performance generally.
* To assist in developing a management style where the emphasis is on leadership.
* To ensure that new employees operate in a safe working environment.
* To reduce costs associated with repeated recruitment, training and lost productivity.

**Induction Checklist**

The Induction checklist is a very useful way of ensuring that information is imparted to new employees when they are likely to be most receptive. It avoids overloading employees with information during the first weeks whilst ensuring that all areas are covered.

Managers/supervisors should ensure that these matters have been properly understood whilst the checklist is being completed, perhaps in the form of a weekly chat with the new entrant.

Arrangements should also be made for the employee to visit any relevant departments with which they have regular contact in the course of their duties. At the end of the process the induction checklist should be signed by the relevant parties and placed in the member of staff's personnel file.

**Conducting a Successful and Effective Induction Process**

Preparations should be made for the arrival of the new entrant well in advance, for example, arrangements should be made to provide desk, equipment, business cards, network accessibility and email address etc.

Most new employees tend to be concerned primarily with two matters:

1. whether they can do the job and
2. how they will get on with their new colleagues.

It is therefore important to introduce them to their new workplace and colleagues at the earliest opportunity. An introductory talk will be appropriate at this time and can be combined with the provision of general information and exchanging any necessary documentation. This talk should be as brief as possible, because the employee is unlikely to be receptive to detailed information at this stage, and should be conducted by someone who is well prepared and has sufficient time available. Managers/supervisors should refer to the Induction Checklist and use it as a basis for discussion thus ensuring all documentation is complete.

A tour of the workplace should be arranged for the new entrant allowing the organisation to be viewed as a whole and the recruit to see where he/she fits into the organisation.

The new entrant will want to get to know his/her colleagues and quickly become part of the team and time should be made for this process. Colleagues should be briefed on the new entrant’s arrival. If possible one of the new entrants colleagues should be nominated to ensure that he/she has every assistance in settling in quickly.

Induction can be said to end when the individual become fully integrated into the organisation. Of course, there is no set timescale within which this will happen and follow up is essential. Giving new employees the opportunity to ask questions several weeks into employment can be useful, and the induction checklist will provide this opportunity.

In some areas, such as understanding wider aspects of the organisation, follow up after a number of months may be appropriate.

An Induction Checklist can be found in the appendix of this document.

Further examples of Induction and other human resources policies, processes and templates can be found at the following websites;

<http://www.fairwork.gov.au/about-us/policies-and-guides/templates> (provides free, editable templates, policies, practices and on-line development tools)

<https://www.ahri.com.au/> (Member based human resources organisation, fees apply)

<http://www.commerce.wa.gov.au/labour-relations> (provides free advice to business regarding statutory requirements together with best practice solutions for employers)

# Business Conduct

## Introduction

<Organisation> expects its staff (including temporary, agency, interim, contractor or consultant staff) to be scrupulously impartial and honest in all affairs relating to the organisation and their job within it. All staff also bear a responsibility as employees to act as ambassadors for the organisation in terms of their general conduct both within and outside the organisation. This policy outlines the responsibilities of staff working for the organisation.

The duties of an employee are as follows:

* to be ready and willing to work;
* to take reasonable care in the exercise of that service, including the duty to be competent at work and to take care of the organisation’s property;
* to not wilfully disrupt the organisation’s business;
* to obey reasonable orders as to the time, place, nature and method of service;
* to work only for the organisation in the organisation’s time;
* to disclose information to the organisation relevant to the organisation’s business: for example that they might know or discover;
* to hold solely for the Organisation the benefit of any invention relevant to the business on which the Organisation is engaged;
* to respect the Organisation’s trade secrets;
* in general, to be of good faith and do nothing to destroy the trust and confidence necessary for employment;
* to account for all benefits – monetary or in kind - received in the course of employment.

## Standard of Conduct Required by the Organisation

**Gifts and Hospitality**

The oganisation requires its employees to ensure that gifts and hospitality offered by suppliers and potential suppliers of goods and services to the organisation are declined. This applies, whether the gifts or hospitality are offered within, or outside normal working hours. The only exceptions to this are trivial gifts with a nominal value of less than $20 such as a calendar, diary, chocolates or mugs can be accepted. All other gifts must be politely refused or, if received through the post, returned to the donor with a suitably worded letter signed by the Department Manager.

**Transaction of Private Business**

Employees having official dealings with contractors and other suppliers of goods or services must avoid transacting any kind of private business with them by any means other than the organisation’s normal commercial channels. No favour or preferences as regards price, or otherwise, which is not generally available, should be sought or accepted.

**Attendance at Functions**

Where it is evident that the work of the organisation will be facilitated, invitations to attend receptions and other functions may be accepted under the following rules:

* no employee may accept an invitation without first obtaining the approval of the Department Manager;
* if addressed personally, such an invitation may not be transferred to another employee, except with the consent and approval of a senior manager as above and with the concurrence of the party issuing the invitation;
* invitations involving attendance outside normal working hours may be accepted only on the authority of the Departmental Manager;
* as a general rule, any employee who has any doubts about the wisdom of accepting any hospitality should decline the offer.

NB The important difference between, for example, attendance in an official capacity at a function organised by the organisation and the acceptance of hospitality from a private individual or firm should be recognised.

**Confidentiality**

At all times confidentiality must be maintained. No information can be released to unauthorised persons or organisations. The Chief Executive or other Senior Managers of the organisation will inform employees of those authorised to receive information.

If doubt exists as to the validity of an organisation or individuals to receive information, this must be checked with a Senior Manager.

**Outside Interests and Employment**

Outside interests include directorships, ownership, part ownership or material shareholdings in companies, business or consultancies likely to seek to do business with the <Organisation> should be declared to the individual’s line manager as should the interests of a spouse / partner or close relative.

**Political and civic activities**

It is not the intention of <Organisation>, or this policy, to dissuade employees from participating actively in public duties. It is important, however, that by doing so there is no suggestion to a third party that the employee is acting on behalf of, or with the support of, <Organisation> .To avoid any misunderstanding, no organisation employee should permit his or her organisation affiliation to be noted in any outside organisation's materials or activities without the express written approval of a member of senior management.

**Dress Code**

*(ORGANISATION NAME)* has adopted a business casual dress code reflecting its flexible and informal organisational standards. We recognise that business casual is the predominant style of attire within business generally and is a preferred choice of our employees.

Similarly it is important that we reflect the standards of our customers and it may be necessary, therefore, to adopt more formal dress codes when interacting with particular clients.

Accordingly, employees may wear either business casual attire or more traditional business attire in accordance with this policy.

**Policy Guidelines**

Employees are required to maintain a professional standard of dress and be well groomed, neat and tidy. The appearance and manner of employees reflects the public image of *(ORGANISATION NAME)*.

*(ORGANISATION NAME)*'s business casual dress code includes the following standards:

* No denim of any kind or colour i.e. jeans or similar attire.
* Shirts must have collars.
* No leggings or jodhpurs.
* No shorts.
* No T-shirts, transfer t-shirts, tank tops, halter-tops, see-through or midriff-tops.
* No mini-skirts, sundresses or other revealing or provocative clothing.
* No trainers, sports shoes or beach thongs.

**General Conduct**

Employees should at all times conduct themselves in such a way as to enhance the reputation of the organisation.

<Organisation> will support employees who become aware of and are willing to report breaches of this policy or who genuinely believe that a breach is occurring, has occurred or is likely to occur within the business. Employees should raise the issue internally with their manager or supervisor

These standards of conduct are intended to underpin and clarify standards required by the organisation of its employees and form a fundamental part of the employment contract. Staff who fail to comply with the guidance detailed in this Policy could be subject, following full investigation, to disciplinary action up to and including dismissal.

If through their actions or omissions staff are found to be in contravention of either this Policy or, indeed, their legal responsibilities then the organisation reserves the right to take legal action if it deems it to be necessary to do so.

Further examples, guidelines and templates related to Business Codes of Conduct can be found at the following resource links;

<http://www.fairwork.gov.au/about-us/policies-and-guides/templates> (provides free, editable templates, policies, practices and on-line development tools)

<https://www.ahri.com.au/> (Member based human resources organisation, fees apply)

<http://www.commerce.wa.gov.au/labour-relations> (provides free advice to business regarding statutory requirements together with best practice solutions for employers)

<http://dsr.wa.gov.au/site-elements/search-results?indexCatalogue=bigger-picture-sport&searchQuery=code+of+conduct&wordsMode=0>

<http://hrcouncil.ca/hr-toolkit/code-of-conduct.cfm>

# **Internet and Email Usage Policy and Guidelines**

## Introduction

This policy sets out the obligations and expectations on employees of the organisation including contractors and temporary staff, who use the organisation’s IT facilities for internet and email purposes. IT facilities are provided to assist with day to day work. It is important that they are used responsibly, are not abused, and that individuals understand the legal professional and ethical obligations that apply to them.

## Authorisation

No person is allowed to use Organisation IT facilities who has not previously been authorised to do so by the Organisation IT Department / Line Manager. Unauthorised access to IT facilities is prohibited and may result in either disciplinary action or criminal prosecution.

## Legislation

All users shall comply with the relevant legislation regarding data protection.

Users need to be sure that they are not breaching any data protection when they write and send emails. This could include but is not limited to:

* Passing on personal information about an individual or third party without their consent.
* Keeping personal information longer than necessary.

Email should where possible be avoided when transmitting personal data about a third party.This includes comment and opinion, as well as factual information. Therefore this should be borne in mind when writing emails, and when keeping them.

## Responsibilities

All Users are expected to act in a manner that will not cause damage to IT facilities or disrupt IT services. Any accidental damage or disruption must be reported to IT / Line Manager as soon as possible after the incident has occurred. Users are responsible for any IT activity which is initiated under their username.

**Use of the Internet**

Use of the Internet by employees is encouraged where such use is consistent with their work and with the goals and objectives of the organisation in mind. Reasonable personal use is permissible subject to the following:

* Users must not participate in any online activities that are likely to bring the organisation into disrepute, create or transmit material that might be defamatory or incur liability on the part of the organisation, or adversely impact on the image of the organisation.
* Users must not visit, view or download any material from an internet site which contains illegal or inappropriate material. This includes, but is not limited to, pornography (including child pornography), obscene matter, race hate material, violence condoning messages, criminal skills, terrorism, cults, gambling and illegal drugs.
* Users must not knowingly introduce any form of computer virus into the organisation’s computer network.
* Personal use of the internet must not cause an increase for significant resource demand, e.g. storage, capacity, speed or degrade system performance.
* Users must not download commercial software or any copyrighted materials belonging to third parties, unless such downloads are covered or permitted under a commercial agreement or other such licence.
* Users must not use the internet for personal financial gain.
* Users must not use the Internet for illegal or criminal activities, such as, but not limited to, software and music piracy, terrorism, fraud, or the sale of illegal drugs.
* Users must not use the internet to send offensive or harassing material to other users.
* Use of the internet for personal reasons (e.g. online banking, shopping, information surfing) must be limited, reasonable and done only during non-work time such as lunch-time.
* Use of gambling sites, online auction sites and social networking sites such as, but not limited to, Facebook, LinkedIn, Youtube, Twitter, Bebo, Flickr, MySpace etc is **not** permissible.
* Staff may face disciplinary action or other sanctions (see below) if they breach this policy and/or bring embarrassment on the Organisation or bring it into disrepute.

**Use of Email**

Emails sent or received on the email system form part of the official records of the organisation; they are not private property. The organisation does not recognise any right of employees to impose restrictions on disclosure of emails within the organisation. Users are responsible for all actions relating to their email account/pc username and should therefore make every effort to ensure no other person has access to their account.

When using organisation email, users must:

* ensure they do not disrupt the organisation’s wider IT systems or cause an increase for significant resource demand in storage, capacity, speed or system performance e.g. by sending large attachment to a large number of internal recipients, without receiving prior authorisation
* ensure they do not harm the organisation’s reputation, bring it into disrepute, incur liability on the part of the organisation, or adversely impact on its image.
* not seek to gain access to restricted areas of the network or other “hacking activities” is strictly forbidden
* must not use email for the creation, retention or distribution of disruptive or offensive messages, images, materials or software that include offensive or abusive comments about ethnicity or nationality, gender, disabilities, age, sexual orientation, appearance, religious beliefs and practices, political beliefs or social background. Employees who receive emails with this content from other employees of the organisation should report the matter to their line manager or supervisor.
* not send email messages that might reasonably be considered by recipients to be bullying, harassing, abusive, malicious, discriminatory, defamatory, and libellous or contain illegal or offensive material, or foul language.
* not upload, download, use, retain, distribute, or disseminate any images, text, materials, or software which might reasonably be considered indecent, obscene, pornographic, or illegal.
* not engage in any activity that is likely to
  + - Corrupt or destroy other users’ data or disrupt the work of other users
    - Waste staff effort or organisation resources, or engage in activities that serve to deny service to other users
    - Be outside of the scope of normal work-related duties – for example, unauthorised selling/advertising of goods and services
    - Affect or have the potential to affect the performance of damage or overload the organisation system, network, and/or external communications in any way
    - Be a breach of copyright or license provision with respect to both programs and data, including intellectual property rights
* not send chain letters or joke emails from an organisation account.

Staff who receive improper email from individuals inside or outside the organisation, should discuss the matter in the first instance with their line manager or supervisor.

## Good Practice

The organisation has good practice guidelines for dealing with email when staff are out of the office for longer than three days. When activating the "out of office" facility messages should name an alternative member of staff for correspondents to contact if necessary. This will ensure that any important messages are picked up and dealt with within required timescales.

During periods of absence when highly important emails are anticipated, the employee (or manager) should make arrangements for notification and access by another appropriate member of staff.

Where sensitive and confidential information needs to be sent via email for practical reasons, please be aware that email is essentially a non-confidential means of communication. Emails can easily be forwarded or archived without the original sender’s knowledge. They may be read by persons other than those they are intended for.

Users must exercise due care when writing emails to avoid being rude or unnecessarily terse. Emails sent from the organisation may be interpreted by others as organisation statements. Users are responsible for ensuring that their content and tone is appropriate. Emails often need to be as formal and businesslike as other forms of written correspondence.

Users should delete all personal emails and attachments when they have been read and should also delete all unsolicited junk mail. In the process of archiving emails, users should ensure inappropriate material is not archived

(Organisation) provides a current and up to date automatic virus checker on all networked computers. However, caution should be used when opening any attachments or emails from unknown senders. Users must best endeavour to ensure that any file downloaded from the internet is done so from a reliable source. It is a disciplinary offence to disable the virus checker. Any concerns about external emails, including files containing attachments, should be discussed with the IT / Line Manager.

**Remote Users**

Employees may sometimes need to use organisation equipment and access the organisation network while working remotely, whether from home or while travelling. The standards set out in this document apply whether or not organisation equipment and resources are being used.

**Penalties for Improper Use**

Breaches of these regulations may be dealt with under the Organisation’s disciplinary procedures. It may lead to termination of employment from the Organisation.

Where appropriate, breaches of the law will be reported to the police.

# **Social Media Policy**

Social media offers the opportunity for people to gather in online communities of shared interest and create, share or consume content. As a member based organisation, (Organisation name) recognises the benefits of social media as an important tool of engagement and enrichment for our stakeholders. It is important that the reputation of (Organisation name) and the sport generally is not tarnished by anyone using social media tools inappropriately, particularly in relation to any content that might reference the organisation.

When someone clearly identifies their association with (Organisation name), and/or discusses their involvement in the organisation in this type of forum, they are expected to behave and express themselves appropriately and in the ways that are consistent with (Organisation Name) stated values and policies.

This policy aims to provide some guiding principles to follow when using social media. This policy does not apply to the personal use of social media platforms by members or staff that makes no reference to (Organisation Name) or related issues.

**Scope**

This policy applies to (Organisation Name) members, member clubs, officials, staff and any other formal representatives of the organisation.

This policy covers all forms of social media. Social media includes, but is not limited to, activities such as:

* Maintaining a profile page on social or business networking sites (such as LinkedIn, Facebook or Twitter);
* Content sharing including Flicker (photo sharing) and YouTube (Video Sharing);
* Commenting on blogs for personal or business reasons;
* Leaving product or service reviews on retailer sites or customer review sites;
* Taking part in online votes and polls;
* Taking part in conversations on public and private web forums (message boards)

The intent of this policy is to include anything posted online where information is shared that might affect members, colleagues, sponsors or (Organisation Name) and the reputation of the sport in general.

**Guidelines**

For (Organisation name) members, officers and staff using social media, such use:

* Must not contain, or link to, libellous, defamatory or harassing content;
* Must not comment on, or publish information that is confidential in anyway
* Must not bring the organisation or the sport into disrepute.
* Under no circumstance should offensive comments be made about the sports members, volunteers or staff online.

**Breach of Policy**

If detected or reported a breach of this policy may result in disciplinary action being taken.

A breach of this policy may also amount to breaches of other (Organisation Name) policies. This may involve a verbal or written warning or in serious cases, termination of employment or engagement with (Organisation Name) including suspension of membership.

# **Managing Performance**

## Appraisal Policy

<Organisation> is committed to supporting every employee to reach their potential and achieve their personal goals, which in turn will assist the organisation to achieve its objectives.

The performance appraisal policy supports the performance appraisal scheme. The scheme is a formal process centred on an annual meeting of each employee and their line manager to discuss his/her work. The purpose of the meeting is to review the previous year’s achievements and to set objectives for the following year. These should align individual employees’ goals and objectives with organisational goals and objectives.

**Appraisal Process Guidelines**

* The appraisal process aims to improve the effectiveness of the organisation by contributing to achieving a well motivated and competent workforce.
* Appraisal is an ongoing process with an annual formal meeting to review progress.
* The appraisal discussion is a two way communication exercise to ensure that both the needs of the individual, and of the organisation are being met, and will be met in the next year.
* The appraisal discussion will review the previous year’s achievement, and will set an agreed Personal Development Plan for the coming year for each member of staff.
* All directly employed employees who have completed their probationary period are required to participate in the appraisal process.
* The appraisal process will be used to identify the individual’s development needs
* All staff will receive appraisal training as an appraisee, and where appropriate as an appraiser.
* The appraisal process will provide management with valuable data to assist succession planning.
* The appraisal process will be a fair and equitable process.

**Performance Appraisal Implementation**

Performance appraisal discussions will be held over a designated 4 week period on an annual basis. They will be arranged by the appraisee’s line manager. Line managers are encouraged to provide the opportunity for an additional 6 month verbal appraisal review, mid-year and other informal reviews as necessary throughout the year.

The discussion will be held in private. Information shared during the appraisal will be shared only with senior management. Confidentiality of appraisal will be respected.

The appraiser (usually the employee’s line manager) will be expected to have successfully completed appraiser training, and to be familiar with the appraisee’s work.

All appraisal documents should be issued to both parties prior to the discussion, in order to allow time for both parties to reflect and prepare. These will provide a framework and focus for the discussion.

A time and venue for the discussion will be advised at least one week before the meeting takes place.

**The Appraisal Discussion**

The appraisal discussion will allow an opportunity for both the appraisee, and the appraiser to reflect and comment on the previous year’s achievements. It will praise achievement and encourage the appraisee in his/her role.

The appraiser is accountable for giving the employee constructive, timely and honest appraisals of their performance, which should take into account both the goals of the organisation and of the individual.

The discussion should be a positive dialogue, and will focus on assisting the appraisee to acquire the relevant knowledge, skills and competencies to perform his/her current role to the best of his/her abilities.

The appropriate forms will be completed and signed by both parties. The appraisee will be given the opportunity to note any comments that he/she does not agree with and complete a self assessment.

The appraisee and line manager should agree on a Personal Development plan for the appraisee for the following year. This will reflect the appraisee’s aspirations and the organisation’s requirements, and should align personal and organisational goals. The organisation and the line manager will support the individual to achieve these goals during the forthcoming year.

Any training needs, future training requirements, planned qualifications, development opportunities and career planning should be discussed in the light of the Personal Development Plan.

Further information and resources regarding performance appraisal processes can be found at;

<http://humanresources.about.com/od/performancemanagement/a/perfmgmt.htm>

<http://www.australianbusiness.com.au/lawyers/expertise/employment-law/guidelines-on-how-to-conduct-a-performance-apprais>

<http://www.fairwork.gov.au/about-us/policies-and-guides/templates> (provides free, editable templates, policies, practices and on-line development tools)

# **Disciplinary Procedure**

(Organisation’s) Disciplinary Procedure will be used only when necessary and as a last resort. Where possible, informal and/or formal counselling or other good management practice will be used to resolve matters prior to any disciplinary action being taken. The procedure is intended to be positive rather than punitive but takes cognisance of the fact that sanctions may have to be applied in some circumstances.

An employee can discuss any part of this policy with their `Line Manager. They can help clarify an employees rights as well as give guidance and support where it may be needed. Every individual has the right to representation at any point during the disciplinary process.

## Suspension

Suspension is not disciplinary action. The purpose of suspension is manifold and can be used when it is necessary to remove a member of staff from the workplace pending an investigation for example, to allow time for a 'cooling down period' for both parties, for their own or others protection, to prevent them influencing or being influenced by others or to prevent possible interference with evidence.

Only the Manager in charge of that individual, at that time or their superior, have the authority to suspend an individual.

An employee suspended from duty will receive written confirmation within three days of:

* the reason for the suspension
* the date and time from which the suspension will operate.
* the timescale of the ongoing investigation.
* the right of appeal to the immediate manager of the suspending manager should the suspension last more than 7 days

## Counselling

Counselling is an attempt to correct a situation and prevent it from getting worse without having to use the disciplinary procedure. Where improvement is required, the employee must be given clear guidelines as to:

* what is expected in terms of improving shortcomings in conduct or performance
* the time scales for improvement
* when this will be reviewed
* the employee must also be told, where appropriate, that failure to improve may result in formal disciplinary action.

A record of the counselling should be given to the employee and a copy retained in their personnel file. It is imperative that any counselling should be followed up and improvements recognised and recorded. Once the counselling objectives have been met, any record of the counselling will be removed from the employees file.

If during counselling it becomes clear that the matter is more serious, then the discussion should be adjourned, and pursued under the formal disciplinary procedure.

## Procedure for Formal Investigation

Formal investigations should be carried out by the most appropriate manager who is not directly involved with the incident being investigated. This manager may involve others to assist with the investigation process. All the relevant facts should be gathered promptly as soon as is practicable after the incident. Statements should be taken from witnesses at the earliest opportunity. Any physical evidence should be preserved and/or photographed if reasonable to do so.

A report should be prepared which outlines the facts of the case. This should be submitted to the appropriate senior manager / Director who will decide whether further action is required. Where appropriate, this report may be made available to the individual and their representative.

In most circumstances where misconduct or serious misconduct is suspected, it will be appropriate to set up an investigatory hearing. This would be chaired by the appropriate Senior Manager / Director, who would be accompanied by another manager. The investigating manager would be asked to present his/her findings in the presence of the employee who has been investigated. Witnesses should be called at this stage, and the employee (or their representative) allowed to question these witnesses. The employee has a right of representation at this hearing.

Following the full presentation of the facts, and the opportunity afforded to the employee to state his side of the case, the hearing should be adjourned, and everyone would leave the room except the senior manager / Director hearing the case, and the other manager. They would discuss the case and decide which of the following option was appropriate:

* take no further action against the employee
* recommend counselling for the employee
* proceed to a disciplinary hearing

All parties should be brought back, and informed as to which option has been chosen. Should the decision be taken to proceed to a disciplinary hearing, then this may follow on immediately from the investigatory hearing if the following criteria have been met:

* the employee has been informed by letter that the investigation may turn into a disciplinary hearing, and that he has the right of representation
* he has been told in advance what the nature of the complaint is, and had time to consult with a representative
* all the facts have been produced at the investigatory hearing, and the manager / Director is in a position to decide on disciplinary action.
* the manager should inform the employee and their representative that the hearing would now become a formal disciplinary hearing, and invite them to say anything further in relation to the case.

It may be appropriate at this point to adjourn proceedings, whilst necessary arrangements are made for a representative to attend the hearing at the request of the employee.

Should anyone who is subject to disciplinary action resign during the course of it, the action will cease unless there are extenuating circumstances which require it's continuance. The subject of the discipline may also request that the disciplinary action continue.

## Warnings

**Examples of Minor Misconduct**

Below are listed examples of misconduct which may warrant either a Verbal Warning or a First Written Warning. It is stressed however that this list is not exhaustive and that on all occasions a full and proper investigation must take place prior to the issue of a warning.

* Persistent lateness and poor time-keeping.
* Absence from work, including going absent during work, without valid reason, notification or authorisation.
* Smoking within unauthorised areas.
* Failure to work in accordance with prescribed procedures.
* Incompetence.
* Unreasonable standards of dress or personal hygiene.
* Failure to observe Organisation regulations and procedures.

**Verbal Warning**

A Verbal Warning is appropriate when it is necessary for the manager in charge to take action against an employee for any minor failing or minor misconduct.

**First Written Warning**

A First Written Warning is appropriate when:

* a verbal warning has not been heeded and the misconduct is either repeated or performance has not improved as previously agreed.
* an offence is of a more serious nature for which a written warning is more appropriate.
* the recurrence or accumulation of an offence/offences, if left, will lead to more severe disciplinary action.

**Examples of Gross – Misconduct**

Listed below are examples of misconduct which may be considered to be Gross Misconduct and may warrant a Final Warning, Demotion or Dismissal. It is stressed however that this list is not exhaustive and that on all occasions a full and proper investigation must take place prior to the issuing of a Final Warning, Demotion or Dismissal.

* Theft, including unauthorised possession of Organisation property.
* Breaches of confidentiality, prejudicial to the interest of the Organisation,
* Being unfit for duty because of the misuse/consumption of drugs or alcohol.
* Refusal to carry out a management instruction which is within the individuals capabilities and which would be seen to be in the interests of the Organisation.
* Breach of confidentiality / security procedures.
* Physical assault, breach of the peace or verbal abuse.
* False declaration of qualifications or professional registration.
* Failure to observe Organisation rules, regulations or procedures.
* Wilful damage of property at work.

**Final Written Warning**

A Final Written Warning is appropriate when:

* an employee's offence is of a serious nature falling just short of one justifying dismissal.
* an employee persists in the misconduct which previously warranted a lesser warning.

**Downgrading or Transfer to another Post**

This action is appropriate when:

* previous attempts, via the disciplinary procedure, to rectify a problem have failed and this is a final attempt to solve a problem without having to dismiss an employee.
* an employee is considered by the Manager of the department to be incompetent or otherwise unfit to fulfil the duties for which he is employed but where dismissal is not thought to be appropriate.

**Dismissal**

Dismissal is appropriate when

* an employee's behaviour is considered to be Gross Misconduct.
* an employees misconduct has persisted, exhausting all other lines of disciplinary procedure.

**Time Scales for the expiry of Warnings**

Warnings issued to employees shall be deemed to have expired after the following periods of time.

* Verbal Warnings: 6 months
* First Written Warnings: 12 months
* Final Written Warnings: 18 months (or as agreed and recorded at the hearing)

These time scales remain provided that during that period, no further warnings have been issued in respect of the employee's conduct.

## Letter of Warning

All Warnings must contain the following information

* The letter must be issued within 7 days of the date of the disciplinary hearing.
* The nature of the offence and where appropriate, that if further misconduct occurs, more severe disciplinary action will be taken.
* The period of time given to the employee for improvement.
* The employees right to appeal to the manager directly above that of the one issuing the warning.

A copy of the warning and any supporting documentation must be attached to the individuals personnel file.

The employee must also receive a copy of the warning which in the case of any written warning will be sent to their home address by recorded delivery if not handed to them in person.

In the case of a final written warning, reference must be made to the fact that any further misconduct will lead to dismissal, and that the employee has the right of appeal, and to who they can make that appeal.

The letter confirming dismissal will contain the following information:

* The reason for dismissal and any administrative matter arising from the termination of their employment.
* The employees right of appeal and to whom they should make that appeal

## Appeals

Every employee has the right to appeal against the outcome of a disciplinary hearing. The basis of an appeal should normally relate to one of the following areas:

* that the Organisation’s' Procedure had not been followed correctly.
* that the resulting disciplinary action was inappropriate.
* that the need for disciplinary action was not warranted.
* that new information regarding disciplinary action has arisen

An appeal should be put in writing to the responsible person within the organisation. The letter of appeal may be constructed by the employee or their representative. The letter should contain the grounds for appeal and should be lodged within 10 days of receipt of the warning / dismissal letter.

An appeal will be arranged within 20 working days of receipt of the appeal letter.

**Appeals against Verbal and First Warnings**

In the case of verbal and first warnings, the appeal will be heard by the manager next in line to the one who issued the warning.

**Appeals against Downgrading, Final Warnings and Dismissal**

The hearing and determining of appeals against final warnings and dismissal will be heard by the appropriate Director or Chief Executive. They may also involve another senior manager / Director not previously involved with the case.

When dealing with an appeal against a Final Warning or Dismissal written statements of case may be submitted no later than 2 days prior to the date of Appeal Hearing. No additional written evidence will be admitted by the Appeal Committee on the date of the Hearing.

Witnesses may be required by either party at an appeal hearing, dependent upon the circumstances and nature of the case. However, there is no specific obligation on either party to produce a witness. Either party must give 5 days prior notice that they intend to call specific persons involved or associated with the case under consideration.

It is the responsibility of the management representative and for the appellant to each arrange for the availability and attendance of any witness they wish to call.

**Important note**

Prior to the commencement of disciplinary action, particularly with regard to termination of employment, it is recommended that you seek professional advice to avoid any potential claims of unfair dismissal.

Further information can be obtained from the following resources;

<http://www.fairwork.gov.au/about-us/policies-and-guides/templates> (provides free, editable templates, policies, practices and on-line development tools)

<http://www.commerce.wa.gov.au/labour-relations> (provides free advice to business regarding statutory requirements together with best practice solutions for employers)

# **Capability Procedure**

<Organisation> places great importance on maintaining levels of performance at an acceptable standard and the capability procedure provides a fair and objective process to enable managers to ensure that those standards are met in every aspect of the organisation’s operations.

**Definition**

For the purpose of this Capability Procedure, capability is defined as:

"*Where a member of staff is failing in a significant or persistent way to carry out their responsibilities or duties in a satisfactory manner, either due to a lack of ability, inadequate training or lack of experience. Such failings will be identified by use of the following procedures and steps taken to improve performance. Where such steps prove unsuccessful the member of staff may have their employment terminated on the grounds of incapacity*".

The procedures set out in this document aim to ensure that there is:

* A means of monitoring performance and establishing performance criteria.
* A degree of consistency in how staff with widely differing responsibilities and duties are given opportunities to attain satisfactory levels of performance.
* Assistance in identifying the most appropriate form(s) of support and providing that support.

If a member of staff fails to overcome their difficulties, any consequent action will be based on:

* Adequate evidence that the member of staff is incapable of performing their duties satisfactorily.
* A fair procedure.
* The fact that the member of staff was given all reasonable assistance to overcome such failings.

## Procedure

**Stage 1 - Informal Procedure:**

Where an employee of the organisation exhibits an inability to perform their duties satisfactorily, the organisation will attempt to resolve the matter informally via a meeting between the Line Manager and the member of staff. The nature and date of the meeting will be recorded and a letter sent to the member of staff indicating the nature of their unsatisfactory performance and how such performance can be improved to the satisfaction of the Line Manager.

At this meeting, the line manager will agree performance standards with the member of staff, and a time period (normally three months) over which improvement will be expected. They will also agree how the individual’s performance will be monitored.

If the individual’s performance improves adequately over the timescale, then the process will terminate at this stage. If performance remains unsatisfactory, then the formal procedure will be invoked by the Line Manager as set out in stage 2.

**Stage 2 - Formal Procedure - Information Collection:**

The Senior Manager / Director of the Line Manager concerned may call on the support of an external advisor or another member of the Management Team, to undertake collecting the necessary information. They would be expected to interview the member of staff concerned and the Line Manager, as well as any other appropriate individuals. The member of staff should be informed that they may be accompanied at any meetings by a trade union representative or work colleague.

A written report based on evidence gained e.g. by interviews and observation of performance will be prepared by the advisor / Manager. The report should be precise and specific in the observations and comments it makes and shall contain clear information on:

* areas where the member of staff is failing to perform adequately
* actions already taken by management to address these failings and whether these actions were adequate - i.e. were clear performance standards set and monitored
* whether the member of staff acknowledges a problem and shows a willingness to improve
* the impact of the individuals failings on colleagues and work output
* any other mitigating factors

The report should be given to the member of staff concerned and to the Line Manager. Both may record in writing any comments on the observations contained within the report.

The Senior Manager / Director will consider the report, and may opt to take one of the following options:

* no further action
* instruct the line manager to set reasonable performance standards for the individual and monitor these for a set period of time. *(This option should be chosen if this has not previously been carried out adequately and at least three months given to improve)*
* convene a formal capability hearing to consider the matter further

**Stage 3 - Capability Hearing**

The Senior Manager / Director will write to the member of staff informing them of the date of the hearing, attaching any relevant documentation. The letter shall contain:

* The performance deficits in sufficient detail to ensure that the member of staff fully comprehends their nature, extent and seriousness.
* The time, date and venue of the interview.
* The person who will conduct the interview, usually the Senior Manager / Director
* A statement that all employees have the right to be accompanied by a trade union representative or work colleague at any interview or hearing held under the provision of these procedures.
* At least 10 days notice of the hearing.

At the hearing, the member of staff will be given the opportunity to put forward a defence, to bring witnesses in support of their defence, to present mitigating circumstances and to make a full statement. A written copy of the procedure to be adhered to during the hearing should be made available to the member of staff before the hearing takes place.

If the allegation is found to be justified, then a decision on the action to be taken must be made. Depending on the nature, frequency and seriousness of the allegation(s) it is expected that at this stage a Warning will be given and this will be confirmed in writing.

A letter should be sent to the member of staff confirming the decision and the reason(s) why it was made. The letter will also indicate that the member of staff's progress will continue to be monitored and how this will be carried out. A time scale for performance to improve and a review date(s) will be specified.

If the failings are found to be not sufficiently serious to warrant a formal warning or where there are mitigating circumstances, then monitoring should be discontinued subject to a clear indication to the member of staff that it may be reintroduced if the problem(s) reappear.

**Stage 4 - Second Capability Hearing:**

If poor performance continues, the process set out in stage 3 should be repeated. The time scale for improvement will depend on the nature of the duties and responsibilities of the employee concerned and the seriousness of the complaint(s).

If the conclusion of the second hearing is that performance has not sufficiently improved and that there is still evidence of incapability despite support and prior warnings, a final warning should be issued.

The letter confirming the decision as well as covering the points made at Stage 3, should clearly state that if an improvement is not forthcoming, the Organisation will convene a final meeting at which it will consider terminating the contract of the member of staff involved on the grounds of capability.

**Stage 5 - Third Capability Hearing:**

The appropriate Director will conduct the third hearing at which if previous advice, training and warnings have not had the desired effect, he/she will terminate the contract of the employee concerned. The procedures outlined in Stage 3 will be followed.

## Appeals

An appeal against any decision to terminate the employee’s contract of employment on the grounds of capability may be made in writing within 14 days of the decision. The employee’s appeal will be heard by the appropriate Senior Manager or Director. Decisions made on appeal shall be final.

# **Dealing with Employee Concerns**

## Member Protection Policy

Many National Sporting Organisations have adopted a Member Protection Policy provided by the Australian Sports Commission (ASC) that also encompasses State Sporting Associations and their affiliates.

The ASC provides excellent resources and templates that can be downloaded by sporting organisations at <http://www.ausport.gov.au>

The Member Protection Policy template includes:

• an outline of the organisation’s responsibilities and the responsibilities of individuals associated with the organisation

• position statements on a range of key issues, such as child protection, anti-discrimination and harassment

• a description of the organisation’s complaint handling procedures and the disciplinary measures associated with a beach of the policy.

**The template is complemented by a range of documents** that can be attached to the policy, including:

• codes of behaviour

• Working with Children Check and other employment screening requirements

• complaint handling procedures

• reporting documents.

These attachments provide detailed information about how the organisation will implement the policy.

NSOs can select and amend, if necessary, those attachments that are relevant to their organisation and include them in their finalised Member Protection Policy.

For this and other policies to be binding on member organisations, they will generally need to be:

• formally incorporated into a national sporting organisation’s Memorandum and Articles of  Association or the By-Laws under its Constitution

• referred to in membership agreements/forms/contracts with the state sporting organisation, which member organisations are required to sign.

The national sporting organisation should ensure that state, regional, district and other affiliated associations and clubs formally adopt the national policy (with any relevant modifications to take account of state/territory legislative or other requirements) in accordance with that organisation’s Constitution.

Additional information regarding Member Protection Policies, including training, development opportunities and alternative templates can be found at the Department of Sport and Recreation website

<http://dsr.wa.gov.au/support-and-advice/safety-and-integrity-in-sport>

# **Prevention of Bullying and Harassment at Work**

As part of its Member Protection Policy <Organisation> is committed to encouraging and maintaining good employee relations within a working environment which fosters team working and encourages employees to give of their best. Everyone in the organisation and those who have dealings with the organisation has a responsibility to maintain good working relationships and not use words or deeds that may harm the wellbeing of others.

Everyone has the right to be treated with consideration, fairness, dignity and respect. This contributes to a workplace environment in which individuals feel safe and can work effectively competently and confidently.

The Organisation’s policy applies to all staff working within the organisation and to all employees working off the premises. It extends to include non-permanent workers such as secondees, contractors, agency, temporary staff, consultants and any other workers. The policy, in addition, covers the behaviour of staff outside working hours which may impact upon work or working relationships.

**The Organisation has a “zero tolerance” policy and will investigate vigorously any allegations of bullying or harassment, regardless of whether the matter has been raised formally or informally.**

## Key Principles

The Organisation will provide and sustain a safe working environment in which everyone is treated fairly and with respect. Those working or dealing with the Organisation must not encounter harassment, intimidation or victimisation on the basis of gender, race, colour, ethnic or national origin, sexual orientation, marital status, religion or belief, age, disability, offending background or any other personal characteristic.

Everyone carries a personal responsibility for their own behaviour and for ensuring that their conduct is in accordance with the principles set out in this policy. In addition, each person has a responsibility to report any instance of bullying or harassment which they witness or which comes to their attention. Employees have a responsibility to act as role models, pro-actively addressing instances of bullying and harassment. Managers should also make themselves aware of their responsibility.

Harassment may be defined as any conduct which is :-

* unwanted by the recipient
* is considered objectionable
* causes humiliation, offence, distress or other detrimental effect.

Harassment may be an isolated occurrence or repetitive: it may occur against one or more individuals. Harassment may be, but is not limited to:

* Physical contact – ranging from touching to serious assault, gestures, intimidation, aggressive behaviour.
* Verbal – unwelcome remarks, suggestions and propositions, malicious gossip, jokes and banter, offensive language.
* Non-verbal – offensive literature or pictures, graffiti and computer imagery, isolation or non-co-operation and exclusion or isolation from social activities.

Bullying is unlikely to be a single or isolated instance. It is usually, but not exclusively repeated and persistent behaviour which is offensive, abusive, intimidating, malicious or insulting. Bullying includes but is not limited to :

* Conduct which is intimidating, physically abusive or threatening
* Conduct that denigrates, ridicules or humiliates an individual, especially in front of colleagues
* Humiliating an individual in front of colleagues
* Picking on one person when there is a common problem
* Shouting at an individual to get things done
* Consistently undermining someone and their ability to do the job
* Setting unrealistic targets or excessive workloads
* “cyber bullying” i.e. bullying via e-mail. (This should be borne in mind where employees are working remotely and are managed by e-mail. Care and sensitivity should be practised with regard to the choice of context and language).
* Setting an individual up to fail e.g. by giving inadequate instructions or unreasonable deadlines.

***Harassment and Bullying may be summarised as any behaviour that is unwanted by the person to whom it is directed. It is the impact of the behaviour rather than the intent of the perpetrator that is the determinant as to whether harassment or bullying has occurred.***

Any employee who wishes to make a complaint of harassment or bullying is encouraged to first discuss matters informally with their line manager or with Human Resources, provided that they feel able to do so. Should the issues not be resolved at this stage, or the employee feels unable to raise the issue informally, then a formal resolution should be sought.

When a complaint of Harassment or Bullying is brought to the attention of a manager at any level, whether informally or formally, prompt action must be taken to investigate the matter. Corrective action must be taken where appropriate and this may require an investigation under the Organisation’s Disciplinary Policy and Procedure.

If it is considered that one of the parties concerned in a harassment or bullying case should be moved from their current workplace, then as a matter of principle the Organisation will normally remove the alleged perpetrator rather than the complainant. However, the final decision on who should be moved should reflect the particular circumstances of the case and advice from Human Resources to the relevant manager. It should be noted and explained to those concerned that the moving of either party is not an implication of guilt or culpability and no detriment to either party will be construed as a consequence.

All matters relating to the investigation of complaints of harassment or bullying will be treated in strict confidence. Any breach of confidentiality in this regard may render those responsible liable to disciplinary actions. However, it will be necessary that any alleged perpetrator is made aware of the allegations against them and the name(s) of those making the allegations together with the name(s) of any witnesses.

No employee will be victimised or suffer detriment for making a complaint of harassment or bullying and no manager shall threaten either explicitly or implicitly that an employee’s complaint will be used as the basis for decisions affecting that employee. Such conduct will be treated as a very serious disciplinary offence. Similarly, managers are required to act on any complaint of harassment or bullying. Failure to do so will be regarded as misconduct which if proven, will result in disciplinary action.

## Procedure

**Informal Resolution**

Very often people are not aware that their behaviour is unwelcome or misunderstood and an informal discussion can lead to greater understanding and agreement that the behaviour will cease.

Complainants are therefore encouraged to try, if they feel able to do so, to resolve the problem informally by making it clear to the alleged harasser that his/her actions are unwanted and should not be repeated. This may be done verbally or in writing in which case the complainant should keep a copy of the documentation and, where possible, the times and dates of incidents should be recorded.

If the complainant feels unable to approach the alleged harasser, a work colleague, or other representative could be asked to speak to the alleged harasser on the complainant’s behalf. A note should be made of the action taken and the matter notified to Human Resources.

An individual who is made aware that their behaviour is unacceptable should:-

* Listen carefully to the complaints and the particular concerns raised;
* Respect the other person’s point of view: everyone has a right to work in an environment free from harassment/intimidation;
* Understand and acknowledge that it is the other person’s reaction/perception to another’s behaviour that is important;
* Agree the aspects of behaviour that will change;
* Review their general conduct/behaviour at work and with workplace colleagues.

**Formal Resolution**

If the alleged harassment continues, the complainant feels unable or unwilling to deal with the matter informally, or the allegation is so serious as to prevent use of the informal procedure, a complaint should then be raised formally with the employer as per the organisation’s Member Protection Policy.

Normally, the employer’s representative will be the employee’s line manager. However, if the employee feels unable to do this they should submit the complaint in writing to a more senior manager within their Department or Directorate. In exceptional circumstances, allegations may be raised directly with the relevant Director, who will with other appropriate senior managers, arrange for the matter to be progressed in accordance with this policy and procedure.

When dealing with a complaint of harassment under the Formal Resolution Procedure, the relevant manager should:

* Take full details of the incidents in writing from the complainant and their representative (if appropriate);
* Take full details from any witnesses/other complainants who come forward and may have witnessed the alleged behaviour
* Inform the alleged harasser of the complaints against him/her, advise the alleged harasser to seek representation and invite him/her to a meeting in order that they can comment on the allegations against them.
* Keep all parties informed of expected timescales.
* Inform all parties in writing of the outcome and any action that may be required.

If the allegations and the working situation warrant it, the alleged harasser may be suspended during the investigation (in accordance with established disciplinary procedure) or transferred temporarily pending the outcome of the inquiry to another Department.

Should there be a case to answer against the alleged harasser, the manager who has dealt with the complaint will communicate this to an impartial manager who will conduct a separate disciplinary investigation. The normal disciplinary procedure for misconduct/gross misconduct should then be followed. However, the following points should be taken into account:-

The complainant will normally be required to attend the disciplinary hearing as a witness, unless there are exceptional circumstances which prevent them from doing so.

If the complainant is required to attend, they are entitled to be accompanied by representative or work colleague and have any questions directed through that person.

If the complaint is upheld at the disciplinary stage, there are a number of possible outcomes for the harasser, depending on the evidence presented and the circumstances. These could include, but are not limited to:-

* Dismissal
* A formal warning
* A recommendation of redeployment of the harasser, either on a temporary or a permanent basis. This will not be on any less favourable terms and conditions of employment.
* Implementation of other sanctions as detailed in the Organisation’s Disciplinary Policy.
* Making arrangements for both parties to work as separately as possible within the same workplace.

In addition to the above, the harasser may be required to attend any training courses as deemed necessary by the Organisation.

It should also be noted that the complainant may wish to move Department/section depending upon the nature of the complaint and the people involved. Appropriate consideration should be given to this request and the outcome with reasons provided to the complainant.

With any allegation, the need for a thorough and objective investigation is paramount. Consequently, if through the course of the investigation evidence demonstrates that the allegation has been made frivolously, maliciously, or for personal gain, then the individual making the complaint will be subject to Disciplinary proceedings as outlined in the Organisation’s Disciplinary Policy.

**Appeals**

Appeals against decisions taken under the Bullying and Harassment at Work Policy and Procedure shall be dealt with as follows:-

* Appeals against a disciplinary sanction will be dealt with in accordance with the appeals process in the Disciplinary Process Policy.
* Appeals by a complainant about the outcome of any inquiry will be dealt with in accordance with the appeal process in the Member Protection Policy.

**Records**

Where the complaint is informal and resolved at this stage, no record will be kept on personal files.

Following formal investigation, where the complaint is not substantiated, no records will be retained.

Where a complaint is substantiated or partially substantiated but does not proceed to disciplinary, a letter confirming the outcome will be retained on the personal file and supporting documentation retained in a separate file for a period of 12 months.

Where the matter proceeds to a disciplinary hearing then the storage of records should be in accordance with the disciplinary procedure.

# **"Whistleblowing" Policy**

<Organisation> is committed to the highest standards of openness, probity and accountability.   
  
An important aspect of accountability and transparency is a mechanism to enable staff and other members of the organisation to voice concerns in a responsible and effective manner.

It is a fundamental term of every contract of employment that an employee will faithfully serve his or her employer and not disclose confidential information about the employer’s affairs. Nevertheless, where an individual discovers information which they believe shows serious malpractice or wrongdoing within the organisation then this information should be disclosed internally without fear of reprisal, and there should be arrangements to enable this to be done independently of line management (although in relatively minor instances the line manager would be the appropriate person to be told).

It should be emphasised that this policy is intended to assist individuals who believe they have discovered malpractice or impropriety. It is not designed to question financial or business decisions taken by the organisation nor should it be used to reconsider any matters which have already been addressed under harassment, complaint, disciplinary or other procedures.

Once the "whistleblowing” procedures are in place, it is reasonable to expect staff to use them rather than air their complaints outside the organisation.

## Scope of Policy

This policy is designed to enable employees of the organisation to raise concerns internally and at a high level and to disclose information which the individual believes shows malpractice or impropriety. This policy is intended to cover concerns which are in the public interest and may at least initially be investigated separately but might then lead to the invocation of other procedures e.g. disciplinary. These concerns could include

* Financial malpractice or impropriety or fraud
* Failure to comply with a legal obligation or Statutes
* Dangers to Health & Safety or the environment
* Criminal activity
* Improper conduct or unethical behaviour
* Attempts to conceal any of these

**Protection**  
This policy is designed to offer protection to those employees of the organisation who disclose such concerns provided the disclosure is made:

* in good faith
* in the reasonable belief of the individual making the disclosure that it tends to show malpractice or impropriety and if they make the disclosure to an appropriate person (see below). It is important to note that no protection from internal disciplinary procedures is offered to those who choose not to use the procedure. In an extreme case malicious or wild allegations could give rise to legal action on the part of the persons complained about.

**Confidentiality**  
The organisation will treat all such disclosures in a confidential and sensitive manner. The identity of the individual making the allegation may be kept confidential so long as it does not hinder or frustrate any investigation. However, the investigation process may reveal the source of the information and the individual making the disclosure may need to provide a statement as part of the evidence required.  
  
**Anonymous Allegations**  
This policy encourages individuals to put their name to any disclosures they make. Concerns expressed anonymously are much less credible, but they may be considered at the discretion of the organisation.  
  
In exercising this discretion, the factors to be taken into account will include:

* The seriousness of the issues raised
* The credibility of the concern
* The likelihood of confirming the allegation from attributable sources

**Untrue Allegations**

If an individual makes an allegation in good faith, which is not confirmed by subsequent investigation, no action will be taken against that individual. In making a disclosure the individual should exercise due care to ensure the accuracy of the information. If, however, an individual makes malicious or vexatious allegations, and particularly if he or she persists with making them, disciplinary action may be taken against that individual.

## Procedures for Making a Disclosure

On receipt of a complaint of malpractice, the member of staff who receives and takes note of the complaint, must pass this information as soon as is reasonably possible, to the appropriate designated investigating officer as follows:

Complaints of malpractice will be investigated by the appropriate Director unless the complaint is against the Director or is in any way related to the actions of the Director. In such cases, the complaint should be passed to the Chief Executive for referral.

In the case of a complaint, which is any way connected with but not against the Director, the Chief Executive will nominate a Senior Manager to act as the alternative investigating officer.

Complaints against the Chief Executive should be passed to the Chairman who will nominate an appropriate investigating officer.

The complainant has the right to bypass the line management structure and take their complaint direct to the Chairman. The Chairman has the right to refer the complaint back to management if he/she feels that the management without any conflict of interest can more appropriately investigate the complaint.

Should none of the above routes be suitable or acceptable to the complainant, then the complainant may approach one of the following individuals who have been designated to handle such matters and act as independent points of contact under this procedure. They can advise the complainant on the implications of the legislation and the possible internal and external avenues of complaint open to them:

1 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

If there is evidence of criminal activity then the investigating officer should inform the police. The organisation will ensure that any internal investigation does not hinder a formal police investigation.

## Timescales

Due to the varied nature of these sorts of complaints, which may involve internal investigators and / or the police, it is not possible to lay down precise timescales for such investigations. The investigating officer should ensure that the investigations are undertaken as quickly as possible without affecting the quality and depth of those investigations.

The investigating officer, should as soon as practically possible, send a written acknowledgement of the concern to the complainant and thereafter report back to them in writing the outcome of the investigation and on the action that is proposed. If the investigation is a prolonged one, the investigating officer should keep the complainant informed, in writing, as to the progress of the investigation and as to when it is likely to be concluded.

All responses to the complainant should be in writing and sent to their home address.

## Investigating Procedure

The investigating officer should follow these steps:

Full details and clarifications of the complaint should be obtained.

The investigating officer should inform the member of staff against whom the complaint is made as soon as is practically possible. The member of staff will be informed of their right to be accompanied by a trade union or other representative at any future interview or hearing held under the provision of these procedures.

The investigating officer should consider the involvement of the Organisation auditors and the Police at this stage and should consult with the Chairman / Chief Executive

The allegations should be fully investigated by the investigating officer with the assistance where appropriate, of other individuals / bodies.

A judgement concerning the complaint and validity of the complaint will be made by the investigating officer. This judgement will be detailed in a written report containing the findings of the investigations and reasons for the judgement. The report will be passed to the Chief Executive or Chairman as appropriate.

The Chief Executive / Chairman will decide what action to take. If the complaint is shown to be justified, then they will invoke the disciplinary or other appropriate Organisation procedures.

The complainant should be kept informed of the progress of the investigations and, if appropriate, of the final outcome.

If appropriate, a copy of the outcomes will be passed to the Organisation Auditors to enable a review of the procedures.

If the complainant is not satisfied that their concern is being properly dealt with by the investigating officer, they have the right to raise it in confidence with the Chief Executive / Chairman, or one of the designated persons described above.

# **Equality Policy**

## Policy Statement

<Organisation> recognises that discrimination and victimisation is unacceptable and that it is in the interests of the Organisation and its employees to utilise the skills of the total workforce. It is the aim of the organisation to ensure that no employee or job applicant receives less favourable facilities or treatment (either directly or indirectly) in recruitment or employment on grounds of age, disability, gender / gender reassignment, marriage / civil partnership, pregnancy / maternity, race, religion or belief, sex, or sexual orientation (the **protected characteristics**).

1. Our aim is that our workforce will be truly representative of all sections of society and each employee feels respected and able to give of their best.
2. We oppose all forms of unlawful and unfair discrimination or victimisation. To that end the purpose of this policy is to provide equality and fairness for all in our employment.
3. All employees, whether part-time, full-time or temporary, will be treated fairly and with respect. Selection for employment, promotion, training or any other benefit will be on the basis of aptitude and ability. All employees will be helped and encouraged to develop their full potential and the talents and resources of the workforce will be fully utilised to maximise the efficiency of the organisation.
4. Our staff will not discriminate directly or indirectly, or harass customers or clients because of age, disability, gender reassignment, pregnancy and maternity, race, religion or belief, sex, and sexual orientation in the provision of the Organisation’s goods and services.
5. This policy and the associated arrangements shall operate in accordance with statutory requirements. In addition, full account will be taken of any guidance or Codes of Practice issued by the Equality and Human Rights Commission, any Government Departments, and any other statutory bodies.

## Our Commitment

* To create an environment in which individual differences and the contributions of all our staff are recognised and valued.
* Every employee is entitled to a working environment that promotes dignity and respect to all. No form of intimidation, bullying or harassment will be tolerated.
* Training, development and progression opportunities are available to all staff.
* To promote equality in the workplace which we believe is good management practice and makes sound business sense.
* We will review all our employment practices and procedures to ensure fairness.
* Breaches of our equality policy will be regarded as misconduct and could lead to disciplinary proceedings.
* This policy is fully supported by senior management and has been agreed with trade unions and/or employee representatives.
* The policy will be monitored and reviewed annually

## Responsibilities of Management

Responsibility for ensuring the effective implementation and operation of the arrangements will rest with the Chief Executive. Directors / Managers will ensure that they and their staff operate within this policy and arrangements, and that all reasonable and practical steps are taken to avoid discrimination. Each manager will ensure that:

* all their staff are aware of the policy and the arrangements, and the reasons for the policy;
* grievances concerning discrimination are dealt with properly, fairly and as quickly as possible;
* proper records are maintained.

Senior Management will be responsible for monitoring the operation of the policy in respect of employees and job applicants.

## Responsibilities of Staff

Responsibility for ensuring that there is no unlawful discrimination rests with all staff and the attitudes of staff are crucial to the successful operation of fair employment practices. In particular, all members of staff should:

* comply with the policy and arrangements;
* not discriminate in their day to day activities or induce others to do so;
* not victimise, harass or intimidate other staff or groups who have, or are perceived to have one of the protected characteristics.
* ensure no individual is discriminated against or harassed because of their association with another individual who has a protected characteristic.
* inform their manager if they become aware of any discriminatory practice.

## Third Parties

Third-party harassment occurs where an Organisation employee is harassed, and the harassment is related to a protected characteristic, by third parties such as clients or customers. <Organisation> will not tolerate such actions against its staff, and the employee concerned should inform their manager / supervisor at once that this has occurred. <Organisation> will fully investigate and take all reasonable steps to ensure such harassment does not happen again.

## Grievances/Discipline

Employees have a right to pursue a complaint concerning discrimination or victimisation via the Grievance or Harassment Procedures.

Discrimination and victimisation will be treated as disciplinary offences and they will be dealt with under the organisation Disciplinary Procedure.

## Review

The effectiveness of this policy and associated arrangements will be reviewed annually under the direct supervision of the Organisation Chief Executive.

# **Drug and Alcohol Abuse Policy**

<Organisation> recognises that alcohol and drug abuse related problems are an area of health and social concern. It also recognises that a member of staff with such problems needs help and support from his / her employer.

The organisation also recognises that alcohol and drug abuse problems can have a detrimental effect on work performance and behaviour. The organisation has a responsibility to its employees and customers to ensure that this risk is minimised.

Accordingly, organisation policy involves two approaches

1. Providing reasonable assistance to the member of staff with an alcohol or drug abuse problem who is willing to co-operate in treatment for that problem.
2. Disciplinary rules, enforced through disciplinary procedures, where use of alcohol or drugs (other than on prescription) affects performance or behaviour at work, and where either (1) an alcohol or drug dependency problem does not exist or (2) where treatment is not possible or has not succeeded.

The organisation does not have the internal resources to provide or arrange treatment or other forms of specialist assistance. Such services are provided by doctors, hospitals and other agencies. Through this policy the organisation will seek both to assist a member of staff in obtaining such specialist help, and to protect his/her employment.

## Assistance for a Member of Staff

The Organisation will, where possible, provide the following assistance to a member of staff:

Helping the member of staff to recognise the nature of the problem, through referral to a qualified diagnostic or counselling service.

Support during a period of treatment. This may include a period of sick leave or approved other leave, continuation in post or transfer to other work, depending upon what is appropriate in terms of the staff member's condition and needs of the organisation.

The opportunity to remain or return to work following the completion of a course of treatment, as far as is practicable, in either the employee's own post or an alternative post.

The Organisation's assistance will depend upon the following conditions being met:

* The Occupational Health Service / Organisation Approved Doctor diagnoses an alcohol or drug dependency related problem.
* The member of staff recognises that he/she is suffering from an alcohol or drug abuse problem and is prepared to co-operate fully in referral and treatment from appropriate sources.

The organisation and its employees must recognise the following limits to the assistance the organisation can provide:

**Where a member of staff fails to co-operate in referral or treatment arrangements, no special assistance will be given and any failure in work performance and behaviour will be dealt with through the Disciplinary Procedure.**

If the process of referral and treatment is completed but is not successful, and failure in work performance or behaviour occurs, these will be dealt with through the Disciplinary Procedure.

A member of staff's continuation in his/her post or an alternative post during or after treatment will depend upon the needs of the Organisation at that time.

## Disciplinary Action

In line with the Organisation's disciplinary rules, the following will be regarded as serious misconduct:

* Attending work and/or carrying our duties under the influence of alcohol or drugs.
* Consumption of alcohol or drugs whilst on duty (other than where prescribed or approval has been given).

Breach of these rules will normally result in summary dismissal, and only in exceptional cases will either notice or the reduced disciplinary action of a final written warning be applied.

Where a breach of these rules occurs, but it is established that an alcohol or drug abuse related problem exists, and the member of staff is willing to co-operate in referral to an appropriate service and subsequent treatment, the organisation will suspend application of the Disciplinary Procedure and provide assistance as described above. Staff who do not comply with the treatment suggested or continue to abuse alcohol or drugs will be subjected to the application of the Disciplinary Policy.

## Procedures

**Nature of the Procedures**

The procedures define management responsibilities and provide guidelines on:

* Where assistance to a member of staff should be provided and the nature of and limits to such assistance.
* The application of the Organisation's Disciplinary Procedure.

Through the Occupational Health Service / Approved Organisation Doctor the Organisation will provide:

* Advice and support to managers on
* Whether an alcohol or drug related problem exists
* progress in treatment
* re-establishment or continuation at work of a member of staff or other appropriate arrangements.
* Assistance to members of staff with alcohol or drug abuse related problems.

This does not include directly providing treatment or specialist help which is the responsibility of GPs, hospitals and other agencies working in the field. The Occupational Health Service / Organisation Approved Doctor, in close liaison with these persons and agencies, will assist staff referred in the following ways:

* through counselling encourage them to come to a better understanding of their problem and the benefits of seeking treatment or help;
* providing advice and direction regarding obtaining treatment and specialist help;
* assisting in continuing at or achieving a return to work.

Alcohol or drug abuse related problems can come to the notice of management through:

* Failures in work performance or behaviour necessitating use of the Disciplinary Procedure. In such situations the procedure described above should be followed.
* Other means, where a member of staff seeks or agrees to accept assistance on a voluntary basis. In such situations, the procedures described above should be followed.

**Diagnosing the existence of an alcohol or drug abuse problem.**

Should the interviews lead to the conclusion that an alcohol or drug abuse problem might exist and the member of staff accepts referral, the manager should refer the matter to the Occupational Health / Organisation Approved Doctor, who will be responsible for establishing whether or not a diagnosis of alcoholism or drug dependence can be made.

Disciplinary action should be suspended until diagnostic advice is obtained. Where appropriate, suspension arrangements in the Disciplinary Procedure should be followed.

If the interview fails to lead to the conclusion that an alcohol or drug abuse problem exists, or the member of staff rejects, or fails to co-operate in referral, disciplinary action should be continued, where and as the situation justifies.

**Confirmation that a problem exists and treatment arrangements.**

If a positive diagnosis of an alcohol or drug abuse problem is made, and the member of staff agrees to co-operate in treatment, treatment arrangements should commence. Where necessary, the Occupational Health Service / Organisation Approved Doctor will advise the member of staff regarding treatment and will be responsible for monitoring progress with treatment and advising the manager concerned. This advice should be available at least monthly following commencement of treatment and thereafter as appropriate. (Disciplinary action should be discontinued unless the member of staff fails to co-operate on the treatment arranged.) Should a diagnosis of alcoholism or drug dependence not be confirmed or should the member of staff refuse to co-operate in treatment, disciplinary action should be continued. The Occupational Health Service / Organisation Approved Doctor will advise on whether a situation has been reached where there is a lack of progress with treatment or lack of co-operation by the member of staff. Managers must review the facts and consider whether or not there needs to be a return to the use of Disciplinary Procedures.

Where medical certificates are submitted, sick leave should be given. Should the employee continue to be fit for work during the period of treatment, he/she should be permitted to continue in his/her post or alternative work unless such an arrangement would have an adverse effect on Organisation services. In such circumstances, annual or unpaid leave should be approved or, exceptionally, suspension arranged. If a member of staff has been off work during the period of treatment, before returning to duty, he/she will be seen by the Occupational Health Service / Organisation Approved Doctor who will advise management regarding capability for continuation in his/her own post and whether any special supervision or other arrangements are required.

Every effort should be made to comply with the advice provided by the Occupational Health Service / Organisation Approved Doctor. If it is not reasonably practicable to do so, and as a result, the member of staff is not able to resume duty, employment may be terminated on the grounds of incapacity (ill health).

If a member of staff is again involved in disciplinary situations resulting from alcohol or drug abuse related problems, a second referral to the Occupational Health Service / Organisation Approved Doctor and suspension of the disciplinary procedure may be appropriate. If they advise positively on the possibilities of further treatment or help and the willingness of the member of staff to co-operate, the disciplinary procedure may be suspended again to permit treatment and help to be undertaken. This second referral will not apply if the further disciplinary problems involve serious misconduct. Third and subsequent referrals are not permissible.

**Situations where a Disciplinary Situation does not exist**

There may be situations where the possible existence of alcohol or drug abuse problems affecting a member of staff comes to a manager's attention, although there is, or has been, no discernible affect on work performance or behaviour. This could arise if a member of staff confides in his/her manager about an alcohol or drug abuse problem, or a manager could see a need to approach a member of staff after observing possible "indicators" of an alcohol or drug abuse problem (ie) an absence pattern, information provided by the member of staff's colleagues, etc.

In such situations, the Organisation would wish staff to feel they could seek help from their employer (in complete confidence) without worry that their job security would be in jeopardy. Accordingly if managers should be faced with a situation of this type they should:

* seek the advice of the Occupational Health Service / Organisation Approved Doctor regarding whether and how the matter could be dealt with;
* counsel the member of staff and, if appropriate, arrange for the member of staff to be interviewed by the Occupational Health Service / Organisation Approved Doctor.
* as in the procedure described above, the Occupational Health Service / Organisation Approved Doctor will play a facilitating role (ie) seeking to establish whether a problem exists, advising and directing the member of staff towards appropriate forms of treatment and help.

These steps cannot be taken without the co-operation of the member of staff. If the member of staff does not wish to co-operate, no further action should be taken. Should a member of staff take up the opportunity of assistance on this voluntary basis there need be no further formal involvement of management in terms of action or the right to learn of progress with treatment. It may be however that the member of staff would wish, or agree to, further involvement of management as a means of assisting progress with treatment.

Use of the disciplinary procedures and/or the application of the approach described above would only be appropriate if subsequently, the member of staff is involved in a breach of disciplinary rules.

Should the problems of the member of staff develop to an extent that his/her continuation in post or employment became impossible, it may be necessary to identify alternative work or arrange for termination, on the same basis as the Organisation operates for staff with problems of incapacity due to ill health.

# **Health and Safety Policy**

<Organisation> fully accepts the obligations placed upon it by state and federal law covering health and safety. The organisation requires its Chief Executive to ensure that the following policy is implemented and to report annually on its effectiveness.

This policy has been prepared and published under the requirements of Health & Safety at Work legislation. The purpose of the policy is to establish general standards for health and safety at work and to distribute responsibility for their achievement to all managers, supervisors, and other employees through the normal line management processes.

## Management Responsibilities

**Chief Executive**

The Chief Executive has overall responsibility for the implementation of the Organisation's policy. In particular they are responsible for ensuring that the policy is widely communicated and that its effectiveness is monitored.

**Senior Managers**

These managers are wholly accountable to the Chief Executive for the implementation and monitoring of the policy within the area of their specified responsibility.

**Safety Officer**

The Safety Officer is a nominated manager responsible for co-ordinating effective health and safety policies and controls across the organisation.

The Safety Officer is responsible for:

* the production and maintenance of the Organisation's policy and ensuring that Department Guidelines are consistent with policy;
* its application;
* monitoring and reporting on the effectiveness of the policy;
* the provision of general advice about the implication of the law;
* the identification of health and safety training needs;
* the production and maintenance of Health and Safety Codes of Practice for each aspect of the services within the organisation.

## Health and Safety Management Process

The Organisation believes that consideration of the health, safety and welfare of staff is an integral part of the management process and that associated and regulated Codes of Practice will be adopted as required standards within the organisation.

Responsibility for health and safety matters shall be explicitly stated in management job descriptions.

The organisation requires managers to approach health and safety in a systematic way, by identifying hazards and problems, planning improvements, taking executive action and monitoring results so that the majority of health and safety needs will be met from locally held budgets as part of day-to-day management, although many health and safety problems can be rectified at little additional cost.

For major additional expenditure, cases of need will be submitted to the Chief Executive.

If unpredictable health and safety issues arise during the year, the Chief Executive must assess the degree of risk, in deciding the necessary resources and actions to commit to addressing these issues.

## Health, Safety and Welfare Guidelines

It shall be the responsibility of the manager to bring to the attention of all members of his or her staff, the provisions of the guidelines, and to consult with appropriate Health and Safety Representatives about the updating of these guidelines. The model contents of a guideline are:

* a clear statement of the role of the department;
* regulations governing the work of the department;
* clear reference to safe methods of working;
* information about immediate matters of health and safety concern, such as fire drills, fire exits, first aid;
* training standards;
* the role and identity of the Health and Safety Representative (Safety Officer);
* names of specialist advisers who can be approached about the work of the department;
* the manager responsible for organisation and control of work;
* accident reporting procedures;
* departmental safety rules;
* fire procedures;
* policies agreed by the Organisation.

## Identification of Health and Safety Hazards

**ANNUAL AUDIT AND REGULAR RISK ASSESSMENTS**

It is the policy of the organisation to require a thorough examination of health and safety performance against established standards in each department, at least annually. The technique to be adopted for such examinations will be the 'Safety Audit'. The Audit requires review of standards laid down in the policy;

* departmental guidelines;
* relevant regulations;
* environmental factors;
* staff attitudes;
* staff instructions;
* methods of work;
* contingency plans;
* recording and provision of information about accidents and hazards and the assessment of risk.

The information obtained by the Audit will be used to form the basis of the plan for the department for the following year. Audits must be completed by July of each year.

The responsibility for ensuring that audit activity is carried out as part of this policy rests with the Chief Executive and will be carried out by the Safety Officer. Although the Audit remains a management responsibility, managers are required as part of this policy to seek the involvement of the appropriate Health and Safety Representative in the conduct of the Audit.

It is the management's responsibility to ensure that any deficiencies highlighted in the Audit are dealt with as speedily as possible.

In addition to carrying out Safety Audits, it is the responsibility of the department manager to check, at least quarterly, all portable equipment, including electrical appliances, in their area, and to ensure that all problems are immediately dealt with.

Managers have a continual responsibility for the elimination of hazards in order to maintain a safe working environment and will also be expected to carry out regular risk assessments in line with the Health and Safety Executive Guidelines; that is follow the 5 steps:

1. Identify the hazards
2. Decide who might be harmed and how
3. Evaluate the Risks and decide on precautions
4. Record the findings and implement the precautions
5. Review the assessment and update when necessary

## Safety Representatives

The Organisation will support Safety Representatives in carrying out their role and give all reasonable assistance. Safety Representatives will be encouraged to discuss specific health and safety issues with the relevant Head of Department. They may also formally report hazardous or unsafe circumstances to the Head of Department and will be formally notified of the remedial action taken or be given a reason why the action cannot be taken.

## Training

Health and Safety training shall be incorporated within annual training programmes, as part of the development of a systematic training plan. Health and Safety training needs will, therefore, be identified and planned for in the same manner as other training needs.

Four areas of need shall be given special priority:

1. training for managers, to equip them with an understanding of the manager's responsibilities under this policy, and the role and purpose of safety representatives;
2. training for safety representatives to enable them to discharge their function;
3. training for all members of staff to acquaint them with the main provisions of the law and its practical implication, the main features of this policy and key safety rules;
4. induction and in-service training for staff at all levels to acquaint them fully with new requirements and hazards.

## Records, Statistics and Monitoring

The organisation will operate systems for recording, analysis and presentation of information about accidents, hazard situations and untoward occurrences Advice on systems will be provided by the Safety Officer, in conjunction, where appropriate with specialist advisory bodies for example local Environmental Health Departments, and the responsibility for the operation of these systems rests with managers and supervisors at all levels. Information obtained from the analysis of accident statistics must be acted upon and, where necessary, bids for additional expenditure made to the Chief Executive.

## First Aid

It is the policy of the organisation to make provision for First Aid and the training of 'First Aiders' in accordance with the First Aid Regulations. The Safety Officer is responsible for ensuring the Regulations are implemented and for identifying training needs.

## Fire

The Chief Executive is responsible for ensuring that the staff receive adequate fire training, and that nominated fire officers are designated in all Organisation premises. The Chief Executive delegates these responsibilities to the relevant managers.

In addition the Organisation will nominate a Fire Officer (this may be the Safety Officer or someone external to the Organisation)

* report and advise on the standard of fire safety in the Organisation's premises and the standard of fire training of its staff;
* undertake overall responsibility for fire training;
* assist in the investigation of all fires in the Organisation's premises and to submit reports of such incidents.

## Lifting and Handling

Managers are responsible for informing staff of safe lifting techniques. The Safety Officer will identify specific training needs and will ensure training in lifting and handling is provided to staff who require it.

## Non-Smoking On Organisation Premises

The organisation has agreed that there will be no smoking in its buildings. The overall aim is to reduce smoking and so save life, reduce risk of fire, prevent unnecessary illness and chronic disability.

## Health and Safety and the Individual Employee

Every employee has a responsibility to take reasonable care for the Health and Safety of themselves and of other persons who may be affected by their acts and omissions and to co-operate with management to enable management to carry out their responsibilities under the organisation’s health and safety policy. In short, employees have equal responsibility with the organisation for Health and Safety at Work.

The refusal of any employee to meet their obligations will be regarded as a matter to be dealt with under the Disciplinary Procedure. In normal circumstances counselling of the employee should be sufficient. With a continuing problem, or where an employee leaves themselves or other employees open to risk or injury, it may be necessary to implement the formal stages of the Disciplinary Procedure.

## People Working On Organisation Premises Not Employed By The Organisation

Persons working in the organisation premises who are employed by other organisations are expected to follow Organisation Health and Safety Policies with regard to the safety of Organisation employees, their own personal safety (and that of other parties such as the general public if appropriate) and their method of work. This responsibility will be included in contracts or working arrangements. Similarly seconded Organisation employees working in other host premises will be expected to follow the host employers Health and Safety Policy.

**Additional information, resources and current legislation related to Health and Safety in the Workplace can be found at the Department of Commerce Worksafe website**

**http://www.commerce.wa.gov.au/worksafe/tool-box**

# **Appendix**

The following forms, documents and templates are included in the appendix in support of the policies and processes contained within this Policy Manual;

## Recruitment

Job Description template Recruitment Ads Interview Checklist

Offer and Rejection letters Induction Checklist

## Performance Management

Performance Appraisal Template Disciplinary Letters Grievance Letters

Capability Letters Study Support

## Job Description Template

(Organisation Name)

|  |  |  |  |
| --- | --- | --- | --- |
| JOB TITLE | Development Coordinator | INCUMBENT | Vacant |
| REPORTS TO | Development Manager | DATE REVISED |  |

|  |
| --- |
| JOB OUTLINE |
| The Development Coordinator reports to the Development Manager and is responsible for coordinating and administering the processes related to (Organisation Name) community programs and other special projects aimed at increasing the promotion and development of the sport in Western Australia.  Remuneration & Benefits: circa $50k per annum, inclusive of superannuation.  Working Hours: The role is contracted based upon a 37.5hr working week, however a flexible approach to working hours is required due to the nature of working within a community sports association. |

|  |
| --- |
| MAJOR ACCOUNTABILITIES AND RESPONSBILIITIES |
| **Stakeholder Communications (20%)**   * Provide effective and professional ongoing support to regional & metropolitan clubs and members including community & special Events coordination & support. * Proactively generate and foster positive relationships with stakeholders, including clubs, internal Advisory Committees, XX Australia, local and state govt representatives, community organisations, schools, accredited coaches & program partners. * Identify & implement initiatives aimed at improving communication lines and plans. |
| Marketing, Media & PR (20%)   * Develop positive media relationships. * Develop promotional materials & releases aimed at increasing profile & awareness of events, programs & activities. * Undertake necessary promotional duties and tasks as requested by the CEO. |
| Community Programs & Special Projects (60%)   * Coordinate promotion, development and delivery of community programs * Identify & develop initiatives aimed at increasing participation in the sport. * Identify & develop initiatives that help raise the profile of the sport and our member clubs. * Identify & develop initiatives aimed at increasing club membership through transfer from participation in our programs. * Related program administration & reporting |

SELECTION CRITERIA

Essential

* Experience in working within a similar role, ideally within a not-for-profit/sports environment
* Well-developed written, verbal communication and interpersonal skills
* Demonstrated experience in working with a diverse range of stakeholders/volunteers
* High level of client service skills
* Highly developed organizational and administrative skills.
* Able to create effective processes to improve the delivery of work and efficiency
* Highly developed computer skills, MS Office
* Ability to manage a variety of conflicting priorities over extended periods
* Willingness & availability to work evenings and weekends as required.
* Ability to work independently and as part of a small team
* Knowledge of the sport
* Current WA driver’s license.

Applications including a copy of your resume together with a covering letter indicating your suitability for the role, anticipated salary and possible date of commencement, should be sent via e-mail to (organization contact details)

|  |  |  |  |
| --- | --- | --- | --- |
| JOB TITLE | Marketing & Communications Manager | INCUMBENT | Vacant |
| REPORTS TO | Chief Executive Officer | DATE REVISED |  |

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| JOB OUTLINE |
| To coordinate and undertake the marketing, communications, web, media and production requirements of the sport, with a focus on continuous improvement, in support of the development of the sport in Western Australia.  Remuneration & Benefits: circa $XXk per annum, inclusive of superannuation.  Working Hours: The role is contracted based upon a 37.5hr working week, however a flexible approach to working hours is required due to the nature of working within a community sports association. |

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| MAJOR ACCOUNTABILITIES AND RESPONSBILIITIES |
| **Marketing & Sponsorhip (60%)**   * Manage the sponsorship portfolio including the drafting of sponsorship proposals. * The preparation of sponsorship agreements and related sponsor benefits and the development of partner marketing plans * Co-ordinate the delivery of sponsorship benefits, and subsequent evaluations * Draft annual report for sponsoring organizations reflecting agreement and related achievements. * Liaise and develop relationships with current and potential sponsors. * Develop, implement and evaluate annual marketing and communications plan for the organisation. * Develop and track related forecasts and budgets. * Increase the profile and image of the sport in Western Australia (related tracking, monitoring and reporting) * Ensure appropriate positioning amongst the community, including sponsors, government and other stakeholders |
| **Media & Communications (40%)**   * With the operational support of the Public Relations Officer; develop, implement and co-ordinate media and publicity plan aimed at promotion of the game, related events and maximizing media coverage of the sport in Western Australia. * Develop and oversee implementation of branding and production protocols * Design, write and co-ordinate production and distribution of electronic newsletter * Assist in the writing, design and production of annual report, annual hand-book and other related publications * Write and desk-top publish a range promotional brochures, marketing flyers etc * Develop brief for design and quotation on all production and promotional collateral. * Assist in the maintenance of all distribution databases. |

SELECTION CRITERIA

Essential

1. Two - four years experience in a marketing communications role at a similar level

2. Strong written, oral, presentation and interpersonal communication skills

3. Experience in preparing copy for media, reports, web, publicity and brochures

4. Well developed project and budgetary management and planning skills

5. Experience and skills in developing event plans, implementation and evaluation

6. Experience in developing creative promotional concepts and plans

7. Experience and ability to manage a variety of conflicting priorities over extended periods.

8. Desktop publishing and layout skills and experience.

9. Experience in co-coordinating the publication process.

10. Ability to work within a small team.

11. Tertiary qualifications in marketing, communications, or related discipline.

Desirable Skills and Experience

• Experience in securing or managing sponsors.

• Skills in communications planning, evaluation and accountability.

• Experience in website writing, maintenance and development.

• Knowledge of the sport

Applications including a copy of your resume together with a covering letter indicating your suitability for the role, anticipated salary and possible date of commencement, should be sent via e-mail to (organization contact details)

|  |  |  |  |
| --- | --- | --- | --- |
| JOB TITLE | Operations Manager | INCUMBENT | Vacant |
| REPORTS TO | Chief Executive Officer | DATE REVISED |  |

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| JOB OUTLINE |
| To coordinate participation in the operations management of the organisation, with a focus on continuous improvement, in support of the development of the sport in Western Australia.  Remuneration & Benefits: circa $XXk per annum, inclusive of superannuation.  Working Hours: The role is contracted based upon a 37.5hr working week, however a flexible approach to working hours is required due to the nature of working within a community sports association. |

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| MAJOR ACCOUNTABILITIES AND RESPONSBILIITIES |
| **Operations Management (60%)**   * Set and deliver Operations Department plan and budget * Key member of Executive Management Team * Effectively manage the operations component of the organisation including competitions management, prevailing rules, disciplinary processes, state teams and officials coordination. * Implement efficient state-wide competition systems and structure * Management and coordination of high performance and state team processes * Assist Regional Clubs and Associations on operational matters including rules and systems * Continuous improvement recommendation for competition structures to increase participation (statewide) |
| **Finance (20%)**   * Preparation and management of department budgets * Preparation of financial reports * Preparation of monthly forecasts * Coordination and communication with book-keeper * Preparation of related board papers |
| **Office Management (20%)**   * Sourcing and management of organisation workers compensation insurance * Management and security of premises and facilities * Management of support functions to the organisation |

SELECTION CRITERIA

Essential

* Significant experience in running operational organizations and managing operational plans.
* Significant experience at a Management level.
* Well-developed written and verbal communication and interpersonal skills.
* Highly developed organizational and administrative skills.
* Ability to manage a variety of conflicting priorities over extended periods.
* Ability to deliver to deadlines and within budgets.
* Well-developed client service skills.
* Highly developed computer skills.
* Ability to work within and motivate a small team.
* Willingness and an ability to work evenings and weekends as required.
* Tertiary qualifications (or relevant experienced).
* ‘C’ class WA driver’s licence.

Desirable Skills and Experience

* Understanding of sporting structures,
* Knowledge of sport and related issues.
* Experience working within a member-based association.

Applications including a copy of your resume together with a covering letter indicating your suitability for the role, anticipated salary and possible date of commencement, should be sent via e-mail to (organization contact details)

|  |  |  |  |
| --- | --- | --- | --- |
| JOB TITLE | Program Officer | INCUMBENT | Vacant |
| REPORTS TO | Development Manager | DATE REVISED |  |

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| JOB OUTLINE |
| To coordinate participation in the high performance programs of the organisation, with a focus on continuous improvement, in support of the development of the sport in Western Australia.  Remuneration & Benefits: circa $XXk per annum, inclusive of superannuation.  Working Hours: The role is contracted based upon a 37.5hr working week, however a flexible approach to working hours is required due to the nature of working within a community sports association. |

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| MAJOR ACCOUNTABILITIES AND RESPONSBILIITIES |
| **Program Management & Development (60%)**   * Work with the Development Manager regarding annual program budget and plans * Develop protocols and processes related to the programs * Manage all related administration, including attendance records. * Develop and coordinate processes and protocols related to state team representation * Produce and monitor detailed project implementation plans for HP development programs, Camps and Academies * Develop program improvement initiatives * Assist in the development and coordination of functions and events as requested |
| **Stakeholder Communication (20%)**   * Manage communication related to the programs * Work closely with the marketing department to develop and implement program promotional strategies and related materials. * Develop and produce the content required around each development program to ensure programs objectives and benefits are clearly defined * Work with the Marketing Manager and determine needs, frequency and format of stakeholder communications related to Education and Development. * Provide proactive and relevant feedback to internal/external stakeholders * Work with the Membership officer to manage information databases related to programs, coaches and participants * Work with the Marketing Manager to ensure format and branding of programs is aligned with marketing strategy. |

SELECTION CRITERIA

Essential

* Sports development program administration experience
* Well-developed written and verbal communication
* Well developed interpersonal skills.
* Highly developed organisational and administrative skills.
* Ability to manage a variety of conflicting priorities over extended periods.
* Ability to work irregular hours as per the needs of the business.
* Well-developed client service skills.
* Ability to work within a small team.
* ‘C’ class WA driver’s licence.

Desirable Skills and Experience

* Understanding of sporting structures,
* Knowledge of sport and related issues.
* Experience working within a member-based association.

Applications including a copy of your resume together with a covering letter indicating your suitability for the role, anticipated salary and possible date of commencement, should be sent via e-mail to (organization contact details)

|  |  |  |  |
| --- | --- | --- | --- |
| JOB TITLE | Media Officer | INCUMBENT | Vacant |
| REPORTS TO | Marketing Manager | DATE REVISED |  |

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| JOB OUTLINE |
| To coordinate media and communications of the organisation, with a focus on continuous improvement, in support of the development of the sport in Western Australia.  Remuneration & Benefits: circa $XXk per annum, inclusive of superannuation.  Working Hours: The role is contracted based upon a 37.5hr working week, however a flexible approach to working hours is required due to the nature of working within a community sports association. |

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| MAJOR ACCOUNTABILITIES AND RESPONSBILIITIES |
| **Planning and Development (20%)**   * Assist in the development of the marketing and communications plan – both internal and external plans * Assist in the development of the marketing and communications budget * Effective implementation of the communications plan * Evaluate the communications plan for improvements * Responsible for the development and distribution of (e-)newsletters * Deliver KPI’s, operational plan and budget |
| **Communications (40%)**   * Develop and implement media and publicity plan * Develop and implement media policy and protocols * Establish productive relationships with members of the media * Record and prepare responses for all media inquiries * Develop and implement pro-active media and publicity plans * Write and dispatch media releases and publicity copy * Monitor coverage of the sport in both traditional media and web |
| **Events and Promotions (40%)**   * Develop and coordinate the delivery of events and promotions for development programs, competitions, corporate announcements * Plan and co-ordinate regular annual events such as AGM and sponsor launches. * Where applicable, promotions to achieve measurable targets such as increase in participation and increase in development program participants * Formalize process for events feedback from stakeholders and sponsors, provide subsequent improvement initiatives |

SELECTION CRITERIA

Essential

* A minimum of two years experience in a similar communications role
* Strong written communication skills and experience in preparing copy for media, reports, web, publicity and brochures
* Strong verbal communication, presentation and interpersonal skills.
* Well developed project management and planning skills and experience.
* Experience and skills in developing event plans, implementation and evaluation
* Experience in developing promotional concepts and plans, in implementing and evaluating
* Experience with ability to manage a variety of conflicting priorities over extended periods.
* Ability to work within a small team.
* Tertiary qualifications in communications, public relations or related discipline.

Desirable Skills and Experience

* Membership of the Public Relations Institute of Australia.
* Skills in communications planning, evaluation and accountability.
* Experience in website writing, maintenance and development.

Applications including a copy of your resume together with a covering letter indicating your suitability for the role, anticipated salary and possible date of commencement, should be sent via e-mail to (organization contact details)

|  |  |  |  |
| --- | --- | --- | --- |
| **JOB TITLE** | Operations Coordinator | **INCUMBENT** | Vacant |
| **REPORTS TO** | Operations Manager | **DATE REVISED** |  |

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| **JOB OUTLINE** |
| The Operations Coordinator reports to the Operations Manager and is responsible for managing the processes related to membership of the sport in Western Australia, related stakeholder communications, some financial administration, and holistic administrative support aimed at the smooth and efficient running of the organization, particularly related to sports administration, competitions and events.  The role is contracted based upon a 37.5hr working week, however a flexible approach to working hours is required due to the nature of working within a community sports association |

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| **MAJOR ACCOUNTABILITIES AND RESPONSBILIITIES** |
| **Sports Administration, Competitions & Events (60%)**   * Assist in the development and execution of operational plans * Manage administration of related activities * Provide effective and professional ongoing support to regional & metropolitan clubs and members including Events administrative support * Handle incoming telephone/e-mail enquiries * Coordination and related administration of the Membership registration process * Related database management * Production & development of associated reports |
| **Stakeholder Management & Communications (30%)**   * Maintenance, updating and report generation related to member database * Production & distribution of weekly e-news bulletin to members and other stakeholders * Updating of website as required (content management) * Proactive approach to communication with diverse stakeholder groups, including identification of initiatives aimed at improving communication lines and plans. * Undertake necessary duties and tasks as requested by the Operations Manager & CEO |
| **Finance & Funding (10%)**   * Process accounts payables/receivables & generate invoices * Assist with end of year audit process and production of annual accounts |

**SELECTION CRITERIA**

**Essential**

* Experience in working within a similar member/service driven role, ideally within a not-for-profit/sports environment
* Well-developed written, verbal communication and interpersonal skills
* Demonstrated experience in working with a diverse range of stakeholders/volunteers
* High level of client service skills
* Highly developed organizational and administrative skills.
* Knowledge of administrative and clerical procedures and systems
* Able to create effective processes to improve the delivery of work and efficiency
* Highly developed computer skills, MS Office
* Ability to manage a variety of conflicting priorities over extended periods
* Willingness & availability to work evenings and weekends as required.
* Ability to work independently and as part of a small team
* Current WA driver’s licence.

Applications including a copy of your resume together with a covering letter indicating your suitability for the role, anticipated salary and possible date of commencement, should be sent via e-mail to

## Recruitment Adverts

**(Vacancy) – (Organisation Name)**

(Organisation Name) is the governing body of XX in Western Australia. Currently based in (Location), we coordinate all facets of the sport within the state, and are currently searching for a suitably qualified individual to fill the role of (Position Title).

The role is critical in ensuring governance and administration of the game is conducted effectively, and is a key position in the (Organisation Name) management team, contributing significantly to our development and growth plans.

Prime areas of responsibility include;

* Strategic and budgetary planning
* Management of the well established and knowledgeable Operations team
* Development and execution of the Operational Plan and Budget
* Effective management of the competition within the state
* Development of processes and procedures targeted at improvement
* Ongoing development and implementation of Rules and Regulations, Codes of Conduct, and related policies
* Stakeholder management and communication

Successful applicants will possess experience in operations management, ideally in a similar organization. A copy of the full Position Description, together with the relevant selection criterion and salary indication can be found at;

[www.seek.com](http://www.seek.com)

www.organisationname.com

This is a rare opportunity for a qualified individual with a passion for the sport to join us in an exciting and challenging period of growth and change.

If you have the necessary background and experience, please forward your resume with a covering letter detailing your suitability for the role to;

Applications close (Date).

If you have any further questions regarding the advertised vacancy, please contact (Organisation Contact)

## Interview Checklist

Candidate Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |  |
| --- | --- | --- |
| **Question** | **Response** | **Rating**  **(1-10)** |
| Provide a brief history of your work experience, identifying core areas of responsibility |  |  |
| Can you tell us a little more detail, providing examples, of your exposure to;  Area 1  Area 2 |  |  |
| What were your most significant achievements in your previous role?  What was your role in the process?  What challenges did you face?  How did you overcome them? |  |  |
| Can you think of a situation where a project hasn’t gone as planned?  What was your role?  What did you do to overcome the challenges you faced? |  |  |
| What is your understanding of the role at (Organisation Name)?  What motivated you to apply for the position? |  |  |
| What is your ideal working environment? Where do you ‘flourish’? |  |  |
| What is your career ambition? |  |  |
| What date would you be able to start? |  |  |
| What is your salary expectation for the role? |  |  |
| Do you have any questions? |  |  |
| **Total** |  |  |
| **Comments:** |  |  |

## Other EXAMPLE Interview QUESTIONS

What kind of decisions do you make rapidly? What kind takes more time? Give examples?

How do you react in a situation where you need to take an immediate decision? What process will you follow for decision making in such a critical situation?

Have you ever faced a situation when you had to take a decision, which did not fall within in your area of responsibility? What decision did you make and how?

Have you ever tried to delay any decision-making? What were the consequences of this on both your company and customers?

Do you always make decisions on your own without the help of others? In which situations do you seek other ’s help for decision-making?

What kinds of problems have you had coordinating technical projects? How did you solve t hem?

Sometimes the only way to resolve a defense or conflict is through negotiation and compromise. Tell about a time when you were able to resolve a difficult situation by finding some common ground?

Give an example of a problem which you faced on any job that you have had and tell how you went about solving it?

Give an example of when you “went to the source” to address a conflict. Do you feel trust levels were improved as a result?

Tell us about a situation in which you had to separate the person from the issue when working to resolve issues?

Tell us about a time when you identified a potential problem and resolved the situation before it became serious?

There is more than one way to solve a problem. Give an example from your recent work experience that would illustrate this?

Can you tell me about a time when you discovered a more efficient way to do a work task?

What steps do you follow to study a problem before making a decision?

We can sometimes identify a small problem and fix it before it becomes a major problem. Give an example(s) of how you have done this?

Tell me about a task that really tested your analytical abilities?

Describe a situation in which you had to collect information by asking many questions of several people?

Tell me about a tricky situation for which you found a very simple solution?

Have you ever been in a real dilemma at work? What did you do to get out of it?

Describe the work environment or culture and its communication style in which you experience the most success?

How do you explain a complex technical issue to someone who has less technical knowledge than you?

Give me an example of a time when you had to put your point across in a meeting to which most of the people were reluctant to hear.

When you have entered a new workplace in the past, describe how you have gone about meeting and developing relationships with your new coworkers, supervisors, and reporting staff?

When you have had a boss, in the past, who fails to adequately communicate with you, how have you handled this?

Give me an example when you had to present complex information in a simplified manner in order to explain it to someone?

How do you determine priorities in scheduling your time? Give an example?

Do you generally spend your time the way others want or the way you want?

Tell me about a time when you failed to meet a deadline. What things did you fail to do? What were the repercussions? What did you learn?

Do you spend more than a few minutes to find important papers and documents?

Tell me about a time when you were particularly effective on prioritizing tasks and completing a project on schedule?

Do you find yourself spending too many hours in meetings that don’t accomplish very much?

How will you initiate a new relationship with a potential client? Do you think it is necessary?

How would you characterize your written and oral communication-skills?

What do you require from a supervisor?

Would you rather work on a team or on your own?

What, in your view makes a person like able?

Do you think it is worthwhile to establish new relationships? What are the consequences of building new relationships in your professional and personal life?

Describe what a “team” environment means to you?

## Job Offer Letter (Contract)

On behalf of (***(ORGANISATION NAME)***), I am pleased to confirm your employment as (***Position***) located at our **(Office Location)** on the terms of this offer letter.

1. **Position**

Your duties, responsibilities, authority and delegations have been discussed with you and are specified in the attached Position Description. It is understood and accepted that the scope and content of this Position is subject to change in response to the business requirements of *(ORGANISATION NAME)*. *(ORGANISATION NAME)* reserves the right to amend the Position Description to reflect any changes in the scope and content of this Position

At all times, you must:

1. comply with the lawful and reasonable directions of *(ORGANISATION NAME)*;
2. act in good faith, honestly and in *(ORGANISATION NAME)*’s best interests; and
3. use due care and skill when performing the duties of this Position.
4. **Commencement**

Your appointment will commence on **(Date)**

**3. Hours of Work**

A standard working day for this Position will be based on (X) working hours. The usual hours of work are X.XXam to X.XXpm. It is expected you will work additional hours necessary to meet the requirements of this Position.

Your appointment is full-time, and you will devote your whole time and attention during normal working hours to the business of *(ORGANISATION NAME)*.

**4. Remuneration**

Your total remuneration package of $............. per annum will be comprised of:

1. base salary of $............. per annum; and
2. superannuation contributions in accordance with the Superannuation Guarantee legislation.

Your total remuneration package is all inclusive and covers payment for all hours worked and annual leave loading.

Your base salary will be paid on a **(Fortnightly/Monthly)** basis by bank transfer.

**5. Performance Management and Base Salary Review**

From time to time throughout your employment, your performance will be reviewed to facilitate ongoing development and continuous improvement. Any issues regarding your performance will be addressed at these times.

There will be an annual review of your base salary. The following factors will be considered in determining whether a base salary increase will be paid:

1. internal equities;
2. the external market;
3. your performance;
4. inflation; and
5. the capacity of *(ORGANISATION NAME)* to award an increase.

**6. Expenses and Benefits**

You will be entitled to reimbursement of all reasonable out-of-pocket expenses incurred by you on *(ORGANISATION NAME)* business as outlined in our Expense Reimbursement Policy

**7. Leave**

Your entitlement to all forms of leave is in accordance with *(ORGANISATION NAME)* policy. You will:

1. receive twenty (20) days annual leave per annum, administered within the current relevant legislation. Leave is to be taken at a time or times agreed with your line manager and must be taken within eighteen (18) months of entitlement, thus leave entitlements cannot accrue to more than thirty (30) days at any time;
2. be eligible for long service leave in line with relevant legislation; and
3. be entitled to eight (8) days paid sick leave per annum. Where sick leave exceeds three (3) consecutive business days it should be supported by a doctors certificate.

**8. Compliance with Laws, Policies, Code of Conduct etc.**

You must comply with all relevant civil and criminal laws. In addition, you must comply with the constitution of *(ORGANISATION NAME)*, *(ORGANISATION NAME)* policies, *(ORGANISATION NAME)* Code of Conduct, *(ORGANISATION NAME)* By-Laws and *(ORGANISATION NAME)* Regulations and any of the Laws, applying from time to time (“***Policies”***) which may be applicable to your employment. Copies of relevant Policies are available on request.

You acknowledge that the Policies may change during the course of your employment. In instances where a term of this agreement are inconsistent with a term of the Policies, the term of the Policies will govern to the extent of the inconsistency.

**9. Conflict of Interests**

You must not have any direct or indirect pecuniary or other interest that may in any way compromise the performance of your duties under this agreement. In particular, you must not hold any position for monetary or other reward that would conflict with your responsibilities to *(ORGANISATION NAME)*. If such a conflict arises, you must immediately notify your line manager.

**10. Intellectual Property**

In relation to intellectual property, you:

1. acknowledge that the words ***Intellectual Property Rights***when used in this agreement mean all intellectual property rights, including:
   * 1. patents, copyright, rights in circuit layouts, registered designs, trade marks and the right to have confidential information kept confidential; and
     2. any application or right to apply for registration of any of those rights;
2. acknowledge that all Intellectual Property Rights in all things, materials and information created or generated by you (alone or with any other person) during the course of your employment with *(ORGANISATION NAME)* (whether in or outside usual business hours) including all inventions, software, databases, models, drawings, plans, processes, artwork, designs, performances, logos, reports, proposals and records (“***Materials”***) are owned by *(ORGANISATION NAME)*, and you presently assign all such rights to *(ORGANISATION NAME)*;
3. must do all things reasonably requested by *(ORGANISATION NAME)* to enable *(ORGANISATION NAME)* to assure further the rights referred to in clause (b);
4. must notify *(ORGANISATION NAME)* of all Materials and provide copies on request; and
5. in relation to any moral rights you may have, you consent to *(ORGANISATION NAME)*:
   * 1. performing all acts necessary or desirable to enable *(ORGANISATION NAME)* to fully use and exploit Materials; and
     2. not attributing you as the author of any Materials.

**11. Confidentiality**

You must treat as confidential all information concerning or relating to *(ORGANISATION NAME)* or the business of *(ORGANISATION NAME)* that is not in the public domain. You must not, in any direct or indirect way, make use of any such confidential information except in the course of your employment, disclose it to any person or allow any other person to use it. This obligation survives termination of your employment for any reason.

For the purposes of this agreement, information which is confidential includes trade secrets, formulae, software, financial and accounting information, customer and supplier information, marketing strategies, market research, information regarding coaching, sports medicine, team performance data, research and development information, personnel information and any other material or information that *(ORGANISATION NAME)* specifies as confidential.

**12. Resignation**

Either party may terminate your employment on the giving of at least one (1) months written notice to the other party. *(ORGANISATION NAME)* may choose to provide payment in lieu of the notice period.

**13. Termination**

*(ORGANISATION NAME)* may by written notice to you terminate your employment with immediate effect if:

1. you are guilty of any fraud, serious misconduct, wilful breach of duty, or of a serious or persistent breach of your employment obligations;
2. you materially breach any provision of these terms which is not remediable, or if remediable, is not remedied promptly after *(ORGANISATION NAME)* gives you notice specifying the breach; or

On the termination of your employment, you will immediately return to *(ORGANISATION NAME)* all *(ORGANISATION NAME)* property such as keys, security pass, cab charge, credit card, laptop and documents etc before your final salary payment and payment in respect of accrued leave entitlements is made.

**14. Disclosure**

Neither *(ORGANISATION NAME)* nor you may disclose any of these terms except to the extent required by a court or by legislation and, where required by legislation, both parties must consult in order to agree the extent and manner of the disclosure.

**15. Jurisdiction**

This agreement is governed by the law applicable in Western Australia and each party irrevocably and unconditionally submits to the non exclusive jurisdiction of the courts of that state.

If you agree with the terms as set out in this letter, please signify your agreement by signing and dating the enclosed copy of this letter and returning it to me. Your doing so will constitute the agreement between *(ORGANISATION NAME)* and yourself. I confirm to you that I am authorised to make the above offer and to commit *(ORGANISATION NAME)* to the above terms.

I look forward to a productive working relationship between *(ORGANISATION NAME)* and yourself.

Yours sincerely,

**Manager Name**

**Title**

**Employee Acceptance**

I agree to the terms of my employment at *(ORGANISATION NAME)* as set out in this letter and attachments. I also warrant that the details included in my resume provided to *(ORGANISATION NAME)* are a complete and accurate record of my skills and past experience.

*Name:*

*Date \_\_\_\_\_\_\_\_*

*Signature:*

## Candidate UNSUCCESSFUL Letters

*Insert name*

*Address*

*City*

*State & Post Code*

*Date*

Dear (Applicant Name)

Thank you for your application for the position of (*insert position title)* with Organisation Name.

All applications have now been carefully considered and assessed against the key selection criteria. Unfortunately, in this instance, you have been unsuccessful in making our shortlist for interview.

The number and standard of applications for this position was extremely high, therefore it has been an extremely competitive process.

We advertise our vacancies utilising a variety of mediums so please feel free to apply for other opportunities with (Organisation Name) as they arise in the future.

Thank you for your interest in (Organisation Name). We appreciate the time and effort you have put into your application.

We would also like to take the opportunity to wish you every success in your future endeavours.

Yours sincerely,

*Name*

*Address*

*City State Postcode*

*Insert Date*

Dear (Applicant Name)*,*

Thank you for attending an interview for the position of (*insert position title)* with (Organisation Name).

The number and standard of applications for this position was extremely high, and it has been an extremely competitive recruitment process.

Unfortunately on this occasion your application has been unsuccessful.

We appreciate the time and effort you have put into your application and attending an interview. Once again, thank you for your interest in (Organisation Name), and I would like to take the opportunity to wish you every success in your future endeavours.

Yours sincerely,

## Induction Checklist

DEPARTMENT ......................................................................

NAME OF EMPLOYEE ......................................................…………..

JOB TITLE ......................................................................

DATE COMMENCED ......................................................…………..

This is a checklist of information for Induction which managers / supervisors should use with new staff as part of their induction programme within the first few days, and certainly within the first two weeks of employment. Health and Safety items should be identified immediately. The new employee should be asked to tick each subject as he/she has been informed about it, and sign the end of the form. A copy of the Induction form must be retained in the employee’s file.Not all the following subjects are applicable to all departments. Should this be the case, record N/A.

**ITEMS TO COVER WITH EACH NEW EMPLOYEE**

|  |  |  |  |
| --- | --- | --- | --- |
| **The Department** | **Complete** | | |
| 1. Department function |  | | |
| 2. Introduction to colleagues |  | | |
| 3. New entrant’s own job |  | | |
| 4. Supervision |  | | |
| 5. General layout - entrances and exits |  | | |
| 6. Telephone system & stationery |  | | |
| **Conditions of Employment – hr hANDBOOK cONTENTS** |  | | |
| 1. Information on hours of work |  | | |
| 2. Time recording, flexi-time |  | | |
| 3. Bonus scheme, allowances |  | | |
| 4. Probationary periods of employment |  | | |
| 6. Reporting in when sick including when on leave |  | | |
| 7. Arrangements for requesting leave: annual leave, unpaid leave, compassionate leave |  | | |
| 8. Issue of staff uniforms, dress code policy |  | | |
| **Health and Safety, Security, Fire** |  | | |
| 1. Health and safety information relevant to the department |  | | |
| 2. Issuing of fire instructions and procedure |  | | |
| 3. Location of fire-fighting equipment |  | | |
| 4. Accident reporting |  | | |
| 5. First aid facilities & provisions |  | | |
| 6. Loss of personal effects |  | | |
| 7. Security of department/building |  | | |
| 8. Arrangement for keys, passes, ID Badges etc. |  | | |
| 9. Violence and aggressive behaviour |  | | |
| 10. Management of monies/valuables |  | | |
| 11. Major Incident procedures |  | | |
|  |  | | |
| **Conduct** |  | | |
| 1. Personal presentation |  | | |
| 2. Disciplinary procedures |  | | |
| 3. Courtesy to the customer and the public |  | | |
| 4. Confidentiality |  | | |
| 5. Noise Control |  | | |
| 6. Acceptance of gifts |  | | |
| 7. Statements to the Press |  | | |
| 8. Local rules regarding smoking |  | | |
| 9. Private use of telephones |  | | |
| 10. Standards of Business Conduct |  | | |
| **Facilities** | |  |
| 1. Cloakroom, lockers, lavatories | |  |
| **Education, Training, Promotion** | |  |
| 1. Study leave | |  |
| 2. Means of advancement, promotion opportunities | |  |
| 3. Employee appraisal, review systems | |  |
| **Employee Involvement and Communication** | |  |
| 2. Communication arrangements | |  |
| 3. Information sources, e.g. notice boards, circulars etc. | |  |
| 4. Food and Health Policy | |  |
| 5. Handling Complaints | |  |
| **Items Specific to Department** | |  |
| 1. Pay | |  |
| 2. Notice of termination of employment | |  |
| 3. Sick certificates | |  |
| 4. Waste disposal | |  |
| 6. Lifting and handling | |  |

**OTHER RELEVANT ISSUES SPECIFIC TO DEPARTMENT**

I have been informed about and understand the above items.

Signature:...............................………………………………… Date:..............

I confirm that the above Induction Programme has been completed for the above member of staff.

Signature of Head of Department/

Designated Officer:...................................…………………… Date:..............

## Performance Appraisal Template

|  |  |  |
| --- | --- | --- |
| Employee Name | Position | DOC |
|  |  |  |
| Appraiser Name | Position | Date of Appraisal |
|  |  |  |

|  |  |  |
| --- | --- | --- |
| Major Areas of Accountability | Performance Outcomes | Performance Ranking (S,E,M,N,U)\* |
| 1 |  |  |
| 2 |  |  |
| 3 |  |  |
| 4 |  |  |
| 5 |  |  |

\*(S=Superior, E=Exceed expectations, M=Meet Expectations, N=Not Meeting Expectations, U=Unacceptable performance)

|  |  |  |
| --- | --- | --- |
| Special Projects, Goals & Objectives | Performance Outcomes | Performance Ranking (S,E,M,N,U) |
| 1 |  |  |
| 2 |  |  |
| 3 |  |  |
| Other Areas for Review | Performance Outcomes | Performance Ranking (S,E,M,N,U) |
| 1 |  |  |
| 2 |  |  |
| 3 |  |  |

|  |  |
| --- | --- |
| Overall Ranking |  |

|  |
| --- |
| Appraiser’s Comments: |

|  |
| --- |
| Appraisee’s Comments: |

|  |
| --- |
| Personal Development Plan for the coming 12 months; |

Appraiser signature Appraisee signature

Date Date

## Miscellaneous Forms

**[Organisation *Name*]**

**Study Support Program Application Form**

Name

Course Information

*(Attach a copy of the program outline)*

Date(s)

Location

Why do you feel **[*Organisation Name*]** would benefit from participating in the nominated course?

**ESTIMATED** Course Registration Fee $

**COSTS** Estimated Travel, Hotel and Other Expenses $

TOTAL ESTIMATED COSTS $

**REIMBURSEMENT**

I agree that if I voluntarily terminate my employment with **[Firm Name]** within one year

of the above program date, I will repay the firm on a pro rata basis as per the Study

Support Policy. Costs include registration fees, travel and other expenses.

Applicant’s Signature Date

## Study Support Compensation

**[Organisation Name]**

**Study Support Agreement**

I understand that, if approved to participate in **[*Firm Name*]**’s Study Support Program, **[*Firm Name*]** is making a significant investment in my personal and professional growth and development.

I understand and agree that if for any reason I voluntarily terminate my employment before the completion of this personal commitment, I will pay **[*Firm Name*]** on a *pro rata* basis the full cost of attending **[*Firm Name*]**’s Study Support Program (including tuition, travel, food, and accommodation) as follows:

|  |  |
| --- | --- |
| Termination in Relation to Completion  of [*Firm Name*]’s Study Support Program | **Required Reimbursement Percentage** |
| 0-6 Months | 100% of Associated Expenses |
| 7-12 Months | 75% of Associated Expenses |

I hereby authorize **[*Firm Name*]** to withhold said costs from my final salary payment, to include payment for vacation.

I also understand that if I am involuntarily separated from **[*Firm Name*]** employment through no fault of my own, these prorated payments will be waived.

*I UNDERSTAND AND AGREE THAT THIS AGREEMENT WILL BECOME AN ADDENDUM TO MY EMPLOYMENT AGREEMENT.*

**APPROVED:**

Signed (Employee) Date

Employee Name (please print or type)

## Vacation Request Forms

Date: \_\_\_\_/\_\_\_\_/\_\_\_\_\_\_

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Department / Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Vacation Dates Requested: \_\_\_\_/\_\_\_\_/\_\_\_\_\_\_ until \_\_\_\_/\_\_\_\_/\_\_\_\_\_\_

Date returning to work: \_\_\_\_/\_\_\_\_/\_\_\_\_\_\_

Total Number of Hours Requested: \_\_\_\_\_ Hours

Number of Hours Available: \_\_\_\_\_ Hours

Number of Hours Remaining \_\_\_\_\_ Hours

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature of Employee

**Approval:**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Signature of Supervisor

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature of Manager

**Annual leave and long service leave application form**

***Employee’s details***

|  |  |
| --- | --- |
| *First name:* |  |

|  |  |
| --- | --- |
| *Surname:* |  |

|  |  |
| --- | --- |
| *Position:* |  |

|  |  |
| --- | --- |
| *Contact phone number:* |  |

***Leave type***

|  |  |
| --- | --- |
|  | *Please tick the appropriate box(es). If you are applying for more than one type of leave, please specify the details in the comments section provided.* |

*Annual leave (full pay)*

*Annual leave (half pay)*

*Annual leave in advance*

|  |  |
| --- | --- |
|  | *Note: Upon termination of employment, leave taken that has not been accrued can be withheld from wages.* |

*Leave without pay*

*Long service leave*

*Comments:*

|  |
| --- |
|  |

***Period of leave***

|  |  |
| --- | --- |
| *Last day of work:* |  |

|  |  |
| --- | --- |
| *Return to work date:* |  |

|  |  |
| --- | --- |
| *Total number of working days off:* |  |

|  |  |
| --- | --- |
|  | *Note: Do not include any RDOs, public holidays, or substituted days in the total.* |

*Comments:*

|  |
| --- |
|  |

*Signature of employee: Date: / /*

***Approval of leave (to be completed by manager/supervisor)***

*Approved  Not approved*

*Reason for refusal (if applicable):*

|  |
| --- |
|  |

|  |  |
| --- | --- |
| *Name of manager/supervisor:* |  |

*Signature of manager/supervisor: Date: / /*

## Timesheet Template

|  |  |
| --- | --- |
| Employer’s name: |  |

|  |  |
| --- | --- |
| Employee’s name: |  |

|  |  |  |
| --- | --- | --- |
| Pay period (date/month/year): | / / to / / |  |

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Employee’s ordinary hours: \_\_\_\_\_\_\_\_hours \_\_\_\_\_\_\_\_ minutes per week / fortnight / other \_\_\_\_\_\_\_\_\_\_ (circle appropriate option and insert information if required) | | | | | | | Leave | |
| Day / date  (e.g. Day: Mon;  Date: 21/3) | Start time  (e.g. 8.30am) | Start time of unpaid break  (e.g. 12:30pm) | Restart time  (e.g. 1:30pm) | Finish time  (e.g. 5:00pm) | Other times/ Breaks  (e.g. time of other unpaid breaks) | Total (Hours minus unpaid breaks) | Type  (e.g. personal leave, etc.) | Hours (hours minus unpaid breaks) |
|  |  |  |  |  |  |  |  |  |
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|  |  |  |  |  |  |  |  |  |
|  | | | | | Total: |  | Total: |  |

Signature of employee: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_/\_\_\_\_\_\_\_\_/\_\_\_\_\_\_\_\_\_\_

## Expense Reimbursement Template

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **EXPENSE REIMBURSEMENT FORM**  (Staff, Board, and Volunteers Only)  **Organisation Name** | | | | | | | | | | | |
|  | | | | | | | | | | | |
| Today’s Date | | |  | | | Date Rec’d in Acct. | | |  | | |
|  | | |  | |  |  | | |  | | |
| Name/Payee | | |  | | | | | |  | | |
|  | | | | | | | | | | | |
| Reason for Expense | | | |  | | | | | | | |
|  | | | |  | | | | | | | |
| **ITEMISED EXPENSES**  Check one:  Receipts attached  Receipts already posted  Receipts will be posted on | | | | | | | | | | | |
| **Date Incurred** |  | **Item** | | | | |  | **$ Amount** | |  | **GL Account** |
|  |  |  | | | | |  |  | |  |  |
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|  |  | **Subtotal** | | | | |  |  | |  |  |
|  |  |  | | | | |  |  | |  |  |
|  |  | **Total Amount** | | | | |  |  | |  |  |
|  |  |  | | | | |  |  | |  |  |
| Requested by | | |  | | |  | | | |  |  |
|  | | |  | | |  | | | |  |  |
| Approved by | | |  | | | Date Approved | | | |  |  |

## Disciplinary & Capability Letters

[Insert date here]

[Insert name of employee here]

[Insert address of employee here]

Dear [insert first name here],

**Re: [Choose one – Verbal Warning; First, Second, First & Final, Second & Final Written Warning]**

Further to the meeting held with you on *[insert date here]* at the *[insert location here*], I confirm that this letter serves as an official *[choose one – verbal warning; first written warning; second written warning; first and final written warning; second and final written warning].*

The reason(s) for the *[insert type of warning here]* is due to your *[choose one - work performance or misconduct].* More specifically, during the meeting we discussed:

* *[detail the specific performance / misconduct that warrants the warning here*

As was discussed, the organisation’s expectations and standards in this regard are as follows:

* *[list all the expectations of the organisation to ensure the employee is fully aware of the areas of concern]*

***Optional -*** *[If there have been previous warnings (either verbal, written, etc) or discussions relating to these matters that have been issued or have taken place in the past, list them in detail here].*

(Organisation name) expects that you will show an immediate and sustained improvement in the areas for which you have been warned. Should this not occur, further disciplinary action may result up to and possibly including the termination of your employment.

You have the right of appeal against this disciplinary action which must be made in writing to (Name) within 7 days.

Yours sincerely,

[Insert name here]

[Insert title of manager here]

# Employee Exit Checklist

You can use this checklist to help you conduct an efficient exit process when an employee is leaving your business.

|  |  |
| --- | --- |
| **Tick when complete** | **Tasks** |
|  | Arrange for the person to do a formal handover to someone within the business or to write procedures explaining any complicated parts of their job |
|  | Conduct an exit interview – store this information in the employee’s personal file |
|  | File their personal file in a secure location, separate from files of current employees |
|  | Collect their keys, security passes, name badges and business identification |
|  | Collect their uniform if the business owns them |
|  | Collect any tools, electronic devices or other business property they have. |
|  | Ask them to clean out their desk |
|  | Delete their computer access and remove all personal files and settings from their workstation |
|  | Remind the person of any confidentiality clauses they might have signed |
|  | If they have been a good employee, encourage them to keep in touch and issue a statement of service (you may consider given them a verbal reference) |

Your exiting employee may also request that you provide them with a **Letter of Termination** and in some instances a **Separation Certificate**, if they require this document for **Centrelink** purposes.

## Links and Resources

This Manual represents a guide related to human resources guidelines, policies and processes for the Sport and Recreation industry in Western Australia. Further information regarding any of the policies and processes contained herein can be gathered from the following resources;

<http://www.fairwork.gov.au/> - The **Fair Work Ombudsman** offers free advice and resources spanning the complete range of human resource policy, federal and state requirements regarding pay and awards, regulatory requirements, employee entitlements and advice on best practice process.

<http://www.commerce.wa.gov.au/worksafe/tool-box> - **The Department of Commerce** offers a wide variety of free advice and resources aimed at supporting business, including areas such as human resources policy, process and Health and Safety requirements (Worksafe).

<http://workplaceinfo.com.au/home> - **Workplace Info** operates on licensed subscription basis offering information and advice on human resources policy and process.

<http://wa.gov.au/information-about/jobs-economy/conditions-entitlements> - The WA Government website contains extensive information regarding legislative requirements of employers in WA, particularly in regard to remuneration, awards, and HR policy and processes.

*Disclaimer : This manual has been designed to provide guidance in the management of human resources within the sport and recreation industry in Western Australia. Whilst every care has been taken to ensure the accuracy of information contained in this manual neither the Department of Sport and Recreation nor Apex Human Resources can be held liable for any damage, loss, criminal or civil action that occurs as a result of the implementation of policies and processes contained within it. The Department of Sport and Recreation and Apex Human Resources recommends obtaining appropriate advice when making offers of employment, drafting employment contracts and in matters related to disciplinary and grievance processes.*