


Date Approved: 2021-04-23

es



SFSS Orientation  
and Retention  
Policies

Simon Fraser Student Society

---

**simon fraser**  
**student society**

July 20, 2015

1

# TABLE OF CONTENTS

**Introduction** ..... 3

**Policies** ..... 4

OTP-1: New Employee Orientation ..... 5

OTP-2: **\*Under Review\*** New Council Orientation ..... 7

OTP-3: Volunteer Orientation ..... 11

OTP-4: Succession Planning Expectation Policies ..... 13

OTP-5: Staff Monthly Report Policies ..... 14

# INTRODUCTION

# POLICIES



## OTP-1: NEW EMPLOYEE ORIENTATION

<i>POLICY TYPE: ORIENTATION AND RETENTION POLICY</i> <i>POLICY TITLE: NEW EMPLOYEE ORIENTATION POLICY</i> <i>REFERENCE NUMBER: OTP-1</i>		
Adopted: April 23, 2021 Next Scheduled Revision: April 2022 Previous Revisions		
Position	Signature	Date
President		

### Policy

1.1 The Operations Organizer is responsible for coordinating all new staff orientations. The President will serve as oversight for this service and will work to ensure the process does not break down.

### Process

1.2 The Operations Organizer shall:

- (a) ensure that the required staff information is collected and that the required forms are completed for payroll and benefits,
- (b) ensure that the staff member is provided with a copy of the SFSS Personnel Policies,
- (c) ensure that copies of a staff members' relevant degrees and certifications are filed,
- (d) ensure that that staff sign out keys and/or entry codes they require,
- (e) submit to IT Services all information that is required for email and PC setup
- (f) review the staff's job description with the staff member,
- (g) review the "New Employee Health & Safety Checklist" with the new staff member,

- (h) ensure new employees are trained on the SFSS Privacy and Information Management Policies, and ensure they provide their signature to acknowledge that they have read the policy,
  - (i) arrange for business cards if required, and
  - (j) review timesheet and reporting requirements.
- 13 The President shall:
  - (a) meet with the new staff member, and
  - (b) provide an overview of the SFSS structure, mission, values, services, and the strategic plan.
- 14 The Building Manager shall conduct an orientation to the building, including:
  - (a) a site tour,
  - (b) information on the location and proper use of:
    - (i) first aid kits,
    - (ii) phone and voicemail systems,
    - (iii) fire extinguishers, and
    - (iv) printers and photocopiers.
- 15 An orientation evaluation will be made available to all new employees following their orientation.



## OTP-2: \*UNDER REVIEW\* NEW COUNCIL ORIENTATION & RETENTION

<i>POLICY TYPE: ORIENTATION AND RETENTION POLICY POLICY</i>		
<i>TITLE: NEW COUNCIL ORIENTATION &amp; RETENTION POLICY</i>		
<i>REFERENCE NUMBER: OTP-2</i>		
Adopted: April 23, 2021 Next Scheduled Revision: April 2022 Previous Revisions		
Position	Signature	Date
President		

### Policy

21 At the beginning of each annual elected Council term, an orientation of Councillors shall be organised for all new and re-elected Councillors. The orientation shall cover all aspects of the Society, including but not limited to:

- (a) finance and operations,
- (b) Society governance, including:
  - i. Hierarchy of governing documents (Societies Act, By-Laws, Policies, SOPs)
  - ii. Robert's Rules of Order
- (c) legal responsibilities of Councillors,
- (d) student-centered advocacy
- (e) services, including clubs, student unions, and constituency groups,
- (f) events and marketing, and
- (g) justice, equity, diversity, and inclusion.

22 Throughout Council term, Council shall schedule mandatory and continuous training, and development sessions in subjects such as:

- (a) marketing,
- (b) business development,
- (c) finance/accounting,
- (d) non-profit management,
- (e) social enterprise management,
- (f) strategic planning,
- (g) sexual violence prevention and disclosure support training,
- (h) any other relevant topics that will build the capacity of Councillors and contribute to the overall well-being of the Society.

23 Throughout every Council Term, Council shall schedule a minimum of two (2) workshops in intersectional areas including but not limited to: non-violent communication, decolonization, anti-racism and allyship, gender equity, power and privilege, inclusive workplace practices and accessibility.

#### **Procedures**

24 The Board Organizer will work with the incoming President to coordinate Council Orientation for all new Non-Executive Councillors and Executive Officers. The outgoing President must provide advice and support during this transition.

- (a) The Incoming President may organize and work with Staff to ensure this process does not break down and Council Orientation occurs in a timely manner.

25 The Board Organizer will, with direction from the VP Internal and Organizational Development, as per Bylaw 7(11)(e), coordinate development sessions for Council throughout the term

26 The Operations Organizer will ensure the incoming Council has the appropriate support from the Society operations and is aware of the various departments of the Society.

27 Prior to Council Orientation, incoming Councillors should shadow the Outgoing Councillor in their position.

#### **Orientation**

28 The Board Organizer will:

- (a) ensure that each new Councillor completes all required forms,



- (b) ensure that presentations take place during orientation, with direction from the incoming President, on the history of the student movement and the SFSS, Councillor liability and insurance, HR training, SFSS budget overview, and training on budgeting and financial statements,
  - (c) assist in setting up logistics for Council retreat by working with the outgoing Council to approve funding for team building and annual planning.
- 2.9 The Operations Organizer will:
- (a) submit to IT Services all required forms and information for email and PC setup,
    - (i) resetting the passwords of Councillor emails
  - (b) review the New Councillor Health & Safety Checklist with the new Councillor,
  - (c) arrange for business cards if required.
- 2.10 The Policy, Research, and Community Affairs Coordinator will:
- (a) ensure new Councillors are trained on the “SFSS Privacy and Information Management Policies”, and ensure they provide their signature to acknowledge that they have read the policy.
- 2.11 The Policy, Research, and Community Affairs Coordinator will ensure that Council is provided with the following in electronic format:
- (a) SFSS Constitution,
  - (b) SFSS Bylaws,
  - (c) SFSS Council Policies,
  - (d) SFSS Administrative Policies
  - (e) SFSS Strategic Plan,
  - (f) Societies Act, University Act and other relevant legislation, and
  - (g) Robert's Rules of Order.
- 2.12 The Building Manager will conduct an orientation to the building, including:
- (a) a site tour,

- (b) information on the location and proper use of:
  - (i) first aid kits,
  - (ii) phone and voicemail systems,
  - (iii) fire extinguishers, and
  - (iv) photocopiers.
  
- (c) ensuring that each new Councillor signs out keys and/or entry codes they require,

2.13 An evaluation of their orientation will be made available to all new Councillors following their orientation.

2.14 Upon assuming office, a Council resource manual shall be issued to all Councillors so that they understand their role and responsibilities, how the Society is governed, and what resources they can access.

2.15 During the first four (4) months of Council term, Councillors shall attend a workshop on anti-oppressive organizing, and consent training. When possible, these workshops should occur during Council orientation.

2.16 Council Orientation Planning is expected to be concluded by April 3 of each calendar year. The Board Organizer is responsible for sending out the invitations for Orientation by no later than three (3) weeks prior to the first Orientation session date.



## OTP-3: INCOMING EXECUTIVE OFFICERS

<i>POLICY TYPE: ORIENTATION AND RETENTION POLICY</i>		
<i>POLICY TITLE: INCOMING EXECUTIVE OFFICERS</i>		
<i>POLICY REFERENCE NUMBER: OTP-3</i>		
<i>Adopted: April 23, 2021</i> <i>Next Scheduled Revision: April 2022</i> <i>Previous Revisions</i>		
Position	Signature	Date
President		

### Policy

3.1 OTP-3 shall take effect once the General Election for the Executive Committee concludes and results are released. Its purpose shall be to ensure that Incoming Executive Officers are onboarded, trained, and prepared for their roles as Executives of the SFSS.

- (a) OTP-3 shall not apply to Incoming Executives elected via a by-election or appointed by a resolution of Council to fill a vacancy on the Executive Committee.

3.2 The President and VP Internal and Organizational Development are to oversee the training of the Incoming Executives.

- (a) The President and VP Internal and Organizational Development shall ensure that the Incoming Executives who will be signing authorities are transferred signing authority by the time that they take office.
- (b) The Outgoing VP Finance and Services shall ensure that the Incoming VP Finance and Services has access to relevant banking and payroll information by May 1 of every calendar year.

3.3 Incoming Executives are required to report at least thirty (30) hours of training between late-February and late-April.

- (a) The incoming Executive will receive a stipend for thirty (30) hours of work. Additional hours are voluntary and will not be financially compensated.
- (b) An Incoming Executive shall not receive an additional stipend if they are also a part of the Outgoing Executive committee

3.4 The Board Organizer is tasked with scheduling basic training sessions for the Incoming Executives, between late-February and mid-April:

- (a) Bylaw and Policy overview with the Policy, Research, and Community Affairs Coordinator and VP Internal and Organizational Development
- (b) Robert's Rules and Committee Chairing Training with the Administrative Coordinator and VP Internal and Organizational Development
- (c) Privacy and Information Management with the Privacy Officer
- (d) Building Operations with The Building Manager and Building Team
- (e) Society Finances and Budget with the Finance Department and VP Finance and Services
- (f) Member Services Operations with the Member Services Coordinators
- (g) HR and Unionized Staff Relations with The Operations Organizer and President

3.5 The training sessions outlined in 3.4 (a)-(f) shall be two (2) hours to five (3) hours of shadowing the relevant departments, or required attendance in other facilitated training sessions. These sessions are required to occur after every General Executive Committee Election. The Board Organizer is tasked to ensure these sessions are scheduled before the new Council term begins

- (a) Sessions with SFSS departments shall include, but are not limited to:
  - (i) How the department works
  - (ii) What functions the department performs for the Society
  - (iii) How the department works in relation to the Executive Committee
  - (iv) Overview of programs used to perform tasks
  - (v) Real-life application of department functions

3.6 Sessions outlined in s. 3.3 (a)-(f) are mandatory for all Incoming Executives to complete before May 1 of each elected term. If an Incoming Executive does not complete these training sessions by May 1st, the VP Finance and Services shall reduce the Executives stipend by \$200 in each pay period where all training sessions have not been completed

- (a) In the case where the VP Finance and Services is found in violation of s. 3.5, and is unwilling to reduce their own stipend, the President may escalate this to Council

## **Process**

3.7 Incoming Executives are required to shadow their Outgoing Executive counterparts for their transition. Shadowing may include, but is not limited to:

- (a) Check-in meetings with their Executive
- (b) Performing duties alongside, and under the supervision, of their Executive
- (c) Attending and contributing to committee meetings
- (d) Attending meetings with their Executives, when appropriate
  - (i) It is up to the Outgoing Executive Officer's discretion what meetings, may or may not, be appropriate

3.8 Incoming Executives are required to track their hours, meetings, and progress through training work reports.

- (a) The Outgoing VP Finance and Services is tasked with providing the Incoming Executives with the semi-monthly work report templates.
- (b) The Incoming Executives are required to submit a semi-monthly work report, which will be reviewed by the Outgoing VP Finance and Services.
- (c) Hours will be tallied by the end of the reporting period to ensure that the required thirty (30) hours of training were completed.

3.9 The Semi-Monthly Training Work Reports of Incoming Executives must include:

- (a) All meetings attended during that period
- (b) The amount of time spent attending meetings, working on projects/events, and any other time spent fulfilling their job as an Incoming Executive Committee Member

3.10 The Semi-Monthly Training Work Reports of Incoming Executives are due on the 16th and 1st of every month

3.11 Incoming Executives are required to adhere to the SFSS Constitution, Bylaws, Collective Agreement, and Policies while completing their training.

3.12 Incoming Executives answer to their Outgoing Executive counterparts. If necessary, the Outgoing Executive may escalate matters to the Outgoing President for disciplinary measures.

- (a) Disciplinary measures may include, but are not limited to:
  - (i) An informal warning from the Outgoing Executive Officer
  - (ii) A formal warning from the Outgoing Executive Officer
  - (iii) A formal warning from the President
  - (iv) Recommendations being brought to Council for further disciplinary measures aligned with SFSS Policies, Bylaws, and the Societies' Act
  
- (b) Notwithstanding OTP-3.12, if the Incoming Executive is a current member of Council, the matter may also be escalated to the Committee on Councillor Breaches of Confidence, if appropriate.
  
- (c) Notwithstanding OTP-3.12, if the Incoming Executive is a current Executive Officer, the matter may also be escalated to the Oversight Committee on Executive Officers in compliance with its Terms of Reference.

3.13 Incoming Executives are expected to work on an Annual Plan for their respective portfolios throughout their training period.

- (a) These plans should be completed by the third week of May at the latest.
  
- (b) Annual Plans shall be published on the Society website.



## OTP-4: VOLUNTEER ORIENTATION

<i>POLICY TYPE: ORIENTATION AND RETENTION POLICY</i>		
<i>POLICY TITLE: VOLUNTEER ORIENTATION</i>		
<i>POLICY REFERENCE NUMBER: OTP-4</i>		
<i>Adopted: April 23, 2021</i>		
<i>Next Scheduled Revision: April 2022</i>		
<i>Previous Revisions</i>		
Position	Signature	Date
President		

### Policy

4.1 The Board Organizer is responsible for coordinating all volunteer orientations.

### Process

4.2 The Board Organizer shall:

- (a) ensure that the required volunteer information and forms,
- (b) when required, submit a request to IT services for email and computer setup,
- (c) review job descriptions with volunteers,
- (d) review the “New Employee Health & Safety Checklist” with the new Employee,
- (e) review reporting requirement.

4.3 If necessary, the Building Manager shall conduct an orientation to the volunteer role, including:

- (a) a site tour,
- (b) information on the location and proper use of:
  - (i) first aid kits,
  - (ii) fire extinguishers, and
  - (iii) any other equipment relevant to their volunteerism.
- (c) review of the SUB Emergency Action plan

4.4 An orientation evaluation will be made available to all new volunteers following their orientation



## OTP-5: SUCCESSION PLANNING EXPECTATION POLICIES

<i>POLICY TYPE: ORIENTATION AND RETENTION POLICY</i>		
<i>POLICY TITLE: SUCCESSION PLANNING EXPECTATION POLICIES</i>		
<i>POLICY REFERENCE NUMBER: OTP-5</i>		
<i>Adopted: April 23, 2021</i>		
<i>Next Scheduled Revision: April 2022</i>		
<i>Previous Revisions</i>		
Position	Signature	Date
President		

### **Policy**

- 5.1 All staff must prepare succession planning reports in the event of any change in employment status. The Operations Organizer will be responsible for ensuring a succession planning report is in place for each staff member at the end of every semester.
- 5.2 All staff are responsible for maintaining the confidentiality of any changes in the employment status of any staff, or Councillor vacancy status of any Councillor and await official communication from Council if there is any.

### **Process**

- 5.3 The President will notify all departmental coordinators in writing that a staff member's employment status has changed in the event of death or if they are unable to continue employment due to illness.





## OTP-6: STAFF MONTHLY REPORT POLICIES

<i>POLICY TYPE: ORIENTATION AND RETENTION POLICY</i>		
<i>POLICY TITLE: STAFF MONTHLY REPORT POLICIES</i>		
<i>POLICY REFERENCE NUMBER: OTP-6</i>		
<i>Adopted: April 23, 2021</i> <i>Next Scheduled Revision: April 2022</i> <i>Previous Revisions</i>		
Position	Signature	Date
President		

### Policy

6.1 All departmental coordinators and excluded staff must prepare monthly reports for the Executive Committee. The Operations Organizer will be responsible for ensuring monthly reports across departments are prepared. The President shall serve as oversight of this policy.

### Process

6.2 Every month, departmental coordinators will send staff reports on the activities of each of the committees and its alignment with the strategic plan.

6.3 The Operations Organizer will:

- (a) prepare a template report for departmental coordinators to submit a report of their activities, events, and service delivery alongside any metrics, as well as its results in aligning with the strategic plan,
- (b) collect and compile the monthly reports of all the departmental coordinators into one report,
- (c) compile their own report for the inclusion in the aforementioned report, and
- (d) submit the report to the Executive Committee through the President.