

TOURISM & HOSPITALITY

BEST PRACTICE GUIDE



**Guidelines and Tips for
Tourism and Hospitality Employers**

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GUIDELINES AND TIPS

**FOR TOURISM EMPLOYERS TO
IMPROVE EMPLOYEE ENGAGEMENT**

Guidelines and Tips for Tourism Employers to Improve Employee Engagement

Introduction

This booklet provides guidelines for Tourism Industry employers on how to recruit, train and create an engaged and motivated workforce so that your customers receive great service and that your investments in staff will last over a longer term because of better staff retention.

Many small business owners do not have a HR department to provide all the forms and assistance with people management, so this booklet contains 17 practical forms, templates and tools that most tourism employers could pick up and apply with only a few minor changes to customise them to your business.

The suggestions in this booklet have been compiled by drawing on the findings of research into current workforce strategies and opportunities specific to Queensland Tourism industry employers and employees commissioned by Queensland Tourism Industry Council (QTIC). Our industry partners have also added suggestions based on research findings from other jurisdictions and best-practice strategies which are used to good effect by employers in other industries.

Although the booklet is mainly aimed at small to medium sized businesses which typically do not have a specialised HR department, the practices suggested here are equally applicable for organisations of all sizes and from various businesses within the Tourism sector.

This booklet is organised around the employment life cycle, starting with getting the foundations right before you even recruit and select staff, making sure new staff have a very positive experience in their first few months, then moving on to discuss ideas for improving engagement and motivation over the longer term.

Why should employers be concerned about these matters?

The answer involves both cost and quality:

- Attracting good candidates and selecting the right people first time will save your business time and money
- Correctly engaged staff ensure a happier and more balanced workplace
- Your business would run efficiently and more productive
- Your customers will receive quality service
- Engaged staff will stay with your business longer, so there will be less need to re-recruit new people and less time in lower productivity and workplace stress that goes with being short-staffed and forever in “training mode”.
- You will build a reputation as an ‘employer of choice’

Table I - Recruitment Costs

Many studies have examined the direct and indirect costs of high turnover. For every staff member who leaves prematurely, the cost to the company is between 50% of their salary to over 100% of their salary — these costs are being borne by your business already even if you don't specially track them!

The table below demonstrates the financial costs associated with high turnover. According to MY CAREER, the average hospitality, tourism and travel wage is \$56,845 per annum, the calculations in the table below use this figure.

TABLE I – RECRUITMENT COSTS

RECRUITMENT AND REPLACEMENT COSTS	AVERAGE HOSPITALITY, TOURISM AND TRAVEL WAGE IS \$56,845 PER ANNUM
Training replacement (on average it can take up to 20 weeks before a new staff member is fully productive)	\$21,863.46
Supervisory Costs (portion of time a supervisor or other staff member needs to directly support and supervise)	\$2,157.00 (75 hours)
Cost for Filling in (could be an existing employee or a temp)	\$4372.69 (4 weeks of average salary)
Loss of productivity	\$2,186.34 (approx 2 weeks productivity)
Termination and Exit Costs (holiday pay etc)	\$1500
Recruitment Costs	\$3500
Loss of Clients / Intellectual Property	\$5000
Total	\$40,579.49 71% of salary

Attraction

An employer of choice attracts, candidates to their organisation with little effort due to potential employees choosing to work there. The question is; how does an organisation become an employer of choice? Firstly, potential employees need to know about your organisation. This can be achieved through both external and internal activities as demonstrated in the table below.

TABLE 2 - EMPLOYER OF CHOICE PROMOTION

ACTIVITY	ACTION
EXTERNAL	
Careers Expo	WorldSkills Australia's Try'aSkill held in Brisbane and across the state is an excellent way to attract potential candidates to a business. Public and private vocational education and higher education institutions hold career expos. It is beneficial to be aware of local events in an area. These are typically free events or require payment of a small registration fee. Visit http://www.worldskills.org.au/events/categories/tryaskill/ or http://www.qld.gov.au/jobs/career/pages/expos.html for more information.
Business Awards and Accolades	Showcasing and displaying business awards such as 'Winner of the Steve Irwin Award for Ecotourism 2012' at the Annual Queensland Tourism Awards will attract career focussed candidates to a business. See http://www.queenslandtourismawards.com.au/ or contact QTIC for more information.
Media Exposure	Hosting Tourism and Events Queensland familiarisations provides the Queensland tourism industry with the opportunity to showcase their products and experiences to targeted international media and trade. It is one of the most cost-effective marketing tools, creating exposure for the supporting destinations and operators. The resulting positive media coverage can assist in raising consumer awareness of your products and experiences; and trade famils can lead to enquiries and bookings. This exposure will also assist to attract candidates to a business. Tourism and Events Queensland's International Media and Trade Relations team based in Brisbane are the central point of contact for the co-ordination of trade and media familiarisations. See http://www.tq.com.au/marketing/international-marketing/international-opportunities/international-media-and-trade-familiarisations/international-media-and-trade-familiarisations_home.cfm
Community Presence	Offer specials to locals such as discounted adventure tourism experiences throughout non-peak times of the year, or partner with a local accommodation provider to provide an accommodation and adventure tourism package experience. Contact local schools, Tafes and sporting groups to offer special adventure tourism packages to students. Increasing community presence can help attract local candidates to a business. See http://www.junglesurfing.com.au/company.html for information about how Jungle Surfing Canopy Tours in Cape Tribulation get locals involved in planting programmes for native vegetation in their very own nursery.
Strong Brand	Make potential candidates aware of the benefits offered to work in your business. For example, opportunities for career progression, a set roster providing every second weekend off, or opportunities to work with and learn from well renowned industry professionals. Benefits such as this can assist a business to be viewed as an 'Employer of Choice', enabling it to successfully attract and retain talent because employees choose to work there. Greyhound Australia Pty Ltd had a goal to become an Employer of Choice for Indigenous Australians and aimed to increase the percentage of indigenous employees in the business from 1.4% to 5% by 2011. See case study http://www.qtic.com.au/sites/default/files/casestudies_sept_09.pdf for more information.

INTERNAL	
Documented and Transparent Policies and Procedures	Company policies that are well communicated reinforce and clarify the standards expected of employees and help employers manage staff more effectively by defining acceptable and unacceptable behaviour in the workplace.
Safe Workplace	It is a basic requirement of employment that all employees feel secure at work and understand the process to follow if they do sustain a workplace injury, to ensure quick rehabilitation and return to the workplace. A guide to workplace health and safety standards and guidelines for specific industries can be found at http://www.deir.qld.gov.au/workplace/industry/index.htm#UkodrKh--Uk
Good Reputation	Having a positive reputation as an employer amongst current employees will assist to attract candidates to your business through word of mouth.
Training Opportunities	Businesses may partner with Registered Training Organisations (RTO's) to offer employees government funded training opportunities to gain formal, accredited qualifications (e.g. Certificate IV in Outdoor Recreation). Such qualifications are typically a net neutral cost due to the government incentives businesses may be eligible to receive once an employee completes a qualification. Contact QTIC for further information.
Reward and Recognition	Celebrate individual or business achievements. Praise and recognition are two key motivators for employee morale. I.e. Recognition of staff at staff meetings or through staff newsletters, annual employee awards, incentive programs based on KPI's achieved in the business such as sales targets, customer feedback, return visits, hits on a website page or social media page.
Special offers	A business may also be able to offer employees benefits through documented policies such as 'Discount Policy for Employee Family and Friends' for your products and services. Alternatively you can approach other establishments and setup an agreement for your staff to receive discount there.

Recruitment

The recruitment phase of the hiring process takes place when the company tries to reach a pool of candidates through job postings on company and external websites, job referrals, help wanted advertisements, college campus recruitment, social media recruiting, etc.

Job applicants who respond to the recruitment efforts of the company are then screened to determine if they are qualified for the job.

Selected candidates are invited to interviews and other methods of assessment. Employers may check the background of prospective employees, as well as check references prior to making a job offer and hiring the top candidate for the position.

TABLE 3 – RECRUITMENT METHODS

ACTIVITY	ACTION
EXTERNAL	
Seek.com.au	Australia's main jobs, employment, career and recruitment site, Seek is the primary way to reach active job seekers in the market. Vacant roles can be classified into specific target industries and locations to attract the most relevant candidates such as 'Tour Guides' within 'Hospitality and Tourism' in 'Cairns and Far North'. Costs to place an advert vary depending upon the number of adverts you place on a regular basis, i.e. generally the more adverts placed, the more reasonable the per advert cost. Visit http://www.seek.com.au for further information.
Other Useful Advertising Sites	There are many websites available for displaying job adverts, and most of these are free and increase your reach to candidates who are not necessarily job seeking through the traditional channels like Seek. For example, use Gumtree or the 'Queensland Blog' to advertise adventure tourism roles. Visit http://www.gumtree.com.au/ , http://blog.queensland.com/ , or http://www.discoveryourcareer.com.au/ .
Industry Networks and Contacts	Utilise industry networks and contacts to recruit candidates such as local universities, tafe, high schools, community job boards, local backpacker accommodation, or job placement agencies. These networks are typically free of charge and may provide a business access to school leavers who are seeking traineeship opportunities to progress their career or students who are seeking casual work while at university. Backpackers are constantly seeking casual work opportunities while travelling. Contact the Careers Advisor for local universities or tafe in the region to discuss job opportunities and advertising roles on university/tafe job boards and websites.
Agency	Often it can be difficult to attract and recruit the right candidate for a role, particular in skills shortage areas and regional or remote locations. In these cases, an industry specific external recruitment agency can be of assistance. Agencies have access to a database of candidates and often are able to approach candidates who may not be actively seeking employment through channels such as Seek, but who will move for the right opportunity. Recruitment Agencies typically charge a placement fee based on the salary package of the successful candidate and placement fees can range anywhere from 5% up to 15%. A replacement guarantee will be offered by the agency if the candidate is deemed to be an unsuitable fit for your business once they have commenced. Contact QTIC to assist in finding the right agency to fit your business needs.
Migration Agent	Many international candidates are seeking permanent employment in Australia and require an Australian business sponsor to be permitted Australian working rights. There are many different visas and sponsorship options for employers to offer work to international candidates, ranging from Working Holiday Visas for short term employment through to the Temporary Work (Skilled) Visa (457) for more permanent job offers. Some of these visas impose a cost and certain obligations to employers, others, such as the Working Holiday Visa,

	are cost and relatively obligation free. For more information on various visa and sponsorship options, visit the Department of Immigration and Citizenship http://www.immi.gov.au . The validity of a Migration Agent's registration can be checked at https://www.mara.gov.au/ . An International candidate's visa conditions can be checked quickly and easily using Visa Entitlement Verification Online (VEVO) at http://www.immi.gov.au/e_visa/vevo.htm . It is wise to check visa holders working conditions are legitimate prior to making any formal offer of employment.
INTERNAL	
Internal Recruitment	Prior to commencing recruitment in the external market to fill a vacant role, it is good practice to first look internally. Are there any team members who may be able to be trained and promoted into the vacant role? Can an internal opportunity be provided to someone to encourage them to commit longer term to a business for future career prospects? The benefits of internal promotion for current staff are that a role can be filled more quickly, the current team member is already a 'cultural and team fit', it can be cheaper to fill a role internally due to not needing to invest in external advertising, and internal hiring reinforces the culture and sends a message that loyalty and performance will be rewarded with a promotion.
Company Website	Utilising a good business website to advertise vacancies within a business is another method of using internal channels for advertising. Businesses with a well established brand, such as Virgin Australia, often rely solely on their website as a primary means for advertising employment vacancies. The benefits of using a website for advertising vacancies are that it is relatively cost effective (by comparison to advertising through external channels such as Seek), and the candidate market is opened up to anyone visiting the website (e.g. regular return customers, potential customers and job seekers). See how Australia Zoo at the Sunshine Coast use their website to advertise current job vacancies and provide an employment application process to potential candidates at http://www.australiazoo.com.au/about-us/employment/ .
Social Media	The use of social media is presently on the agenda of most employers to promote business, however social media avenues are becoming an increasingly popular way to attract and recruit candidates for vacant roles. Sites such as Linked in, Twitter, Facebook, Pinterest and Instagram all provide exposure to different markets and age groups and can assist to attract candidates outside the traditional methods used. Using these sites is free of charge and allows a business to follow current online business trends. Contact QTIC for more information.
Regular Customers	Holding a database of regular customers is a useful tool to promote specials and offers to those customers most loyal to a business. However, it is also a useful way to internally (and at minimal cost) access another stream of potential candidates. Regular customers or friends and family of regular customers may respond positively to being made aware of vacant employment opportunities within a business through an email blast or marketing campaign targeted at this customer database.
Referral Incentive	Employers often overlook current employees as a way of recruiting candidates for a role. Communicate employment vacancies with current team members and offer a referral incentive for an employee who refers a candidate who is successfully appointed to a role. This is another free method of advertising a role and attracting candidates that can also be fun and rewarding for current employees in a business. An example would be if your current employee recommends someone and that person is employed and still there past probation you reward your current employer with a book of movie tickets or a Myer gift card. In most cases you can buy bulk tickets and vouchers direct from their corporate office at a discounted rate.
Candidate Pool	Often when a vacancy is advertised, there are a number of potential applicants to consider; however, eventually a decision is made to offer a role to one candidate. If a candidate has a strong skill set and appears to be a good fit for a business, however is not successful for the role at a particular time, it is wise to retain the candidate's details 'on file' for suitable future opportunities that may arise. Advise the candidate that you wish to do this and seek their permission to do so. Stay in touch with the

	<p>candidate on a regular basis to ensure ongoing rapport and a good relationship. This is known as building a 'candidate pool' and is often the method that external recruitment agencies use to access a range of candidates for a role. There is no cost to using this method of recruitment and this may allow a business to place a candidate in the role without having to invest in external advertising.</p>
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Getting the right foundations

There are many ways to ensure we attract and select the best staff. An area where many businesses could improve, is thinking about all the benefits of being an employee in your company, (not just the obvious ones of pay and superannuation), and developing an Employee Value Proposition (EVP) which goes outside the square, but will make it more likely to attract and keep good candidates.

A good EVP will bring together many aspects of what makes your business a great place to work such as the work itself, working with a friendly and happy team, opportunities to work with people, perhaps to travel and the ability to earn a competitive salary. Several aspects of importance to employees but which are not extensively used at present in the industry involve the chance to further develop your career, and the ability to have some flexibility in working hours and conditions.

Although smaller employees may have less scope for career development in terms of promotional positions, there is no reason why a limited salary progression structure that values experience and skills gained could not be developed for front line staff for a two to three year period.

Such a salary structure could make the difference between an average employment length of 12 to 15 months for front line staff increasing up to 2 to 3 years.

Developing a suite of strategies to make employment with your company attractive for prospective employees, making the best mileage out of the attractions during the recruitment process, and managing your business to deliver on such promises over the longer term will have a big impact on employee engagement. Even if some of these initiatives are more costly, they can be more than paid for by the cost savings achieved through improved retention.

The table below lists the “HR basics” that need to be in place, as well as outlining some “Value Added HR Practices” that will make a difference if they are well implemented.

TABLE 4 – HR BASICS

BASIC AND SOUND HR PRACTICES	VALUE-ADDED HR PRACTICES
<ul style="list-style-type: none">• Ensure the job description is clear, concise, lists all the main duties as well as the skills, experience and characteristics that you are looking for• Review all applications (no matter where they came from) based on the selection criteria in the job description• Develop a list of questions that are the same for all candidates you interview• Do proper referee checking for the best one or two candidates• Keep all applications and candidates personal information confidential and stored in a secure location• Where relevant, use techniques such as limited (but paid) work trials, examining applicants portfolios and job relevant simulations or tests to assess the best candidate(s); rather than just relying on an interview• Keep in touch with good candidates who may not have been successful at the time (for example, you may have had three great applicants but you could only appoint to the one vacancy)	<ul style="list-style-type: none">• Develop an Employee Value Proposition that suits your business and use this during the recruitment process. Your EVP could contain matters such as:<ul style="list-style-type: none">◦ Flexible working arrangements◦ Salary progression◦ Career opportunities◦ Working with a good team◦ Training you provide◦ Opportunity to earn a performance bonus• Advertise widely in print, social media, Seek etc, as well as using employee referrals• Tailor advertisements to attract a greater demographic of applicants, such as mature aged, women, indigenous Australians and people from different cultural backgrounds, people with disabilities



Available Resources

ATTRACTION TEMPLATES AND FORMS ARE FOUND IN SECTION I OF THIS BOOKLET AND INCLUDE:

- I.1 Position Descriptions (2) templates
- I.2 Develop your own Employee Value Proposition
- I.3 Job Advertisements (2)
- I.4 Interview Questions
- I.5 Referee Checking Guide

Retention

The first few weeks and months of any new employee's working life at a business is the most critical time for that person to form a positive view about working for the company and whether they will stay over the medium term.

Especially if you have gone to the trouble of developing a well-balanced EVP and communicating this during the recruitment process, new employees will be keen to see if their early employment experience is consistent with what was promised at interview. Even if there is no formal EVP, new employees will be looking for the following experiences:

- Was there a planned and specific job induction?
- Was there a more general company orientation?
- Were they formally introduced to team members and key people on their first day?
- Did they have a work station and required tools to perform their tasks on day one?
- Did the company arrange all the HR and finance paperwork efficiently so their first pay happened on time?
- Did the promised training happen so they could feel confident in doing their work and interacting with customers?
- Depending on the size of the company, did the Manager/Owner or their immediate supervisor spend some one-on-one time with them in the first week, and was there further follow-up after two or three weeks to make sure they had settled in properly?
- New people are bound to make some mistakes, so how was this handled by supervisors/management? Hopefully in a supportive way rather than being extremely critical.

Although none of the above good practice suggestions would be costly to implement, they will require some thought, planning and time from supervisors and managers to implement. New employees are usually highly motivated to do a good job and create a good impression with their colleagues, supervisors and customers; so this time is critical for the company to help new employees feel part of the team and be productive as quickly as possible. The table below demonstrates external and internal retention strategies;

TABLE 5 - RETENTION

ACTIVITY	ACTION
EXTERNAL	
Clear Career Progression through Experience with Organisation	Gaining strong and long term experience with a reputable organisation is an investment in one's future, due the future career opportunities such experience may create for an individual. Tourism and hospitality businesses can focus on this as a way to aid retention of their people, by ensuring their staff are aware of career progression opportunities (both internally and externally) from the commencement of a new hire's employment and onboarding process, through ongoing training and information sessions provided to current employees
High Profile Establishment/Well Known Brand	A well known employer brand or business viewed as holding a positive, highly esteemed profile will attract and retain the best candidates to a business. Take a moment to think about brands such as Virgin Australia, Google, and Seek.com. Part of the romance of working for organisations like these is as much in the benefits they provide their employees as it is in the 'brand name'. In the Adventure Tourism industry, well known brands such as 'Riverlife' are a good example. Situated on the banks of the Brisbane River in the heritage listed Naval Stores, Riverlife Adventure Centre is a young, dynamic and fun adventure tourism business that provides active, soft-adventure and recreational experiences within Brisbane's inner city's Kangaroo Point. See http://www.riverlife.com.au/2013/index.html for more information. Another excellent example is Brisbane's iconic 'Story Bridge Adventure Climb' at http://storybridgeadventureclimb.com.au/ .
Corporate Social Responsibility	Whilst demonstrating a strong corporate social responsibility will not be the single factor to retain employees within a business, studies have shown that employees do show increased commitment to a business with corporate social responsibility high

	on the agenda. See article http://adage.com/article/cmo-strategy/10-companies-social-responsibility-core/143323/ for examples of how well known organisations are committing to their corporate social responsibilities and http://www.ccl.org/Leadership/news/2010/csr.aspx for a study carried out on the effects of corporate social responsibility and retention of staff within a business.
Industry Contacts/Networks	An employee who has worked for a reputable business over a long term basis will no doubt have had opportunities to create many contacts and networks within the industry over the course of their employment. Such contacts and networks can be useful to use as future referees, assist with future employment opportunities or good to share industry ideas and concepts with. For example, Human Resource professionals from different businesses within the same industry may form a network and meet on a monthly basis to discuss and share ideas. The opportunity to create meaningful contacts and networks within and outside an organisation is an important factor for retention of key staff.
INTERNAL	
Succession Planning	The goal of a succession plan is to ensure the key positions within an organisation are always filled with the most qualified candidates. The process of succession planning involves identifying key positions, determining key position criteria, creating the succession planning and monitoring and revising the plan regularly. Succession planning is a key way for businesses to continue operating effectively when individuals occupying critical positions leave. It is also a key way to retain your strongest people by providing internal opportunity for development, promotion and career progression within an organisation. Succession planning within a small business may refer to the future structure that would be put in place if the business owners decide to move on from working within the business.
Onboarding and Training Opportunities	It is estimated that 45% of new hires fail within the first 12 months of commencing a new role. Businesses that focus on onboarding new team members properly, as well as providing ongoing training opportunities have a stronger chance of retaining their talent. An onboarding process involves team involvement (e.g. introduction to the team and key players and assigning the new employee a mentor or 'buddy'); consistent structure (follow a consistent onboarding process for all new employees to reflect the company's values); prepared for first day (have everything ready for your new employee on their first day including uniform or desk/equipment set up to ensure they feel comfortable); access to business information (provide them with crucial information such as about pay day, frequency of payment of wages, company policies including information about OH&S in the workplace) and regular "check-ups" (2 week, 6 week and 10 week discussions with the new employee allowing for a meeting prior to completion of the 90 day probation period). Transitioning a new employee into a company shouldn't just be a one-day training, but an ongoing process to increase productivity, engagement, and retention. Ongoing training and career development opportunities may also aid retention (internal training, or opportunities to attend external training sessions such as First Aid Training or Eco Guide Certification through Eco Tourism Australia).
Management Communication	Create an open forum for communication to understand individual needs and ideas. This can be in the form of regular 'One on Ones' with a direct supervisor or manager. Inviting feedback or ideas creates a sense of employee engagement which then relates to a feeling of security and better understanding of the business needs and direction.
Note Special Occasions	It is also important to remember the 'warm and fuzzy' stuff and acknowledge people on their birthdays, anniversary of employment and celebrate individual or business wins and achievements. Praise and recognition are two key motivators for employee morale which directly impacts employee retention.
Correct Payment and entitlements	It is important to ensure you are paying employees in line with the current legislation See the Fair Work Information at http://www.fwc.gov.au/ for industry

	<p>specific information about base award rates legislated for particular positions and classifications. A Modern Award will apply, unless a workplace has another approved industrial agreement in place. See also http://www.business.qld.gov.au/business/employing/employee-rights-awards-entitlements</p> <p>Consider paying salaries in line with the current market to ensure you retain key talent. With tourism industry skill shortages at an all-time high at present, it is a candidates market when it comes to employment opportunities. Sites such as http://www.seek.com.au/ can provide useful research and data about current salaries being paid in the market for specific industries and roles.</p>
Financial Reward	In addition to base award rates and market salaries, businesses may elect to reward staff with an incentive bonus based on performance. Such incentives must be clear and easily measurable.
Work/Life Balance	The nature of shift work within the tourism industry is a given and can be used as a positive selling point to attract new employees, or retain current employees, if approached correctly. Shift work provides flexibility in working hours and often allows employees to work during the evening or on the weekend, while they may be able to spend their weekdays with their children or attend university classes. Surveys undertaken have shown that work/life balance is prioritised above remuneration as the number one factor in taking on a new role, or remaining in a current role. Visit http://www.smh.com.au/small-business/techbizz/worklife-balance-more-important-than-money-survey-20130626-2owr4.html .

In busy periods not all the above activities and promised training may be able to be organised in an employee's first three months. Provided the company has mostly done what was promised, the employee feels 'part of the team', and that there is a plan in place to complete the training; this should not affect the engagement of employees with the company and its customers.

The first few months (usually three to six months) is also a designated Probationary Period which has a particular set of arrangements for the termination of employment which are different to permanently engaged employees. Care must be taken to ensure that an unsatisfactory employee has been informed of any work deficiencies early, has had appropriate training/instruction and been given time to learn the job fully, and is informed of action to terminate their employment (should this be necessary) before the end of the probation period. If things aren't working out with a new staff member it's better to identify this early and try and fix it, rather than wait for several months to then part ways. The below table demonstrates both sound HR practices and value-added practices.

TABLE 6 – HR PRACTICES

BASIC AND SOUND HR PRACTICES	VALUE-ADDED HR PRACTICES
<ul style="list-style-type: none"> Ensure there is an induction plan for the new employee outlining their work program at least for day one and the first week. The plan would involve: <ul style="list-style-type: none"> Safety briefings and demonstrations Job specific instructions Completion of required legal HR/financial paperwork Introductions to the team Time to read and understand key company policies Time is scheduled for important on the job training about systems and the main work processes Meeting with their Supervisor/Manager Follow-up meeting with their Supervisor/Manager Attending training courses applicable to their immediate job 	<ul style="list-style-type: none"> Company orientation to discuss with the new employee matters such as: <ul style="list-style-type: none"> Flexible working arrangements Salary progression Training that will be done over the first three months Opportunity to earn a performance bonus Career opportunities over the medium term Assigning an experienced person the new starter's "buddy" to help them learn the job and get to know the team Negotiating any reasonable requests for flexible working arrangements such as shift times, part time hours, time off in lieu or working from home in line with company policies Supportive counselling if the new employee experiences any difficulties



Available Resources

ATTRACTION TEMPLATES AND FORMS ARE FOUND IN SECTION I OF THIS BOOKLET AND INCLUDE:

- 2.1 Induction Checklist
- 2.2 Personal Information Form
- 2.3 Employment Contract
- 2.4 6 – 8 Week Employee Feedback Template
- 2.5 Flexible Working Application Form

Longer Term Employee Engagement and Motivation

Once an employee has settled in, learned the job basics and is seen to be part of the team, employers need to focus on the medium to longer term. Influencing staff motivation on a day to day or week to week basis is an important part of every supervisor's responsibility; but equally, self motivation is an important characteristic which you ideally have tried to assess in the recruitment stage.

Managing employee expectations and communicating the company's expectations to its workforce is a key factor in maintaining an engaged workforce over time. Having regular communication with staff to discuss work issues, listen to suggestions, resolve problems and make improvements on 'how we do things' will be critical to keep motivation high on a day to day, week to week basis. Every business will need to have some form of team meeting forums, but if such meetings are one-sided or even worse are used by some managers to 'splinter' the workforce, they may do more harm than good.

Systems such as performance management and training and development will be important to build and implement to keep engagement levels high; but much can be done in the absence of formal performance management or training and development programs to keep staff engaged. Depending on the size of the company, mid-year reviews could be implemented with minimal effort so supervisors have one on one conversation with their team members twice per year to discuss how things are going, what training needs to be done, and/or what the individual's career aspirations are. Most employees also value feedback – both positive and negative, provided it is delivered in a timely and constructive way. Many supervisors or managers are quick to lay blame but slow to give praise for a job well done; but both are important to maintaining a harmonious work environment.

The table below shows both sound HR practices and value-added practices which will be important over the longer term.

TABLE 7 – LONG TERM HR PRACTICES

BASIC AND SOUND HR PRACTICES	VALUE-ADDED HR PRACTICES
<ul style="list-style-type: none"> • Develop a regular forum for communication between management and the workforce outside of just the daily information needed to provide the company's services • Provide timely and regular feedback to staff on their performance. Praise and positive comments could be in front of the team, but negative comments will most likely be suited to a more private discussion • Ensure that supervisors take time to get to know staff, including where relevant what issues they may be having in life outside of work that the company could assist them in managing by providing some flexibility in working arrangements • Where possible look to give staff variety in their work, assign them to special projects for development and understand their future career aspirations 	<ul style="list-style-type: none"> • Develop and implement more formal recognition programs such as employee of the month, small gifts such as movie/sporting tickets, restaurant dinners etc. • Develop a performance management system that has at least the following features: <ul style="list-style-type: none"> o Planning for the year ahead o Identifying key measures of performance in all aspects of the role o Discussion of development and training needs o Mid-year review of how we are going, and whether the planned training has occurred o Self assessment of what has been achieved • Negotiating any reasonable requests for flexible working arrangements if employees' personal circumstances change • Supportive counselling if the experienced employee experiences any difficulties • Conduct exit interviews to find out reasons why staff may be leaving so that the company can improve on these



Available Resources

ATTRACTION TEMPLATES AND FORMS ARE FOUND IN SECTION I OF THIS BOOKLET AND INCLUDE:

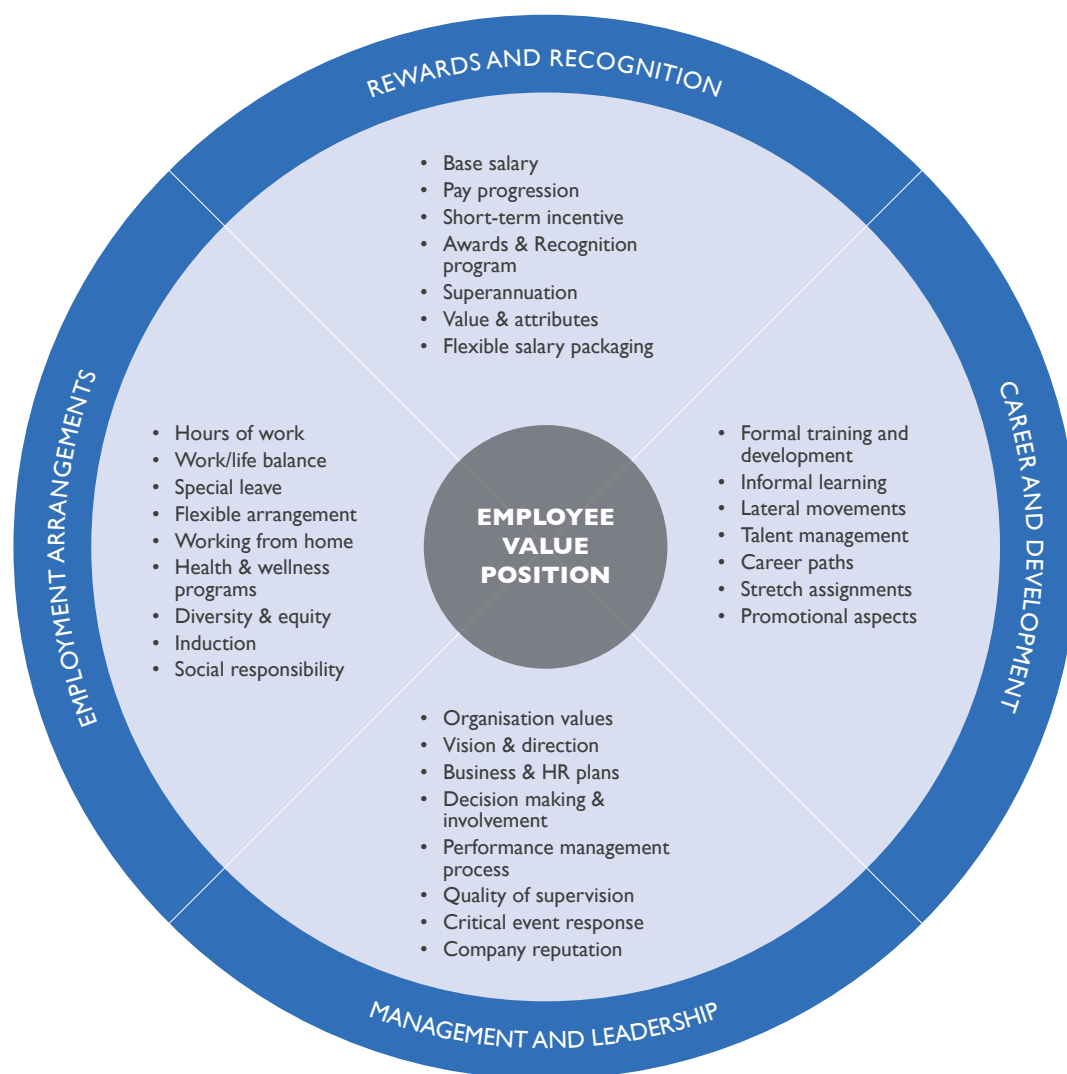
- 3.1 Performance Management Forms (2)
- 3.2 Learning and Development Plan Templates (2)
- 3.3 Grievance Form
- 3.4 Employer Termination Checklist

What do Employees Value?

Maximising attraction and retention is an issue facing all employers, including those in the Tourism Industry. Organisations are realising that in order to attract and retain talented employees it is essential to consider the whole employment offering to employees – it is no longer just about pay and remuneration levels alone.

In developing an Employee Value Proposition (EVP) it is important to consider a number of dimensions outside the traditional remuneration and reward fields. Organisations need to consider how their current Employment Arrangements (such as flexible work practices), Career and Development opportunities and Management and Leadership style impacts on employee perception of their workplace. A well-developed EVP can have a positive and sustained organisational benefit. Employers who are able to articulate and implement a well balanced EVP are more likely to provide a positive and supportive experience for employees and in turn help attract and retain a talented workforce.

The following diagram serves to illustrate the four key dimensions and the variables that underpin an organisation's EVP.



Not all employers will be able to build programs covering all the possible activities and management practices shown above. However, a critical consideration is to understand clearly what drives employee decisions around the four key dimensions shown in the diagram above.

Often employees value benefits such as flexible working arrangements far more than salary (provided salaries are not too low), so it is important for business owners to understand what your employees will value. The examples shown in previous sections of this booklet summarise the main findings of research from both employer and employee perspectives. There is also a guide on “Developing your own Employee Value Proposition” included in this booklet.



Sample Resources for Employers

The attached documents/forms are provided as samples only, and will need to be modified to suit your company's circumstances. In some cases, only slight modifications may be needed.

Documents/forms marked with red italic text gives you instructions and details on how to customise for your own business.

SECTION 1

ATTRACTION – SUPPORTING RESOURCES:

- | | |
|------------|---|
| 1.1 | POSITION DESCRIPTIONS (2) |
| 1.2 | DEVELOP YOUR OWN EMPLOYEE VALUE PROPOSITION (EVP) |
| 1.3 | SAMPLE JOB ADVERTISEMENTS (2) |
| 1.4 | INTERVIEW QUESTIONS |
| 1.5 | REFEREE CHECKING GUIDE |

SECTION 2

RECRUITMENT - SUPPORTING RESOURCES:

- | | |
|------------|-----------------------------------|
| 2.1 | INDUCTION CHECKLIST |
| 2.2 | PERSONAL INFORMATION FORM |
| 2.3 | EMPLOYMENT CONTRACT |
| 2.4 | 6 – 8 WEEK EMPLOYEE FEEDBACK FORM |
| 2.5 | FLEXIBLE WORKING APPLICATION FORM |

SECTION 3

RETENTION - SUPPORTING RESOURCES:

- | | |
|------------|---|
| 3.1 | PERFORMANCE MANAGEMENT FORMS (2) |
| 3.2 | TRAINING AND DEVELOPMENT PLAN TEMPLATES (2) |
| 3.3 | GRIEVANCE FORM |
| 3.4 | EMPLOYER TERMINATION CHECKLIST |





SECTION I: ATTRACTION

SECTION I Attraction

I.1 Position Descriptions

RECEPTIONIST / FRONT DESK / GUEST SERVICES

JOB TITLE:	Complete as required
LOCATION:	Complete as required
REPORTS TO:	Complete as required
SUPERVISES:	Complete as required
HOURS	Complete as required

ORGANISATIONAL ENVIRONMENT

Short description of the organisation. Possibly include information such as company history, market position, size, location, company values, and goals.

JOB PURPOSE

Brief description of what the position entails. Possibly include the role's objective or some of the key responsibilities.

To deliver friendly and effective customer service, that creates a warm and welcoming atmosphere for all our guests. The role is the first and continuous point of call for all guests and represents the organisation in a professional, helpful and friendly manner.

KEY ACCOUNTABILITIES

In this section list the main responsibilities, task and jobs that the position will have to complete on a regular basis. Being very specific about the role's responsibilities can paint a clear picture for people considering applying for the role.

DESCRIPTION	PERFORMANCE CRITERIA
CUSTOMER SERVICE	
Deliver excellent customer service at all times either in person, by phone or by email	<ul style="list-style-type: none">Customers feel welcome and all of their requests are met satisfactorily and in a timely mannerGuests are given accurate suggestions in regards to local area and directionsGuests are informed of rates and promotions in an informative and professional way that promotes salesPosition is presentable and always acts in a friendly and professional manner
To maintain and display an excellent knowledge of the area including restaurants, cafes, bars, points of interest and general directions	
Keep up to date with current promotions and hotel pricing, to provide information to guests, on request, while maximising sales opportunities	
Fulfil all reasonable requests from guests to ensure their comfort, satisfaction and safety	
Be punctual and maintain a friendly, professional appearance adhering to the uniform policy	
ADMINISTRATION	
Administer all reservations including invoicing, cancellations and no-shows	<ul style="list-style-type: none">Effectively and efficiently administer all guest booking services in line with company policyFront office equipment is utilised to maximum capability that ensures effectiveness and efficiency of service
Expert use of front office equipment including computers, cash and credit systems, phone services and key system	
Update the shift diary at the end of each day detailing all important activities carried out	

DESCRIPTION	PERFORMANCE CRITERIA
Regular communication with housekeeping to ensure that all rooms and general areas are kept clean	<ul style="list-style-type: none"> and follows operating procedures Shift diary is kept up to date and accurate Housekeeping is regularly informed of cleaning jobs that need to be completed
Prioritise tasks in order of relevance and importance	
Responsible for following the standard operating procedures	
GENERAL	
Assist in keeping the hotel reception area clean, tidy and presentable at all times	<ul style="list-style-type: none"> Reception area is clean and tidy and represents the desired image of the organisation Security is made a priority and any issues are dealt with quickly Safety of all guests and staff is a priority and procedures are strictly followed Other hotel staff are assisted when necessary to ensure a cooperative working environment
Conduct regular security checks throughout the property and report any issues to management	
Be responsible for evacuation, in case of emergency, acting as first point of call for guests and emergency services	
Report any maintenance issues immediately to the responsible person	
Take food and beverage orders and communicate them to the kitchen staff	
Assist other members of staff when required and appropriate	

POSITION DIMENSIONS

List positions/managers/supervisors that the role will directly report to e.g. Housekeeping supervisor, manager, front desk. Possibility exists to list any other positions that the role might be in regular contact with e.g. Front desk, Maintenance.

KEY SKILLS, EXPERIENCE AND QUALIFICATIONS

List of required and essential qualifications needed to complete the role at an acceptable standard. Included in the list can be 'desired' which might highlight exceptional candidates and help in the shortlisting process.

- Excellent telephone manner and communication skills
- Proficient in general IT (word, excel, email, any additional hotel systems)
- Minimum experience requirements (if any)
- To be punctual, reliable and presentable
- Proven ability to work in a team environment
- Motivated and able to work autonomously
- Qualifications in business related or general management is desirable

OTHER INFORMATION

Include any additional information that might be relevant to the role. This might include hours of work, visa requirements, past applicants need not apply, contact name for further questions and statement explaining that only successful candidates will be contacted.

Approved by: _____ (Insert Manager's title) Date: _____

Accepted by: _____ (Incumbent) Date: _____

SECTION I Attraction

HOUSEKEEPER / CLEANER / ROOM ATTENDANT / MAID

JOB TITLE:	Complete as required
LOCATION:	Complete as required
REPORTS TO:	Complete as required
SUPERVISES:	Complete as required
HOURS	Complete as required

ORGANISATIONAL ENVIRONMENT

Short description of the organisation. Possibly include information such as company history, market position, size, location, company values, and goals.

JOB PURPOSE

Brief description of what the position entails. Possibly include the role's objective or some of the key responsibilities.

The position performs routine duties in cleaning and servicing of guest rooms and general areas under the supervision of the housekeeping supervisor. The position creates a positive image of the property to guest and must be pleasant, honest, friendly and able to assist with guest requests and problems.

KEY ACCOUNTABILITIES

This is the section to list the main responsibilities, task and jobs that the position will have to complete on a regular basis. Being very specific about the role's responsibilities can paint a clear picture for people considering applying.

DESCRIPTION	PERFORMANCE CRITERIA
CLEANING	
Prepares room for cleaning	<ul style="list-style-type: none"> Rooms are cleaned efficiently and to the highest possible standard Room is cleared of all rubbish General hotel guest areas are clean and presentable at all times
Makes bed	
Dust room and furniture	
Cleans the bathroom	
Cleans the closet	
Vacuums and racks the carpet	
Removes waste from the trash and old newspapers	
Cleaners general guest areas are required	
Assist in keeping hotel reception area clean and presentable at all times	
GENERAL DUTIES	
Checks and secures the rooms	<ul style="list-style-type: none"> Security is treated very seriously Shift diary is kept up to date and accurate Communication between staff is regular and effective
Update the shift diary at the end of each day detailing all important activities carried out	
Reports any issues to supervisor in regards to safety, maintenance and stock	

DESCRIPTION	PERFORMANCE CRITERIA
Regular communication with supervisor and front desk to ensure tasks are being prioritised	<ul style="list-style-type: none"> Rooms are sufficiently stocked with all amenities
Replenish amenities (water, bathroom supplies etc.) according to the operational standards	
Responsible for following the standard operating procedures	
GENERAL	
Attend to guest calls, requests and complaints	<ul style="list-style-type: none"> Guests are treated with respect any requests are dealt with in a timely and effective manner Guests privacy is respected and security of themselves and their property is achieved Reasonable requests from other members of staff are completed with gratitude
Ensure security of guests rooms and privacy of guests	
Authorise to enter in guestrooms for cleaning and providing turndown service as per requirement	
Deliver and retrieve items on loan to guests e.g. Iron, ironing boards	
Assists other members of staff when required	

POSITION DIMENSIONS

List positions/managers/supervisors that the role will directly report to e.g. Housekeeping supervisor, Manager, front desk. Possibility exists to list any other positions that the role might be in regular contact with e.g. Front desk, Maintenance.

KEY SKILLS, EXPERIENCE AND QUALIFICATIONS

List of required and essential qualifications needed to complete the role at an acceptable standard. Included in the list can be 'desired' which might highlight exceptional candidates and help in the shortlisting process.

- Minimum experience requirements (if any)
- Demonstrate the ability to be punctual, reliable, honest and presentable with good communication skills
- Proven ability to work in a team environment
- Motivated and able to work autonomously
- Physical mobility and stamina required to complete all tasks
- Commitment to outstanding customer service
- Excellent attention to detail
- Qualifications in cleaning is desirable

OTHER INFORMATION

Include any additional information that might be relevant to the role. This might include hours of work, visa requirements, past applicants need not apply, contact name for further questions and statement explaining that only successful candidates will be contacted.

Approved by: _____ (Insert Manager's title) Date: _____

Accepted by: _____ (Incumbent) Date: _____

1.2 Develop your Own Employee Value Proposition (EVP)

Developing an employee value proposition (EVP) that fits your business and contains the benefits and working arrangements which your employees and prospective employees value will give you a competitive advantage in attracting, recruiting and retaining quality staff.

An EVP is a series of short statements about the attractions and benefits of working for your company. A well-developed EVP can have a positive and sustained business benefit; and in most cases will require creative thought rather than costing a lot of money to develop and implement.

Organisations need to consider how their current Employment Arrangements (such as flexible work practices), Career and Development opportunities and Management and Leadership style impacts on employee perception of their workplace.

THERE ARE FOUR STEPS INVOLVED IN BUILDING YOUR EVP:

STEP 1 DEVELOP YOUR OWN LIST OF THE GOOD FEATURES OF WORKING FOR YOUR BUSINESS

Think about and write down all the best features of working at your company from your perspective as the owner/operator.

This list could include features such as: the location of your business on the <Whitsunday Coast>, friendly staff and a great team spirit, our customers are generally great to work with, the town where we are is a great place to bring up a family as it has good schools and community activities, our salaries are competitive, we reward experience and good performance, we give people responsibility and let them work independently, you can have a good career with us and in the local tourism industry. There may also be some things you would like to implement but haven't as yet.

LIST ALL YOUR EMPLOYMENT ADVANTAGES HERE

LIST THE WORKPLACE FEATURES YOU MIGHT LIKE TO BRING IN HERE

STEP 2 ASK INFORMALLY THE VIEWS OF YOUR STAFF ON WHAT THEY SEE AS THE GOOD FEATURES OF WORKING FOR YOUR BUSINESS; AND WHAT THEY MAY LIKE TO SEE IN THE FUTURE

Over the next two weeks as you walk around the business casually ask your staff:

- what they like about working for your company

- what benefits they would like to see that aren't there at the moment that would make a big difference to job satisfaction
<do this casually making no promises>

This list could end up including many of the advantages you have already thought of from Step 1, as well as issues which you haven't thought of as being important. Issues like flexibility of working hours will probably come up as an issue for at least some employees, as well as more training opportunities, salary progression etc. Employees may also value the fact their suggestions are listened to by management. Keep an open mind at this stage on any new ideas.

LIST ALL THE MAIN EMPLOYMENT ADVANTAGES THAT STAFF THOUGHT OF HERE

LIST ALL THE EMPLOYMENT ADVANTAGES THAT STAFF SAID THEY WOULD LIKE TO SEE HERE

STEP 3 COMPARE ALL FOUR LISTS, AND PICK THE BEST THREE TO FIVE ADVANTAGES OF EMPLOYMENT WITH YOUR COMPANY TO CREATE YOUR OWN EMPLOYEE VALUE PROPOSITION.

Pull the best suggestions from your list and the employees' list together, and work out how you can meet some of the new suggestions. Develop your final list of the best 3 to 5 attractions. This becomes your EVP. Some of these attractions may be directed at tapping into a source of labour such as mature-age workers or persons from a different cultural background than you are used to hiring.

In cases where you would like to include aspirational benefits such as a recognition program or more flexible working arrangements, make sure you can deliver on these new aspects. Complete this statement:

The advantages of working for *XYZ Company* involve:

-
-

STEP 4 USE YOUR EVP IN ANY NEW JOB ADS YOU CREATE, EMPHASISE THESE FEATURES IN YOUR SELECTION INTERVIEW PROCESSES, AND ENSURE YOU LIVE UP TO THESE PROMISES ONCE A NEW PERSON STARTS AND ALSO FOR YOUR CURRENT STAFF.

I.3 Sample Job Advertisements

The following two job advertisements are examples of ways in which you can attract candidates to work in your organisation. The comparison between the two advertisements is to demonstrate the different ways in which organisations attempt to find their future employees for exactly the same role.

ABC is a busy hotel that is located near the town of Noosaville . We require an experienced front office receptionist to coordinate room check in / check out, the scheduling of room cleaning, and general clerical duties.

Experience with the RMS booking system would be an advantage but is not essential .

Essential that you a confident with computer based systems.

Approx. 10 hours per day.

The roster is 21 days on, 7 days off.

The first advertisement is very basic. It offers very limited information about the organisation, the position available, duties and responsibilities and the desired skills and attributes.

Welcome to Dreamville! Our 100 room hotel located right on the beach in the tropical paradise town of Noosa is looking for its next exciting, energetic receptionist.

The property, with its world class facilities, swimming pool and gardens has a diverse friendly workforce that will guarantee unlimited amazing career experiences.

Our aim is to make you feel as comfortable as possible in your work environment, by offering you flexibility in your roster, exceptional training and development opportunities and multiple avenues for career progression.

In this role you will report to the Front Office Manager, and work closely with all staff not only at the front desk but also the sales, kitchen, housekeeping and maintenance departments.

Tasks and responsibilities for the position will include, but are not limited to:

- Provide exceptional customer service including greeting guests, check-in and check-out and switch board activities
- Ensure accurate charges for room revenue as well as maintaining daily guest records
- Handle complaints effectively and efficiently and in a professional manner
- Handle guest enquiries and provide information on local attractions, restaurants, cafés and bars
- Carry out additional duties assigned by the Front Office Manager as required

To be a successful in this sought after role you will display excellent customer service skills and be friendly, outgoing and well presented. You will have a high level of attention to detail and possess some experience in a similar role or environment. You will be able to work autonomously as well as be a contributing member to a team environment. A background in business or accounting is desirable but not necessary.

Our organisation believes that our team are the most valuable assets we have. Training and professional development are high priorities and the opportunity for you to work with an experienced, motivated management team will ensure that you will learn and grow every day, setting you down your chosen career progression path.

If you want to be part of this fantastic team in our wonderful location, progress your career and take advantage of some excellent benefits then contact us now! Successful candidates will be notified within 7 days of applying.

The second advertisement is a much better example of how to attract the most suitable candidate for the role. It offers valuable information about the organisation and its values, and the working environment. Duties and responsibilities of the role are made clear as well as a brief description of the type of skills and attributes an applicant will need to possess.

Benefits such as job flexibility, training, development and career progression, all of which are highly valued by employees, are also mentioned giving the applicant a good idea of the value the organisation puts in their staff. Overall the advertisement makes the role sound enjoyable, challenging, exciting and a great career opportunity.

Which job would you prefer?

I.4 Interview Checklist

This document can provide assistance in the interviewing process. The main aims of a job interview are to assess a number of key elements focusing on 3 key points;

- I. Is the person capable of doing the job?
- II. Will the person do the job to the required standard?
- III. Will the person fit into your organisation and contribute to its overall success.

It is important that all questions are asked and that responses are thorough and properly noted.

Short examples can be provided to encourage responses, however it is vital that the way in which the question is asked and that the examples provided do not influence or shape the applicants answer in any way.

For consistency and fairness all interviews should follow the same format and all of the questions should be asked in the same fashion. Where possible, at least two interviewers (preferably one male and one female) should interview all candidates.

INTERVIEW GUIDE

JOB TITLE:	<i>Complete as required</i>
LOCATION:	<i>Complete as required</i>
REPORTS TO:	<i>Complete as required</i>
SUPERVISES:	<i>Complete as required</i>
HOURS	<i>Complete as required</i>

INTRODUCTIONS:

- *Thank the candidate for applying and coming to the interview*
- *Explain how the interview will be conducted, expected duration and reason for note-taking*
- *Provide an overview of the role and the company, particularly the many positive features from your Employee Value Proposition*

QUESTIONS:

Can you tell me about your education qualifications, and briefly your career history.	Note any skills, experience and qualifications that meet the requirements outlined in the Position Description.
What attracted you to this particular role?	Assess the applicant's knowledge about the role and organization and the enthusiasm they show when describing what attracted them and why they want the position. Assessing their motivation for applying can give a good indication of their suitability to the position and the company environment.
In your previous roles describe some of the duties that might be relevant to this particular position?	Note any similar prior roles and any experience in performing the duties outlined in the Position Description.
What did you like or dislike about the above mentioned duties?	Gain an understanding of the type of work and duties that the applicant likes and dislikes. This can be important in evaluating if the candidate is suited to the position as described in the Position Description.
Can you give me an example of when you have had to work in a team to achieve a common goal?	<p>TEAM WORK</p> <p>This question allows the applicant an opportunity to demonstrate their ability to work in a team.</p> <p>Communication is one favourable trait that might be mentioned during the answering of this question.</p> <p>Answers might also give an indication of the type of team member they are i.e. Leader, follower.</p>

What was the most difficult customer service situation you have ever dealt with? How did you deal with the situation? Would you do anything differently if you had a similar situation arise in this role?	PROBLEM SOLVING Answers to this question will give you an idea of the candidates ability to problem solve and perform under pressure. The second part of the question will also provide them with an opportunity to demonstrate how they learn from certain situations and their ability to change their behaviour when faced with a similar situation.
Can you give me an example of when you went out of your way to please a customer	Examples given in this answer can demonstrate the applicant's desire and ability to deliver quality customer service. If they have no job specific situations a general example from family or social life can help display the desired attributes.
Job Specific Question/s	This is an opportunity to ask one or a number of questions that directly relate to the job and the skills or attributes required. Interviewers can tailor the questions to gain an understanding of how the candidate deals with certain situations and demonstrates preferred skills and behaviours.
Do you have any questions you would like to ask at this point?	This is a final opportunity for the candidate to ask any additional information about the position, organization or the recruiting process.

Depending on the position being interviewed for, additional questions can be asked in relation to personal strengths and weaknesses, task prioritising, time management, desired remuneration and availability to start.

A final question: "Is there anything else we should know about your background that could be relevant to our decision on whether to offer you the position?" could also be very useful.

Thank the candidate for their interest in the position and participation in the interview. Inform them of the next steps in the process and when they can expect to hear if they have been successful or not.

I.5 Recruitment Reference Check

Reference checks are performed by organisation to gain an independent view on the applicant and to cross check the information provided in the interview process.

Preparation of questions for the reference check will take a similar structure to the interview with the objective being to gain an understanding of the applicant's ability to successfully fill the role.

Similar to the interview, for consistency and fairness it is important that there is a set question list and that the referee is not influenced in anyway when providing answers.

Depending on the position, job specific questions can be developed to assess the candidate's ability to perform specialised tasks and duties.

CANDIDATE:	<i>Complete as required</i>
REFEREE'S NAME:	<i>Complete as required</i>
COMPANY NAME:	<i>Complete as required</i>
POSITION:	<i>Complete as required</i>
TELEPHONE NO.:	<i>Complete as required</i>
CLIENT:	<i>Complete as required</i>
INTERVIEWER:	<i>Complete as required</i>
DATE:	<i>Complete as required</i>

Introduce yourself and outline the reason for the reference check and give a brief description of the organisation, role, skills required and future of the position sought.

Make sure the referee is aware that your organisation respects their privacy and the privacy of the applicant. Inform them that any information gathered will only be used by you for the recruitment process and will only be used to evaluate the applicant's suitability to the role.

1. HOW DO YOU KNOW THE CANDIDATE?
Understand the relationship (professional or social).
2. HOW LONG DID YOU WORK WITH THE CANDIDATE?
Understand the length of relationship (professional or social).
3. WHAT WERE THEIR DUTIES AND RESPONSIBILITIES?
Understand the main duties and responsibilities that the candidate performed in their previous role. Do they align with the current requirements?
4. WHAT WERE THEY LIKE IN PERFORMING THE JOB?
Gauge the applicants ability to perform the duties and responsibilities
5. HOW DID THEY RELATE TO OTHERS AT WORK? PLEASE DESCRIBE THEIR INTERPERSONAL AND COMMUNICATION SKILLS.
Gain and understanding of the type of person they are and how they work and socialise with others.

6. DO THEY WORK WELL WITH MINIMUM SUPERVISION? ARE THEY A TEAM PLAYER, A LEADER?

Attempt to understand the type of working environment they thrive in. Team player, autonomous.

7. HOW WOULD YOU DESCRIBE THEIR ABILITY TO DEAL WITH A DIFFICULT/PRESSURE SITUATION? CAN YOU GIVE AN EXAMPLE?

Asses their ability to solve problems and how they function under pressure.

8. THE ROLE REQUIRES THE PERSON TO XXX HOW DO YOU RATE THEIR ABILITY TO PERFORM THIS DUTY?

Position specific question with regards to a certain duty they need to perform and their ability to successfully perform that duty.

9. THE ROLE REQUIRES THAT THEY ARE PROFICIENT IN XXX. CAN YOU COMMENT ON THEIR TECHNICAL ABILITIES WITH REGARDS TO XXX?

Position specific question in regards to a particular skill required for the position and their ability to perform that skill.

10. WHAT WERE THEIR MAIN STRENGTHS?

Attempt to understand the applicant's strengths.

11. WHAT WERE THEIR MAIN WEAKNESSES?

Attempt to understand the applicant's weaknesses.

12. HOW WOULD YOU RATE THEIR WORK ETHIC?

Gain an idea of how motivated they will be to work and effort they will apply to the position.

13. ATTENDANCE RECORD?

To judge possible commitment to the role.

14. HONESTY AND INTEGRITY?

To evaluate personal values and ethics and if they align with the company's.

15. WHY DID THEY LEAVE THE COMPANY?

Understand the reason they left they previous role. This can give you a good idea of the type of person they are. Were they fired, were they bored and wanted a change, did they crave more responsibility and a greater challenge.

16. IF YOU HAD THE OPPORTUNITY, WOULD YOU RE-EMPLOY THEM?

Referees overall judgement of the candidate.

17. OTHER COMMENTS?

Any other information that the referee believes would be useful and assist in the recruitment process.

Although you may not use all the questions above, referee checks should be undertaken thoroughly and in the same way for all candidates/ referees





SECTION 2: RECRUITMENT

SECTION 2 Recruitment

2.1 Induction Checklist

WELCOME TO THE (COMPANY) TEAM!

Our induction program aims to help you get to know us better — our organisation, people, culture, policies and procedures. So that you can hit the ground running, this is your checklist to work through together with your Manager. Please tick off each action and initial after each section as it is completed. When you and your Manager are satisfied that all of the actions have been completed, please sign at the bottom and return to the [Business Services Coordinator](#) for filing.

NEW EMPLOYEE DETAILS		
Name:	Date of Birth:	
Position:	Department:	
Supervisor/Manager:	Workplace:	
Next of Kin:	Emergency Phone:	
CHECKLIST	TICK	INITIAL
PERSONNEL DOCUMENTS		
Have you supplied us with all of our required personnel documents?		
Tax file number		
Superannuation details		
Evidence of Residency or right to work		
Licenses and qualifications		
Medical Insurance details		
Bank details		
Emergency contact details		
Contact details for new business cards		
TERMS AND CONDITIONS OF EMPLOYMENT EXPLAINED		
Have we explained all of your terms and conditions of employment?		
Contract of employment or letter of confirmation issued and signed		
I have been provided access to the Fair Work Information Statement		
Award identified and described		
Probationary period		
Hours of work and work breaks		
Clocking on/flexi time procedures		
Timesheet procedures		
Pay and Payment procedures		
Holidays and sick leave entitlements and procedures		
Other leave		
Professional development and performance		
Grievance Resolution and Disciplinary procedures		
Cessation procedures		

INTRODUCTION TO (COMPANY)		
Have you met all of our team members and familiarised yourself with our organisation?		
Welcome meeting and office tour with Line Manager – discuss role, responsibilities (see section below), major clients, projects etc.		
Who's who – meet and greet all members of the team		
Coffee meeting with the Directors and Chief Financial Officer - The (COMPANY) Story, organisation direction, future plans and developments		
Session with IT Department regarding system passwords, security and (COMPANY) software		
The (COMPANY) brand - Have you read our (COMPANY) brand story and style guide?		
YOUR ROLE		
Do you understand your role and responsibilities with (COMPANY)?		
Introduction to manager/supervisor		
Requirements of new job / key performance indicators		
Allocation of jobs and communication processes		
Standards expected		
Areas of training identified		
Supervision requirements outlined		
Promotion and salary reviews		
Assimilation plan meeting arranged with your immediate <i>Manager/Supervisor</i>		
HEALTH AND SAFETY		
The (COMPANY) team has an obligation to follow safe working procedures at all times, and to take reasonable precautions to prevent personal injury to others and damage to plant and equipment.		
I have read and understand (COMPANY)'s Fatigue Management Policy <i><Ref No></i>		
I have read and understand the (COMPANY) HR Policies and Procedures		
I am familiar with (COMPANY)'s emergency procedures		
I have received a copy of the "Portable Fire Extinguisher Guide" and the operation of fire extinguishers has been explained to me		
I have been shown how to locate the following: <ul style="list-style-type: none"> The nearest fire extinguisher and fire hose and fire alarm button Any emergency equipment relevant to my work All emergency exits including the nearest emergency exit for my work area The fire warden for my area 		
I am aware of the procedures for reporting incidents, near misses and hazards		
In case of fire or other emergency, I know where/how to find the Emergency Assembly Point		
I have discussed and identified any first aid or health and safety training requirements for my role		
I know the location of the First Aid Kit		
I am aware of (COMPANY)'s Swipe Card and Security Access procedures		
(COMPANY) POLICIES AND PROCEDURES		
Have you read and familiarised yourself with all of (COMPANY)'s policy and procedure documents?		
<i><REF NO> Anti-Discrimination Policy</i>		
<i><REF NO> Sexual Harassment Policy</i>		
<i><REF NO> Workplace Harassment Policy</i>		

Insert other policies as relevant into the above table

I HAVE COMPLETED MY INDUCTION CHECKLIST AND FAMILIARISED MYSELF WITH ALL OF (COMPANY)'S COMPANY POLICIES AND PROCEDURES.

Inductee:	Date:
Signed:	
Inducted by:	Date
Signed:	
Dated filed:	Signed (<i>Manager</i>):

2.2 Personal Information Form

New employee <input type="checkbox"/>	Update existing employee <input type="checkbox"/>	Date
Site/office name		Site/office phone number
Employee name		Personnel ID
NAME (FULL NAME)		
Title:	Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Other <input type="checkbox"/>	
Employee name:		
Date of birth:		Tax File Number:
ADDRESS		
Unit/flat:		Street number:
Street name:		
City/Town:	State:	Postcode:
EMERGENCY CONTACT DETAILS		
Name:		Relationship:
Address:		
Mobile:		Phone #:
MAIN BANK DETAILS		
Name of Account:		
Name of Bank:		
Bank Branch Name:		
Bank Account #:		
SUPERANNUATION DETAILS		
Name of Fund:		
Account Number:		

2.3 Employment Contract

EMPLOYMENT CONTRACT, LETTER OF ENGAGEMENT, LETTER OF OFFER SHOULD INCLUDE:

- The new employee's name
- The nature of the job
- The remuneration as a total package
- Other benefits, such as a bonus and non-packaged items (e.g. company car)
- Annual leave, sick leave, maternity/paternity leave
- The terms and conditions of resignation/termination, including notice period

Other things may be included depending on the position, such as confidentiality agreements covering sensitive information (e.g.: their intellectual property and that of their customers)

Example Cover Letter

Dear new employees full name

Offer of employment as (insert position title)

We are delighted to offer you employment in the above position.

The terms and conditions are set out in the attached employment contract. If you have any queries about these please do not hesitate to contact insert name.

If you have specific queries you may wish to seek your own legal advice.

Please review this employment contract, if you agree on its terms please sign, date and return to insert name. An additional copy of the contract is enclosed for your retention.

We look forward to welcoming you on day, date and time.

Yours sincerely

Name

Position

Example Employment Contract

THIS DOCUMENT OUTLINES THE TERMS OF CONTRACT OF EMPLOYMENT PROPOSED BY BUSINESS NAME AND ADDRESS.

Name of employee

Position

Type of Employment (*casual/part-time/fulltime/contract*)

Commencement date

Location: *Address or department*

Direct Manger: *Full name*

Hours of Work: *State core hours if applicable, any breaks e.g. lunch, any flexible options such as working from home etc.*

Responsibilities/duties: *Use to wording from your position description.*

Remuneration: *List rate of pay gross annual salary inclusive of the percentage of superannuation.*

Benefitss or Incentives: *List any agreed benefits or incentives that have been offered.*

Pay Period: *State pay period – fortnightly, monthly and when it will be paid e.g. the 15th of each month.*

Overtime: *Highlight any overtime if applicable and the conditions and rates.*

Annual leave

confirm the specifics e.g. 20 days per year. Outline the monthly accrual days and provide information on how to apply for leave

Sick leave

provide days of entitlement for first year of service and the number of days for each year following. State the cumulative e.g. 20 days. Also state when you expect a medical certificate e.g. more than two days. Make clear that unused sick leave will not be paid on resignation or termination (if applicable)

Long service leave

state the time (in years) that the person will need to work in continuous employment with the organisation before being eligible for long service leave. Then indicate how many weeks per year following that

Maternity/paternity leave

highlight how many years of service before eligibility and period (in weeks) of leave entitlement

Harassment/racial vilification/discrimination

Many organisations today provide employees with clear policies associated with behaviours relating to the above, and the consequences for not following them. Such policies refer to the responsibilities of employees, managers and the company in upholding these and the protection for

those who complain.

Compliance with company policies & procedures

Refer to policies and procedures manual or state particular policies relevant to your business e.g. safety requirements

Computer use/abuse

The organisation needs to state clearly its policy on personal use to protect it from viruses and law suits relating to copyright. You may also wish to include consequences for any unacceptable use of the internet.

Confidentiality

This information is to protect your organisation from misuse of confidential information by an employee. It may also refer to confidential and sensitive information relating to customers, e.g. commercial and financial activities. It cannot refer to information already in the public domain. It might also include information relating to intellectual property while the person is employed in the organisation, stating that all such information and copies thereof need to be returned to the employer on resignation or termination.

Termination

State clearly the conditions that would warrant summary dismissal e.g. convicted of an indictable offence (you might wish to consult with legal counsel or your employer association).

Acceptance

I accept the offer of employment and agree to the terms and conditions as stated in this contract.

Signed _____

Date _____

2.4 6-8 Week Employee Feedback Form

NAME:	[INSERT]	ROLE:	[INSERT]
EMPLOYMENT STATUS:	[INSERT]	GROUP/ DEPARTMENT:	[INSERT]
START DATE	[INSERT]		

I. OVERALL HOW DO YOU THINK YOU ARE PERFORMING:

--

A. AREAS PERFORMING WELL:

--

B. AREAS WHERE PERFORMANCE REQUIRES IMPROVEMENT:

--

3. PLEASE COMMENT ON THE FOLLOWING:

A. RECRUITMENT PROCESS (PLEASE CIRCLE):

5	4	3	2	1
VERY EFFECTIVE	EFFECTIVE	AVERAGE	NEEDS IMPROVING	POOR

--

B. INDUCTION – WHOLE OF BUSINESS AND DEPARTMENT (PLEASE CIRCLE):

5	4	3	2	1
VERY EFFECTIVE	EFFECTIVE	AVERAGE	NEEDS IMPROVING	POOR

--

C. STYLE OF MANAGEMENT:

--

D. TEAM CULTURE:**4. WHAT WAS THE YOUR PERCEPTION OF (COMPANY) BEFORE STARTING****5. HAS THIS PERCEPTION CHANGED SINCE STARTING****6. TO WHAT EXTENT ARE WE MEETING THE YOUR EXPECTATIONS (PLEASE CIRCLE):**

3	2	1
EXCEEDING EXPECTATIONS	MEETING EXPECTATIONS	BELOW EXPECTATIONS

7. DOES THE EMPLOYEE HAVE ANY SUGGESTIONS OF IMPROVEMENTS THAT CAN BE MADE:**8. OTHER COMMENTS:**

EMPLOYEE:	[INSERT]	DATE COMPLETED:	[INSERT]
SUPERVISOR/MANAGER:	[INSERT]	DATE COMPLETED:	[INSERT]

By signing this form the Supervisor/Manager's also agrees to provide a copy of the form to the Individual and submit the original to the *<General Manager or HR Manager>* for filing.

2.5 Flexible Working Application

[Use this Application if you are making a request for flexible working arrangements pursuant to section 65 of the Fair Work Act 2009 (Cth)].

NAME	
POSITION TITLE	
COMMENCEMENT DATE	
TEAM / DIVISION	

WHICH FLEXIBLE WORKING OPTION(S) ARE YOU APPLYING FOR? (PLEASE TICK BELOW)

- ☐ Part time working
- ☐ Job Sharing
- ☐ Compressed Hours
- ☐ Variation in Hours
- ☐ Temporary Reduction in Hours
- ☐ Working from Home
- ☐ Other

FROM WHICH DATE DO YOU WISH THE FLEXIBLE WORK ARRANGEMENTS TO COMMENCE?

IN MAKING THIS REQUEST I CONFIRM ONE OR MORE OF THE FOLLOWING OPTIONS. (PLEASE TICK BELOW)

- ☐ I am the parent of a child who is of school age or younger
- ☐ I have responsibility for the care of a child who is of school age or younger
- ☐ I have caring responsibilities for another individual because that individual:
 - has a disability
 - has a medical condition (including terminal or chronic illness)
 - has a mental illness
 - is frail and aged
- ☐ I have a disability
- ☐ I am 55 years or older
- ☐ I am experiencing family violence
- ☐ I am caring or supporting a member of my immediate family or household member, who requires that care or support because they are experiencing family violence
- ☐ (If not casual) I have completed 12 months continuous service with <COMPANY> at the time of making this request
- ☐ (If casual) I am a long term casual employee of <COMPANY> and I have a reasonable expectation of continuing employment by <COMPANY> on a regular and systematic basis.
- ☐ Other

PLEASE PROVIDE DETAILS OF THE CHANGE(S) SOUGHT TO YOUR EXISTING WORK ARRANGEMENTS AND THE REASONS FOR THE REQUESTED CHANGE(S). PLEASE BE SPECIFIC - INCLUDE HOURS, DAYS OF WEEK, START/FINISH TIME AND IF YOU INTEND THAT THIS ARRANGEMENT WILL CHANGE OR IF YOU INTEND FOR THE ARRANGEMENT TO BE ONGOING.

PLEASE PROVIDE DETAILS ON HOW YOU THINK THIS WORKING ARRANGEMENT WILL AFFECT <COMPANY> AND YOUR COLLEAGUES. WHAT STEPS CAN BE TAKEN BY YOU, YOUR MANAGER OR <COMPANY> TO MANAGE AND MINIMISE THE EFFECTS ON <COMPANY> AND YOUR COLLEAGUES? CONSIDER THE FOLLOWING:

- THE COSTS TO <COMPANY> OF THE PROPOSED WORKING ARRANGEMENTS
- THE CAPACITY FOR <COMPANY> TO CHANGE THE WORKING ARRANGEMENTS OF OTHER EMPLOYEES TO ACCOMMODATE THE PROPOSED WORKING ARRANGEMENTS
- THE PRACTICALITY OF CHANGING THE WORKING ARRANGEMENTS OF OTHER EMPLOYEES, OR RECRUITING NEW EMPLOYEES, TO ACCOMMODATE THE PROPOSED WORKING ARRANGEMENTS
- THE IMPACT OF THE PROPOSED WORKING ARRANGEMENTS ON EFFICIENCY OR PRODUCTIVITY
- THE IMPACT OF THE PROPOSED WORKING ARRANGEMENTS ON SERVICE DELIVERY.

Signed: _____ (Employee) Date: _____

Signed: _____ (Manager) Date: _____





SECTION 3: RETENTION

SECTION 3 Retention

3.1 Performance Management- Sample I

SIX-MONTHLY <ANNUAL> PERFORMANCE AND TRAINING REVIEW

CUSTOMER SERVICE/ADMINISTRATIVE/FRONT LINE STAFF: _____

PERIOD (TICK ONE)	<input type="checkbox"/> January – June	<input type="checkbox"/> July – December
--------------------------	---	--

<input type="checkbox"/> Self Review	<input type="checkbox"/> Office Manager	<insert title of Supervisor>
--------------------------------------	---	------------------------------

The person and their immediate supervisor each need to complete the form and discuss it at a formal one-on-one meeting

SECTION I: PERSONAL PERFORMANCE <add to or change the dimensions as needed>

RATINGS: 1 = FAILS TO MEET; 2 = PARTLY MEETS; 3 = MEETS EXPECTATIONS; 4 = EXCEEDS; 5 = FAR EXCEEDS

DIMENSION	MEASURE/STANDARD	RATING	COMMENT
WORK THROUGHOUT	Reception, office administration, filing and record-keeping and organising meetings and travel are all done to a high standard		
APPLICATION OF KNOWLEDGE AND SKILLS	Applies skills and job knowledge in a way that best achieves results		
SKILL IMPROVEMENT	Shows keen interest in learning from other staff and is also developing skills through experience		
PROBLEM SOLVING AND FLEXIBILITY	Anticipates and solves problems and displays flexibility in responding to emerging events		
ORGANISATIONAL SKILLS	Completes assigned tasks efficiently and willingly and displays good prioritisation and time management		
COMMUNICATION AND TEAMWORK	Communicates and works well with staff at all levels as well as excellent communication with Company Stakeholders and clients. Displays active listening skills		
SETTING A GOOD EXAMPLE	Degree to which the employee demonstrates and lives up to company's agreed values and behaviours		

SECTION 2: PERSONAL TRAINING AND DEVELOPMENT

TRAINING AND DEVELOPMENT PLAN FOR THE PAST 6 MONTHS	WHAT WAS ACHIEVED AND HOW EFFECTIVE WAS IT?	PLAN FOR THE NEXT SIX MONTHS

SECTION 3: OVERALL COMMENTS

COMMENTS ON THE SIX MONTHS JUST FINISHED

SECTION 4: OVERALL RATING

<input type="checkbox"/> Fails to meet	<input type="checkbox"/> Partly Meets	<input type="checkbox"/> Meets Expectations	<input type="checkbox"/> Exceeds	<input type="checkbox"/> Far Exceeds
--	---------------------------------------	---	----------------------------------	--------------------------------------

SECTION 5: FOCUS/ACTION ITEMS FOR THE NEXT <SIX MONTHS OR YEAR>

LIST UP TO 5 KEY ACTIONS OR OBJECTIVES FOR THE NEXT <SIX MONTHS>	WHEN WILL THE ACTIONS BE UNDERTAKEN?

Signed: _____ Employee Date: _____

Signed: _____ Employee Date: _____

Completed forms to be kept confidentially by HR or the General Manager's office

3.1.1 Performance Management- Sample 2

Annual Performance Appraisal Form

NAME	
POSITION TITLE	
COMMENCEMENT DATE	
TEAM / DIVISION	

(COMPANY) has a Performance Appraisal system that is designed to be easy to understand and to operate. The system incorporates an element of self-assessment for employees as part of their preparation for the formal review process and as a full participant in their own development planning. An appraisal is also conducted on behalf of (COMPANY), typically by the employee's supervisor of the relevant area discipline.

The objectives of the appraisal system are to:

- Facilitate open and frank discussion between Supervisor/Manager and Individual on work performance
- Plan for training and development activities to enhance performance
- Plan performance objectives for the following year
- Understand expectations on remuneration and advancement

The steps in the process for both Supervisor/Manager and Individual are outlined as follows:

SUPERVISOR/MANAGER		INDIVIDUAL
PRIOR TO THE MEETING	<ul style="list-style-type: none"> • Reflects on Individual performance • May informally gather feedback on the Individual's performance from relevant people (either external (eg customers) or internal (eg peers of the Individual) or both) • Completes the appropriate parts of the appraisal form • Plans the meeting 	<ul style="list-style-type: none"> • Considers own performance against each of their responsibilities in preparation for the meeting by completing the appropriate part of the form • Considers training needs in the light of the self-assessment • Considers the likely Key Performance Indicator's for the next 12 months • Considers career goals, promotional and remuneration expectations

SUPERVISOR/MANAGER		INDIVIDUAL
DURING THE MEETING	<ul style="list-style-type: none"> Discusses and reviews: <ul style="list-style-type: none"> Achievements against the Individual's responsibilities (comment about both results and behaviours, and what helped or hindered achievement of goals). Personnel member's self-appraisal Areas for development Agrees upon objectives and action plan for the next 6 - 12 months Summarises and signs off 	<ul style="list-style-type: none"> Participates fully in the discussion Seeks insights into others' perceptions of work performance Seeks clarification and explanations (and examples) where necessary Collaborates with the Supervisor/Manager in developing action plan
AFTER THE MEETING	<ul style="list-style-type: none"> Determines overall assessment Sends the original copy of Appraisal form to HR resource and keeps a copy Monitors progress and development as per the action plan Identifies and sets training and development plan 	<ul style="list-style-type: none"> Keeps a copy of the Appraisal form Carries out agreed actions Assists in the identification of training and development needs

THE FOLLOWING RANKING MARKS ARE TO BE USED BY BOTH THE SUPERVISOR/MANAGER AND INDIVIDUAL.

ASSESSMENT RANKING	
5	OUTSTANDING Exceptional performance in all areas of responsibility. Planned objectives were achieved well above the expected standards and accomplishments were made in unexpected areas.
4	EXCEEDS EXPECTATIONS Consistently exceeds expected standards in most areas of responsibility. All requirements were met and objectives were achieved above the expected standards.
3	MEETS EXPECTATIONS All job requirements were met and planned objectives were accomplished within expected standards. There were no critical areas where accomplishments were less than planned.
2	NEEDS IMPROVEMENT Performance in one or more critical areas does not meet expectations. Not all planned objectives were accomplished within the expected standards and some responsibilities were not completely met.
1	DOES NOT MEET MINIMUM STANDARDS Does not meet minimum job requirements. Performance is unacceptable. Responsibilities are not being met and important objectives have not been accomplished. Needs immediate improvement. Performance Counselling Policy should be instigated.

Annual Performance Appraisal

ASSESSMENT OF:	
DATED:	
UNDERTAKEN BY:	

PERFORMANCE ASSESSMENT RANKING

- 5 OUTSTANDING
- 4 EXCEEDS EXPECTATIONS
- 3 MEETS EXPECTATIONS
- 2 NEEDS IMPROVEMENT
- 1 DOES NOT MEET MINIMUM STANDARDS

ASSESSMENT CRITERIA	SELF ASSESSMENT		SUPERVISORS/MANAGERS ASSESSMENT	
	RANKING	COMMENT	RANKING	COMMENT
RESPONSIBILITIES (INDIVIDUAL TO ENTER IN KEY AREAS OF RESPONSIBILITY, AS LISTED IN THE POSITION DESCRIPTION)				
Key area of responsibility:				
Key area of responsibility:				
Key area of responsibility:				
Key area of responsibility:				
Key area of responsibility:				
BEHAVIOURS (KEY BEHAVIOURS AND ANY COMMENTS ABOUT PERFORMANCE).				
Contribution to team effectiveness				
Technical knowledge and skills				

ASSESSMENT CRITERIA	SELF ASSESSMENT		SUPERVISORS/MANAGERS ASSESSMENT					
	RANKING	COMMENT	RANKING	COMMENT				
Communication								
Innovation and Creativity								
Safety								
General Work Practices								
GENERAL COMMENTS ON THE PAST 12 MONTHS								
SELF			SUPERVISOR					
GOALS								
What are your Short Term career goals? (<12 months)								
What are your Long Term Career Goals (>12 months)								
What are your salary expectations for the upcoming 12 months?								
Do you have any promotional expectations for the upcoming 12 months?								

PART B (TO BE COMPLETED BY BOTH SUPERVISOR/MANAGER AND INDIVIDUAL)

SUMMARY OF STRENGTHS & AREAS FOR DEVELOPMENT (INCLUDING TRAINING OPPORTUNITIES)	
Any other comments in relation to the Individual's behaviour (for example, consider competency in communication, problem solving, planning and organising, using technology, leadership, research and analysis). Consider performance in relation to both Key Areas of Responsibilities and Behaviours.	
STRENGTHS	AREAS FOR DEVELOPMENT

PART C (TO BE AGREED BY SUPERVISOR/MANAGER AND INDIVIDUAL)

KEY MEASURES FOR NEXT 6-12 MONTHS (SPECIFY THE KEY MEASURES FOR THE NEXT REPORTING PERIOD).	
1.	
2.	
3.	
4.	
5.	

PERFORMANCE DEVELOPMENT PLAN		
SPECIFIC ACTIONS	EXPECTED OUTCOMES	BY WHEN
1.		
2.		
3.		
4.		
5.		

Individual's Signature

Date

Supervisor/Manager's Signature

Date

By signing this form the Supervisor/Manager's also agrees to provide a copy of the form to the Individual and submit the original to Chief Executive Officer or HR Representative for filing.

3.2 Individual Training and Development Plan

This form is for the planning of training and development activities for employees and is to be completed by the individual and Manager/Supervisor during the Annual Performance Appraisal (APA) process and reviewed at the Mid-year Performance Review meeting.

NAME:	ROLE:
EMPLOYMENT STATUS:	GROUP/DEPARTMENT:
TRAINING PLAN START DATE:	TRAINING PLAN END DATE:

TRAINING / DEVELOPMENT ACTIVITY	TRAINING OBJECTIVE E.g. Alignment with position description or goals	APPROX TIME COMMITMENT & DATE/S	APPROX COST	AGREED NEXT STEP E.g. Additional research on course dates/costs or approval from GM

SIGNED BY: (MANAGER/SUPERVISOR)	DATE:
SIGNED BY: (INDIVIDUAL)	DATE:

AGREE NEXT STEPS INCLUDING:

- Supervisor to submit this form to HR or GM with the APA form
- GM to approve/request additional information from the Supervisor/Manager or Individual
- GM to communicate outcomes of the overall APAP process
- HR resource to coordinate administration of approved training and development

3.2.1 Organisational Training and Development Plan

This form is for the planning of the whole of (COMPANY)'s training and development activities for employees and is to be completed by the General Manager once the Managers' recommendations have been received.

[illegible]

3.3 Dealing with Grievances

This attached Grievance Form is to be completed by an (COMPANY) staff member wishing to formally raise a Grievance. A 'Grievance' is defined as: "Any real or perceived problem, or any significant question, dispute, difficulty, claim, complaint or concern raised by one or more employees in relation to work or the work environment". A grievance may be between the complainant(s) and the employer, between employees, may involve a union, or may relate to decisions or actions taken or not taken, systems, processes or the physical environment, and may include:

- Decisions arising out of the application of workplace human resource policies and practices and employment conditions;
- Discrimination, i.e. being treated less favourably than others for no justifiable reason;
- Harassment, i.e. any unwelcome, offensive, abusive, belittling or threatening behaviour or language that has the effect of intimidating, offending or humiliating a person;
- Bullying, i.e. behaviour that is intimidating, humiliating, or that degrades, ridicules or insults a person at work."
- Any other behaviour the complainant(s) deems to be inappropriate.

The "Complainant" is the employee who has raised the grievance. The "Respondent" is the employee or entity against which the grievance has been raised. Before raising a grievance, employees should read relevant company policies such as <insert details>. A copy of this completed Form or its relevant contents will be provided to the Respondent, so that they can respond to the claims that have been made. An employee can obtain advice in relation to a prospective Grievance either from their manager or another manager, <Chief Financial Officer or Director>.

The completed form needs to be provided to <insert details>.

3.3 Grievance Form

NAME OF COMPLAINANT:	
Occupation:	Work Location:
PLEASE INDICATE PREFERRED METHOD OF CONTACT	
Telephone no:	Email:
1. Who is the respondent to this grievance?	
2. What is the nature of your grievance? (e.g. Workplace Bullying, Harassment)	
3. Have you tried to resolve the matter with the respondent before now? If so, what was done and what was the outcome?	
4. What is the outcome you are seeking to resolve the grievance?	
5. Please provide specific details to support your claim/s. (i.e. detail any incident, including date, time, location and any witnesses).	
SIGNATURES	
Complainant:	Date:
Manager:	Date:

3.4 Employee Termination Checklist

As a manager you may have to make a decision to terminate an employee who has persistently performed below the required standard.

Below is a checklist that is designed to ensure that you have given the individual a fair and reasonable chance to rectify their performance and the confidence that due process (including your legislative obligations) have been implemented.

STEP 1 IDENTIFICATION OF THE PERFORMANCE ISSUE

ACTIVITY	COMPLETED
Refer to your HR policy and procedures and/or get advice from your HR advisor – throughout the process make sure your actions are consistent with the organisational practices	
<p>Have you recorded all specific examples where the employee's performance has not met the required standard?</p> <ul style="list-style-type: none"> • Task requested • Date requested • Date presented • Actions taken to provide adequate training/mentoring/instruction to complete the task satisfactorily • Why standard of the output was not up to an acceptable standard 	
<p>Have you established an environment whereby the employee's work standards are clear?</p> <ul style="list-style-type: none"> • Do they have a position description? • Have they had regular reviews and/or received regular formal and informal feedback on past performance? • What development activities have been identified in the past? • How have you as a manager supported these? • Are there any areas in which the employee is performing well in? • Have you used the Performance Analysis Quadrant to help identify the root cause of the issues? 	
<p>Are there any personal issues that may be affecting the employees work performance?</p> <ul style="list-style-type: none"> • Family commitments or issues • Substance abuse • Illness or medical conditions • Working arrangements 	
<p>Have you checked all industrial and employment contract conditions related to the individual to identify any unique termination conditions? Examples may include:</p> <ul style="list-style-type: none"> • Employment contract xxxx • Modern Award: xxx • Employment Agreement: xxxx • Visa: xxx <p>Have you received specialised legal advice? E.g.</p> <ul style="list-style-type: none"> • Performance management processes • Specific Award/Employment Agreement conditions/obligations • In regards to Unfair/Wrongful dismissal • Entitlements • Other 	

<p>Have you conducted an initial meeting with the employee communicating that you have identified a performance issue and want to establish a performance improvement plan with the individual to try and rectify the issues.</p> <p>As an outcome of the meeting ensure that:</p> <ul style="list-style-type: none"> • Meeting record is documented • The employee understands the performance shortcomings <ul style="list-style-type: none"> ◦ Identify the behaviour/performance issue ◦ Explain the impact of the behaviour/performance ◦ Restate the required standard • A process has commenced • All possible outcomes are explained: <ul style="list-style-type: none"> ◦ Formal acknowledgement of satisfactory performance standard ◦ Termination • That the goal of the performance plan is to support the individual to rectify the issues 	
---	--

STEP 2 PERFORMANCE IMPROVEMENT PLAN

ACTIVITY	COMPLETED
<p>Have you established a performance improvement plan with the individual?</p> <p>Have both parties agreed to its contents?</p> <p>Ensure that:</p> <ul style="list-style-type: none"> • Specific tasks with clear performance standards are set and agreed to: <ul style="list-style-type: none"> ◦ The task/project requirement ◦ Expected outcome ◦ Quality standard ◦ Timeframe. • Set a date for progress to be formally reviewed • Set a date for outputs to be reviewed • Explain the consequences of continued poor performance <p>Have you made a record of this meeting and provided a copy to the individual?</p>	
<p>Have you conducted a performance session to review the individuals progress and provide feedback and/or guidance?</p> <p>If sufficient progress has not been made, a warning letter may be issued.</p> <p>Ensure all communication and meeting outcomes are recorded.</p>	
Have you reviewed the performance plan outcomes, are they to the agreed performance standard?	
<p>Have you conducted a performance meeting at the end of the agreed performance period? Ensure that:</p> <ul style="list-style-type: none"> • Employee has the opportunity to communicate their view on the performance improvement plan outcomes • Organisations assessment of the performance improvement plan outcomes is communicated • Reiterate all possible outcomes: <ul style="list-style-type: none"> ◦ Formal acknowledgement of satisfactory performance standard ◦ Termination 	

STEP 3 PERFORMANCE MANAGEMENT OUTCOME

ACTIVITY	COMPLETED
<p>Have you made the decision to terminate or continue with employment?</p> <ul style="list-style-type: none"> Have you received advice from a legal advisor? Do you fully understand all of the applicable Industrial instrument implications? 	
<p>If Termination is the outcome, have you addressed the following:</p> <ul style="list-style-type: none"> Checked if a termination or final payment is applicable under state or federal law e.g. unused holiday pay, wages owing pro rata long service leave Checked the required notice period. Will depend on how long the individual has worked for the organisation. 	
<p>If the outcome is termination you will need to decide:</p> <ul style="list-style-type: none"> If you want the employee to stop work immediately or work through the required notice period What equipment will need to be returned What building access and security actions need to be de-activated What relationships with customers/suppliers/employees will need to be managed 	
Have you booked in a meeting with the individual to communicate the outcome of the process?	
<p>Have you checked the unfair dismissal claims process?</p> <ul style="list-style-type: none"> Employees have a maximum of 21 days from the date of dismissal to lodge an unfair dismissal claim Applies to organisations that have: <ul style="list-style-type: none"> less than 15 staff and the individual has worked there for 12 months or more more than 15 staff and the employee has worked there for six months or more (Head count not FTE) 	
<p>Have you prepared a Termination Notice? Ensure that the following details are included:</p> <ul style="list-style-type: none"> Termination date Final payment details, including unused annual leave, payments in lieu, pro-rata long service leave Instructions in regards to return of equipment, workplace attendance, access to computer systems, representation as an employee and all other conditions as stated in the employment instrument. 	

STEP 4 TERMINATION MEETING

ACTIVITY	COMPLETED
<p>The agenda of the meeting should cover the following:</p> <ol style="list-style-type: none"> Summarise the performance process so far and advise of the process outcome; Explain that the individual's performance has not met the performance standard required and why; Communicate that the decision has been made to terminate the individual's employment; work through of all the conditions detailed in the Termination Notice. 	
Allow the individual time to respond	
Agree a reasonable time to allow the individual to pack up personal belongings and return all equipment.	

QUEENSLAND TOURISM INDUSTRY COUNCIL

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