EMPLOYER OF CHOICE
TOOLKIT

Regional Development Australia Limestone Coast

Employer of Choice Toolkit

Acknowledgment of Country

We acknowledge and respect the traditional owners of the ancestral lands and waters of the Limestone Coast. We acknowledge elders past and present and we respect the deep feelings of attachment and relationship of Indigenous peoples to Country.

Forward

The development of this Employer of Choice Toolkit has been a significant piece of work for the Business and Workforce Development team at Regional Development Australia Limestone Coast (RDALC). It is the culmination of many years of experience in a wide variety of work places, lessons learned in leadership roles, hours of research and reading, and of hundreds of conversations with employers across the Limestone Coast.

We have intentionally set out not to write a formal text book but rather an easy to read Toolkit that provides employers with the information they need to make small (or big) changes in their workplace.

Thank you to the Department of Industry, Innovation and Science for funding this project, providing us with the opportunity to bring together what we think are the key elements of what it means to be an 'employer of choice'.

Contents

Introduction

The decision to transform how you operate your business or organisation and how you lead your people is not an easy one.

You might be anxious about the change ahead or you could already be imagining the results – a perfect dream-like workplace where output is high, everyone smiles all day, and no one ever wants to leave. That version is not quite the reality – it will be a challenge at times, and it will be an ongoing process of change, checking in on your progress, making more changes as a result of your new knowledge, and finding out what works and what doesn't.

But importantly, you are here because you are interested in the idea of becoming an 'employer of choice.'

The term 'employer of choice' describes a business or organisation where people actively choose to work. Employees join and stay at these businesses because they stand out from the crowd by offering more and providing more than others - people genuinely believe these businesses or organisations are a 'great place to work'.

You might already be kicking goals in this space and providing your staff with a great workplace. For you, reading this Toolkit might be a chance to revisit and update your approach, as well as confirmation that you are getting things right.

On the other hand, you might have been head down working 'in' your business and not 'on' your business – we know what that is like, so don't feel bad or blame yourself if you have missed a few things.

This is your chance to stop, think about your business, and make some changes. We are not going to judge you for doing things differently in the past, as we can all do things better. The fact that you are here, reading this Toolkit is a positive first step, indicating that you are open to change.

> *Becoming an employer of choice can be a trek, but if you use this Toolkit, and are committed to making some changes, your business or organisation will reap the rewards.*

We have developed the framework and Toolkit to help you grow and develop as a business and put you in a better position to attract and retain employees. There is no guarantee that you will have immediate success, but if you focus on fostering a great inclusive workplace culture, encouraging effective communication, leading with compassion, developing some key policies and systems, plus supporting, rewarding, and developing your staff, you cannot go wrong.

Through this Toolkit, we will help you with the journey ahead because we want people to choose you and stay with you. We want you to become an employer of choice.

How to use this Toolkit

This Toolkit will take you through our 5 Pillar framework, exploring a series of topics that will help you become an employer of choice. Each section of this Toolkit covers a Pillar and is structured the same way, with explanations and suggestions of what you can implement, change, or do in your workplace to help you demonstrate those employer of choice practices.

At the end of each section, you will find a summary with important takeaways. There is also a checklist for you to complete at the beginning of the Toolkit, and to return to when you have made some of the changes in your workplace. No changes to make? You are winning (or possibly not looking hard enough!).

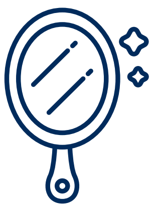
Each section of the Toolkit will refer to templates that you will find at the end of the Toolkit. These are resources you can use to create documents such as policies and position descriptions.

Throughout this Toolkit, we regularly use examples from a fictitious business called 'Smith's Solar Fixings' to help illustrate the topics (a big thanks to the fictitious owners for being involved).

You will notice orange numbers in brackets like this (0) - these are our references, which are listed at the back of the Toolkit.

We will also use icons throughout the Toolkit to indicate when to remember key parts, reflect on what you have read, suggest concepts you may want to takeaway, and ideas to note.

Remember



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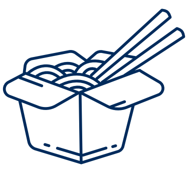


Takeaway

Note on

We think the best way to use this Toolkit is to read it all first – yep, we know it is long, but stay with it.

Read it all, let it sit for a while and then go back to the beginning and work your way through. You might jump around between sections and that is fine, as we know some of you will already have some of these topics in hand.

Remember - Ultimately the best way to use the Toolkit is to actually use it; it really doesn't matter how. We think small steps are really important and we are already applauding you for believing that change is possible.

Why do you want to become an employer of choice?

In simple terms, you want to become an employer of choice because you aspire to provide such a great workplace that your employees are so proud to be a part of, they tell everyone. You want people outside your business or organisation to see that you are an inclusive, open, and accountable employer who has created a place where people aspire to work and, more importantly, want to stay.

In the introduction, we mentioned that employers of choice offer more and provide more. Offering more and providing more is not about bigger pay packets and free soft drinks in the fridge, although they can be good options. Being an employer of choice means your organisation offers more and provides more in an almost magic combination of tangible and intangible benefits to your employees, defined as your 'employee value proposition' (EVP).

According to the recruitment giant, Michael Page (1):

> *'An employee value proposition (EVP) is the unique set of benefits that an employee receives in return for the skills, capabilities, and experience they bring to a company.'*

In a competitive jobs market, attracting and retaining the best workers is key to your business's success. If you do not have people to make your products, help manage your business, or sell your goods, your business will not succeed. The reality is that if you fall behind other businesses who focus on being employers of choice, your employees are more likely to move on, or be tempted by the opportunities and EVP elsewhere.

There are many reasons why you would want your business or organisation to be considered the best place to work, and it's entirely reasonable your motivations include making and saving money. But those reasons should also include giving your employees opportunities to grow, develop, and feel more included in their working day. We sometimes hear employers say: 'I am paying them their wages so they should be happy with that!' Yes, you pay them, but you do so because they undertake work for you, ultimately making you money. Unless you are in a profit-sharing arrangement with all your staff, you need to value the input of your employees in more ways than just a pay cheque.

Treating staff as if they are an endless supply of labour will not get you very far anymore, as we know our employees are becoming an increasingly precious commodity.

Bad news travels fast, and if you treat your staff incorrectly, you will struggle to retain or replace them. In a regional setting, this is critical – behave badly, and the whole town will know about it.

The way you treat your customers also has a big impact on your potential workforce. If people are treated well as a customer or client, they will already have a positive association with your brand as an employer.

You can rebuild your reputation if you have merely had a rough patch, and focusing on becoming an employer of choice is a great place to start. Being a reputable business means both customers and employees can count on your business's honesty and integrity.

We believe that by becoming an employer of choice, not only will you attract and retain the best talent, you will create an engaged workforce that contributes to decision making and the direction of your organisation. Also, you will save money on recruitment costs and your customers or clients will be more likely to stay loyal to your brand because you have a good reputation. We think that is a pretty good result.

Remember - Building and maintaining a good employer brand is critical for attracting and retaining staff and repeat customers and clients.

How do I stand out from the crowd?

Positioning your business to stand out from the crowd doesn't mean you need to be a huge tech giant or a blue-chip consulting company. You do not need flashy gimmicks and false promises.

To be an employer of choice, you need to make sure that you are getting some key things right when it comes to how you treat your employees and how you run your business.

A lot of these things are not hard or expensive; the hardest part might be having a critical look at your business operation and letting go of previous processes and old ways of doing things (don't worry, we have all been there). Small businesses can most definitely lead the way as employers of choice.

What do I need to do?

Contrary to what some people might think, being an employer of choice is not just about paying high wages; it is about much, much more. Remember, you will need to potentially transform aspects of your business operation and perhaps gain new skills as a leader and communicator. This is not an overnight quick fix and it may take you some months to get there.

Before you get started, you will need to reflect on yourself and on your business. You are more than likely already doing some of the things required to be an employer of choice, however, there might be some aspects that you will need to rethink and change.

You also need to be clear about why you are making these changes. Yes, it can be about making more money, but hopefully it is about more than that.

Treating your staff well underpins what it means to be an employer of choice, so as a part of your planning, think about your approach to people management and what is working well or might need some work. You might be a very small business with only a couple of staff, however, think about those staff and how you treat them in the workplace.

Did you provide an induction when they started? Did you outline what their role would be? Do you have regular meetings with them or ask their opinions? Also, do you offer training opportunities or talk about career progression?

Some of you might have just thrown this Toolkit on the desk and mumbled something about 'damn career progression', but if you pick this back up again, come back to this spot and stick with it, it might make more sense later.

Before we move on, let's run through this checklist to get you thinking about some of the topics that we will examine later in a lot more detail.

Have you or do you?	Yes or No
Undertake an induction with new employees?	
Provide new staff with copies of policies and procedures?	
Have regular team meetings?	
Provide training or talk about training needs?	
Discuss development and career progression?	
Check awards or 'market rate' for pay?	
Reward your staff?	
Really listen to your staff?	
Focus on your communication?	
Ask your staff for ideas on how to change things on a regular basis?	
Think you are a good leader?	
Know the names of your staff? Do you know anything about their lives and families?	
Talk about wellbeing in the workplace?	
Admit to your team when you have got it wrong?	
Tell them when they have got it right?	

Our employer of choice framework

If you search the internet for 'employer of choice', you will find many hits listing the 5, 7, 8 or 11 things that workplaces need to demonstrate if they are going to be an 'employer of choice'.

We have settled on five. Our 5 Pillars contain a few really big things and lots of smaller things that can get you and your business to where you need to be.

Being an employer of choice is about making changes that can have a big impact on your business, your people, and ultimately, on you.

Drum roll please... Here are the things that we think clearly define an 'employer of choice'.

01 **Leadership and Culture**

Quality leadership and an identifiable workplace culture

02 **Modern Operations**

Business operations that are organised and planned

03 **Care and Inclusion**

Employers care for both staff and clients and display inclusive practices

04 **Recruitment and Retention**

Employees are well recruited, remunerated, and retained

05 **Support, Develop, and Reward**

Employees feel supported, are offered development opportunities, and are rewarded

01 Leadership and Culture

- Communication
- Leadership
- Workplace culture

Introduction

An employer of choice displays excellent communication, quality leadership, and a positive and productive workplace culture. Employers of choice include their staff in their decision-making processes and make communication a priority in their organisation. Everyone in these workplaces knows why they are there and what their goals are. They have leaders that 'eat last' and employees that are proud of where they work. An employer of choice workplace has a vibe that just feels right.

We are looking at this Pillar first as it contains some of the most important elements of the framework; communication, leadership, and workplace culture. It doesn't matter how great your internal systems and your procedures are if your leadership is lacking and your culture is as flat as a deflated balloon. Set aside what you have heard in the past, as you can absolutely 'teach an old dog new tricks'.

Communication

In the list of standout attributes of an employer of choice, communication is right up there at the top. Good, open communication is essential in creating a productive workplace with a positive workplace culture.

Workplace communication is the exchange of information and ideas, both verbally and non-verbally, between two or more people and between a group of people within an organisation (and between organisations). Workplace communication includes emails, video conferencing, text messages, notes, phone calls, Post-it-notes left on your desk, and the message written in your birthday card. Sounds simple? Not always, and in fact communication tends to be behind most workplace issues.

A tell-tale sign that you have poor workplace communication is an entrenched reluctance to share information with everyone and a reoccurring theme of people saying 'no one told me'. You may regularly experience miscommunication resulting in misunderstandings and misdirected work.

Effective communication deserves an entire toolkit of its own, but here it will be woven into each of the Pillars, and if, at any point we don't mention a focus on good communication, you can assume it's there.

Leaders set the tone and the way workplaces communicate. Workplaces that value the contributions of staff in meetings, that discuss things that go wrong, and that are open and honest about the help they need, are good places to work.

Remember -
Good communication minimises workplace conflict.

Good communication increases staff engagement.

Good communication creates better relationships with everyone.

Good communication results in a more productive workforce.

Quick ideas for improving communication

1 Work on your own communication skills

Pay attention to non-verbal cues when you are talking to someone. Notice their body language: are they clicking their pen, drumming their fingers, or raising their eyebrows? If you see that someone is becoming increasingly physically agitated, maybe it's time for a break or to reschedule the meeting; sometimes people just need a breather.

Listening is a real skill, and stopping the urge to just say your message is hard sometimes. But try and really listen to what your employee is saying. Keep in mind that people communicate in many different ways – the person that keeps interrupting you isn't necessarily being rude. It may just be that their way of showing they are listening and understanding you is to tell you! Being mindful of the many ways people communicate is important.

Ensure you check for understanding. Use follow up and probing questions to make sure everyone is on the same page.

Work on how you provide constructive feedback to your team (more on this later). Make sure you are using your regular one-on-one sessions with your employees to provide feedback (if you are a larger business with supervisors or team leaders, make sure they are regularly meeting with their staff). Your one-on-one sessions should be regular and short, perhaps only a 'how are you actually doing?' Use these sessions to address any issues quickly and efficiently. Don't leave things. It will become much easier if you provide feedback regularly. Remember - most problems go back to communication issues!

2 Could that have been an email?

Not every subject or issue deserves a meeting of its own. You can find meeting calculators online which you can use to work out the cost of your meetings. Meetings need to have a reason for being.

3 One-on-one conversations

More on this subject later, but it is important to make time to chat to your staff on a one-on-one basis. Ok, if you have 500 staff, maybe not regularly, but make sure you are meeting with all your leadership team and ensure they are meeting with their team leaders/ supervisors, staff and so on and so on.

4 Short, sharp, and shiny

A meeting in which we all sit and listen to a manager drone on for 45 minutes is not much fun. Make sure everyone is involved and make sure there is an actual purpose for the meeting. Research indicates that only 50 percent of time spent in meetings is considered a good use of time by attendees (2). The good news? Here are some ways to improve how meetings are run in your workplace:

- Set an agenda and goals for each meeting, and send out the agenda and other materials that will be discussed to the team ahead of time, so people have the chance to review them.
- Only invite people who need to be invited.
- Consider whether a meeting is the best way to communicate something in the first place.
- Cancel a meeting if it is no longer needed.
- Make sure technical equipment is functioning ahead of time.
- Start and end meetings on time and distribute meeting notes afterward.
- Share the role of Chair to let everyone have a turn running the meeting.
- End with something fun. Not every meeting needs it, however you might think about ending your weekly staff meeting with a 5-question quiz or a team Shazam as a fun way to end the session.

Quick ideas for improving communication

> *In my old job we used to have a thing called '2-minute topics'. At the regular team meeting, staff were tasked on a rotating roster with sharing a quick update on something important like a new policy or a change to the way we ordered office supplies. We kept it brief and it gave everyone the chance to contribute.*

5 Create an open culture for communication

Use that time you just clawed back from your previously badly run meetings for a coffee morning or afternoon snack break. Sometimes staff just want a chance to chat, and you need to make time for that too.

Offer other ways to participate; some of your staff may not feel confident speaking up on an issue in a big group. Provide options for people to get back to you in writing. For example, after a group discussion, let your team know that you are happy to receive any further thoughts by the following morning.

If you have a team of people that love to write, you might get them to participate in a survey or written task, rather than share in a group meeting setting.

Don't forget your remote workers by encouraging the use of Zoom, Microsoft Teams, or Slack so that no matter where your staff are, they can still be involved in workplace discussions. Invite them to your morning teas and if you can, get something delivered for them so they feel included in the team.

Remember - You cannot afford to get communication wrong.

Communication is a skill, which means it can be improved and developed! You can absolutely learn new skills and ways to communicate in your workplace. It may feel a bit forced when you introduce a new skill you have learned, but stick with it. We were all appalling drivers our very first time in a car but look at us now! Some of us even race F1 cars at 372.5kms an hour – a skill that is 100 percent learned.

A note on communicating important information in a workplace

We all know that people don't read all their emails, nor do they read all the posters you stick in the lunchroom.

If you have important information that needs to be conveyed or circulated to the team, double down on the way you share that information. By all means, put it in writing, but then reinforce that message in a quick 5 minute stand-up meeting. And make sure you check in to confirm that the information has been understood.

Reflection - Think about communication in your workplace. How do you think you are doing? What is your initial thought on the points made in this section? Do you check back in with staff to ensure they understand what they have been asked to do?

Takeaway – Make sure you have regular one-on-one meetings with your staff. People want to feel they are listened to. Also, try not to cancel these meetings with your employees; we don't always get this right, but it is very important. Repeatedly cancelling on your staff sends a message that they are way down your list of importance.

Leadership

Employers of choice are easy to spot when it comes to the quality of their leaders. People are drawn to and will stay with businesses that have leaders with a vision, and who can communicate that vision. A good leader always considers their employees' quality of life as part of the workplace experience.

Someone once said that 'people don't leave bad workplaces – they leave bad bosses.' Good leaders set the tone of the workplace, provide a critical role in the direction of the organisation, and lead the delivery of the organisation's strategic goals. Good leaders inspire their staff and motivate and guide employees to get their jobs done.

You might have heard that good leaders are born that way. Yes, there are some things that are deep within our genes that help us become good leaders, but most of it is learned along the way. It is never too late to learn the skills to become a better leader and to change patterns (or potential bad habits) that we might have picked up along the way.

What is leadership?

There is probably no other business-related topic written and talked about as much as leadership. Every year it seems like there are thousands of books published on leadership. There are countless Ted Talks, podcasts, YouTube videos, and even TikToks on what makes a great leader, plus there are endless memes, jokes, and entire comedy routines based on what a bad leader looks like.

Being a good leader can be distilled down to some simple things: caring for the people around you, providing opportunities for them to develop, and inspiring them to be their best. Sometimes it is about being at the front when times are really tough and other times it is about sitting on the sidelines and watching your people change the world.

Good leadership is about putting your ego aside and letting other people shine. It is about giving your people all the chances and giving them all the credit. And it's about picking up the pieces with them when things don't quite work out.

Amongst the million quotes about leadership, the quotes listed here resonate with us and capture some of the essential elements of what leadership is all about.

'*The action of leading a group of people or an organisation.*' - Oxford Dictionary

'*Leadership is a process of social influence, which maximizes the efforts of others, towards the achievement of a goal.*' - Forbes Magazine

'*The definition of leadership is to influence, inspire and help others become their best selves, building their skills and achieving goals along the way.*' - Tony Robins

'*Leadership is not a rank or a position, it is a choice – a choice to look after the person to the left of us and the person to the right of us.*' - Simon Sinek

'*The first is to inspire trust, the second is to clarify purpose, the third is to align systems and the fourth is the fruit of the other three—unleashed talent.*' - Stephen Covey

Why is quality leadership important?

A person’s trust in their leaders and belief that their opinions are valued are key components of a great employee experience. The good news is, trust is easy (and cheap) to build. Leaders who are trusted achieve it by getting some simple things right:

- Visibility
- Transparency and fairness
- Honesty
- Communication

When employees have access to their leaders, are well-informed about what’s going on, participate in developing plans for the future, and see their leaders following through on their promises (or explaining why they couldn’t) they trust them. Leaders that cover up, exclude staff from decision-making that affects them, and keep secrets are not really leaders; they are people ‘dressed up’ in a leadership role – a bit like an actor in an astronaut costume, they aren't an astronaut, they are still just an actor.

Of course, there are workplace matters that cannot be discussed with all staff, and employees are mature enough to understand that. The problems arise when poor leaders communicate poorly, keeping some staff or entire teams in the dark while others are provided with valuable information. If there is only one takeaway from this Toolkit, it is to work on your communication as a leader. You will be surprised with the effect it can have.

> *I used to work with a really senior manager who was a great leader. He had a huge amount of responsibility in a pretty challenging environment, but he had time to mentor us and gave us the room to grow and develop, and always sought out our ideas and input. And when we were busy, he made the tea.*

> *'If your actions inspire others to dream more, learn more, do more, and become more, you are a leader.'*

What can you do to improve your leadership skills?

There is lots more that we could write about leadership (again, it could be a whole toolkit of its own), but we can’t cover it all. We encourage you to seek out other training and tools to help you develop your skills as a leader in your workplace.

A great place to start is with the four dot points on the page right over there. Here are some ideas relating to each of these (and you will find more in the following section):

1. **Visibility** – say 'good morning' to your staff every day, or if your business is large, get out and around the site at least once a week. Set some time aside in your diary and be accountable for keeping that time free to say: 'hello and how are you?' to the people that work for you. Don’t hide in your office all the time.
2. **Transparency and fairness** – treat all your staff the same, even if you don’t like them. Let’s be frank, there are some people on your team that do their jobs well, but you may not gel with them, however, you need to put that aside and treat your staff the same. In small businesses, it can become tricky if you are personal friends with some of your staff; performance managing your golf buddy is not easy. Try and keep your employees a bit at a distance.
3. **Honesty** – tell it like it is, when you can. If you have dropped the ball, don’t blame someone else; take responsibility for your own actions and accept and acknowledge your failures. You need to develop tactful honesty when you are delivering performance feedback.
4. **Communication** – you know what we think about this one!

A word on the difference between management and leadership

There are lots of books and articles that talk about the difference between managers and leaders and how workplaces need both. In this Toolkit, we consider them the same thing. If you are in a management role and you have employees, you are a leader, regardless of your title. However, some people like to differentiate managers and leaders like this: managers manage numbers and leaders lead people.

In a small business or organisation, you are most likely doing both, and you will need to ensure you are balancing these roles out. Too much of one approach and not enough of the other can cause issues

Reflection - Are you a good leader? How do you think you are going? How do you know how you are doing? What are your initial thoughts on the points made in this section?

Takeaway - Leadership can be improved. Do not worry if you have some changes to make.

Knowing your 'why'

We will cover this further in the following Pillar, but understanding why you do what you do in your business or organisation is an essential component of your leadership and your workplace culture. You need to be able to articulate this in order for your employees to know why they are there doing what they do. Everyone involved in your business needs to understand why they are there, how they fit into the bigger picture, and how your business carries out your why.

You might have heard the famous story about the cleaner at NASA who, when asked by the President what they do, said they 'help put people on the moon'. This is an example of a unified purpose - an understanding of an organisation's 'why' and how their work will contribute to company goals.

According to Simon Sinek (3):

- Why - this is the core belief of the business. It's why the business exists.
- How - this is how the business fulfils that core belief.
- What - this is what the company does to fulfil that core belief.

An example of this is:

> *At Smith's Solar Fixings we make the switch to solar safe for everyone. We are design centred and innovation focused, making sure our components meet the highest safety standards. We do this by building our products to cope in all conditions that nature sends our way.*

The entire team at Smith's Solar Fixings would know that they make a product to ensure solar panels are safer for everyone. They would also know their company has a focus on safety and quality and they are encouraged to innovate and try new things. They would know their 'why'.

We will come back to finding your why in Pillar 2.

Reflection - Do you know why you do what you do? Can you give a 1-minute pitch? How do you think you are going? What are your initial thoughts on the points made in this section?

Takeaway - Communicate your purpose and make sure everyone shares your company's why.

Culture

What is workplace culture?

According to the team at Forbes Magazine (4), workplace culture is 'the shared values, belief systems, attitudes, and the set of assumptions that people in a workplace share.'

Workplace culture is the overall character of the business. A positive, healthy workplace culture is what we should all aspire to. An environment where people are genuinely happy and enthusiastic about coming to work and productive when they are there.

A positive workplace culture improves the way people work together, increases productivity and efficiency, and may result in increased levels of employee retention. Job satisfaction, collaboration, and work performance are all enhanced in a good workplace.

Most importantly, a positive workplace environment reduces stress and mental health pressures on your employees.

Your workplace culture is a key part of your employer brand (what people think of you as an employer) and your EVP - the unique set of benefits that an employee receives in return for the skills, capabilities, and experience they bring to a company. Your workplace culture is most likely unique to your business or organisation, and can include elements such as values, beliefs, behaviours, goals, attitudes, and work practices, as well as that vibe, or the feeling you get when you are in the right place.

The following attributes are indicators of a good workplace culture. Some of these will already be familiar to you as they are also elements of being a good leader.

Transparency and fairness

A workplace that operates in a fair and transparent manner is a pretty good place to be. Having good policies and procedures in place helps to ensure you treat staff in a similar way. Make sure you are aware of your biases and keep any favouritism under control.

You will lose the trust of your entire organisation or business if someone in the team is receiving a benefit or an opportunity that no one else is. In fact, you can guarantee that you will create a fractured workplace if Barry consistently gets a rostered day off (RDO) that no one else ever seems to get. Humans place a high value on fairness, and your staff are only human after all.

> “
>
> *I worked in an office once and a few of us were doing the same job. The boss gave one of the guys a pay rise, but no one else got it.*
>
> *There wasn't a change in his role and to be honest, he didn't work harder than any of us.*
>
> *We knew the boss just liked him. It didn't take long for people to take their foot off the throttle after that.*

In this example, the reason for the pay increase was not transparent. Yes, you can give staff a pay rise, but you need to understand why you are doing it and how you can explain that to other staff. The easiest way to increase pay is by linking raises to a performance development process, whereby incremental pay increases occur when staff are reaching their key performance indicators (KPIs).

Leading by example

Be a trustworthy leader and behave the way you want your team to behave. If you have afternoons off without explanation, consistently long lunches or use derogatory language about other people, you may have just written a rule book of accepted behaviours that your staff will read from.

Pitching in and helping out during a busy period is also a great way to help create a positive workplace culture. Answering the phone, serving on the counter, helping pack orders, or cleaning up the workshop may not be in your daily duties but it goes a long way to show your team that you support them. And it sets the tone that everyone works together.

People look up to their leaders, so be the best you can be. And if you make mistakes, see the accountability section.

Inclusivity and care

A good workplace culture is inclusive, where everyone feels a sense of belonging. Inclusive workplaces are also fair, meaning everyone is included regardless of who they are. Employers of choice care for their staff and value the contributions they make.

Of increasing importance to newer generations is the corporate social conscience of a workplace and their commitment to making the world a better place. There are many things that you can do, from a recycling policy to regular charity days, that can demonstrate that your business has a social conscience. Some businesses and organisations fully commit and participate in programs such as ‘B-Corp’ . But whatever you do, make sure intentions are always genuine.

Accountability

When everyone in a workplace takes responsibility for their actions, it has a huge impact on both the ability of the organisation to achieve its goals, and on the trust that is shown between staff. Being accountable means teams can celebrate their success but also recognise when there is room for improvement.

A leader saying, ‘we worked really hard, but I didn’t get it right this time, let's think about ways I can help you get it right next time,’ is an easy place to start. This beats the common experience of leaders blaming staff and staff being too scared to admit things didn’t go to plan.

Open communication

The Big C. There are a few big Cs in life but the big one in a workplace is communication. As discussed before, whatever you do, try and get this right. People want to know that they can tell you about the things that are going wrong and should feel comfortable telling you when you are not getting it right. Look for books and courses to help you build the skills you need to develop your communication skills, as well as team communication.

Your staff need to feel they can come up with suggestions and ideas, and that the wacky idea that might in fact solve a huge problem and change the world forever will be supported. Environments that support and foster innovation are the changemakers and disruptors. Workplaces and humanity as a whole need these types of thinkers.

Create a space where your staff can be heard and where you listen. If you want to demotivate your entire workforce, ignore their suggestions, and squash any creative thinking; the only motivation your staff will demonstrate is how fast they can get a new job.

Remember - Leaders set the tone in a workplace. Always lead by example and be honest and authentic.

A fun place to be

A recent survey (5) looking at great places to work found these recurring words:

Challenging	Friendly	Engaging	Fastpaced
Rewarding	Collaborative	Flexible	Innovative
Supportive	Exciting	Caring	Teamwork
Family	Professional	Busy	Motivating
Positive	Fun	Comfortable	Integrity

Fun was ranked number one. Ask yourself: 'is this a fun place to work?' Fun does not mean teasing and practical jokes, as that can land you in a lot of trouble. Fun is not just giant bean bags and video games (although these can be great additions to break-out rooms in some workplaces). Fun can mean hosting themed days to coincide with national days (Donut Day anyone?), surprising your team by bringing in coffee or providing a lunch, having 'crafternoons' or meetings that end in a team trivia, or a good old chat about trashy TV.

Fun can also mean making unenjoyable tasks enjoyable.

When done effectively, fun helps create a positive work culture. It is in these workplaces that things happen organically.

This Toolkit is essentially about creating a workplace that has a good, positive culture because of the good, positive things that you implement.

The following Pillars cover other things that will bring richness to your workplace, build a good workplace culture, and make your organisation stand out from the crowd - but whatever you do, make sure you focus on being a good leader and a great communicator.

> *Faced with a massive amount of complex work that seemed impossible to get though, we branded the task 'Operation Overwhelm' and adopted a military approach with work teams called Alpha Company, Bravo Company etc. We broke the task down, and the teams had responsibility for chunks of the work. We had regular 'SITREPs', had 'special missions', and used 24-hour time – all things you would hear in a Hollywood military movie. It was difficult work, but we made the process around it fun – the work was still carried out at an incredibly high standard and in a professional manner. The result, we got through the work in time, and we kept everyone happy. Years later, people still talk about Operation Overwhelm.*

Reflection - How is your culture? How do you think you are going? What are your initial thoughts on the points made in this section?

Takeaway - A positive, inclusive, safe culture is a non-negotiable for an employer of choice.

Pillar 1 Recap

1

Communication

You cannot underestimate the importance of good, open communication in the workplace. It is the place to start and the Post-it reminder note you need on your wall.

2

Leadership

Employers of choice are easy to spot as they have the best leaders. Most importantly, they have people who are open to change and willing to learn how to become the best leaders they can be. As Simon Sinek would say: 'they have leaders that eat last.'

3

Knowing your why

Creating a great place to work starts with knowing your 'why'. Why does your business or organisation exist? This is essential as it frames everything that happens in your workplace.

4

A supportive, identifiable culture

Work on your culture. Create a great place to be and your workplace will zing. True story.

Takeaway

A focus on communication is essential in the workplace. It can literally save lives. So, invest in taking the time to get this right.

02 Modern Operations

- Your purpose and your plans
- Policies and procedures - the two Ps

Introduction

Employers of choice know why they are doing what they do. They display modern work practices and have systems in place that create a workplace that is a well-oiled machine. Sounds costly and a bit terrifying? It doesn’t have to be expensive or too hard, but it might involve changing the way some things are done.

As a client or customer, you expect a certain level of ‘operational organisation’ in the places you shop or receive services. For example, if you go into the service centre to change your address, you expect the customer service assistant to have the form that you need, and that this simple transaction will be seamless and you don’t expect to have to wait very long.

Now, imagine if you approach the counter and the assistant does not have the form and they tell you to look it up on the computer with no suggestion of where it might be. Twenty minutes passes and you still cannot locate the form and the service centre staff are too busy to help. Have you lost your calm persona? Are you questioning the operational organisation of this service centre? Do you wonder if they have any processes in place and are you muttering things like 'they have no idea what they are even doing!' Hold that thought – we will come back to it.

Your purpose and your plans

Why do you do what you do? Or more correctly, why does your business exist to do what it does?

Without scaring you off, there are a number of plans you will need in your workplace that will help you look, feel, and behave like the modern operation that you are.

These plans all explain who you are and why you are doing what you do, in varying levels of specificity for differing audiences. The plan hierarchy can look like the lovely graphic here.

In this section, we will take you through the main plans and provide you with some easy-to-use templates at the back of this Toolkit to get you on the planning super highway!

Strategic plans

You already know how important it is to understand and articulate your 'why'. A demonstration of an organised and well-planned operation is the existence of a strategic plan – a document that outlines your 'why', 'how', and 'what'.

Employing organisations of all sizes, shapes, and types need to be able to point to a clear set of instructions that tell us - the customer or employee - why they are here, what they are doing, and how they are doing it. A strategic plan points the way forward for your business. It lays out your business or organisation's goals and explains why they're important.

A strategic plan keeps you and your team focused, provides a solid vision and certainty, enables consistency in messaging and gives confidence to the business, your customers, and stakeholders.

If you are starting from the beginning, make sure you include your team in the development of your strategic plan; it's a great chance to get out the butcher's paper and giant Post-it notes, and to get everyone involved.

If you have a current business plan, you can borrow some of that information when you put together your strategic plan. Remember that your business plan is not an outward-facing document and is not usually available to potential employees.

We like a short and sharp strategic plan – it doesn't have to be a novel (we are sure you have had the displeasure of reading a 30 page strategic plan that leaves you with less of an idea of what they do than before you started). Most strategic plans, even for mega multinational companies, can be articulated in a couple of pages. We think you should aim for just 1-2 pages that identify your priorities and what you are doing to achieve them.

Your strategic plan is your chance to tell all prospective employees who you are. It's your 1-minute pitch, your online dating profile, and a lovely framed window into your world.

Sometimes, you might call your 'why, what, and how' your 'purpose, vision, and mission'.

Purpose: why we do what we do

Vision: what we want to achieve

Mission: how we will achieve our vision

Your strategic plan might also have a set of corporate or business values, but you can have these as a separate document too. These combined statements, captured in a page or two, are your business's entire reason for being.

Your values are what you hold dear and are a great opportunity to involve your team. A team approach to developing these is a great way to ensure you have a collective purpose. Core values are the deeply ingrained principles that guide all of a company's actions; they serve as its cultural cornerstones.

Collins and Porras (6) succinctly define core values as being 'inherent and sacrosanct; they can never be compromised, either for convenience or short- term economic gain.'

How to develop your strategic plan

Gather your information

If you are starting this process for the first time, head to the template at the back of the Toolkit to review the examples and gain a basic understanding of what you need to include in your plan.

Take some time to gather data on your business or organisation. Communication is important here as you want to talk to your employees, (and possibly some stakeholders) to illicit their ideas on how they see the future of your business and what opportunities they identify.

Make sure you take the time to research your market and understand how you are positioned within it. You will also need to have an in-depth understanding of how your business is travelling at the moment. Information from both within and outside your business can help identify opportunities and may even challenge some of your preconceptions, resulting in a better outcome. For example, you may not want to focus on building your plastic bag sales when you take into account changes in single-use plastics laws and a decrease in recent sales.

Formulate your plan

Using the information gathered in step one, it's time to put your ideas and goals on the table and layout your road map to achieving them. Set aside a day or two of planning workshops with your team, or hold several shorter, more focused discussions over a longer period of time.

Finalise and implement your plan

Draft up your plan and get feedback from your team. Finalise the document...and boom! You are ready to implement all of the things you said you would.

Team and individual KPIs are most likely going to flow from this document, so you need to make sure that everyone knows what is expected of them and how they are going to get there. Accountability is essential or the plan is literally not worth the paper it is written on.

Review

To paraphrase, 'the best laid plans of mice and men often go awry' (7). Robbie Burns may not have been writing specifically about strategic plans, but the world changes and so do strategic plans.

It is important that your strategic plan should never be set in concrete; it is an adaptive, constant process used to steer your business towards your outcomes.

Reviewing and refining your plan is an essential part of the process to make sure it remains relevant.

If the market changes, or you achieve a goal earlier than expected, go back to your plan and amend it to reflect the change.

Basic strategic plan structure

There are lots of templates on the internet and you will find a pretty good one at the back of the Toolkit, but here is a rough outline:

- Heading with date range
- Your purpose
- Your vision
- Your mission
- Your values
- Your strategy - key deliverables and measurables

In this very short document, your reader will know who you are, why you are here, what you are doing, how you are doing it, and what the outcome is expected to be.

Operational plans

You may also want to introduce operational plans into your suite of documents. These will help your business achieve its goals by making sure everyone knows what is expected of them.

Your strategic plan shares your why and your vision for the future (2-5 years), while your operational plan lays out how you will get there on a weekly or monthly basis.

Operational plans can be for the overall business ,but you might also have team or division plans. Employees who understand their role and how they contribute to overall business success feel more involved and invested in meeting their KPIs or outcomes.

Your operational plans are more internal than your strategic plan and provide a transparent view of your business's daily or weekly outputs and highlights how each section/team/business area contributes to a smooth operation. Head to the back of the Toolkit for an operational plan template.

Team workplans

Team workplans or team goals are the next level down in the hierarchy of plans your organisation might consider having, as these are essential in guiding the day-to-day work of an organisation. Workplans are more specific and may refer to individual roles.

Team goals can be identified using a combination of methodologies, such as:

- SMART or CLEAR goals - You might have heard of SMART goals (specific, measurable, attainable, relevant, and time-based). They are still around, however, some businesses and organisations like to use CLEAR goals (see diagrams on the following page).
- KPIs - Teams can also use key performance indicators (KPIs) to identify their goals and measure their performance.

Once a team has been formed and goals have been set, it is essential to create a roadmap on how to achieve them. As you do this, remember the following points:

- Leadership is essential to direct the team to its goal and remove any obstacles that may hinder the performance of the group.
- Focusing on priorities is part of the roadmap to success. If goals are not prioritised, focus may be lost, hindering performance and creating a backlog. It also creates unhappy people.
- A focus on effective, transparent communication will help ensure the team members are all on the same page. This could include daily stand-ups or toolbox talks, email updates, stop/go check-ins, or 10-minute check-ins on the project plan. Provide space and empower staff to voice their ideas or concerns about progress.
- Provide relevant training and professional development for your staff to meet their goals and consequently, your organisational goals. You will learn more about staff development in the following sections.

Individual workplans

Your employees will no doubt have the final level down: individual workplans. In everyday terms, these might be the 'to do list' for the day. Some people need to break their tasks right down in order to thrive, as they find great satisfaction in completing tasks on their list. These plans are where your employees track themselves against their KPIs.

> *We write 'to do lists' every day and we get super excited when we are able to 'tick things off.'*
>
> *In fact, 'ticking things off' has become a bit of a war-cry in our team*

SMART goals

S — Specific
Who is involved? What do I want to achieve? When do I need to achieve this by? Why is this goal important?

M — Measurable
How will I measure my progress? How do I know if my goal has been achieved?

A — Achievable
Will it be clear when the goal is complete? Is it reasonable to complete the goal in the time allotted?

R — Relevant
Is this goal related to my overall success?

T — Time-bound
How long should it take to accomplish this goal? When will I check in on whether or not the goal has been completed?

CLEAR goals

C — Collaborative
Your team should work together to meet the goal.

L — Limited
The goal should be limited in its scope, timeline, and complexity.

E — Emotional
The goal should feel important to you.

A — Appreciable
Break the goal into smaller parts to build towards larger outcomes.

R — Refinable
Be flexible and have room to refine the goal as situations change.

Score card

Another consideration for your new, modern operation might be implementing business or balanced scorecards (BSC). A BSC is a performance metric companies use to identify and improve internal functions and their resulting external outcomes.

The BSC involves measuring four main aspects of a business: learning and growth, business processes, customers, and finance. BSCs allow companies to pool information in a single report, to provide information on service and quality in addition to financial performance, and to help improve efficiencies.

We haven't provided examples in the templates, but the internet is full of useful resources if you are interested in investigating this further.

Internal systems

Remember when you were at the service centre and no one could help you find the form you needed to complete for that very simple transaction? Remember how annoyed that made you feel? Fast forward to your first week in a new job and you need to complete a leave form for carers leave. You are told that 'it's on the system' and you spend 20 minutes mindlessly searching for it, navigating an illogical records management system and going down endless rabbit holes. You are probably starting to wonder about this workplace that you have just joined, and whether they have any sort of 'operational organisation' at all.

Having internal systems in place that are easy to navigate is a good business practice. You don't have to be a large business to have some basic systems in place, and you do not have to spend lots of money on software. Microsoft Office is a good package and there are some low-cost accounting systems available that will ensure you are meeting your accounting and auditing requirements.

Another great package is Google Workplace - a collection of cloud computing, productivity, and collaboration software tools, and products developed by Google.

Things to consider getting in order are:

Electronic records management

- Initiate a collective approach to filing and retaining information.
- Store essential information in one place, such as a policy manual and a standard operating procedures (SOP) manual.
- If your business is still very paper based (some medical services still are, as are music schools, for example), make sure your paper filing system is organised and as streamlined as possible.
- Make sure your systems are secure! Keep up with the latest security and systems protection, and look for free Government resources on how to be cyber safe.

Administration

- Use a central calendar or system that records key dates (BAS, GST, reporting, auditing, inspections, insurance due dates).
- Create registers that are easy to find and easy to use (e.g., logbook for vehicles).
- Have easy-to-use and easily discoverable HR and staff forms.
- Record basic instructions for all roles that are accessible; you want to ensure that, as much as you can, operations are not interrupted when staff are absent.

Finance/bookkeeping

- Have good accounting software and people that know how to use it. Always have more than one person looking after your finance. Even if you are a small business, make sure you have the appropriate levels of checking in place - do not leave it all to one person.

  Auditing will only catch issues after they have happened.

Employer obligations

There are a number of essential regulations and practices that you must implement in a workplace. As an employer, it is your responsibility to make sure you are getting this right.

Keeping on top of your legal obligations is not only the law, but also key to building a workplace that is seen as modern and professional.

Some of the key obligations you have are:

- Providing a safe workplace, including a workplace free from bullying, harassment, and discrimination.
- Meeting superannuation and PAYE tax obligations.
- Paying correct wages on time.
- Complying with the Fair Work Act.
- Keeping employee records (leave, wages, contracts).
- Maintaining financial records.
- Issuing payslips.
- WHS, including maintaining relevant insurance.
- Maintaining public liability insurance.

For detailed information on some of these legal obligations you can visit: www.fairwork.gov.au and www.safework.sa.gov.au

Reflection - Do you have a strategic plan? Do you have operational plans? What is your records management like? How do you think you are going? What are your initial thoughts on the points made in this section?

Takeaway - Have a purpose and make sure everyone in your team can find what they need.

Policies and procedures - the two Ps

Policies and procedures explain how you want your business or organisation to operate. They are the essential instructions for why and how things are done. Policies and procedures give employees a well-rounded view of the workplace, allowing them to understand the culture the organisation is striving for, the acceptable behaviours, and how to achieve them.

Policies set parameters for decision-making. They show the 'why' behind an action. Procedures, on the other hand, explain the 'how'. They provide step-by-step instructions for specific routine tasks. They may even include a checklist, process, or steps to follow.

The two Ps effectively define what is acceptable and unacceptable in your workplace.

One of the simplest explanations we came across in preparing this Toolkit is this: if you were leaving on a driving trip, the policies for your drive are the rules of the road you follow, i.e., speed limits, one-way roads, no passing zones, etc. The procedures for your driving trip are the directions you are following to get there, i.e., go 50kms north on the Riddoch Highway until you reach Penola, then take Clay Wells Road west, then turn left at the old tree stump next to John's place. Policies govern how you drive, procedures tell you what to do to get to your destination.

No matter what type of workplace or business you operate, policies and procedures are vitally important. An employing organisation needs to have clear policies and procedures in place as these create standards and help everyone to understand how to operate. They are essential in a transparent workplace.

Policies are often provided to employees in a handbook or manual that includes all workplace policies and procedures, and some policies may form part of the employment contract. Polices are also important for employers as a part of your risk management. A well constructed and communicated policy may help you navigate difficult or complex situations, including staffing situations.

Policies can have a poor reputation sometimes, for being long and very difficult to interpret. However, in practice, a well written set of policies plays an essential role in protecting the employer's interests while creating a positive workplace culture. Well written and well communicated policies and procedures are a hallmark of an employer of choice. According to the NSW Government, (8) the benefits of robust and well communicated workplace policies are that they:

- Help employees understand your expectations with respect to standards of behaviour and performance, and give them defined boundaries that are consistent with the values of your business.
- Provide a set of guidelines for decision-making in everyday situations that employees can refer to, which can help to maintain stability even during periods of upheaval or change.
- Allow you to treat all employees equally, ensuring uniformity and consistency in decision-making and operational procedures.
- Provide everyone with a documented method of dealing with complaints and misunderstandings, which should help avoid any undue claims of favouritism or discrimination.
- Assist in assessing employee performance and establishing accountability.

The two Ps

Creating policies and procedures does not have to be as stressful as it sounds, and there are lots of good templates available for free. If you are a member of an industry association, your peak body may have a library of policies available for you to personalise (for example, Dairy Australia have an excellent policy bank with templates ready to be tailored with the details of individual farms).

Healthy Workplaces SA (9) have a great range of templates available (including alcohol and other drugs, work health and safety) so don't worry, this is not going to take you years to implement.

We think that the 'critical' list of policies you must have in your business are:

- Code of conduct
- Bullying, sexual harassment, and anti-discrimination
- Leave policy
- Recruitment policy
- IT - internet, social media, and email usage
- Drug and alcohol policy (and workplace smoking and vaping)
- Grievance and complaints handling
- Performance development and management/dismissal
- Workplace health and safety
- Child safety
- COVID-safe plan
- Working from home.

You might notice that there are 12 policies in this list. As well as being the ones we think are essential, 12 means that you can tackle one a month!

If you are starting your policy and procedures journey from the beginning, just focus on getting one policy and the corresponding procedure drafted, consulted, communicated, and finalised each month. It is more achievable than you think, especially with a quick timeline.

Example of a monthly timeline

Week 1 - raise potential for new policy at staff meeting, ask for ideas, and draft

Week 2 - circulate draft

Week 3 - discuss draft at staff meeting and make any changes

Week 4 - finalise and present at staff meeting.

As your business matures you might like to add more policies and, depending on the direction your business takes, you will most likely have additional procedures to add.

For example, you may not have any company vehicles when you launch your business, but as you grow and increase profits, you might introduce them as part of your staff packages. If you do, you will need to develop a policy and procedure before the cars arrive.

How to write a policy

If you are looking at templates or starting from scratch, policies should be written in a consistent, standardised way that is well organised, easy to navigate and effortlessly understood by all workers. All policies should follow the same structure and overall look. A policy should have the following structure:

- Set out the aim of the policy
- Explain why the policy was developed
- List who the policy applies to
- Set out what is acceptable or unacceptable behaviour or process
- Set out the consequences of not complying with the policy, if applicable
- Provide a date when the policy was developed, updated, and when it is due for update.

Workplace policies should not be long - brevity is the key. A policy might start a bit like the example below (based on the Institute of Community Directors templates and information from Fair Work).

Bullying Policy

Example

1 - INTRODUCTION

Smith's Solar Fixings believes that all people should work in an environment free from bullying. Smith's Solar Fixings understands that workplace bullying is a threat to the health and wellbeing of its staff, volunteers, and customers. Smith's Solar Fixings is committed to eliminating, so far as is reasonably practicable, all forms of workplace bullying by maintaining a culture of openness, support, and accountability. Smith's Solar Fixings has a duty of care to provide a safe workplace, and ensure, so far as is reasonably practicable, that workers and other people are not exposed to health and safety risks, and accepts and acts on its duty of care. Any reported allegations of workplace bullying will be promptly, thoroughly, and fairly investigated.

2 - PURPOSE

The purpose of this document is to communicate that Smith's Solar Fixings does not tolerate any form of workplace bullying and to set out the process which is to be followed, should any instances of workplace bullying be reported. This policy applies to all employees and contractors.

3 - POLICY

- Smith's Solar Fixings has a duty of care to provide a safe workplace, and ensure, so far as is reasonably practicable, that workers and other people are not exposed to health and safety risks.
- Smith's Solar Fixings accepts and acts on its duty of care and any reported allegations of workplace bullying will be promptly, thoroughly, and fairly investigated.
- Bullying complaints will be handled in a confidential and procedurally fair manner. Where confidentiality cannot be guaranteed, this will be clearly communicated to the relevant parties.
- All parties will be treated with respect.
- The person against whom the allegation is made has the right to natural justice (the right to know what is alleged against them, the right to put their case in reply, and the right for any decision to be made by an impartial decision-maker).

4 - DEFINITIONS

'Bullying' is defined by the *Fair Work Act 2009 (Cth)* as 'repeated unreasonable behaviour towards another person or group which creates a risk to health and safety.' Bullying does not include reasonable management action carried out in a reasonable manner. Examples of bullying include:

- Behaving aggressively towards others
- Teasing or playing practical jokes
- Pressuring someone to behave inappropriately
- Excluding someone from work-related events
- Unreasonable work demands.

The rest of this policy would include more definitions of what bullying and harassment is, outline the responsibilities of staff, and any references. It is important to include a list of any relevant legislation, any related policies and procedures, and any other relevant documents (this might be forms that need to be completed to report an incident of bullying). It is also advisable to include an amendment and version control history, and set a time frame for when the policy needs to be reviewed. It is good practice to get those review dates in a group calendar so you don't forget.

We have provided a basic template at the back of this Toolkit, but as noted above, there are lots of really good policy templates freely available on the internet and through your industry groups. You do not need to reinvent the wheel when it comes to policies, but whichever approach you take, just make sure you have the key ones in place as soon as you can.

Procedures

Workplace procedures are step-by-step instructions for routine tasks. Procedures are often linked to a workplace policy and are designed to help employees implement those policies.

For the purposes of this Toolkit, we are differentiating procedures as two separate groups: one group are the procedures linked to policies (often administrative in focus) and the others are the more practical or technical SOPs, which will be covered in the following pages.

Workplace procedures are developed in much the same way as policies, by involving staff and seeking their feedback during the development phase. Therefore, it makes practical sense to develop your procedure at the same time you develop your policy.

It is important to include your staff in the development of your procedures, as they are the ones who are most likely already following the processes in their everyday work.

Procedures should be reviewed at the same time that policies are reviewed.

Remember - A policy guides the way you operate, outlining to people what to do and why. A procedure tells people how to do it and usually also contains the 'where' and the 'when'.

Make sure that procedures and polices make sense and do not contravene the law. For example, we looked at a procedure that stated that all harassment complaints about the manager had to be submitted in writing to the manager and would be investigated by the manager. This type of error was a foolproof way to limit complaints, but not at all appropriate.

Procedures are often longer than the corresponding policy and that is okay; just make sure all of the steps involved are included, and the instructions are clear to understand and follow. Ensure all relevant forms are listed in the procedures.

The rest of the extract of the procedure below would continue to outline the steps involved in the investigation, support that is provided to staff, and any potential disciplinary action that may be taken.

Example

Bullying Procedure

1 - PURPOSE
The purpose of the Bullying Procedure is to communicate that Smith's Solar Fixings does not tolerate any form of harassment, bullying, or discrimination and to set out the process which is to be followed should any instances of harassment, bullying, or discrimination be reported.

2 - ADVICE
Employees of Smith's Solar Fixings should seek advice if they believe they are experiencing, or are observing workplace bullying. All staff should be encouraged to access the Employee Assistance Program (EAP) support at this time.

Advice may be sought from:

1. Team Leader or Office Manager
2. Management team and CEO
3. Health, Wellbeing and Safety Officers
4. Harassment and Discrimination Contact Officers at our EAP provider.

3 - INFORMAL RESOLUTION
All reasonable attempts to resolve reports of workplace bullying should be made at the informal level, before proceeding to a formal complaint. If the employee feels comfortable doing so, the employee should attempt to resolve the issue directly with the other party by talking or writing to the person in relation to their behaviour.

Introducing a new policy or procedure

The two Cs – consultation and communication

It is essential that your staff are consulted before any new policy is introduced. They need to have the opportunity to understand the changes and to have these communicated in a clear way. The key elements to introducing or significantly changing a policy are:

1. Consulting with all existing staff, before implementation
2. Communicating the change, outlining the context and the purpose of the new policy

Before you introduce a new policy, give some thought to why you need it and what the practical application will be. For example, in some workplaces a Drug and Alcohol Policy is essential, but it must apply to everyone. You cannot have a situation where a manager is allowed to have a beer at work, but other staff are not. You need to ensure that the policy's application applies to all staff, including the leadership team.

Meet with your team when you are considering introducing a new policy and get their feedback by genuinely listening to their ideas. Let them comment on a draft and have the opportunity to provide feedback after the meeting.

When the decision is made to introduce or amend a policy, you need to ensure that it is communicated to all staff. This can be at a staff meeting, as well as via email, and also perhaps a printed copy in their pigeonhole. What is key is making sure that you have provided sufficient opportunity for your staff to review the new policy. Depending on the composition of your staff, you may need to provide alternative ways to communicate the new policy.

It is good practice to have staff sign a declaration when they have read (or listened to) and understood the new policy. It also is good practice to keep the signed declaration on their personnel file.

These signed declarations are very important, especially if you have an issue where a staff member has contravened a policy.

Go to the back of the Toolkit for the declaration template.

Providing access to policies

An employer of choice ensures that all new and existing employees are provided with access to the policies and procedures. This can be a printed version, but a link to an electronic copy might eliminate out-of-date printouts being circulated. If your employees are farm or factory-based and do not have access to computers, a printed version in the lunchroom may work best; just make sure you are always providing the most up-to-date versions.

Providing access to the documents and allowing new employees time to read them can be a part of their induction process (more on that later). Make sure employees understand what they are reading and signing.

Review schedule

You will need to make sure that policies are reviewed, with some able to be reviewed every 12 - 24 months or longer, depending on the type of policy. Develop a register and add the review dates to your calendar or to your scheduling system. It is important that essential policies are up-to-date.

Reflection - Do you have any policies and procedures? When did you look at them last? What are your initial thoughts on the points made in this section?

Takeaway - Make sure your employees have access to the policies and procedures, both paper and electronic.

Standard operating procedures

So, you have your policies and procedures together in relation to your employees. Well done! Everyone now knows that they cannot drink at work or how they can accrue time off in lieu (TOIL).

You may have initially focused on your business's standard operating procedures (SOPs), so they might only need a quick tidy up, or you may be starting at the beginning with those too.

SOPs define the workflow (or steps) and processes required to undertake a given activity. If you are baking a cake, they are considered the 'method'. SOPs provide a shared understanding of how something is done, which is critical in setting expectations for your employees and ensuring consistency of service delivery, production, or manufacturing of a product. A SOP takes out the guess work and makes the process consistent across the business.

You might call them safe operating procedures (SOPs), safe work procedures (SWPs), or job safety analysis (JSAs) and depending on your workplace, these are often mandatory.

When setting out to create a SOP (10), think about the reason why you are creating the document in the first place - ask yourself:

- How will a SOP allow employees and teams to work more efficiently?
- How will following a SOP allow the team to better serve our customers?
- How will following an SOP impact the business' bottom line?

Identifying pain points that currently exist will also allow you to be more specific in determining how the SOP will help your team to be more productive. For example, changing batteries in work vehicles is taking up more time than necessary and holding up your ability to be back on the road quickly.

You will then need to decide on the format of the SOP.

The following are some format examples commonly used:

- Step by step written format
- Hierarchical format
- Flowchart format
- Checklist format.

Similar to developing policies and procedures, you will need to involve everyone who will be engaging in, or impacted by your SOP, including your:

- Leadership team – they will be focused on developing lean operations to achieve high-level business goals, as well as developing best practice. They can define necessary use of resources and equipment, and determine a plan for implementing the SOP.
- Employees – they will be able to determine the validity and plausibility of the SOP in terms of logistics and resource consumption (is it usable?).

The next step is to gather all of your information, and:

- Look for relevant information about the task or process that the SOP will cover, which may include industry guidelines, best practices, and any relevant policies or procedures.
- Seek input from people who have expertise in the task or process that the SOP will cover.

Draft up the new SOP and make sure your employees know the new SOP is coming. You can apply the same two Cs approach here – consultation and communication.

Remember - Include relevant employees in the development of your SOPs, and communicate all new SOPs to your whole team to avoid the 'no one told me' scenario.

Once you and your employees are happy with the new SOP, ensure that you review existing policies and procedures. If there are any existing policies or procedures that relate to the task or process described in the SOP, be sure to review them and incorporate any relevant information into the SOP, and vice versa.

For example, when you develop a SOP for changing the battery in a work vehicle, make sure your work health and safety policy and procedure references the new SOP.

Instructions

In an administrative setting, you may have more general instructions compared with the very detailed SOPs that you would find in a timber mill or engineering workshop.

If the SOP is the brother of the policies and procedures, think of instructions as the cousin; you may not need a Letter Box Policy, but you might need a few dot points that explain where the letter box key is kept. That way, if your administration team are all out of the office, someone else can quickly look in the instruction manual and collect the mail.

Instructions are particularly useful in an administrative or office environment, and it is wise to keep them updated. We understand that these sorts of tasks are often pushed to the side because of urgent, everyday work. But, if you can find a way to schedule in some time each month to check on the most used instructions, you may avoid the situation where a staff member leaves and takes all the knowledge with them.

> *One of the our committee left abruptly and at a meeting about 6 months later, someone casually asked about the mail. It turned out that the person that left used to collect the mail from our post office box that most of us didn't know even existed.*

> *We had our Administration Officer leave quite suddenly and we had been a bit slack at keeping instruction manuals up to date. We literally spent weeks figuring out processes that should have take a few minutes to look up in the manual.*

You may have heard the term 'linchpin' before and in the context of a workplace, the 'linchpin' is that person that holds it all together. We have all worked in businesses where there was one person that held most of the knowledge. The risk is that if they are away or they leave, everything comes to an standstill. Having a good set of instructions minimises the impact of the loss of that person.

Instructions do not have to be written and there is a growing trend for people to record short videos demonstrating the steps rather than writing them out. These are a great alternative for practical instructions like changing the printer cartridge or the filter in the vacuum. And a great way to impart important information to staff that may have different learning styles.

In case of emergency, it is a great practice to have a set of instructions (and policies, procedures, SOPs, etc.) saved somewhere offsite in electronic and paper formats. This way if there is a significant disruption to your premises, you can still access those key documents.

Reflection - Do you have any SOPs or instructions? When did you look at them last? What are your initial thoughts on the points made in this section?

Takeaway - Make sure your employees have access to their SOPs and all instructions, both paper and electronic.

Pillar 2 Recap

1 **Purpose, strategic plans, and operational plans**
Have your 'why' clearly identified and make sure everyone is on the same page.

2 **Team goals**
Set some SMART or CLEAR goals and monitor them regularly.

3 **Internal business systems**
Some low cost, easy-to-use systems go a long way to making your business modern and professional. Remember that when you introduce any new systems, especially IT, provide training and support to your teams.

4 **Employer obligations**
Make sure you are aware of the legal responsibilities that you have and do not, under any circumstances, ignore these if you are getting them wrong. Check your pays and make sure you are up with all insurances.

5 **Policies and procedures**
A good, short, smart set of policies and procedures sets the foundation for what is expected in the workplace and protects you if things go wrong.

6 **Communication**
Just a reminder that you need to keep focusing on your personal communication, as well as your workplace communication.

Takeaway

Remember the two Cs when you introduce or amend a policy or procedure – consultation and communication

03 Care and Inclusion

- Diversity, inclusion, and care
- Social conscience and caring for others
- Work health and safety
- Leave
- Evidence and reasons for leave/absence

Introduction

Employers of choice care about their staff, as well as their customers. With the impact of workplace bullying alone costing the Australian economy between $6 - $36 billion annually (11), employers that build an inclusive and supported workplace can see significant savings. An engaged and supported workforce demonstrates increased levels of productivity, which is ultimately good for the business's bottom line.

But that is not the only reason you want to create a safe workplace. You want to do it because you are a good person, and you don't want a bad experience in your workplace to ruin someone's life. There are a multitude of ways that you can create a safe, inclusive, and supportive workplace and this Toolkit is a good place to start.

Diversity, inclusion, and care

A good workforce is a diverse workforce – simple as that. Diversity is about the characteristics we are born with and the characteristics we acquire. Traditionally, discussions about diversity have focused predominantly on ethnicity, gender, and disability. However, today's definition of diversity covers a broad spectrum of individual and group differences ranging from work styles and generational perspectives to political and religious beliefs.

Diversity in the workplace means that you employ people from a wide range of backgrounds. Working with a team of diverse employees will enhance your business through different perspectives, experiences, and knowledge. Diversity is about difference and this can be demonstrated through employing cat people AND dog people (😉) in your workplace, as well as people from all over the world.

Research shows (12) that diversity can be good for business. It promotes:

- Better business performance and productivity from employees.
- More creative and innovative thinking among staff.
- Improved staff health and wellbeing.
- Lower risk of discrimination and harassment in the workplace.

Why should you have a diverse workplace?

- New perspectives.
- Wider talent pool.
- Increased innovation.
- Better employee performance (and potentially increased profits).

Remember, diversity in your workplace is a good thing. A diverse workplace is a great way for you to build your customer base as people from different backgrounds and experiences may be drawn to your business or organisation if they see themselves in your staffing composition. Diversity is about reflecting the faces of your community in your office, or in your shop.

In Australia, national and state laws cover equal employment opportunity and anti-discrimination in the workplace. As an employer, you must understand your rights and responsibilities under human rights and anti-discrimination law.

It is unlawful to disadvantage employees and job seekers in any way on the basis of the following protected attributes:

- Race
- Colour
- Gender
- Sexual orientation
- Gender identity
- Intersex status
- Age
- Physical or mental disability
- Marital status
- Family or carer's responsibilities
- Pregnancy
- Breastfeeding
- Religion
- Political opinion
- National extraction (place of birth or ancestry)
- Social origin (class, caste, or socio-occupational category)
- Industrial activities (such as belonging to a trade union).

You can find out more about discrimination at www.ag.gov.au The Australian Human Rights Commission also have resources available to help you make sure you are not discriminating at the point of recruitment.

As an employer, you can increase your understanding of Aboriginal and Torres Strait Islander people and their experiences. Your understanding will help you provide appropriate and respectful opportunities for job seekers from these communities. Search the Fair Work website for really helpful information.

Australia is a multicultural society. Almost half of the population were born overseas, or have at least one parent born overseas. A culturally and linguistically diverse (CALD) workplace means having employees who:

- Are from different countries.
- Have different cultural backgrounds.
- Can speak multiple languages.
- Are from different areas in Australia.
- Follow different religions.

CALD employees provide additional perspectives and experience and can help you:

- Understand Australia's multicultural consumers.
- Provide better customer service by using their language and cultural skills.
- Provide access to new market segments and networks.
- Expand internationally to overseas markets.

In order to make sure your workplace is ready to embrace diversity, you should:

- Develop workplace policies and training that promote cross-cultural awareness.
- Hold lunches and events that celebrate workplace diversity and encourage employees to share their cultures and experiences.
- Set up mentoring arrangements that match employees from different backgrounds to foster open communication.
- Arrange disability inclusion training for everyone.
- Have someone from the LGBTIQA+ community talk about being an ally in the workplace.

Caring for your employees is at the heart of an employer of choice. In all the decisions they make, they're thinking about how it impacts their team. This Toolkit includes so many ways that you can show your employees that you care - from paying correct wages, to bringing in donuts. These are all demonstrations of care (and of course some legal obligations.

Here are some other ways that you can show your team that you care:

- Show an interest in their family or companion animals. Ask how Snoopy is doing!
- Remember birthdays and other important dates, including anniversaries of deaths of loved ones.
- But also value boundaries - some employees do not want their private lives to be brought into the workplace.
- Respect work hours and lunch breaks.
- Encourage self-care - make time for a walking group even if it is only a 15 minute stroll. Being out in nature has great mood enhancing qualities.

We heard about a business that had been throwing away 'fake' job applications. They said that they had received lots of applications from people with the same types of names and didn't believe they were real.

In fact, what they had been doing was throwing away a potential pool of outstanding employees, because they didn't understand common names from culturally diverse communities.

Remember - Building a diverse workplace is good. Good because it is the right thing to do and good because it makes your employees and your customers feel welcome.

Employing people with a disability

Growing a diverse workforce includes people with disability. The definition of 'disability' used in the Disability Discrimination Act is broad. It includes physical, intellectual, psychiatric, sensory, neurological, and learning disabilities. It also includes physical disfigurement and the presence in the body of disease-causing organisms, such as the HIV virus. The Act covers disabilities that people have now, had in the past, may have in the future, or which they are believed to have.

> Like people without disability, people with disability work across all industries, in many different roles and bring a range of skills, qualifications, talents, and experience to business.

If you employ or interview someone with disability, you may need to make changes to your workplace to ensure it is accessible. Most people with a disability may not need modifications, however, it's a good idea to chat with them first. As part of your recruitment process, you should provide an opportunity for candidates to let you know if you need to make any adjustments or arrangements for the interview. Changes to your workplace could include:

- Modifying the physical environment including providing an accessible bathroom and parking facilities.
- Making sure your common areas are accessible - don't have your coffee on a high shelf if you are welcoming staff that use mobility aides.
- Provide quiet workspaces.

It is a good idea to talk to your existing team about your new recruit, but first check with the person with disability about what they would like the team to know about them.

It is important to remember people can become disabled or require additional support at any time in their lives. And that for some people with disability, their needs change regularly. For example, some days they might walk with a walking stick and other days they are OK without it. It is important that you and your team understand that disability can look different on different days, and be different for different people.

There is support available for employers, so speak to your local Disability Employment Service for advice and assistance, or reach out to organisations such as WISE Employment, AXIS, and WEDEA Works.

Are you an accessible business?

Can people in a wheelchair access your business? Do you operate a retail store with narrow aisles? Do you have high shelves with no one around to assist with getting things down? Is your driveway uneven? Do you have a chair in your shop or waiting room?

Having an accessible shop or office does not have to be expensive or difficult to put into place. But by making your office or shop accessible, you have instantly increased your potential customer base. You have also instantly identified yourself as a pretty great person that obviously cares about including everyone.

Reflection - Think about your workplace – is it diverse? How do you think you are going? What are your initial thoughts on the points made in this section?

Takeaway – Workplaces that are diverse are good workplaces to work in.

Social conscience – caring for others

A commitment to the wider community and to the planet is good for your workplace culture and also for your 'employer brand'. Supporting local communities and actively being socially conscious helps to create a happier, motivated workforce with a greater sense of purpose.

When people are looking for a new place of work, or when customers are looking for a new place to spend their money, they might want to know a bit more about how your business cares about their community and/or the environment.

You might consider including this information on your website and in your promotional material. However, not everything you do has to be promoted as it can look disingenuous if you have one charity day and try to ride on those coattails for years.

Think about what is important to you and how this can be included in your workplace values for both your staff and your customers. It is essential that you include staff in decision making about how they want to give back to the community in which they live and work.

> *I led a large team in a Government Department, and we dressed casually on a Friday and everyone that participated donated to a charity. Each month we chose a different charity and focused on ones that were small and didn't get the big dollars on big national days.*
>
> *We raised over $250 a month - for small grassroots and community charities that meant a lot. And for us, it meant a lot too. We had the shared experience of doing something good for other people.*
>
> *Did we all leave the office on a Friday after counting the donations with a warm glow? Of course we did.*

Businesses that want to take it to the next level can become certified with organisations such as B Corp, where you meet obligations in relation to social and environmental performance.

It is a big commitment and cost outlay, so you might consider implementing more localised actions such as recycling batteries, donating furniture that is no longer useful, or supporting a local charity or good cause instead.

Reflection - Do you think about the world around you? How do you think you are going? What are your initial thoughts on the points made in this section?

Takeaway – Give back to your community, simply because it is a good thing to do and also a good thing for your employer brand. Get your team together and decide collectively how you are going to do this.

Work health and safety

This entire section should be in bold and ALL CAPS, because we all already know how important work health and safety (WHS) laws, obligations, and commitments are. As an employer, you have a huge responsibility to make sure that your staff get home safe and well at the end of each working day.

It is important that your employees attend regular safety training and that safety is discussed at all staff meetings. In some industries, safety is discussed daily or at every opportunity, especially with new staff, apprentices, and trainees. As an employer, you need to ensure that you have appropriately trained first aid staff, and that their training is kept up-to-date.

Safety is not just about physical harm from a falling tree or box of bolts, or a pallet of water bottles starting a fire (true, it did!). It is about providing a safe environment free from discrimination, bullying, and harassment, and providing a place where mental health struggles are acknowledged and staff feel supported. An employer of choice creates a physically safe and mentally healthy workplace.

Mentally healthy workplaces

As an employer of choice, you need to promote good mental health in your business. The Australian Government have put together some simple steps you can take to build and promote a mentally healthy workplace (13), including:

- Protecting your employees from bullying, harassment, or discrimination.
- Making sure staff have the right level of training and support.
- Being open with employees about mental health in the workplace and have regular check-ins to see how your staff are doing.
- Providing a healthy work/life balance.
- Ensuring your employees know where to go for help.

As a leader and by using those great communication skills, you will make sure you are talking to your staff about mental health and ensuring you have staff trained in mental health first aid. You will be looking and listening for any signs that your staff are not coping, and if needed, you will have hard conversations with your staff to make sure they are safe.

Also, as a leader, you need to be prepared to ask: 'are you OK?' and 'are you going to hurt yourself?' We know that these conversations are tough, but we also know that you will never regret having them; however, you might regret not having them. If you haven't done Mental Health First Aid training do it, as it will help you navigate situations like this.

Remember - It is essential that you check in with your staff and follow-up on any changes really quickly. If you are unsure how, there are some fantastic resources available at www.headsup.org.au

Signs that your staff might need support

While you are getting yourself and your team through mental health training, there are some great resources available online to help you better support your employees (and family). Below are some ideas of signs that a work colleague or employee might need your support (14):

- Turning up late to work or taking extra leave
- Looking tired and seeming stressed
- Having trouble concentrating, making decisions, and managing multiple tasks
- Being unusually emotional and getting frustrated with people
- Avoiding social activities
- Sitting alone at lunchtime
- An inability to accept negative feedback
- Drinking more alcohol than normal
- Avoiding certain workplace activities, such as staff meetings
- Getting overwhelmed or easily upset
- Becoming aggressive and threatening others
- Taking illegal drugs.

If you have concerns, this is when you ask your staff member if they are okay. Before you start a conversation, it is a good idea to plan ahead. Think about what you will say and make sure you have plenty of time in case the conversation is long.

Choose the right moment and find a quiet place that will make the person feel more comfortable. Make sure it is not a time when they will be distracted and avoid communal areas.

Do some research into mental health support services and helplines that you may be able to suggest. And if your employee is in immediate danger, call 000 and wait with them until help arrives.

You will need to do a lot of listening and don't try and solve their problems. You may be able to solve some practical issues like calling to make an appointment for them or finding a mental health provider, but don't try and solve their mental health issues. We know it comes from a good place, but it is best to let professionals work with your employee. As an employer though, you can provide support, access to leave, understanding, and altered duties while your employee navigates their health.

EAP

Providing access to an Employee Assistance Program (EAP) is essential. EAP is a confidential service that enables a professional outside your business to help your staff with personal or workplace issues that might be impacting their performance, wellbeing, mental, or physical health. It can be difficult in regional areas to access face-to-face EAP support, but many services offer tele-health or Zoom consultations. Search online for 'Employee Assistance Programs' – there are services for businesses of all shapes and sizes.

Do not feel like you need to go with a large, expensive EAP provider; you can engage local professionals that you pay as you need. It can be a simple arrangement where they just invoice you as required. Try and make sure you have a psychologist somewhere on your list, in case the support required is more than a counsellor can provide. Also try to have a provider outside of your local area, for the sake of staff anonymity.

Some EAP services provide a 'manager assist' service where you can get advice and assistance on workplace issues. And don't forget yourself, as running a business and managing staff is, at times, the most stressful thing you could possibly do. There are free dedicated Australian Government programs especially for business owners. You can find out more by searching online 'mental health and wellbeing support for managers'.

Reflection - Do you have staff trained in first aid and mental health first aid? How do you think you are going? What are your initial thoughts on the points made in this section?

Takeaway – Always ask the question, are you okay (RUOK)?

Leave

Annual leave

As you know, your award, enterprise agreement, or the National Employment Standards clearly outline how much annual leave your staff are entitled to. A leave policy that outlines when and how staff can access their annual leave is good to have. You might want to cap the accumulation of annual leave (for example, no more than four weeks), or you might need to state that significant annual leave cannot be taken over harvest or shearing season for example, depending on your business.

Rotate leave for the Christmas and Easter period amongst your staff, and make sure you monitor who is getting leave after or before long weekends.

It is considered good practice to ask your staff for an indication of tentative leave every 3-6 months to make sure you know what is coming up. Using a leave calendar or Gantt chart is a great visual way to see what your planned leave schedule looks like.

Remember - Transparency and fairness are essential in building and developing a good workplace culture.

Personal leave

Keeping on top of personal leave balances and usage is critical for organisations of all sizes. It is important as it can indicate where there are potential issues for individual staff or with entire teams. You should have a Leave Policy that outlines how and when personal leave can be used. Personal leave is sometimes called sick leave or carers leave, but whatever the name, it all comes from the same bucket. Personal leave is not usually paid out on a staff member's departure from your business. There are some industries that do pay it out, but it's not common.

Changes to the National Employment Standards have included the provision of family violence leave; it is a requirement that you provide it, if requested.

It goes without saying that an employer of choice would support staff that are experiencing family violence and connect them to any support they might require.

You can also offer additional personal leave to the minimum standards, or to what is set out in your enterprise agreement or employment contracts.

If you are offering family planning, birthday, or 'Doona Day' leave, make sure your Leave Policy reflects these additions to the minimum leave allocation.

And before you introduce any additional leave, make sure you have costed it out. Birthday leave might sound great, but if you have a lot of staff, you may be looking at a significant additional cost to your organisation. Taking back a leave entitlement is not a great move, so perhaps a 2:00pm finish on birthdays is a compromise you could consider.

You may implement a policy in which staff can go into negative leave balances on personal leave, with any negative balance paid off if the staff member leaves your business. Just make sure the policy and procedures are clear, and that this is available to all staff.

I used to work for a company that had no limit on our personal leave. After our first 12 months of service (when the NES minimums applied) we moved on to the Unlimited Personal Leave Policy. Apparently on average, we used less personal leave than staff at companies that provided the minimum 10 days every year. People didn't see it as an entitlement that they should use – they saw it as being there for when they needed it.

Evidence and reasons for leave/absence

Employers can request evidence of the reason for personal leave, for as little as one day or less of work (according to Fair Work regulations). While it is important that employers can, and at times must, request evidence, an employer of choice is mindful of individual circumstances, the reason for leave, and the frequency of leave requests.

Asking for evidence every time a well performing staff member is sick puts pressure on them and on the already stretched medical services in a regional community. Consider the cost involved with more and more medical practices refusing to bulk-bill. Think about the practicalities of a parent with a sick child having to drag them to the clinic to get evidence of the gastro that is keeping them home from day care. Why do you need that evidence? Remember that trust is integral in a workplace with a good culture.

We also completely understand there are times when employees are struggling and are taking a lot of leave. You are absolutely entitled to request medical certificates, but make you are also talking to your staff about their use of leave and asking if everything is okay.

An employer of choice is open about mental health and supports their staff seeking assistance and treatment. You might negotiate with staff facing mental health challenges that they do not need to secure evidence of illness for everyday they are away.

You might also agree that their partner or carer can call you to advise of a personal leave day, as they might just not want to talk to anyone if they are having a really rough day. Although annual leave should be used for rest and relaxation, you might allow staff to access paid annual leave if they have exhausted their personal leave, as the added pressure of no income on top of health challenges can be incredibly stressful.

A note on flexibility versus flex time

We are about to talk about flex time and later in the Toolkit we will discuss 'flexible workplaces'.

Flex is short for 'flexible time worked' and refers to the agreements where staff can start earlier, finish later, accumulate any additional hours worked, and take these as flex leave.

A flexible workplace is one in which the employer supports things like varied start and finish times, compacted hours, and working from home.

Some places of work that allow flex time are not really very flexible places of work. They might allow employees to accumulate additional hours worked but they may not openly support working from home. Also note that some very flexible workplaces do not allow flex time accrual.

Flex and time off in lieu

Flex and time off in lieu (TOIL) are sometimes available in workplaces. Or you might have an arrangement in your workplace where everyone gets an RDO once a month because of a slightly longer working day. In this document, flex refers to the recording of start and finish times to keep a running calculation of hours worked, with additional hours banked to use as time off. TOIL is the use of that accumulated flex. Alternatively, in some workplaces, TOIL is recorded for bigger chunks of time worked rather than the extra minutes worked every day.

> *We have a policy in our workplace where flex is not recorded but any extra work that has been agreed to in advance can be added to a TOIL accumulation. For example, if our manager asks us to work an extra hour on an urgent thing, we can record that but if I chose to stay and do an extra 15 minutes to finish something, we don't record that.*

Whatever you decide to do to remunerate additional hours worked, it must be clearly set out in an appropriate policy with clear procedures, easy-to-interpret instructions, and a robust record keeping system. We cannot stress this enough. We encourage you to include the clause that all additional hours must be approved by a supervisor/manager, as a flexible approach to the approval of extra hours worked can become an absolute nightmare when you have staff claiming they worked extra hours and you have no evidence.

> *We had a pretty tight policy and approval process for additional hours worked. But I still ended up in the court system. It is a long and complicated story, but my advice is that if a staff member works 'unapproved' extra hours, you need to address it immediately and make it very clear what your expectations are, highlighting your policy and approval process for additional hours worked. It sounds harsh, but if you have a staff member that ignores your direction and works and claims additional hours, you need to move to a performance process – take my advice, do not let it fester.*

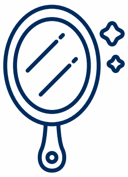
Cultural leave

The Fair Work Ombudsman has valuable information and resources available to support businesses and organisations employing Aboriginal and Torres Strait Islander peoples. Like all employees, Aboriginal and Torres Strait Islander peoples have pressures and responsibilities relating to their home and community life. However, there are some specific cultural issues that employers need to understand, including:

- The importance of family and kinship ties.
- Cultural obligations.
- Significant dates and cultural events.
- The need for time away from work for issues such as sorry business.

For many Aboriginal and Torres Strait Islander peoples, responsibilities to family, community, and culture are extremely important. These responsibilities can sometimes conflict with workplace responsibilities.

These are serious issues, which employers should discuss with sensitivity and respect, in order to find a solution that's best for everyone. The Fair Work website has more information: www.fairwork.gov.au/find-help-for/aboriginal-and-torres-strait-islander-people



Reflection - You can have all sorts of additional leave – just have a policy in place that is fair and transparent. How do you think you are going? What are your initial thoughts on the points made in this section?

Takeaway - Be fair and consistent.

Employers of choice encourage flexibility in a working day (more on that soon), but whatever you do, make sure you are consistent, transparent, and that you have a policy in place.

Pillar 3 Recap

1

Diversity, inclusion, and care for employees (and customers)
When you are planning your recruitment, think about creating a workplace that is diverse and represents the world around you - this type of workplace is a richer and more rewarding place to be.

2

Social conscience
Demonstrating care for your community and the world you live in can be good for your workplace culture and also a good thing for your bottom-line as people are increasingly interested in the types of places in which they give their business.

3

A commitment to health and safety
This is incredibly important and your employee’s physical safety and mental health need to be on your radar.

4

Leave
It's great if you want to create additional leave to support your employees - but cost it out, create a policy, and be consistent!

Takeaway

A good workforce is a diverse workforce.

04 Recruitment and Retention

- Workforce planning
- Attraction and recruitment
- Induction
- Retention

Introduction

Employers of choice stand out like a lighthouse at night in the way they treat their employees and their potential employees, and it all starts long before the job advertisement is printed in the paper. Employers of choice treat their customers and clients in a way that already defines them as a business worth engaging with.

According to the Tasmanian Government (15) 'employers that care about their people and build well-managed, inspiring workplaces have a competitive edge in the search for skilled labour, retain their people longer, and celebrate the unique contribution individuals can make in a team. Satisfied staff whose ideas are sought out and valued are more productive and provide better services, helping to win new customers and keep existing ones.' These are the types of workplaces that are recognised as employers of choice.

Before you start working through this section of the Toolkit, take a second to put yourself in the place of a potential employee – let's call them Carla. Carla sees your job vacancy on the RDALC Job Board. Your advertisement lists basics about the role, location, and the salary but not much else. Carla also finds another advertisement from one of your competitors. The other advertisement provides all the basic information plus a detailed summary of the role, information about their business, highlights options for flexible working arrangements, and refers to a training program that is available.

If you were Carla looking at the advertisements, would the salary be the only thing you were interested in? Or would you like the idea of working for an employer that provides training and flexible working arrangements? Be honest. Think about the type of place you would want to work. You might have worked for someone else before you started your own business – what was that like? Would you like to be asked for your ideas and solutions? Would you like to be included in decisions that are being made? Would you like to be treated with respect and valued in the workplace?

Remember - Your chances of long-term retention start before you even advertise.

Workforce planning

Before we get into the 'how to attract and retain staff' section, you need to think about your workforce in detail. Workforce planning is a valuable process, but it does take some work and for some of you, might seem a bit much for your business. This is an overview, which points out some key considerations for developing what might be a 'back of the envelope' workforce plan.

What is workforce planning?

Workforce planning analyses your current staffing situation and identifies skills gaps and potential vulnerabilities in your workforce, such as productivity or turnover. In simple terms, it is about having the right number of people with the right skills in the right jobs at the right time in your business.

The benefit of undertaking a workforce planning exercise is that it helps you prepare your business or organisation for future challenges, analyses your workforce competencies to ensure you can achieve your goals, and reduces the cost of ineffective hiring processes. We have based some of this process on the very useful tool developed by Jobs and Skills WA (16).

Step 1

Context and environment

Workforce planning needs to be directly linked to your business plan and your strategic plan. If you haven't got your business plan and strategic plan yet, you need to stop here and put those together (see the back of the Toolkit for a template and instructions).

When you have your plans in front of you, think about:

- What are my business goals?
- Where is my business heading? Is it growing, shrinking, or is there new technology that will change the way you operate?
- Who are my customers? Is that changing?
- What is happening in the broader business environment? Are there new competitors? Is the product we manufacture becoming redundant?
- What is happening elsewhere in the world? Are there growing geopolitical issues that can impact my business either in a positive or a negative way?

Step 2

Current workforce

Look at your current workforce, and at the demographics, the skills, and expertise you already have in your team. Understanding the make-up of your workforce is important, especially when it comes to the age of your employees. Although conversations around retirement need to be managed very carefully, if your entire workforce is in an older age group, you might need to, as a matter of urgency, think about the continuity of your business and plan how you can retain or capture that corporate knowledge.

Look at your staff turnover, results of any exit interviews, and any other information that you have on your workforce to determine your current staffing situation.

Large organisations will have large amounts of data they can analyse, but even a small business can make a simple table like the one on the following page to collect some key information. If you do not have some of the information, you can survey your staff or if your team is small, ask them to complete a form based on the table.

Remember - As a part of your workforce planning, make sure you are aware of all annual leave accruals and long service leave entitlements for your current workforce. Being aware of your total leave liability is critical.

Name	Age	Commenced	Role	Quals	Previous roles/other skills	Rating*
Dolly Schepz	57	01/05/2000	Finance Manager	B. Accounting	Primary School Teacher	1
Raj Sharma	31	12/02/2022	HR Manager	B. HR Management	Mechanic	3
Barry Longley	26	16/11/2019	Delivery Driver	Cert III Fitness Instruction	Fitness Instructor	5
Stacy Ranger	49	05/08/1999	Engineering Manager	Masters, Engineering Science	Cave Diver	1

Risk ratings: 1 = critical role, 3 = required role, 5 = optional role
*Risk rating – we know that it sounds a bit dramatic, but you need to think about the risk to your organisation if that staff member leaves.

When you undertake this exercise, you need to assign a risk rating to each of your staff - what is the risk to your business if they left one day and did not return? You might think that it's a bit rough that Barry is only a 5, but in this example, the owner of Smith's Solar Fixings has a cousin who owns a delivery company so they can easily outsource that role if Barry leaves.

Alternatively, depending on your business, Barry (your Delivery Driver) might be a 1, whereas Dolly (your Finance Manager) might be a 3 or even a 5 if you have an external bookkeeper and accountant who can fulfil the role (and might be more cost effective and efficient in the long run).

Think about these questions as you complete the risk rating process:

- Would your business be significantly hurt if you couldn't find someone to fill the job?
- Does one of your employees already have the skills you need but isn't using them in their current role?

Reflecting on the other skills your workforce has is important, as there are times you may need to re-deploy staff in a crisis. In this example, Raj may be able to get your truck back on the road when your only mechanical service in town just burned down.

Step 3

Future workforce

You have looked at your business goals and the environment in which you operate, and you have analysed your current workforce. Now, you need to put that information together to look at what your workforce might look like 3-5 years from now.

In great news, the team at Smith's Solar Fixings are happy that the Government are installing a million solar panels* and their fixings are one of the few on the market (*this is made up). With a commitment to procuring locally made, Smith's are confident that your business will grow.

This is an opportunity to think about the diversity of the population, skills shortages, and the development needs of your current workforce as potential job roles change. Now you have an idea about where your business will be in 3-5 years, you can think about what your ideal workforce will look like - think about your A Team and how you will get there.

Step 4

Find the gap

This is where you look at your goals, your current workforce, your future workforce and find the gaps. Using the example above, although there are some competitors, Smith's have the patent on a particular solar panel fixing so their business will continue to grow for at least the next 5 years.

Continuing with this example, when Smith's are thinking about recruiting for the future, they might want to have someone in the team with qualifications and experience in logistics, given their projected increase in output and sales. In your business, your sales may have been moving online, which has highlighted a gap in your current skills mix, or you might have been smashing it on social media but need some more expertise in that area.

You might undertake the gap analysis now, but not move to fill the gaps (recruitment) until later - this is OK as you will be prepared for when you need to start recruiting. You can prepare the position description and make sure you cost the wages in your upcoming budget projections.

Step 5

Filling gaps and building your team

Now you are armed with your workforce plan, you can look to fill the gaps in your business. Make sure you know what skills and experience you are looking for and remember that skills can be taught - attitudes and behaviours are much harder to change. Think about your workplace culture and how your recruits will fit in.

When you have decided what you are looking for, you will need to develop job descriptions or position descriptions (PDs) (if you haven't already done so) for any new roles, and check that your existing PDs are up to date. Ensure any tweaks are made before you start advertising.

And again, make sure you have costed out a new hire and you have the budget for it – taking on staff that you cannot afford is a nightmare for everyone involved.

As with any good plan, make sure you review and evaluate as you go.

Remember - Workforce planning might seem like a lot of work, but it is an important task to undertake to make sure you have the right people in the right jobs at the right time.

> *'Plan your work and work your plan.'*

Reflection - Have you undertaken a workforce planning exercise? Or is it on your list of things to do? What are your initial thoughts on the points made in this section?

Takeaway - It's a smart move to plan for your business's future.

Attraction

You will have have heard the terms 'attract' and 'retain' used increasingly over recent years in discussions about workforce. In simple terms, they can be defined as the following:

- **Attraction** - enticing the right people to apply for jobs with your organisation.
- **Retention** - keeping the right people in your organisation.

Employers of choice attract the right candidates and retain them by providing them the right roles and the right conditions.

In this section we look at attraction and the process of recruitment in more detail. You may have picked up by now that we think attraction starts long before you think about workforce planning and any resulting recruitment.

Attraction starts when you create your business or organisation, and maybe even from that very first sentence of your business plan. The type of organisation you build and the culture you develop will set in motion the chances you have attracting and retaining employees. But don't panic - if you have things to improve on, you can still become the type of workplace that attracts and retains the right people.

How to write a position description and person specification

Ensuring that you write clear job or position descriptions not only helps you find the right person, but it also defines what they will do once they become a part of your team. Badly written position descriptions create workplace headaches. The good news is, they can be easily avoided.

A well-written position description will make it clear what the role entails and what the employer's expectations are. It is essential employees know what is expected of them and how their success will be measured.

The position description outlines the responsibilities, duties and objectives of the role, the salary, and benefits on offer. It also includes reporting lines and sometimes lists who the key stakeholders are. It explains why this job is required by the business and how it fits into the team and existing organisational structure.

A person specification is a written summary or profile of your ideal candidate. It lists the skills and experience that are required, and includes the qualifications that you require as well as things that are considered 'desirable'. For example, for a role for a qualified mechanic, it would be essential that they possess a trade certificate as a fully qualified mechanic and under desirable you might list forklift license - it would be handy if they had it, but not essential to them carrying our the role.

There are some great resources available on the internet if you are starting out – search 'how to write a position description' and look at webpages from reliable sources such as State or Australian Government sites.

Of course, we want to make it easier for you, so you will find an example on the following page, and a template at the back of this Toolkit. In our example, we include the person specifications in the position description and it is okay to do that - easier to keep it all in one.

Position description

SMITH'S SOLAR FIXINGS

Role: Administration Officer
Location: Beachport
Salary: $65,000 (FTE), plus superannuation
Hours: Full-time, but other hours considered
Other: Driver's licence required

Who Are We?

Smith's Solar Fixings are a leading manufacturer of high quality solar fixings. We are a family owned business, with a focus on innovation and modernisation, located in Beachport, South Australia. We celebrate collaboration and a collective approach to work, support flexible working arrangements, and value the contributions of our entire team.

The Role

The Administration Officer is responsible for providing high level administrative support to the Smith's Solar Fixings team. This is a pivotal role for our business, working as a part of the wider team in all aspects of service delivery.

Working with the Office Manager, the Administration Officer will coordinate the day-to-day administrative operations of our business including answering incoming calls, group email box management, accounts receivable and payable, maintaining office supplies, and organising meetings and events. The Officer will assist with payroll and credit card reconciliations.

The Officer will also manage travel and accommodation requirements for the Management team (and other staff where required).

Duties and Tasks

High level executive and administrative support to the team

- Provide high level administrative support to the organisation including answering incoming calls, group email box management, accounts receivable and payable, maintaining office supplies, and credit card reconciliations
- Draft correspondence for Manager
- Arrange travel and accommodation
- Assist the Team with preparation of reports and events organisation
- Assist with developing and maintaining policies, procedures, and instructions.

Person Specification

Essential

- High level office administrative coordination experience
- Ability to work in a dynamic environment, responding flexibly to changing needs, competing demands, priorities, and deadlines
- Ability to develop and maintain sound working relationships with a range of people
- Ability to use initiative and informed judgement to make well considered decisions
- Advanced computer skills (including, but not limited to, Microsoft Office Suite) and the ability to adapt to a wide range of special purpose software
- Sound knowledge and experience in administrative procedures, practices, and record management systems.

Desirable

- Experience with accounting software.

Personal Qualities

- Develops and maintains effective working relationships and networks
- Takes responsibility for the delivery of quality and timely results
- Maintains professionalism and confidentiality when dealing with sensitive issues
- Understands, supports, and contributes to strategic direction and plans
- Supports and responds positively to the drive for change and innovation.

Key Relationships

Office Manager, Manager, and Team

Direct Reports

Nil

How to recruit

So you are now armed with a new or updated position description – it's time to get recruiting!

But wait! Before you open the floodgates and start advertising, you will need to decide what your application and recruitment process will look like. You might want the applicants to call the contact person and chat about the role, or you might want them to write a cover letter, or address a selection criteria and send in a written response.

Prior to advertising, you will need to make sure you have all the associated documents organised, like the selection criteria questions and applicant guidelines.

Applicant guidelines

To save a lot of lengthy phone calls about the application process, employers can put together applicant guidelines and make them easily available to interested candidates.

The guidelines set out the application process, provides contact details, and outlines what comes next. There is an example at the back of this Toolkit if you would like some ideas on what to include in your document.

Prepare your people

You will need to arrange a contact person (and a back-up) for your recruitment process. It is a good idea to have selected your interview panel, as well as blocked out some time to focus on this process. If your interview panel have never conducted an interview, now is your time to provide them with some training or guidance.

If you are using a human resources or recruitment professional, they will be leading this process - you can negotiate with them on how much involvement you would like and what they will be taking care of.

Application process

Phone call or resume drop off

For a less complicated process with a casual job, you might ask the candidates to give you a call for a chat and drop in their resume.

Cover letter and resume

For a written application process, you might ask the candidates to outline their skills and experience in a cover letter and to provide a copy of their resume.

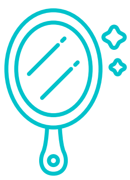
Set a page limit for the cover letter and make sure you (or your applicant guidelines) explain what you want the cover letter to include. But be prepared, applicants won't always follow your instructions - this can be a good way to shortlist people out!

Selection criteria

You may have used selection criteria previously as a part of your recruitment process. If not, this is where you have applicants respond to a set of questions as a part of their written application. This method is used to see how applicants have previously approached a situation, as they will be asked to give examples when answering your questions.

It is common to respond in the STAR format:

- Explain the **situation** and **task**
- Outline the **action** taken
- Explain the **results.**



Reflection - Do you have current PDs for all your roles? Do you update and review them regularly?

Takeaway - A good position description is like a solid foundation – a must if you want that building to stay up.

Attraction – let's recruit!

Before you post that job advertisement, it is worth having another think about your employee value proposition (EVP). Remember, your EVP is the value that an employee receives in exchange for spending 7 ½+ hours a day working for you.

Your EVP includes those tangible and intangible benefits you provide your employees, and it is a key part of your employer brand – the image you portray to the world. Think about your EVP as the good things you will tell your prospective employees about what it is like working for you.

A good EVP and employer brand tells a clear and compelling story about what is expected of employees and what they can expect in return.

Having an EVP and a clear employer brand is critical to staying competitive in today's labour market, because it forces an employer to differentiate themselves and define their message to the types of workers who would be a good fit. Millennials especially need to understand and agree with an EVP to be convinced to work for a company.

Remember Carla right at the beginning? They decided to apply for a job with your competitor because they just didn't feel they had enough information about your workplace and the type of employer you are. Your job advertisement is your chance to shine to people outside your organisation (coupled with your social media and/or your website).

Businesses are competing in an increasingly global market for sales and for talent. If you are hoping to attract workers, especially highly skilled workers, you really are competing globally. Attracting staff to your business or organisation is, quite simply, critical for its survival. Unless you are a sole trader in the true sense of the word, you will need to recruit people to work for you, and sometimes, do this many, many times over the course of your career.

When you are planning to run your job advertisement? Think about your audience - who are you trying to attract and where are they most likely to see your advertisement?

- You might choose to advertise in print media, but be aware you may not get a lot of interest as readership of regional papers is not as high as it once was. Think of it more as a branding tool to create employer brand awareness in the wider community. You might consider radio advertising if you are trying to attract tradies as they seem to love booming radios when they are working onsite.
- The online job websites are big and to be honest, your advertisements can get lost. However, you might still want to throw your hat in that ring as the websites do get a lot of page visits. RDALC have a free Limestone Coast Job Board that can list your vacancies on – email jobs@rdalc.org.au to have your local vacancies included.
- Increasing numbers of employers harness the power of social media and take to Facebook, Instagram, and LinkedIn to promote their vacancies.
- It is important that industry develop good relationships with high school and post-school education facilities, because making those connections and creating pathways while students are thinking about their future is key. You might want to get involved in school career events and be actively involved in work experience programs.
- Use your networks, as well as your team's networks – you might offer incentives to your staff when they refer suitable people to the vacancy, and a bonus if the referral is offered the job.

How to write a good job advertisement

Job title - get it right

This may seem like common sense, but employers do get it wrong. Don't use a fancy name for a role that is commonly known by something else. If the role is for a Labourer, call it a Labourer and not a 'Special Assistant to the Builder' - people search for jobs online by the title and they will discount weird looking job titles.

When you are writing your job advertisement you need to sell the role, your organisation, the location, and the opportunity that this role provides the applicant.

For a lot of roles in rural, regional, and remote locations, you might be trying to attract someone from out of the region, so make sure you are promoting the good things about working and living where the role is based. Mention facilities like the airport, schools, the TAFE SA or University campus, and the great range of restaurants, theatres and natural wonders.

Providing information about your business or organisation sets the scene for potential applicants and gives them an insight into the organisation they might want to join. It is your opportunity to reinforce your employer brand.

It's all in the details

It is important to provide the right amount of detail in a job advertisement, and to get the details right. We often see jobs listed with errors and missing information like location, hours, and whether it's a part-time or full-time role.

It's a good idea to provide any benefits, such as a car or access to a wellbeing program, and possibly flexible working arrangements.

Many organisations provide the salary upfront in their job advertisements, however, some employers like to provide this later. We encourage you to provide a salary range, or at least some indication of remuneration as this will help ensure that your target audience are reading your ads, and will hopefully limit the number of unsuitable applications.

Keep it simple (but include the essentials)

Don't get fancy and make the role sound like something that it's not. You can be succinct and informative without using all the latest buzz words. You do need to be clear about previous experience and the essential qualifications a candidate needs to have. Make sure you are not asking for things that are not required - for example, don't ask for a degree qualification if you really don't need it.

Also, don't ask for 3-5 years experience as a matter of course - you may be excluding a talented graduate or an enthusiastic school leaver who will quickly acquire the skills you need.

It's important to make the job application process clear, so refer applicants to your applicant guidelines.

Mind your language

Make sure your job advertisement is professional and does not include language that is discriminatory or could be viewed as offensive or derogatory. If the role has physical requirements, rather than stating the ideal candidate must be 'fit and healthy', give an indication of the task so the reader can decide if they can physically undertake the role. For example, 'this job requires lifting of bags weighing 15KGs and walking outside on uneven terrain.' Straightaway potential applicants can decide if they are able to undertake that type of work. This can be empowering for applicants with disability as they can make the decision as to whether they are suitable, versus you making an assessment of whether they are 'fit and healthy.'

Remember - Your job advertisement is an opportunity to promote your employer brand and highlight your employee value proposition.

Be responsive

If you provide a phone number or email contact for enquiries about the role, make sure you get back to potential applicants as soon as you can. People will not want to work for you if you don't bother returning their call. Ensure you respond to all applications received, and give the applicant an idea of what happens next – you can have a standard email response set up if you get a lot of applications.

> Dear XXX,
>
> Thank you very much for your application for the position of Administration Officer. Applications close on 14 October 2023, after which time we will assess all applications received. Please expect to hear from us soon after that. We appreciate the time you have taken in preparing this application and the interest that you have shown in this role.
>
> Kind regards,
> Terry Smith

A note on 'non-genuine' and clearly unsuitable applicants

We all know that there are people who may apply for multiple jobs as a part of a reporting requirement for benefits or financial support. Some of these applicants may not be 'genuine' applicants for every job they apply for, but some might be, so you need to be mindful of that when you shortlist applications.

It is a good reminder that you need to be aware of any biases that you may have throughout the entire recruitment process.

You might also receive applications from people who clearly do not have any of the skills and experience that you are looking for. Here are two approaches for how you might manage the applicants that are either non-genuine or clearly not suitable:

1. You can assess or 'shortlist' as you receive applications and exclude applicants at this stage (wait a day or two). Send them a quick email thanking them and finalising the process for them.
2. You can acknowledge every application received with a thank you (like the example at the top of the page) and keep all applicants in the process until you assess all applications. They will then be notified as 'unsuccessful' with all other applicants.

We encourage you to respond to every applicant – it is damaging to your employer brand if you do not respond to applicants (it can get tedious if there are lots of online applications – use templates as it makes the jobs faster)

> Dear XXXX,
>
> Thank you for your application for the position of Administration Officer. We have assessed your application and unfortunately on this occasion your application has not been successful.
>
> We appreciate the time you have taken in preparing this application and thank you for the interest you have shown in this role.
>
> Kind regards,
> Terry Smith

Reflection - Are your job advertisements promoting your business? Could you do better? What are your thoughts on this section?

Takeaway - Prepare some standard responses to save you time.

How to run a smooth recruitment process

So you have posted your job advertisement, and you have your applications in front of you – what comes next?

A successful recruitment process is timely, transparent, and keeps candidates informed of what is happening. Running a professional process is another opportunity to reinforce your employer brand, promoting to the world your good workplace culture.

Assessing or shortlisting

This is where you assess the applications you have received and decide which applicants make it to the shortlist – it is not an easy thing and if you have a big heart, sometimes it can be a little soul destroying. Having a clear set of requirements (a good position description), an assessment template, and a good, fair process makes this easier.

As mentioned above, you can shortlist as you receive applications and exclude applicants that are clearly not suitable. If you are doing this, wait a few days – a rejection a few minutes after the application is lodged is not a good look.

To help you assess your applications, you could have short a template with the role requirements and a rating scale for each applicant against those requirements - it might look like the example below for a Administration Officer role in which you are looking for someone with experience in a similar administration role, formal qualifications in administration, customer service experience, and very good IT skills.

Applicant	**Qualifications** Min. Cert II required	**Admin experience** 1-3 years required	**Customer service** 1-3 years required	**IT** Intermediate level with MS Office	**Total**
Josef	2	4	1	2	9
Julia	4	4	3	2	13
Juan	1	4	4	4	13
Jake	0	0	4	4	8

0 = does not meet minimum, 1 = partially meets minimum, 2 = meets minimum,
3 = partially exceeds minimum, 4 = exceeds minimum

When you are undertaking your assessment, you use the scale to rate each applicant against the essential requirements. You then add up the ratings and come up with a total for each applicant. In this example, you may decide to interview all your higher ranked candidates, however, if formal qualifications are essential and more critical than 'customer service skills', you might decide to interview the candidate that scored a 9.

Remember - Only ask for minimum qualifications as an essential requirement if they really are.

Once you (and your interview panel) have finished the initial assessment and decided who you will progress to the next stage, you can advise the unsuccessful applicants. Or you can wait until the very end of the recruitment process. Here are some suggestions for approaches you might consider at this stage:

1. You can advise all your unsuccessful applicants now as it means they are not sitting and waiting for news. It also means you are going to reduce the number of calls and emails seeking updates on the progress of their application. Send them a quick email like the example a couple of pages back thanking them and finalising the process for them.

2. Even though you have assessed and shortlisted your applications, you can wait to advise everyone after the interviews are conducted. Some employers like to do this as they might have lots of applicants very closely rated and they might choose to interview a batch and then go back to the group for further interviews for the people that rated second highest.

3. It can take up a bit of administration time, but you can assess and shortlist out the clearly not suitable candidates as you receive applications, then reassess all seemingly suitable applications, again advising those that score a low number. You can then interview and advise everyone remaining at the end of that stage. Sounds complicated? It's not really. With some template emails set up, it doesn't take too long.

Remember - Whatever you do, make sure you acknowledge every application you receive, even if it's a casual job for a school aged child.

We hear about the good, the bad, and the ugly of recruitment processes!

Invitation to interview

If you can, it is ideal to shortlist about 4 - 5 applicants. If you are inviting people to interview, they should have rated highly on your assessment template and have the skills and experience you are looking for. Don't ever interview someone for the sake of it.

Also, don't advise someone known to you to apply if you have no intention of interviewing them – long conversations that result in someone being actively and enthusiastically encouraged to apply can be potentially brand damaging if you never wanted to see them reach the next stage.

Your interview panel might be three people, or just you and someone from your team. Or in some cases, just you. Think about the diversity of your panel, and if necessary, bring someone in from outside the organisation to assist you to create balance on the panel. Remember that diversity includes background, gender, and age.

It is good practice to ask your applicants at this stage if they have any accessibility requirements for the interview. Applicants may not tell you they are neurodiverse or experience anxiety, but you might like to keep this in mind when you advise applicants of the next steps - you might present instructions and information loosely in the form of a social story.

Social story example

- For address description: We are the big yellow building at 123 Smith Street

- About parking: You can park at the front of the building and come to the red door

- About the process: We will meet you at the red door at 10.00AM and bring you into a small meeting room. You will have 10 minutes to read your interview questions. We will then come back and collect you and take you to a larger meeting room. There are bathrooms that you can use just near the larger meeting room.

Interviews

There are many ways you can undertake the interview process, from a casual chat at the counter in your store, to a full sit down panel interview. Whichever process you undertake, gone are the days where interviews were bizarre tests where you try to catch someone out – this approach is a waste of everyone's time. Giving people the chance to show their best self is what the interview is all about.

If your job requires expert typing skills for example, you may have your candidates undertake a typing test. Similarly, if your vacancy is for a communications role, you might give the candidates 30 minutes to write a draft media release. It is a good idea to always tell your applicant in advance if they will be undertaking some type of work sample testing at an interview.

As your interviewees arrive for the interview, greet them with a smile and offer them a place to sit and wait. Again, whichever process you follow, just make sure you are clear. For example, 'thanks for coming in Tony, we are going to have a quick chat about your experience and I'll show you around the workshop.' Or you might be conducting a formal process and provide a lengthy briefing on what happens next.

If your interview is sitting down in a meeting room, provide water, tissues (a runny nose can strike at any time), and a pen and paper. Make sure the applicant knows they can re-start a response or come back to one if they get nervous. Taking care and being considerate of applicants is the hallmark of an employer of choice - employers of choice don't make people feel stupid or uncomfortable.

> *We send out questions two days before the interview. At the interview, the candidates all get 10 minutes reading time with the additional questions. And in the interview, they get one question that they have not seen before. We think this is a good mix as we get to see how they respond with the varying times to prepare.*

1 Interview with advance questions

For some roles, sending some of the interview questions in advance of the interview is a great way to give your shortlisted candidates (your interviewees) the chance to use examples they are most proud of and most confident sharing. It can also make for a more relaxing interview.

Asking a combination of questions in advance and new questions at the interview will give you the opportunity to see how the candidate responds with longer preparation versus a short period of reading time.

Have your panel members take it in turns to ask questions and make sure you have someone writing down the interviewee's responses.

2 Questions on the day

In reality, sending out questions in advance may not be the appropriate process for your type of vacant role – if you are filling a casual role at your shop, it would be overkill to have a formal process. Or if you are a small business, you may not have the time and capacity to do that. Still, try to make sure your process is professional.

Even a small business might conduct a panel style interview, but all questions are asked on the day - the interviewee does not get any preparation time at home before coming in. In this instance you could also print the questions out and give the interviewee a few minutes to read over them before you start.

Your interview might not be based around written questions, but rather a series of practical questions about the intricacies of the task, such as 'talk me through how you would check for leaks in a fuel line.' Or, you might ask the candidate to show you how to put cups on if they have told you they have worked in a dairy previously.

Your interview could be a combination of the two approaches with some questions and some practical exercises.

Shortlist after interviews

This bit can be really hard. Sometimes, it's easy – you have a candidate who shines at the interview, and they are everything your business or organisation needs. Sometimes you have four great candidates, and you spend the next week awake all night, unable to make a decision.

You (or your interview panel) would have made some notes at the interview (or soon after if it was a stand-up chat). Use these to help complete an interview assessment template like this (you will find one at the back of the Toolkit).

Applicant	Question 1 Admin example	Question 2 Solving an IT issue	Question 3 Difficult customer	Question 4 Time managment	Total
Julia	4	4	0	2	10
Juan	2	4	4	4	14
Josef	3	3	3	3	12

0 = failed to answer question, 1 = partial response , 2 = good response,
3 = very good response, 4 = excellent response

When making your assessment after the interviews, always go back to the position description, your assessment templates, your workforce plan, and reflect on your workplace culture – and try to be objective. You want the best fit for your organisation and the best skills and experience, but always focus on the potential the applicant has (remember, skills can be taught).

If you are still struggling as your candidates are very close in the final rating, maybe have a confidential discussion with your trusted advisor. You might conduct referee checks on all great candidates rather than your top two. Some businesses conduct personality tests or strengths assessments by external organisations. These can be expensive and still may not give you the answer you want.

You could conduct a second interview or take each candidate for a coffee - it is more than okay to do that, but make sure they know that the final decision has not been made and that this is still an interview.

> *I interviewed an applicant that was so nervous, they started to cry. We stopped the interview, took a quick break, and chatted about travel and what we liked to watch on TV. Once they were feeling more relaxed, we started again.*
>
> *You need to remember that some people may not have had an interview in a long time, and they may really want this job.*
>
> *Did the crying make them a 'liability' – no, it just meant that they were a normal person who was having a really bad day which coincided with an important event. Referee checks confirmed that, and they were offered the job.*

Referee checks

These are an important part of the recruitment process and are usually undertaken after shortlisting your interviewees. Make sure you let your applicant know that you are going to contact their referee(s).

It's a good idea to have some standard questions to ask the referees so you can compare the applicants against each other - you will find a template at the back of this Toolkit that you can use for your referee checks.

Final choice

This is the happy/sad bit where you get to offer someone a job and possibly break someone's heart. Try and do this with compassion.

We like to offer the job via a phone call and tell the unsuccessful candidates via email - it is hard work to hear bad news over the phone. But always offer a phone call or opportunity for feedback – it's the least you can do.

If your job vacancy was for a casual employee that you only interacted with over the phone and in person, you will have to give them a quick call to let them know that they have not been successful.

Always be nice - remember the way you deal with all job candidates can impact your employer brand. While you can send an SMS to acknowledge receipt of a job application, SMS rejections are not great for your employer brand.

Regardless of the outcome, you want people to remember your recruitment process as professional.

Dear XXX,

Thank you again for coming in to meet with us last week. We really enjoyed getting to know you more at the interview and hearing about the great work you have been doing at Andy's Welding Workshop.

Unfortunately, on this occasion you have not been successful. We have offered the position to another candidate as their skills and experience aligned more closely to key aspects of the role.

We do genuinely thank you for all the time and effort that you have put into your application, and we hope that you consider us again in the future.

Please let me know if you would like feedback on your application and interview.

Kind regards,
Terry Smith

Reflection - Do you do your business's recruitment? What are your pain points and roadblocks? Will you make some changes to your process?

Takeaway - Your job advertisement is your chance to shine.

Can't fill a role? A note on the migration program

There are times when the right person is not available at the right time and you might have to look a bit further afield to fill your workforce gaps.

You might consider employing a visa holder that is already in Australia with permission to work, or you might sponsor them to come and work with your business from within or outside Australia.

What is a visa?

A visa is a form of permission for a non-citizen to enter, transit, or remain in a country. Visas can be issued for work, study, or purely tourism purposes. There may not be a physical visa issued, but there is always some type of official notification advising that a visa has been issued or granted.

The Visa Entitlement Verification Online (VEVO) system in Australia allows visa holders, employers, education providers, and other organisations to check visa validity and conditions. Importantly for employers, it will indicate if the applicant has permission to work in Australia.

Who issues visas?

The Australian Government's Department of Home Affairs is responsible for the migration program and makes all decisions on visa applications, as well as the final decision on whether employers can sponsor workers.

The Government of South Australia, through the Department for Industry, Innovation and Science's Skilled and Business Migration program, assists with supporting businesses that are looking to access the program. It plays an important role endorsing applicants under the Designated Area Migration Agreement and certifying employers in the role of a Regional Certifying Body (please note these are only some of the options available to employers).

The Skilled and Business Migration program also provides migrants a pathway to living, working, or establishing their business in SA through the support of State Nomination.

Types of work visas

There are two main types of work visas - visas that are sponsored by a specific employer and visas that are independent of an employer.

Under a sponsored visa (temporary or permanent), the employer has been approved by the Australian Government to employ a specific person for a specific job. The employer may have had to seek endorsement or certification by the Government of South Australia. Examples of sponsored visas include: the Designated Area Migration Agreement (DAMA) and the Skilled Employer Sponsored Regional (494) visa.

A non-sponsored worker can be temporary or permanent, allowing the visa holder to work for whoever they like. Working Holiday and Graduate visas are all non-sponsored temporary visas with work rights.

How does the process work?

The migration program is far from simple, but distilled right down in simple terms it can look a bit like this:

- The Employer has a vacant role that they cannot fill, and the occupation needs to be on one of the Government's Skilled Occupation Lists. And the job needs to be a real one.
- The visa applicant needs to make sure their skills and experience meet the minimum requirements of the occupations, as per the ANZSCO code.
- The employer needs to meet the requirements of being a sponsor (if it's a sponsored visa).
- The visa applicant needs to be of good health and character and meet other requirements.

There is a **big disclaimer here** - all migration requirements are all subject to change.

Visit the relevant Government websites for information and consider speaking to a migration agent about what is right in your situation. Visit www.omara.gov.au for more information.

Offer of employment

In reality, long term retention of your employee started when you first advertised the role and has continued through the entire recruitment process (actually, it started long before all of that). The offer of employment and any salary negotiation is another part of the process that you need to get right.

You may use a contract that your lawyer has drawn up for you or you might use the very simple 'create an employment contract' tool at www.business.gov.au Whatever you use, make sure it is a good one!

Just in case you don't know, an employment contract is an agreement between you and your employee. It can be written (or verbal), but a clearly written contract can help:

- You both to understand your employee's rights to certain pay and conditions.
- Manage your employee's expectations of their new role.
- Protect your business, for example, through confidentiality and intellectual property terms.

We think that a written contract is always preferred as it avoids any miscommunication or misunderstanding. The employment contract must provide your employee with, at least, their minimum legal entitlements. You can find these in the National Employment Standards and the relevant industry award or agreement (if one applies). But you can always choose to provide more generous terms and conditions.

In the lead up to the signing of the contract, and the period after that, there are a lot of opportunities to get your future relationship right and get it wrong.

Once the contracts are signed, invite your brand-new employee to work events, seek their ideas on the office equipment or supplies that you are going to purchase for them, and make sure you ask about any adjustments you may need to make to the office for them. If possible, invite them in for a coffee before day one.

On-boarding

The next stage can be referred to as 'on-boarding' and the following process is 'induction' - a good on-boarding and induction program is essential in retaining that staff member.

Make sure you keep in contact with your new employee. Send them your work newsletter if you have one, as well as information about your office and their new team – a floor plan, photos of staff, and information about staff fridges, coffee supplies, and office fruit supply for example. These little things are important in making sure that you are inclusive of people that are neurodivergent or have general anxieties, as information about basic office layout and routine processes might help ensure a better experience on day one.

This 'on-boarding' phase may include processing important information to ensure they are on your payroll and human resources systems - if you can, it's great to have this done ahead of them commencing as it will ensure they get paid and are officially on the system.

Behind the scenes, your team might be setting up computers, ordering new tools, getting safety gear organised, setting up stationery, getting the printer connected, and putting together links to the most important documents or instructions the new recruit will need.

You will also be scheduling the induction week/s using the induction template at the back of this Toolkit, and making sure everyone that needs to be involved has blocked out time in their diaries. Try and plan for a smooth day one.

> *We used to invite new starters in for coffee and cake before they started - it diffused some first day nerves!*

Induction

Yay! Get the donuts in – it is a happy day. Your new recruit has arrived at your workplace and is excited to be there!

Even if you sent a floor plan to your new staff member in advance, the first thing on the list for day one is the office/factory/site tour with a special visit past the toilets, kitchen, and coffee machines, as well as meeting their new colleagues! And also, the safety briefing – perhaps the single most important thing to cover that day, especially if you are in a manufacturing environment.

The induction is not just a day or two. You need to think of the induction as a 3 - 6 month period in which you and your team are making a concerted effort to help the new staff member settle in to all aspects of their role.

Having said that, the first week or two are critical to get right. The first days and weeks are your chance to shine as an employer of choice and to make another great impression on your newest employee. The best way to keep everyone on track is to use your induction schedule that you have put together (there is a useful template at the back of this Toolkit).

There will be times you might be pulled away to undertake urgent work, but especially in the first few days, make sure you have a plan and a support person for your new joiner – no one likes standing around like a spare wheel in a new job.

Some of you might be thinking 'they should be looking for things to do' – yes, once your new staff member has been with you for a while you would expect that. We would not encourage brand new employees to look for things to do when they have not been trained – this could land them and you in all sorts of trouble.

Make sure you are scheduling in your one-on-one conversations and reviews through the probation period and across the first 6 months. It is important both parties know how the working relationship is progressing and where some support, training, or guidance is needed

An elected member told us that they were not shown where the toilets were on day one at Parliament House. No one bothered to let them know and by about 1.00PM, they really needed to know!

Reflection - Do you have an induction program? How do you think you are going? What are your initial thoughts on the points made in this section?

Takeaway - On-boarding and induction are your chance to increase the chances of retaining employees.

Remuneration

There are lots of things we have said you need to get right (we know the list is getting long), but paying your staff is probably right up the top. Ensuring you are paying the correct award rate or the correct rate as per your Enterprise Agreement or contract is absolutely not negotiable.

Underpaying staff is an offence and we do not have time to visit you in prison. So make sure you get it right. If you are unsure what you need to be paying your employees, Fair Work can assist and guide you with the updated rates of pay.

If you are paying above award rates, you will need to regularly look at what the market rate is for that type of occupation. For example, you pay your administration assistant $63,000 but you have a good look at current vacancies, and you do some sleuthing on the internet and you can see you are below the market rate by $5,000. It might be time to re-assess that salary, and perhaps have a look at your other employees to see where their salaries are sitting.

Being an employer of choice does not mean you have to pay the highest wages in town – remember, it's the combination of all the things outlined in these Pillars that can help make you an employer of choice.

But incorrectly paying staff or paying way under market rate, no matter how good you are at all the other things, will keep you out of the employer of choice gang.

If something goes wrong and your payroll cannot run as scheduled, communicate with your staff about the issue and make it your priority to have it sorted out. You will have staff that have mortgages and loan repayments coming out of their bank accounts and if you are late with your payroll, you will start a snowball of misery. Communication is the key here – talk to your staff about the issue and update them on the solution.

Earlier in the Toolkit we mentioned pay rises – remember to link these to your performance development process to ensure transparency and fairness.

Remember - You need to issue payslips to your employees and make sure new staff (especially trainees and apprentices) understand their payslip.

'If you hire people just because they can do a job, they'll work for your money. But if you hire people who believe what you believe, they'll work for you with blood, sweat, and tears.'
– Simon Sinek

'People want to know they matter and they want to be treated as people. That's the new talent contract.'
– Pamela Stroko

Retention

The probability of retaining your staff starts long before you commence any recruitment activity – it starts when you think about the type of workplace you want to create. It continues every time you do something to create a positive workplace culture. All the things in this Toolkit impact the chances of you retaining your employees.

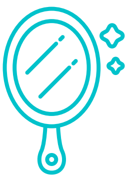
The Work Institute's 2017 Retention Report (17) estimates that it costs as much as 33% of a worker's annual salary to replace them. Retention is about your ability to keep the staff that are critical to the ongoing success of your business or organisation. And in some ways, the driver of becoming an employer of choice is this – to keep the people you want to keep that make your business the success it is.

The costs of replacing staff includes:

- Job advertisements
- Recruitment agency or head-hunter
- Time spent shortlisting applications, contacting applicants, and conducting interviews (and delivering bad news when people are unsuccessful)
- Loss of productivity during early months of a new starter.

There are lots of reasons why staff leave and sometimes, the reasons are completely out of your control. Implementing some actions that are covered in each of these Pillars will hopefully help ensure that your employees choose to stay with you (we have covered some of these and will dive into the others in the next section) – these might include:

- Make sure you have conversations with your staff, have a robust performance development framework in place, and talk to your staff about how they are.
- Undertake stay interviews with your staff - find out what you need to do to help ensure they stay.
- If your team is large, undertake staff engagement surveys (if your organisation is too small, staff will avoid being honest as they will fear being identified).
- Provide flexible work options, including compacted working weeks and work from home (WFH).
- Check your salaries are correct and check the market is not leaving you behind.
- Offer a reward and recognition program.
- Make sure staff training and development is a focus.
- Provide meaningful work.
- Engage staff in decision making.
- Provide clear career paths. If you are a small business, there may not be many opportunities for career progression, but you can make sure there are opportunities for staff to act in higher roles and to take on other responsibilities.
- Deal with issues as they arise and don't sweep them under the carpet.
- Conduct exit interviews with your staff who do choose to leave.



Reflection - What is your current retention like? How do you think you are going? What are your initial thoughts on the points made in this section?

Takeaway - Retention starts with you and the workplace you have created.

Pillar 4 Recap

1

Workforce planning

It might seem like a lot of work, but this is an important task to undertake to make sure you have the right people in the right jobs at the right time.

2

Attraction and recruitment

This is your chance to shine! Be professional and be responsive - never getting back to candidates is not good for your employer brand.

3

Induction

This is not a day or two. It can be a months-long process where you support your new employee on their journey with you.

4

Retention

Your great workplace culture will help here, as will your leadership and your focus on communication.

Takeaway

Your chances of increased retention started long ago, but make sure your recruitment process has an eye to retention at all times.

05 Support, Develop & Reward

- Flexible working arrangements
- Performance conversations and stay interviews
- Training and development
- Rewards and recognition

Introduction

Happy staff, happy life? It doesn't rhyme but it's true – if you have happy staff, your workplace is going to be a happy (and a more productive) place to be for everyone. And you will have happy staff when they are supported, rewarded, and provided with opportunities to develop.

Flexible working arrangements

Work-life balance is not a phrase that will be unfamiliar to you, but it is a concept that you need to embrace, arms wide open. Our workplaces are made up of parents, carers, people studying, people with chronic health issues, and can you believe it, people with a life outside of your business or organisation!

Employers of choice recognise this and are aware of their employees' life issues and experiences in their business, their planning, and their operations. For example, if you have parents with school age children, try not to schedule meetings at 3:00PM every day, and avoid your work retreat during school holidays.

What are flexible working arrangements?

Employers can offer flexible working arrangements at any time, but there are provisions in the Fair Work Act (18) that give employees the right to request flexible working arrangements in certain situations.

Under these provisions, some employees who have worked for the same employer for at least 12 months can request flexible working arrangements, such as changes to hours, patterns, or locations of work. Employees covered by an award also have some extra rights when asking for flexible working arrangements. Examples of flexible working arrangements include changes to:

- Hours of work (for example, changes to start and finish times)
- Patterns of work (for example, split shifts or job sharing)
- Locations of work (for example, working from home.

The Fair Work Act states that employees (other than a casual employee) who have worked with the same employer for at least 12 months can request flexible working arrangements if they:

- Are a parent, or have responsibility for the care, of a child who is school aged or younger
- Are a carer (under the Carer Recognition Act 2010)
- Have a disability
- Are 55 years or older
- Are experiencing family or domestic violence
- Provide care or support to a member of their household or immediate family who requires care and support because of family or domestic violence.

As an employer, you must consider any written application you receive from your staff requesting flexible working arrangements. But we don't think you should wait to be asked - we think employers of choice will make available a wide range of possible arrangements.

Flexible work ideas

There are lots of great ways you can provide flexibility in your workplace. The following suggestions are from Business.gov (19) on ways you can create a better work-life balance by offering flexible arrangements to any staff:

Part-time hours: You could consider reduced-hour working weeks (less than 37.5) - do you need everyone to be full-time? Is 35 or even 25 hours enough for some roles? Be open to suggestions from employees on what part-time arrangements might look like.

Flexible hours: Allow staff to start work earlier or later in the day - is an 8:30AM start necessary for everyone? If you are not client facing, perhaps your 'opening hours' for phones might be 9:30AM. If you are a manufacturing or processing business, does the early shift need to start at 5:00AM?

Look back at why your hours of operation have been set and see if you can make any adjustments for all staff or at least be open to changes for some staff.

Flexible working arrangements might also include staff finishing their day from home after school pick-up or getting in early to take care of some focus-tasks. Think about creating roles that are school hours friendly – make sure you have thought about this as a part of your workforce planning.

Compressed hours: Your staff could work four days a week instead of five by working longer hours. Yes, they are still working full time, just over less days. If you do not need them physically in the office, you might be open to these arrangements.

Work from home or remote work: You might agree to staff working from home, using mobile offices (hot desk arrangements at other locations), or working in public places like libraries. The COVID-19 pandemic has changed thinking for a lot of employers on working from home – it can be great for computer-based staff (and can be a cost saving for businesses that have ran out of desk space).

Job sharing: You might look at two or more people on part-time hours sharing one full-time job. With some agreed communication processes, and a well-structured handover, this is a great option for some employees and employers.

Purchased leave: Your staff can access extra leave by reducing their annual salary. A Purchased Leave Policy is something to consider for staff who have caring responsibilities and may need to take leave over school holidays.

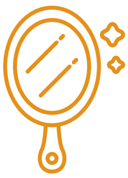
Unpaid leave for school holidays: You can allow staff with school-aged children to take unpaid leave during school holidays. For staff who cannot purchase leave, employers of choice offer extended unpaid leave (make sure you consider other arrangements, as unpaid leave is not possible for everyone).

Subsidies for childcare: childcare is a big expense for families with under school age children. You might consider providing part-payment or a subsidy to help your employees increase their hours.

Return to work support: offer programs that help employees return to work (RTW) after extended leave.

Extended leave may have been due to family commitments or injuries (that will have a dedicated plan for RTW), but you might like to consider a part-time or graduated return option for all staff coming back from a significant period away.

Remember - All of the things listed here are considered part of your employee value proposition and they can make up a huge part of your attraction and retention policy.



Reflection - Do you have a flexible workplace? How do you think you are going? What are your initial thoughts on the points made in this section?

Takeaway - No should NOT be your default answer to flexible work arrangements.

Performance conversations and stay interviews

Supported employees have leaders who want to talk to them about their performance! A good Performance Development Policy is a key activity that supports positive performance partnerships between leaders and employees and is a basis for effective people leadership.

When you are thinking about developing your Performance Development Policy (and procedure), you might want to focus on a simple framework that is based around scheduled, constructive, and forward-looking conversations that will assist in ensuring that your employees are aware of the tasks, goals/KPIs, and responsibilities expected of them. And it will give you the opportunity to see that your team are progressing against their goals/KPIs.

But buyer beware! Performance development is not an effective tool if you meet twice a year and scare off your staff with a list of peeves and gripes. An employer of choice has leaders who use ongoing feedback to regularly talk to staff about their performance. You celebrate their successes in public, and you take them off to a quiet space to let them know when things have not gone to plan.

Remember about 59 pages ago when we said how important communication is? Well, this is where it will have the leading role in your Hollywood blockbuster. Open, honest, and at times tricky communication is the key to a good performance development process. Meaningful, regular performance conversations allow employers and employees to build a shared understanding of expectations, agree on what success looks like, and how it can be supported, achieved, and maintained.

Feedback

Ongoing workplace feedback through meaningful conversations is key to a happy, thriving organisation. Regular one-on-one discussions and feedback opportunities should be initiated with your employees at regular intervals and in different formats over the course of the year.

It is important that leaders think about giving both reinforcing and redirecting feedback as a part of the ongoing feedback approach.

- Reinforcing feedback is given when you want someone to keep doing a certain positive behaviour. When you give this type of feedback, you are verbally reinforcing the positive effects of your staff members actions.

  'It's great when you answer the phone in such a friendly, helpful way - clients have a great impression of us from the moment you answer the phone. Thank you!'

- Redirecting feedback is when you ask employees to stop doing X and start doing Y. If you want to talk about something more serious that could have gone better, make sure you give your staff members an indication of the topic for discussion so that they can prepare for the conversation.

  'Can we have a chat about the phone call that you just took? It's really important that when you answer the phone, you greet the clients in a professional way. Let's go through some ways you could answer the phone calls.'

There are lots of types of feedback you can provide your employees including informal, formal, appreciation, and coaching. You might have used the 'feedback sandwich' in the past or it might have been used on you - it's best to avoid this type of feedback as it is important to try and give more positive feedback than negative feedback. If the only feedback you hear is the negative, it is likely you will stop listening.

By having regular one-on-one catch-ups with your employees where you raise any issues and areas for growth, nothing should be new at the formal performance conversations .

Formal performance conversations

Alongside the ongoing feedback that you provide your employees at one-on-ones, your performance development framework should include 2-3 formal conversations a year where you get together and develop a performance conversation agreement. This is the document that you then return to at each of your other formal conversations to check in and review how things are going.

These formal conversations should not be feared (black tie is not required), however, not everyone is comfortable with identifying where they may need improvement or they may have had horrific feedback sessions in the past - make sure you keep this in mind.

You can use these formal conversations to outline your employee's work goals/KPIs, objectives, and identify training or support required/requested. It should also provide a self-evaluation opportunity. It is a good idea to view your framework as a cycle. Each year you commence an agreement with your employees, you get together mid year to review their progress, and then you meet again at the end of the 12 months to review the year and set your agreement for the following year.

If you are a small organisation with a handful of employees, you may keep your agreement very simple - a basic template that you complete together and review throughout the year. There is a template at the back of the Toolkit that you might like to use.

If you are a larger organisation, you might invest in an employee engagement platform that includes the performance agreement, feedback tools, and and on-line training courses. For larger teams, these platforms are essential as they can provide very useful analytical tools to monitor engagement, performance, and training compliance.

To commence a simple performance conversation agreement, arrange to get together with your employee. It's best practice to give them plenty of advanced notice that the conversation is taking place - two weeks is a good lead time. You might ask them to pre-fill the agreement template before you meet, or you can do it together at the conversation.

The agreement sets out your employees goals/KPIs and any other indicators or areas for growth that they might want to include. You can consider the agreement as a living document that can be changed (with agreement) throughout the year. The most important thing is that you and your employees are clear about what they have agreed to achieve over the next 6 - 12 months ahead.

So you have your agreements in place and six months have passed - it is time to get together and have a chat about how things are going against the goals/KPIs and any other indicators.

Again, make sure you give advanced warning of the conversation meeting and find a quiet, private space to meet - the lunch room in front of other staff is not ideal.

When you are undertaking the formal conversation and completing assessments on performance, employers should reflect on:

- The work your employee has been involved in and how they have met their goals and objectives.
- Any new tasks or new objectives that have been introduced.
- Any aims, tasks, or duties that need to be prioritised over the next period.
- How your employee is travelling in relation to your organisation's values and culture (you might have a Values and Behaviours Policy. If so, hopefully any issues in which the staff member has failed to meet this policy should have been addressed separately).
- Any possible development/training needs and updating of skills and knowledge which are specific to the position.
- Any issues that have been raised across the last six months - you are not going to give them a telling off but you can reflect on any progress or areas for growth.
- Career aspirations and opportunities for development.

When things have not gone to plan for an employee, remember it is important that these issues are first raised outside of this formal conversation. There is a rule that nothing new should ever be raised in a formal performance conversation – your employee should know both the good and the not so good before they sit down in front of you as you will have been providing feedback throughout the year.

It is good to view these formal conversations as follow-up/review discussions in relation to something that has not gone so well. Similarly, when things have gone well, the formal conversation should not be the first place the staff member hears about it.

When you are working through your performance conversation agreement with your staff member, you might consider asking these types of questions:

- What has gone well over the past six months?
- What has been a struggle?
- What could you have done differently?
- What have you learned over this period?
- What is helping or hindering your performance or development?
- How can I support you? What would you like me to do to help you? What more do you need from me?
- What are your career aspirations?
- Do you need any other support or equipment to enable you to do your work more effectively (technology, flexible working, adjustments to support disability)?
- Do we need to make changes or variations to the objectives that have not yet been completed?

New issues or concerns might be raised by the employee in this formal conversation. As an employer, it is critical you deal with any concerns or issues in a timely manner in or after the session. Don't feel rushed to agree to changes or to provide guidance on a matter that may be sensitive or that may involve other staff members.

Thank your employee for raising the issue, but advise them you will need time to formulate a response. Set the timeframe and make sure you prioritise this.

Remember - Nothing new should be raised in a performance conversation. Your employees should know the good and bad before they sit down with you.

Stay interviews

Conducting a more formal check-in with your staff members in the form of a stay interview is something that you might want to consider. A stay interview is when an employer sits down with an employee to gather information about the things their employee values about their job and to discover what the staff member believes can be improved.

Stay interviews are an opportunity to uncover what motivates your employees to remain in your organisation, giving you some insight into which parts of your EVP resonates with employees and which parts need some more work.

If you are undertaking stay interviews, make sure you listen to your employees, and where you can, implement their suggestions. These types of discussions might happen in a more organic way as a part of your regular one-on-ones.

A note on 360° feedback

You may have heard about 360° feedback (also known as multi-rater feedback, multi source feedback, or multi source assessment) and you might be thinking about implementing and undertaking the process in your workplace. If you haven't heard of it, this is a process through which feedback from an employee's colleagues, supervisors, and peers (and sometimes external stakeholders), as well as a self-evaluation by the employee is gathered.

A word of warning – it can be a very in-depth, confronting, and expensive process which is generally undertaken by professionals.

You might not want to undertake the full 360° process, but there are some other things you can do to bring peers into your workplace feedback process.

> *We had a feedback exercise at work where people would provide positive feedback about their peers. We all wrote something down that we really valued about their contribution to our work. People wrote things like 'I like the way Eugene always asks me how I am going' and 'I really appreciate Jim as he offers to help when he can see I am struggling'. It was just really nice and made us feel good when when knew that people in our team valued the work we did. I think my favourite was when someone said they loved the way I always asked if they were okay. I think I might have cried a little bit.*

A final word on performance conversations

Whatever approach you take with your performance development and performance conversations in your workplace, the key is ensuring that you actually implement them. There is no point developing an amazing process if you are never going to do it.

As you have seen here, it doesn't have to be big and scary - an approach that includes regular one-on-ones and a simple template that includes goals/KPIs and progress is sufficient for a lot of workplaces.

If you are uncomfortable with providing feedback or undertaking performance conversations, be upfront and tell your employees you want to talk about their performance, that you find these conversations difficult, but you really want to chat and go over a few things. Being honest and transparent is not a sign of weakness. You can also get some professional help if you are not comfortable at all with having these types of conversations with your staff.

It is more than okay to say to your team 'I am not great at expressing myself in these meetings, but I am working on that. I want to talk about the way you interacted with Barry last week.' This is much better than a leader who avoids being open and honest with their staff. Regular discussions and encouraging openness is a good thing, even if it starts off being uncomfortable.

Reflection - Think about communication in your workplace again, how do you think you are going in relation to performance conversations with your employees? What are your initial thoughts on the points made in this section?

Takeaway - Always be open, honest, and constructive. Celebrate the wins and help find solutions to the losses.

Training and development

What is training and development?

In preparation for this section, we tried something different and developed some new skills along the way - we consulted AI. You might think this was a strange thing to do, but we wanted to see if this new tech really understood the subject.

According to ChatGPT (20), 'training and development refers to the process and activities designed to help individuals acquire new knowledge, skills, and competencies as well as improving existing ones. In practice, the terms 'training and development' are often used interchangeably, and many programs combine elements of both training and development to help individuals acquire new skills and reach their full potential.'

Before you say it, we will, 'why should we train our employees if they are just going to up and leave?' To that we say, 'why would you leave an employee untrained and on the loose in your business?'

Businesses of all sizes should encourage skill enhancement and development through ongoing training and development. Continuing this type of investment in your workforce is an opportunity to enhance the skills available across your entire organisation. Creating a learning environment sets off a chain reaction that leads to more proficient employees, which leads to greater productivity, increases the confidence level of the individuals, and helps reinforce that great positive workplace culture you have developed. All good things. Even in small businesses and organisations with limited training budgets, there are ways to foster development, growth, and advancement.

Through your induction program, your performance development process, and your regular ongoing conversations, you will have identified the training and development needs of your staff. Some of the training needs might be addressed with in-house on-the-job training and support or just a few hours mentoring with another colleague, whereas some needs might be better suited to an external training or certificate level course (or higher).

> *'The only thing worse than training your employees and having them leave is not training them and having them stay.'* - Henry Ford

You will have set a training budget as a part of your overall budget process, but setting a budget is not enough – make sure you are setting aside time for staff to undertake the training they need.

There are lots of high-quality local training providers, and there are low-cost or even free training courses available locally and online. Your industry or peak body or suppliers of your equipment often have great free training programs.

The ATO, www.business.gov.au, and Office for Small and Family Business (Government of South Australia) all have great online basic training suitable for a wide range of employees.

Supporting the development of your staff does not just mean sending them off on an external training session, it means giving them the opportunity to use those skills in the workplace. You need to make sure you set aside time to let your staff put those new skills into action.

Remember - Training is an investment in your people and your organisation, not a cost.

Giving staff the chance to 'act' in higher positions is a great way to support their development. You may have a small team with a flattish structure – this makes the reality of career progression difficult, however, giving your employees the chance to step up into a more senior role, even as backfill, is a fantastic opportunity.

Look for other ways you can provide opportunities for development in your workplace. Some ideas are to:

- Create opportunities for staff to run staff meetings.
- Encourage junior staff to attend functions or events usually reserved for more senior staff.
- Encourage staff to plan and run office events – don't leave it to the leadership team to determine those activities.
- Bring people in on projects they would not ordinarily be involved in – 'we would really like your ideas on this sporting club project as we know you have a keen interest in football – we think your insights would be really valuable here.'
- Encourage staff to share their expertise with other staff (lunchtime learning).

Reflection - What is your training program like? How do you think you are going? What are your initial thoughts on the points made in this section?

Takeaway - Provide opportunities for your staff, even in a small workplace.

Rewards and recognition

Rewarding and recognising the contribution of your employees is key to employee engagement. Employers of choice establish programs that actively value the contributions of all staff.

Employees who do not feel appreciated are less loyal to their employers, and are more inclined to be looking elsewhere. Whereas employees who feel recognised are more engaged, show increased productivity, and loyalty to the business or organisation.

Rewarding and recognising your staff forms a part of your workplace culture and will be an obvious part of your employer brand. When you are developing your rewards and recognition program, make sure you have a structure in place on how and why you recognise staff.

Transparency is key here - you do not want a situation where staff feel other staff are being favoured. A policy will help, but as an employer, celebrating the contributions of your entire workforce might be something that is more ad hoc. For example, you might send everyone home an hour early ahead of long-weekend as a general thank you.

In setting up your program, think about:

- Identifying the achievements your business or organisation wants to support.
- Identifying the desired behaviours/ outcomes for rewards.
- Determining the appropriate rewards.
- Deciding how you will communicate the program to staff.

Make sure your rewards program is aligned to your strategic plan and your operational and team plans.

How you can recognise and reward

You might have seen the ‘employee of the month’ photos on the wall of some workplaces – some staff get a kick out of seeing their faces up on the wall. Others, not so much. You might want to give some thought to how you recognise your staff.

Awards, certificates, a coffee voucher, an ‘early minute’, lunch, or a gift voucher are some ideas. For example, if your sales team exceed their KPIs, you might shout them all a coffee and a scroll as a surprise thank you.

Some employers utilise their local business association events and workshops with attendance as rewards and recognition for staff, or you might negotiate a staff discount at the local gym or health club.

Some ways to reward staff might include:

One-off perks - welcome gifts for new starters, smoking cessation programs, years of service rewards.

Ad hoc rewards - ice cream on hot days, social events including partners and families, massages or yoga sessions as high-stress project deadlines loom.

Annual benefits - early finish on Christmas Eve, celebrating staff anniversaries, celebrating the business's birthday.

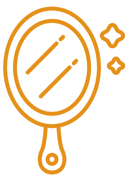
Everyday perks - flexibility with start times, fresh fruit in the tearoom, social club that matches contributions, a corporate library, a relaxed dress code.

A rewards and recognition program does not have to cost a lot of money, in fact it can be a small expense that reaps a big reward. Ask your staff what they want to do.

One of the easiest things you can do is to simply thank your team. It might sound stupid to write this here, but a heartfelt thank you at the time of the achievement or accomplishment goes a long, long way.

Lots of studies have shown that being thanked for workplace contributions is the number one way staff like to be rewarded.

And as leaders, not thanking your staff is a big mistake.



Reflection– Do you reward your staff? How do you think you are going? What are your initial thoughts on the points made in this section?

Takeaway – Thanks and praise are more valued than bonuses (mostly), so make sure you are acknowledging the achievements of your employees.

I worked in an organisation that pretty much had zero budget for staff rewards and recognition. We did a few simple low-cost things like making certificates of appreciation (some of them were a bit of fun but always with a genuine and heartfelt intention) and bringing in flowers from our garden for a team that did well.

We also had a perpetual trophy that was awarded to teams that excelled each month. I think the trophy was about $2.00 from an op shop, but it became a fun way to acknowledge the contributions of staff.

Pillar 5 Recap

1. **Flexible working arrangements**
   Be open to all requests for flexible working arrangements.

2. **Performance conversations and stay interviews**
   Communication is essential in a workplace and being able to speak with your staff about their performance is critical. Keep it regular and informal.

3. **Training and development**
   Invest in your people and they will reward you.

4. **Rewards and recognition**
   It does not have to be expensive or complicated - a heartfelt thank you can go a long, long way.

Takeaway

Have an open mind to flexible working arrangements and don't make your default response no.

Conclusion

If you have made it this far, well done! Thank you for taking the time to read the many words that we have written to help you on your journey as an employer of choice. We hope that you have found this Toolkit useful and that it will continue to guide you as you make some changes in your workplace.

We set out to make this Toolkit user-friendly, providing easy to follow information, suggestions, and templates to help you. We know that taking time out to work on your business can be tough – we hope you can create some space to make this happen.

You know by now that we like a final word (or) two. Whatever you do, remember your employees have chosen you. They choose to put in long, hard hours to help you achieve your business goals and to make your business a success. They choose to spend their time with you and not with another employer. They choose to be with you on days they would rather be with their families and friends, or on their couch under a blanket.

It is this simple thought that should inspire you to be the best leader you can be, to create a positive, inclusive, and caring workplace culture, and to become an employer of choice. It is your choice, but we hope you choose to do the right thing.

> *‘Leadership is not about being in charge. Leadership is about taking care of those in our charge.’* - Simon Sinek

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Page 46
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Page 71
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What's next?

As we set out many pages ago, what come's next is going back to the start and going through this Toolkit again. If this is your second time reading through, an extra special well done. Now you get to head to the templates and start using them.

On the pages that follow, you will find a range of templates to help you continue your employer of choice journey. These are just suggestions and there are many more ideas online.

Thank you

The team at RDALC would like to thank Di Ind, Karen Bryant, and Kate Hill for their assistance in making this Toolkit make sense.

And a huge thank you to Rachael Ashman, Emily Hillary-Burman, Rebecca Barton, and Jess Carolane for their many, many hours spent creating this Toolkit. Thank you to the RDALC Board and team for providing guidance on an early draft. Thanks also to Steve Chapple for the photograph on page 34.

Thank you also to the participants who attended RDALC's Employer of Choice workshop held in March 2023 - we value your feedback and applaud your commitment to making changes in your workplaces.

Templates and Instructions

How to write a strategic plan

Identify your purpose

You need to identify your purpose and articulate why you do what you do. When writing a purpose statement be clear, specific, and direct. Avoid using broad, sweeping statements or generalisations. Readers should get a strong sense of what the business stands for and delivers.

Establish a shared vision

Your business vision refers to what you want the business to achieve. Including employees in the development (or updating) of the vision ensures everyone shares the same understanding of the business's goals.

Mission

The mission for a business describes how the business will achieve their vision. Again, it's a great idea to include employees in the creation of the mission.

Identify your values

A business's values represent how employees and the management team behave as they work toward the communal vision. Values are the things that people in your business hold dear. These values will be deeply ingrained principles that guide all of a company's actions; they serve as its cultural cornerstones. Values might include:

- Quality
- Integrity
- Community
- Teamwork.

Describe projects

You can list specific projects in your strategic plan that your business is going to complete to accomplish its objectives. Effective strategic plans can pair each objective with an actionable project. The project clearly details how you plan to achieve the corresponding objective.

For example, you may have an objective to sell more products online, so you can include your internal project that will see the development of a new eCommerce platform.

Create specific objectives

At this point, you are ready to create specific objectives representing what your business wants to accomplish.

These objectives will likely help guide the rest of your strategic plan and keep your business on schedule to meet and exceed expectations.

Consider using 3-6 objectives to define your aim. It can also be helpful to include specific deadlines and success markers to measure.

Define key performance indicators

Key performance indicators (KPIs) are measurable values demonstrating how effectively a business achieves its objectives. This means that KPIs can help evaluate the success of each objective and project in your plan.

KPIs should be measurable and specific to the goal they evaluate. KPIs are also important because they serve as a communication tool in business. In addition to helping individuals within your business assess their progress, KPIs can inform other business leaders of an organisation's advancement toward reaching a key business objective. Examples of KPIs are:

- Percentage growth in sales
- Percentage growth in new markets
- Number of new partnerships
- Number of new healthy menu items.

You will note the KPIs are not listed in the RDALC strategic plan example below - don't worry, we have them (we were just running out of pages in the Toolkit).

STRATEGIC PLAN 2023-2025

OUR PURPOSE

[Insert your purpose here]

OUR VISION

[Insert your vision here]

OUR MISSION

[Insert your mission here]

OUR VALUES

[Insert your values here]

OUR KEY PROJECTS

[Insert your key projects here]

OBJECTIVES AND MEASURES

1
- [Objective]
- [Measure]

2
- [Objective]
- [Measure]

3
- [Objective]
- [Measure]

4
- [Objective]
- [Measure]

5
- [Objective]
- [Measure]

An Australian Government Initiative

Regional Development Australia

STRATEGIC PLAN 2022-2025

OUR PURPOSE

To support the development of the Limestone Coast by facilitating industry collaboration, encouraging investment, building capability and capacity in our community, and driving collaboration between stakeholders.

OUR VISION

The Limestone Coast; A regional powerhouse recognised for innovation, sustainable production, value-adding, and employers of choice.

OUR MISSION

We collaborate and connect to foster regional growth.

OUR VALUES

INTEGRITY

We are honest and ethical

COLLABORATE FOR IMPACT

We work with others to achieve meaningful outcomes

FUTURE FOCUSED

We anticipate and respond with purpose

STRATEGY & OUTCOMES

1. INFRASTRUCTURE: We will facilitate investment in infrastructure that will sustain and grow our region's economy
   - The region has clear priorities for future infrastructure investment that will drive innovation, economic growth, and liveability
   - Industry has access to fit for purpose freight networks, including road and rail infrastructure.
2. HUMAN CAPITAL: We will support development of the skills, knowledge, capacity, and productivity of our employers and workforce
   - The region has a skilled workforce to meet current and future needs
   - Employers have the knowledge, skills, and tools to diversify and grow business.
3. INVESTMENT: We will collaborate to attract investment to our region
   - Collaborate to attract regional investment opportunities and ensure competitive advantages
   - Collaborate with public and private organisations to ensure they are investment ready.
4. ENVIRONMENT: We will support our partners to maintain our clean, green environment
   - Sustainable use of our natural assets leads to economic growth.
5. ORGANISATIONAL GOALS: We will operate as an employer of choice
   - Our organisation supports a collaborative, agile and high performing workforce
   - We operate with transparent and accountable governance processes overseen by a high-performing Board.

How to write a one-page business plan

Why do you need a business plan?

Whether you are just starting out or have been operating your business for a number of years, putting together a business plan is an important part of your business. A business plan will help you prioritise what you are doing and what your business is trying to achieve. It will help you plan for the good and the bad, and if you are already in business, it will give you the chance to stop and assess how things are going.

It is also essential if you are going to seek funding for your business - your bank or lender will want to see why they should invest in you. If you are seeking funding you will need to undertake a more detailed business plan, but you can use this template as a starting point.

Why a one-page version?

We have designed this one-page business plan to enable you to create a simple snapshot of your business idea, distil the essence of your product or service, and break it down into key parts all in a few sentences. Based on the 'lean canvas' model, we think that this version is easy to use. And remember, organisations like RDALC are here to help you, wherever you are in your business journey.

What does it all mean?

Don't be put off by terms like 'value proposition' or 'market opportunity' - it's pretty simple. Things can get more complex regarding costs and income, but you are going to spend most of your business life thinking about cash flow so you will need to get your head around your finances well before you start your business. Below are our definitions of the key terms and questions you'll need to answer as you form your business plan on the follow page.

Value proposition

The value your business promises to deliver to customers, should they choose to buy your product.

Why will they come to you? What do you offer? What is your why?

Competition and your customer

Who are your existing direct competitors? How are they doing business? How will you be different?
Who is your target (ideal) customer (customer segments)?

Be realistic about this - we all want to be the best café in town, for example, but the competition is fierce.

Start up costs

How much money do you need to get started? Make sure you are including everything! Even the pens you need to take orders at your new café.

The market opportunity and solution

The gap in the market (the problem) and how your business will solve that problem.

For example, how will your café be different to the 17 others on the main street?

Sales and marketing

How will you market and sell your product or service? How will you reach your customer? Do you know where they hang out online? Or do they only interact with print media (unlikely in 2023)?

How will you measure your success?

Financial projections

What is your pricing model and how will you generate income?

The template on the following page is very basic, but it is a good place to start. Begin with your value proposition and go from there - good luck!

BUSINESS PLAN

Your Business Name

Value Proposition

The Market Opportunity and Your Solution

Sales and Marketing

Key Metrics

Competition and Your Customer

Existing Competitors

Your Advantage

Customer Segments

Start up Costs

Financial Projections

Operational plan

Instructions

You might prepare 'global' operational plans that cover multiple projects or you might write operational plans for each project that you are undertaking. Your operation plan should:

- Identify important goals, milestones, or objectives
- Determine key initiatives to help achieve those goals
- Define key assumptions you are making about challenges
- Decide how you will measure success
- Clearly outline responsibilities and tasks
- Assign responsibilities and tasks to team members
- Create reasonable deadlines
- Define necessary resources to accomplish tasks
- Provide training as necessary.

You could present your operational plan in a table like the example below.

Goal	Activity	Assumptions	Measures	Responsibility	Start Date	End Date	Risk

Policy template

[Policy number and name (e.g., 1.1 Complaints Management Policy)]

1. SCOPE
This policy applies to all [directors and employees] of [insert company name].

2. PURPOSE
[Outline the purpose of the policy]

3. POLICY
[Insert your policy objectives]
-
-
-
-

4. RESPONSIBILITIES
Director

Managers

Staff

5. DEFINITIONS

6. REFERENCES

Relevant legislation:	
Relevant polices, procedures, guidelines:	
Relevant documents	

Version: Date adopted: Position responsible: Review next due:

7. REVIEW
This policy will be reviewed every X years or when [insert year/s or describe trigger, e.g., new funding agreement is signed].

8. ADOPTION AND AMENDMENT HISTORY

Version no.	Description of change	Date adopted	Authorised by

Procedure template

[Procedure number and name (e.g., 1.2 Complaints Management Procedure)]

1. SCOPE
This procedure applies to all [directors and employees] of [insert company name].

2. PURPOSE
[Outline the purpose of the procedure]

3. [HEADING - e.g., CUSTOMER COMPLAINTS]
[Outline process for registering and actioning complaints]

4. [HEADING - SUPPLIER COMPLAINTS]
[Outline process for registering and actioning complaints]

5. RESPONSIBILITIES
[Director]
[Managers]
[Staff]

6. DEFINITIONS

7. REFERENCES

8. REVIEW
This procedure will be reviewed every X years [insert year/s].

9. ADOPTION AND AMENDMENT HISTORY

Version no.	Description of change	Date adopted	Authorised by

Any relevant legislation:	
Relevant polices, other procedures, and guidelines:	
Other relevant documents	

Version: Date adopted: Position responsible: Review next due:

Policies and procedures declaration

[Insert company name] have a robust policy and procedure framework. Together, our policies and procedures provide a roadmap for our day-to-day operations. They ensure compliance with laws and regulations, give guidance for decision-making, and streamline internal processes. The policies and procedures are developed in consultation with employees and are approved by the [insert CEO or Directors].

In order for [insert company name] employees to be aware of the responsibilities attached to their roles, they must read and understand all policies and procedures contained in the Policy and Procedure Manual (the Manual). It is important that you talk to your supervisor if on reading the Manual you are unsure what is expected of you.

Policy name	Signature	Date
Drug and Alcohol Policy		
Flexible Work Policy		
Conflict Resolution Policy		
Leave Policy		
WHS Policy		
Time in Lieu Policy		

I declare that I have read the complete [insert company name] 'Policy and Procedure Manual', and that I will adhere to all responsibilities and requirements contained within.

Employee

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

Name: ....

Address: ....

Manager/CEO

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

Name: ....

Address: ....

Workforce planning

Instructions

When you undertake this workforce planning exercise, you need to assign a risk rating to each of your staff – what is the immediate and longer term risk to your business if they left one day and did not return? You might feel like you are being a bit unfair or harsh, but you need to be as objective as you can be. Think about:

- Would your business be significantly hurt if you couldn't find someone to fill the job?
- Does one of your employees already have the skills you need but isn't using them in their current role?

Name	Age	Commenced	Role	Qualifications	Previous Roles/Other Skills	Rating*

Risk ratings:
1 = critical role
2 = important role
3 = required role
4 = partially required role
5 = optional role

Position description

Position title	

Primary location	
Reports to	
Hours	
Tenure	
Salary	
Special conditions	

Our organisation

Position summary

Primary accountabilities and duties	
Accountabilities	Duties

Technical expertise (qualifications, skills, knowledge, and experience relevant to the role)	
Eessential	
Desirable	

Personal qualities	
Quality	Behaviours

Key relationships	
Manager	
Direct Reports	
Other	

Applicant guidelines

Applicant guidelines

Thank you for your interest in applying for a role with [company name]. These guidelines have been prepared to assist you with the application process.

About [company name]

In researching this role and our organisation, you will have visited our website and will have had the chance to look at our Strategic Plan, possibly looking in detail at some of the projects and programs that we deliver. As well as the broad range of interesting work that we undertake, there are some great reasons that you should consider joining our team:

- **Flexible work** - we support and encourage flexible work and aim to support all requests for variations to hours worked (within reason). We support working from home and encourage our team to have a positive work-life balance. We avoid meetings at school pick-up times, and we understand that caring responsibilities can include parents and extended family.
- **Healthy workplace** - we provide access to professional support and guidance through our Employee Assistance Program and promote a healthy workplace with fresh fruit and a great office space with views of trees and visiting birds.
- **Professional growth** - we encourage our team to develop professionally and support training, further education, and capacity building opportunities.

How to apply

To apply for this position, you must submit an application by the advertised due date. Ordinarily, late applications are not accepted. The application must include a cover letter and your resume (CV). These two documents form your complete job application. Incomplete job applications will not be considered.

Your job application is often the first contact the selection panel has with you. As your job application informs the panels' decision to shortlist applicants for an interview, it is important that you demonstrate your suitability for the role and provide details of your previous work experience.

The cover letter (maximum three pages) should be addressed to the contact person listed in the advertisement, making sure you include the title of the role you are applying for. The cover letter is your opportunity to tell us why you are the best person for the job. In this document, you need to discuss your employment experience and your reasons for applying for the role. You will also need to clearly and concisely use examples that demonstrate why you believe you are qualified for this role.

In the cover letter you will need to:

- Use relevant examples of your previous work experience to demonstrate that you can effectively undertake the required duties (as outlined in the position description), that you have the related technical expertise, and that you possess the required personal qualities
- In the allotted three pages, you will not be able to address each of the duties for this role so consider demonstrating multiple requirements in one example. We do not expect every duty to be addressed in your application, so focus on the key points in the position summary and some of the duties
- Where possible, use the STAR (situation, task, action and result) method when explaining how your skills and experience meet the requirements of this role
- If your examples relate to clients, please be mindful of privacy issues and depersonalise your responses.

In preparing your application you should:

- Carefully read the position description
- Learn what you can about our organisation, including browsing our website and reading key documents such as our current Strategic Plan
- Speak to the contact person listed in the advertisement if you have any questions about the role or the organisation. All enquires will be treated confidentially
- Ensure that you carefully proofread your cover letter and that your resume is up-to-date.

Your resume (CV) should include the following:

- Your name, address, contact number and email address
- Education/qualifications
- Employment history (including responsibilities and achievements)
- Other relevant experience (including voluntary)
- Three current referees (include their role title/address/contact number. It is desirable that one of your referees is your current supervisor/manager, however, we understand if that is not always possible). We will contact you prior to speaking to your referees.

Contact person

For a confidential discussion about the role, please call [Hiring Manager] on [phone] or [email].

To lodge your application

Send your cover letter and resume to [Hiring Manager's name] [email] by [time and date vacancy ends].

[Your company logo]

Job application and interview assessment template

Instructions

You can make quick templates like these to use when you are assessing job applications that you have received and after you have interviewed your shortlisted candidates. Make sure each member of your interview panel use the same templates and you have a shared understanding of what minimum requirements look like.

Job application assessment

Include your essential requirements along the top, tailoring it as you require, and score each applicant out of five.

Applicant	Qualifications	Essential 1	Essential 2	Desirable	Total

0 = does not meet minimum, 1 = partially meets minimum, 2 = meets minimum,
3 = partially exceeds minimum, 4 = exceeds minimum

Interview assessment

For the interview assessment template, do the same as above, and number each candidate based on the responses they have provided.

Applicant	Question 1	Question 2	Question 3	Question 4	Total

0 = failed to answer question, 1 = partial response, 2 = good response,
3 = very good response, 4 = excellent response

Reference check

Applicant: .... Date: ....

Position applied for: ....

Name of person providing reference: ....

Title: .... Phone: ....

Reference check conducted by: ....

Introduction	
My name is [your name] and I'm calling to conduct a reference check for [name of applicant] who is being considered for a position with my business [name of business]. Your details have been provided to me by [applicant's name] and I would first like to check if you are prepared to provide a reference?	Yes No
The reference check will take approximately 10 minutes to complete. Is this a good time for you? If not, when is a convenient time for us to continue this conversation?	Call back Proceed

General questions	
What is your relationship with the applicant?	
What role did they/do they have in your organisation?	
What were the dates of their employment?	From: To:
What key duties and responsibilities does/did they have?	

General performance questions	
What would you say are the applicant's strengths?	
What would you say are the applicant's development areas (i.e. weaknesses)?	

General performance questions (continued)	
Have you had any concerns with their performance? If yes, please explain when these issues were identified? Are you able to provide any information on what they are doing to improve their performance and what progress has been made?	
Can you comment on the applicant's: • Reliability • Punctuality • Attendance • Professionalism • Confidentiality • How they work under pressure.	

Job specific questions	
[In this section, you could prepare a list of questions based on the skills or attributes required for the job. For example: Executive Assistant - 'In this role, the applicant is required to be very well organised and be able to manage a busy office. Please describe [applicant's name] ability to organise their workload].	

In closing	
Would you re-employ the applicant? Why/why not?	
Do you have any final comments?	

New joiner induction schedule

Welcome to [inset company name]! We are very pleased that you have agreed to be a part of our team. [*The entries in this schedule are suggestions only].

The induction schedule covers [insert the period that this schedule covers] and sets out the times of your sessions with your new colleagues.

Please note that these timings will be subject to change (we have factored in a morning tea break during your first week - we don't usually have morning tea breaks, but we thought you might need one given the potential for information overload).

Week 1 - Induction – Day 1

Time	Session 1 – Welcome to the building
9.00AM	Tour of workplace, introduce colleagues and outline their roles
	Building access, security, and parking
	Work health and safety • Fire and emergency procedures – location of fire extinguishers, evacuation procedure, emergency exits, emergency contact numbers • Shown location of first aid kit • Incident and hazard reporting process explained • Provide a scanned copy of your current driver's licence.

Morning Tea Break

Time	Session 2 – Welcome to [insert company name]
11.00AM	Manager/s to: • Explain the role of the [insert company name] • Briefly discuss the history of [insert company name] • Explain organisational structure • Discuss our current key projects • General overview of key stakeholders (if any).

Lunch

Time	Session 3 – Welcome to your role at [insert company name]
1.30PM	In this initial meeting with manager you will: • Discuss your position description and key requirements of your role • Discuss timekeeping, leave entitlements and pay details and cycle • General expected work behaviour and input • Discuss workplace culture • Clarify work hours and expected attendance/absence procedures • Clarify dress standards/uniforms • IT overview – computer passwords, electronic records management, phone protocols • Policies and procedures (note - make sure any declarations are signed).
	Debrief at the end of the day

Week 1 - Induction - Day 2

Time	Session 1
9.00AM	Check that you can login - chance to check emails
10.00AM	

Morning Tea Break

Time	Session 2
11.00AM	

Lunch

Time	Session 3
1.30PM	
2.30PM	

Week 1 - Induction - Day 3

Time	Session 1
9.00AM	
10.00AM	

Morning Tea Break

Time	Session 2
11.00AM	

Lunch

Time	Session 3
1.30PM	
2.30PM	

(Continue this template for as many days as required)

Performance conversation agreement

Name: ....

Role: .... Supervisor: ....

Start agreement - your objectives	Mid cycle - action taken	End agreement

Training and development

Start agreement - employee's comments

Start agreement - supervisor's comments

Start agreement sign off

Name: .... Supervisor: ....

Date: .... Date: ....

Mid cycle - employee's comments

Mid cycle - supervisor's comments

Mid cycle sign off

Name: .... Supervisor: ....

Date: .... Date: ....

End of cycle - employee's comments

End of cycle - supervisor's comments

End of cycle sign off

Name: .... Supervisor: ....

Date: .... Date: ....

2023

Region Ready

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Department for Industry, Innovation and Science

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